Ask Me Anything:
Data Migration

The AIIM Community is buzzing with discussions, solutions, and strategies

Introduction

The amount of data organizations must manage today is truly mind-boggling. Research shows that there are 2.5 quintillion bytes of data created each and every day. During the last two years alone, 90% of the data in the world was generated. It's no wonder that many organizations struggle to simply keep pace. And moving mountains of data from older legacy systems to modern cloud-based repositories can seem out of reach for most, regardless of the potential advantages of modernization.

Thankfully, on Thursday, May 6th, 2021, AIIM hosted an online discussion event titled "*Ask Me Anything About Data Migration.*" We had two experts leading the session- *Donda Young*, CIP, Managing Consultant at ILG Solutions and *Mark Carter*, Enterprise Account Executive at Ripcord - who kindly answered questions on all things related to data migration and information governance.

A number of AIIM members joined the discussion, and the session covered a number of important questions as well as strategic inquiries into best practices overall. We can't cover everything in the article here, but below are some important highlights from the session.

Want more? Simply go to the AIIM Community and join in!

Data Migration

If a department won't do their due diligence, have you ever had to do the "lift and shift" approach? – John Daly, Information Governance Manager at the Metropolitan St. Louis Sewer District.

Expert: Donda Young – *If a department isn't willing to do their due diligence, data cleanup, testing, etc., and the system is headed for decommissioning, sometimes you have to do a lift and shift to get the data over. Then its due diligence after, but you have to have a plan of attack to make trash into treasure.*

Jana Gallatin, Owner at Sonoita Networking – *I think you'd want a strategy for identifying individuals' "precious" that is really corporate trash as well. At what point does it become a waste of time/money sifting through the dead cats in search of that collectible?*

Donda – *Jana, in any strategy, there can be different approaches. If part of that strategy is cleaning up the ROT, then you need to be clear as to which point it is overkill. There will always be pieces of data that are a must-have for the business, and those are the pieces you need to fix vs. the true trash that will never be a treasure. Identifying the key pieces of data for the business needs to involve the business. They know their data. They work with their data so they need to have a say.*

Jana – *What policies should be in place to ensure development of appropriate processes for validating trustworthiness, relational context, and usability of migrated info? What roles and responsibilities are recommended? IT departments are disconnected from the business and legal value of data/information/records stored in their services. IT and compliance and business pros don't share a common language. There should be some ground truth for creating and managing expectations?*
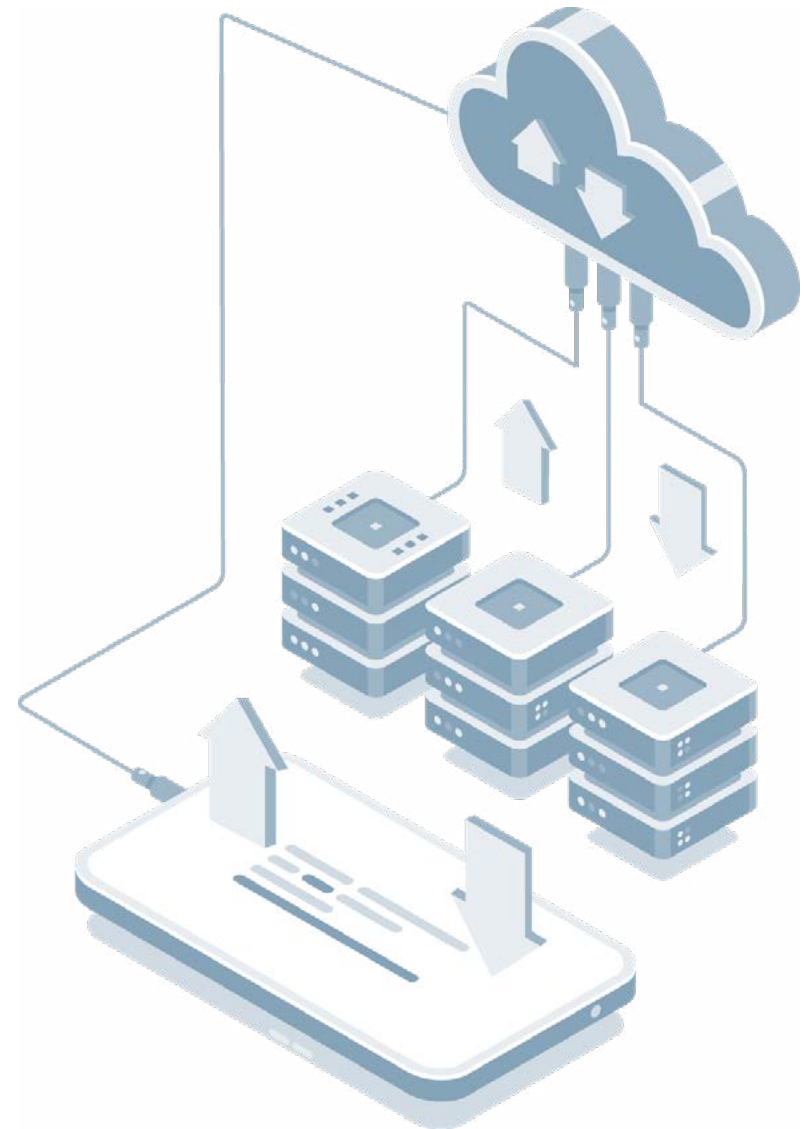
Expert: Mark Carter – *Policies are company-specific, but regarding the process, after you define the scope and make sure you studied requirements, business rules, and mapping document. Create test cases and queries to verify the data. Then execute test cases, compare the results. I absolutely agree with you that IT departments are disconnected from the business and legal value of data.*

