



# Smart Migration

OpenText Smart Migration is a complete end-to-end service equipped with a comprehensive, well proven strategy. This strategy is summarized below to provide the best introduction to this OpenText service.

## OpenText content migration strategy

### Define target context

The first key step when planning a migration project is to define the functionality of the target context. Knowing what end users want the new target repository to look and perform like on completion is a high-level priority and, from a technical standpoint, a way for IT staff to establish necessary protocols. This important step is not always given due consideration by teams that jump in and focus instead on the source content to be migrated.

Take the time to dig in and draw a clear and complete picture of the new repository or application. Review and refine the target based on the source information to identify gaps that exist or enhancements needed. Careful due diligence at the outset will better leverage target capabilities at completion, and add business value by improving access to content for better decisions. Keep in mind that the migrated content will not simply be copied and moved from the old infrastructure into to a new environment. In order to fit the demands of the new system, information will have to undergo change to conform. Without a thorough grasp of what to expect, it is certain that the project will either encounter overruns of time and/or budget, or fail to meet end users' business requirements altogether.

### Understand scope and scale

It is impossible to set accurate budgets and timelines without first understanding content complexities, relationships, quality, and volume. Spend time making accurate accounts of the time and resources your migration project will take—including expenditures for hardware, software, and personnel. Detailed discussions with IT staff, business analysts, and end users are essential during this fact-gathering stage to make a full and accurate inventory of the content to be migrated—or to be left behind.

A knowledgeable OpenText consultant can help guide you through this discovery process. An experienced expert can mitigate project risk by helping your team be aware of, and plan for, any and all eventualities.

## SUMMARY

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*Smart Migration service allows organizations to retrieve, analyze, structure, visualize, and move content from any repository to Content Server. OpenText™ InfoFusion™ Integration Center, OpenText™ Content Analytics, and OpenText™ Information Hub (iHUB) combine data mining, semantic, and business intelligence technologies to guarantee successful content migration. With Content Analytics, OpenText can meet organizational requirements for classifying and disposing of content according to industry standard classification needs and retention policies.*

Migration decisions should always be the responsibility of a business prime. This is a person of authority from the organization who has ownership of the project. The business prime must oversee whatever external resources are brought in and provide leadership of the content migration team, keeping the group fully cognizant of the techniques, strategies, tools, and most importantly, the desired corporate outcomes. The business prime should also ensure that the project has executive sponsorship and buy in.

### Strategize

A content migration almost never occurs in isolation but as part of a broader application, upgrade, or implementation. If the migrated information is going to deliver full operational value and efficiency, then strategic planning to address project-specific requirements must take place early on, and not as a rushed afterthought to the bigger project.

Migration strategy should address high-level business decisions surrounding the original source content being migrated to the new source target repository. Though content migration is in itself a technical process, it is essentially a business issue. Above all, it is about people and their access to and relationship with information. Collaborative strategy sessions must occur between all business users, stakeholders, and IT staff to attain project goals.

A gap analysis should be done to determine if the content to be migrated will match the requirements for content in the new system, or if there is missing information to still be collected. It is also important to identify and analyze taxonomy differences when consolidation of source systems is necessary.

### Assess source

Source content is often comprised of a wide ranging and disparate collection of structured and unstructured data. In order for this myriad collection of information to be transformed into content that can eventually be accessed through a single company view, it must first be located, examined, and defined. OpenText data profiling and assessment capabilities will help identify opportunities and complexities from the source system, such as levels of data relationships.

Invite discussion between relevant business users and IT staff; collaboration is key so that no content is overlooked or obtained without permission. A thorough assessment of source content will weed out good from bad content, and point to errors, omission, discrepancies, inconsistencies, and relationships surrounding content. A detailed understanding of the business needs, along with the use of appropriate tools here and throughout the project, will help eliminate duplication and ensure that only relevant, quality data is preserved and transferred.

