
Data Migration

WHAT RECORDS MANAGERS NEED TO KNOW

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InfoCompass Business Solutions
Nitza Medina-Garcia, CRM

Introduction

- More and more records and information are stored electronically
- Records and information need to be moved periodically from one software program to another
- Records Managers need to understand the typical software project phases
- Records Managers need to understand the data migration process

What is Data Migration?

Data migration is the process of transferring data between storage types, formats, or computer systems. It is a key consideration for any system implementation, upgrade or consolidation.

From Wikipedia

Drivers of Data Migration

Mergers and acquisitions

Library consolidation efforts

Large number of people coming or going

Company/department dispositions

Additional software functionality needs

Information governance initiatives (fileshare and email cleanups)

Benefits of Data Migration

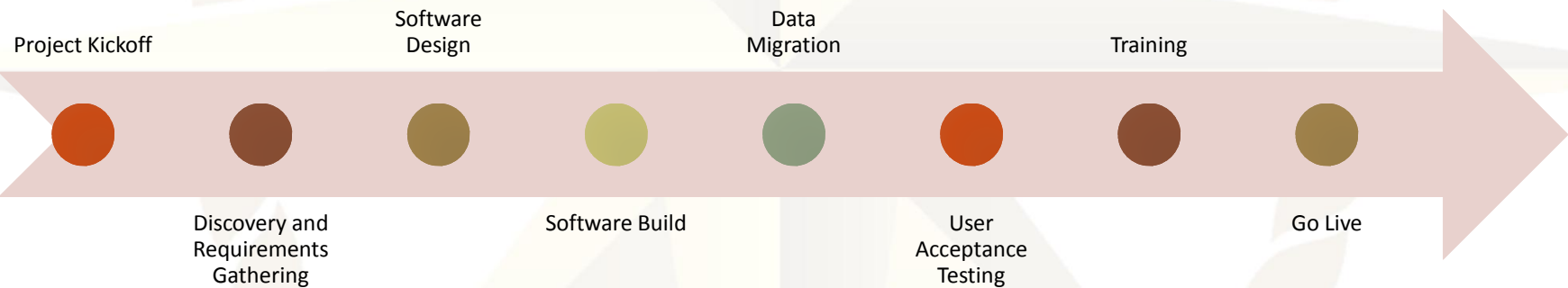
Remove duplication of effort

Remove duplication of content

Utilize additional software features

Remove silos of information

Software Project Phases (Waterfall)



Software Project Phases (Agile)

Project Kickoff



Data Migration



User Acceptance Testing



Approval



Go Live



Discovery and Requirements Gathering

Software Build

Iteration 1, 2, 3 and so on

Training



Data Migration Tasks

Data
migration
strategy

Identification
of data
sources

Analysis of
data sources

Data clean up

Data
conversion

Data
migration
execution

Data
validation

Records Appraisal Tasks

Appraisal
strategy

Identification
of record
sources

Analysis of
records

Records clean
up

Records
conversion

Records move

Records
approval

Key Reasons for Data Migration Failure

Technocentricity

Lack of specialist skills

Underestimation

The blame game



Golden Rules for Data Migration

Data Migration is a business not a technical issue

The business knows best

No organization needs, wants or will pay for perfect quality data

If you can't count it, it doesn't count

Best Practices for Data Migration

1. Create a Migration Strategy
2. Data Inventory and Analysis
3. Gap Analysis and Mapping
4. Data Migration Execution
5. Data Validation
6. Legacy Software Decommissioning

1. Create a Migration Strategy

Determine what data sources are in/out of scope

Determine if following an agile or waterfall methodology

Determine key stakeholders and team members

Communicate migration strategy

2. Data Inventory and Analysis

Is there one data source or multiple?

How big are the data sources?

Where are the data sources located?

Is there ROT (redundant, obsolete, trivial) data that needs to be deleted?

Will there be a standardization on a certain set of codes?

Who will have the authority to make data decisions?

3. Gap Analysis and Mapping

RMS Table.Field Name	Field Type [# characters]	RMS Caption	Old DB Table.Field Name	Old DB Caption Name	Rules	Comments
File.id	Varchar[15]	ID	Jacket.id	ID	Make sure there are 5 digits, if not add leading zeros	
File.name	Varchar[122]	Name	Jacket.name	Name		
File.desc	Varchar[2048]	Description	Jacket.desc	Description		
File.resp_user	Trustee	Responsible User	Jacket.user1	Responsible User	User list will come from AD; legacy users will come from Old DB	
File.office	Metadata Table	Office	Jacket.office	Office		***Need list of Office codes
File.dept	Metadata Table	Department	Jacket.dept	Department		
File.open_date	Date Field	Open Date	Jacket.odate	Open Date	Convert to UTC	
File.close_date	Date Field	Close Date	Jacket.cdate	Close Date	Convert to UTC	
File.comments	Varchar[4000]	Comments	Jacket.notes[1-5]	Comments	Concatenate lines 1-5 into new Comments field. Any comments over 50 characters will be truncated.	***Verify the largest amount of data in Old DB

4. Data Migration Execution



5. Data Validation

#	Issue Name	Description	Reporter	Steps to Recreate	Priority	Comments
1	Missing 10 folders	Folders 1-10 do not appear in new db	Julia Rivera	1. Search for folders 1-10 individually 2. See no results appear	High	Check extraction database to see if information is missing; check to see if folders were created by user after extraction date May 6, 2016.
2	Folder Comments Missing	Folder comments only include 10 characters. The rest of the comments are missing.	John Gills	1. Search for Folder 32 2. Open folder properties. 3. See comments are partially missing	High	Check extraction scripts and database.

5. Legacy Software Decommissioning

Determine when the old database software should be turned off

Two strategies:

- Double data entry (old and new system) for a short period
- Delta migration over a short period (weekend)

Key Take Aways

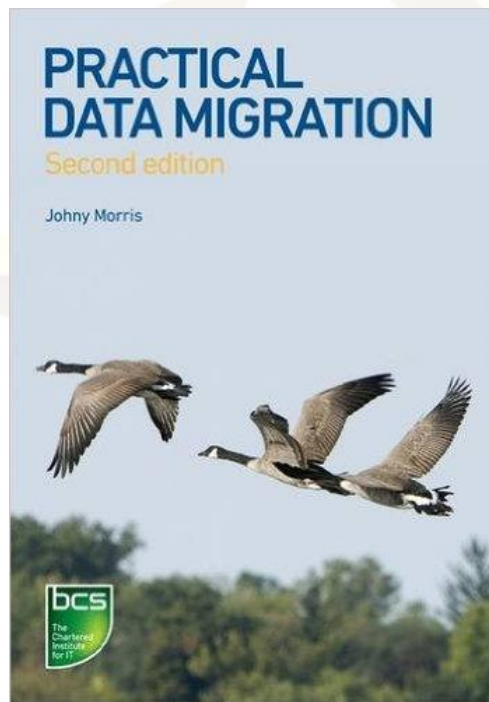
Data migration is not solely the responsibility of IT

Records Managers must become familiar with the data migration process

Allocate enough time/buffer in data migration project

Set right expectations for all involved in the beginning

Good Resources



DAMA International (organization)
www.dama.org

Data Migration Pro (community)
www.datamigrationpro.com



Questions?



InfoCompass Business Solutions

Web: www.icbsolutions.net

Blog: blog.icbsolutions.net

Email: nmg@icbsolutions.net

Nitza Medina-Garcia, CRM



Please contact me if you have any further questions