Migration to the Cloud

None of us have experience with large scale migration to a cloud system, although we seem to be covering common sense planning steps. Is there anything I should watch out for (moving to Egnyte) specifically? I have been doing research, but are there common issues/errors that "first timers" make when doing a migration I should be aware of? – *Audra Schwartz, Production Artist*

*Mark – I don't have first-hand experience with Egnyte, but I heard great things about the platform. **I found this from their website**. Have you seen it? Your common sense planning is probably going to handle most of the issues. Use this AIIM Community Forum and leverage the #aiimtribe for assistance; we all have been doing it for years!*

Security and MS365

What is the best way of handling security (access controls) when moving documents from shared drives to MS365, especially SharePoint? – *Sue Klein*

Donda – Sue, this can be a complex answer, but to give some guidance, you have to work with your security team to understand the current security controls/groups for shared drives and coordinate with your SharePoint administrator to collaborate on building out the proper groups to be complementary to the share drive access they once had. The grit and grind, how-tos depend on the company and how well IT security, SharePoint admin, and records management partner together to ensure the IG factors are taken into consideration. All else fails, set up a meeting to discuss with these groups and march forward.

3. Protect and maintain! We all know that data degrades over time. Ensuring data quality is maintained and protected throughout its lifecycle.

4. Govern! Automate where possible to ensure data integrity. There are tools out there to help: Tracking, reporting, and metrics. Give insights to your data.

Jim Ongena, AIIM member – I would also add the following things to the total strategy:

5. Provide enough training and communication on the 'why' of the migration.

6. Awaken your users using data reports (e.g., Treesize) to show then the real data trash, then involve them in the cleanup (my approach in general: if they don't clean it up, I put it in a read-only archive).

7. Map the 'from' and 'to' locations in time (e.g. when migrating to O365, where a different information architecture will need to be set up).

Key Factors for Your Migration Strategy

What are some key factors in building a data migration strategy? *– Boshia Smith, AIIM*

Donda – There are a few to consider:

1. Know Your Data! Audit the source data before migrating. You never know what trash is coming over.

2. Clean up your trash! Make the data as clean as possible! Garbage In; Garbage Out! This process could take third-party software, extra bodies, or additional software tools to help.

A Phased Approach

Should I do my data migration all at once, or should it be done in stages? – *Katherine Dalton-Hoffman, AIIM*

Donda – *Any given company can deviate and come up with its own plan. Though, there are two popular strategies for migration.*

***Lift and Shift.** This is mass migration. A full migration is typically inside a set timeline. Your SOE's systems of engagement, will have true downtime while data goes through extract, transform and, load ETL processes and migrates to the new database. The benefit of this is that it happens all in one swoop. Be mindful this can be stressful on the business as one of their resources will be offline and IT stress as there's little time to complete. There is a risk of disruptions in migration.*

***Phased Migration.** Old and new systems run in parallel. This eliminates downtime or operational interruptions. You can keep processes running in real-time and can keep data continuously migrating. This type of migration can still be fairly complex. There is added complexity, but it will normally reduce your risks.*

Mark – *There is more than one way to build a data migration strategy. An organization's specific business needs and requirements will help establish what's most appropriate. However, most strategies fall into two categories: "big bang" or "trickle." In a big bang data migration, the full transfer is completed within a limited window of time. Live systems experience downtime while data goes through ETL processing and transitions to the new database.*

The advantage of this method is, of course, that it all happens all at once, requiring relatively little time to complete. The pressure, though, can be intense, as the business operates with one of its resources offline. Trickle migrations, in contrast, complete the migration process in phases. During implementation, the old system and the new are run in parallel, eliminating downtime or operational interruptions. Processes running in real-time can keep data continuously migrating.

Compared to the big bang approach, these implementations can be fairly complex in design. However, the added complexity – if done right - usually reduces risks rather than adding them.

Moving Forward

Join the Community, Add to the Discussion

These are just some of the valuable discussion points that were covered in this event. Stay tuned for more Ask Me Anything sessions to be scheduled in the community soon. Until then, dive in and take part in the dozens of conversations happening every day.

Start a thread of your own or contribute to one of the many threads already underway. Just go to

community.aiim.org

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