### Cleanse content

A migration project is the perfect opportunity for a site cleanup. Encourage content owners to sift and sort through information, removing outdated or redundant content, thus eliminating the volume of information to be moved. Content cleansing tools can be useful here as they allow information to be brought up to standard and its quality to be measured.

Keep in mind that the purpose of cleansing is not to attain perfection in content quality. Even if information is one hundred percent accurate when entered, it can deteriorate almost immediately. In the real world, users of the system are often too busy to record changes as they happen, if at all.

The effort put into cleansing content should be dependent on the business impact if the content value is incorrect. Will a new software program run with incomplete or inaccurate data values? How critical is it to have a post office box but no street address for a customer? Questions such as these will help determine the level of accuracy required across multiple areas of the project.

In almost all cases, starting with a clean slate is preferable to sully the new environment with out-of-date content. There are instances when cleansing could be done post migration, such as when the new environment offers tools that make some kinds of cleanup easy and robust, or if you're faced with a time crunch and migrating content "as is" is a better alternative than postponing the final migration and go-live.

### Map source to target

Mapping is the vital link that bridges information moving from point A to point B or, in a content migration, from source to target. To illustrate the concept of mapping, imagine that a library wanted to change its classification system from the Dewey Decimal System to a different set of categories defined by the Library of Congress.

Mapping scripts are necessary to show how the old cataloguing system's content can be made relevant in the new model.

Mapping should encompass all information, including content metadata and the business and system rules that define the transformations required to convert the information to be compliant with the new system, such as transforming content from the Dewey Decimal System to match the Library of Congress system. A well-defined mapping methodology focuses only on the content to be migrated; extraneous material should be flagged and left behind, as it has no relevance in the new system. Note the importance of having transformations that can be backed out of if part of the migration does not work. Keeping copies of the original data will help make this possible.

