Data migration guide

Data extraction vs data migration

Data extraction is the process of getting your existing information and files out of your current system with the intention to move it elsewhere. The data extraction method you use will depend on your current system. It can either be a database back up that your provider will supply, which is data in a raw form that can be used by a new software supplier. Or, the extraction will be manual and will consistent of reports and spreadsheets.

Data migration is the process of importing your existing data into a brand new system or platform. This involves data manipulation to ensure the current structure and format of the data can be read and understood by the new system, before uploading it and testing it in the new software.

IMPORTANT

In order an implementation project to stay on track, and achieve your desired go live date, it is imperative deadlines are met.

For all migrations, there will be a cut off point in which users must stop using the old system before go live on Osprey. This allows for data to be migrated successfully.

Data that is not provided will not be migrated, This is anything entered into the system after the cut off date or fields that have not been accounted for.

What can be migrated?

- Clients
- Matters
- Professional contacts
- Notes
- Files saved to matters including:
    - Emails
    - Documents
    - PDF's
    - Attendance notes
- Unbilled time and expense activities
- Opening financial balances (a single line item that represents the summative balance at time of export for a matter)
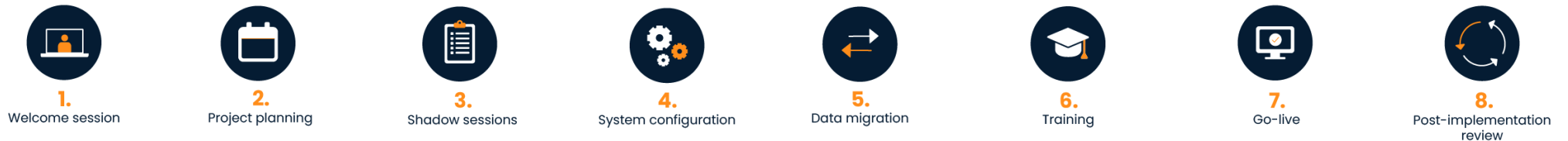- Matter restrictions

What cannot be migrated?

- Full accounting and financial history (a record will be available for each client within the matter history)
- Financial reports
- Management reports

6 top tips to prepare your data

1. **Cleanse your data:** Before migrating your data, it's a good opportunity to ensure your professional contact list and archiving is up to date, plus any files past their destruction date have been destroyed.

2. **Review the data that is currently being captured:** Add a test client and make a note of all of the data that is required. It may be that you are capturing data specific to the matter that is not appearing on standard reports. Any fields that are not standard may be missed when migrating to a new provider.

3. **Gather and review your precedents:** Review and update your precedent templates to standardise your processes. Each fee earner having separate templates, saved locally, is no longer necessary.

4. **Run reports:** Reports cannot be migrated therefore make sure you have copies of any management or financial reports you may need to refer back to. We would advise saving these locally.

5. **Balance your accounts:** Make sure any accounting discrepancies have been resolved to allow for a fresh start in the new system.

6. **Inform your team:** We recommend communicating to all users, well in advance, to improve utilisation of the new system and prepare for training.

Osprey implementation process

1.
Welcome session

2.
Project planning

3.
Shadow sessions

4.
System configuration

5.
Data migration

6.
Training

7.
Go-live

8.
Post-implementation review

See a detailed look at the Osprey implementation process >