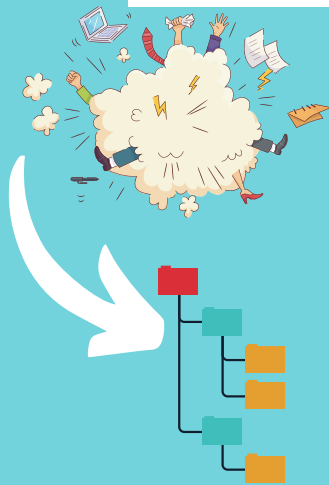


DATA MIGRATION

A 3-STEP PROCESS

MIGRATION IS A THREE STEP PROCESS



The goal is to move all information from an unstructured shared drive to a staging location in preparation for the move to your target repository (e.g. SharePoint Online). This is done in 3 steps. Inventory, Stage & Clean, and Migrate.

STEP ONE: INVENTORY



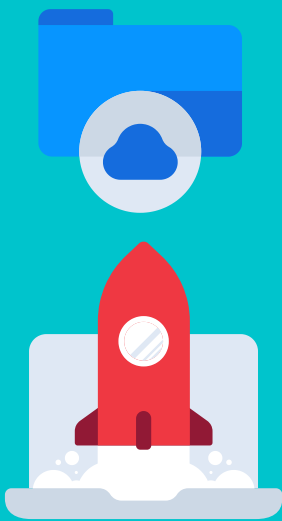
- Pre-categorize file folders
- Identify migratable content
- Establish total count of migratable records
- Map Shared Drive Folders to your Information Architecture (IA) Categories

STEP TWO: STAGE & CLEAN



- Pre-allocate a (virtual) room and time with no disruptions.
- Ensure all involved have their own machines (PC/Laptop).
- Have a presenter screen easily viewable by all.
- Have plenty of water, coffee, snacks and music. Make it fun.
- Analyze types of changes needed (e.g. name shortening, removal of special characters, ambiguous document names).
- Reorganize files into new folders.
- Identify Information Architecture changes & clean up file names.
- Enrich by applying newly defined metadata values (defined within your Information Architecture) for the migratable documents.

STEP THREE: MIGRATE



- Migrate a test batch of sample files, validate results and identify errors
- Keep test running until errors are zero
- Apply changes to the remaining documents found through errors in test migration
- Run the full migration in full or large batches
- Enhance by applying captured Information Architecture changes to your target repository
- Look for 'Deltas' - any files that may have been revised since the migration process

THINGS TO KEEP IN MIND



- Don't underestimate the amount of work to this exercise.
- Set hard stop dates for the migration to your target repository.
- Only information structured in the staging site(s) will be moved
- Communication of final counts and progress with your team is critical to ensure traceability and chain of custody tracking.