

TECHTONICS CONSULT WHITE PAPER

Demystifying Migration

This paper draws on Techtonics' extensive experience to provide an overview of the key components of a successful content migration. It focuses on understanding what and who is involved in a migration, the different approaches and things to take into account throughout the process.



Your Migration Project

Content migration is more than a simple technical activity it's a project that requires a dedicated team and clear project outcomes. Like with any move, migrations are an opportune time to "clean up", improve and dispose of dated information.

Consider; how much information clean up is needed, how complex your information and metadata is, how much validation is appropriate, the extent of any content transformation, the number of migration stages, system dependencies and volume. A good understanding of these factors will allow you to design and undertake the correct migration approach for your organisation.

Successful Migration

A migration is successful when all the content is there, information is preserved and there is no loss in user productivity. A migration has a major impact on an organisation because of the value of the information assets being moved. Access to this business critical content is essential to the normal operation of your organisation.

What do I need to watch out for?

A migration project needs to have the status, visibility and appropriate resources allocated to it to achieve successful outcomes. Expectations need to be realistic and early on some tough decisions will be made about content and its future use in your organisation. It's important that you devote an appropriate amount of time to design and test your migration approach, in addition to the migration itself.

Who should be involved?

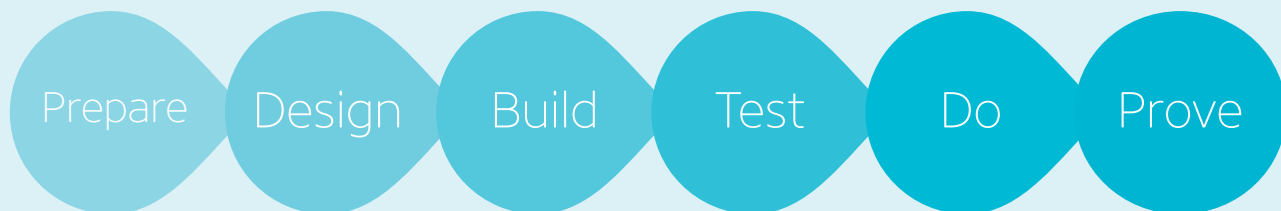
A migration project takes a team. Ideally, you should have a technical migration specialist, an information management expert and user representatives. User representatives will provide context for migration decisions, will be required to undertake pre-migration activities, and need to understand the impact of the migration. From experience, we have found that setting realistic expectations with users and management is essential.

TIP: Technical considerations

There are a number of technical considerations to bear in mind, which can easily be overlooked in any migration project, but can have a major impact in the success of your migration. Keep a look out for any limitations (such as special characters, large files, file formats), metadata (dates, defunct metadata, ex-staff), integrated applications and the migration destination environment. With this in mind, decide if your migration will occur all at once or with scheduled content moves over a period of time.



Migration Phases



The migration phases can be described as follows:

Prepare for it - includes planning, scoping and engaging the organisation and will output a migration strategy and plan. Analysis of the current and target systems should be undertaken, including understanding the content and metadata integration and customisations. The level of content “clean-up” is also determined at this point.

Design it - includes a technical analysis and discovery phase. It encompasses procedures, classification, metadata and security mappings and supports the traceability activities of the last phase of this process.

Build it - includes scripts, tools configuration and migration instructions.

Test it - is a critical step, which should include a good representative sample and volume in a testing environment. Real data is preferable; be prepared for additional snags and issues to arise during the testing phase, which may result in a return to the earlier stages of this process.

Do it - will include monitoring, reporting and remediation.

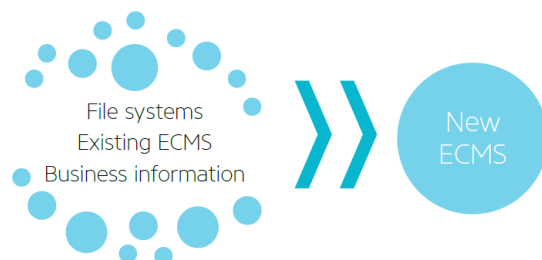
Prove it - is the validation step to ensure your migration has achieved what it was designed to do and includes audit and integrity reporting.

Changing Paradigms

You need to both understand and be prepared for the paradigm shift between your current and future environments. There are differences in your systems and in the way your users will use information going forward. These are important variations and you should familiarise yourself with them as early in the process as possible.

Review:

- Information architectures
- Security architectures
- Records models
- Document versioning
- Metadata models
- Classification structures
- User processes
- Customisations



Prepare for your information migration today with help from one of our experts



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