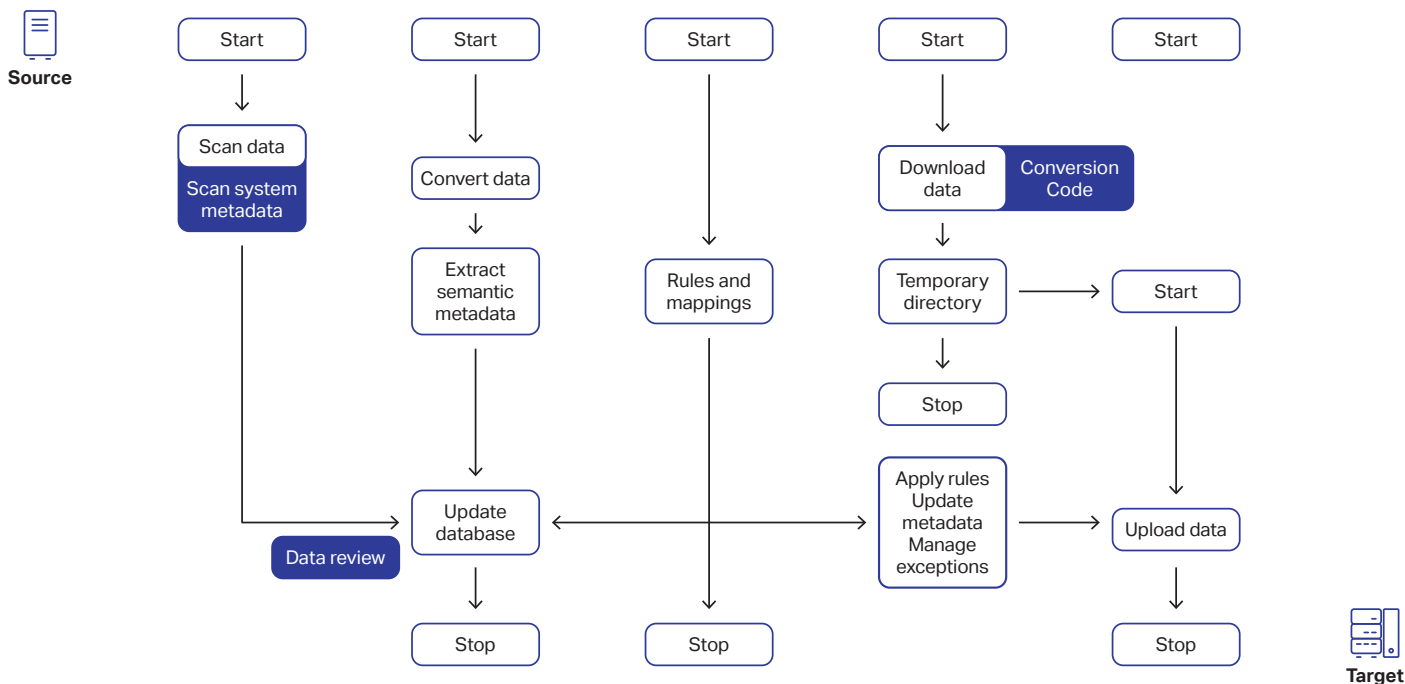
### Analyze risk and plan contingency

A thorough risk analysis should include the building and testing of a prototype system. Representative data will help define performance requirements and serve as a benchmark during testing for software/hardware compatibility, downtime, and budgetary projections. Run the migration program completely against a replication of all the content in a lab environment before running it live. Take all the steps necessary to validate this run and be sure to involve representative groups of end users and internal training services. When the risks are investigated, the migration team should sign off on the results.

Have a contingency plan for the first day's support and a plan to keep content live during the migration period. It is critical to have proper documentation. Keep a copy of the original content for testing and training purposes in the event that part of the migration does not work and you need to go back. Even then, remember that the migrated content has been restructured for the new system and context will have changed, hence it will be difficult to compare, if not impossible.

### Migrate content

Once the proceeding best practices are addressed, end users are trained on the new system, the migration method is agreed on, and the migration date is selected, it's time to go ahead and guide the migration process. Again, an experienced consultant will prove an invaluable resource here as content migration is often a one-time event. Having a knowledgeable expert who can leverage



Smart Migration Functional Process Diagram

past experience will reduce risk of project failures and maximize the value of the software, services, and personnel investments made in the migration efforts.

Before proceeding with the actual migration, it is important to review all the guidance and best practices of the previous steps. By ensuring that the objectives are being met and contingency plans are in place, you can feel confident moving forward with the content migration.

**Validate and document**

The migration team’s work is not finished until confirming that source content has been successfully moved into the new target. Build checklists to make content movement and integration easier to check and track. Document migration expectations against actual results to validate migration completion and quality. A good audit will involve conversations with end users to ensure everybody is happy with their new single view of information. These are the people with daily hands-on use and knowledge of the new model. Often the true “test” of success is user acceptance.

A final step is to save and archive migration scripts. Content migration is often a one-time exercise; however, with the right tools, the protocols, mappings, and scripts can be reused in future projects within the organization. A documented report of the migration process will serve as a repeatable reference guide.

**The OpenText solution**

The keys to a successful migration project are: a clearly defined migration strategy (as described above); content mapping/transformation/disposal rules; the tools to analyze, enrich, extract, transform, and load the content; and data visualization capabilities. The solution outlined in this document combines three pieces of software:

- **OpenText™ InfoFusion™ Integration Center**—a native integration platform to extract, enhance, transform, integrate, and migrate data and content across the enterprise
- **OpenText™ Content Analytics**—a text-mining engine that increases the value of the content by detecting, extracting, inferring, and exposing highly relevant semantic metadata
- **OpenText™ Information Hub (iHUB)**—a content analytics visualization platform with flexible on-the-fly-created dashboards showing graphics and charts in regards to data migration.

**OpenText InfoFusion Integration Center (OTIC)**

The OpenText toolkit can connect to various databases (SQL Server, Oracle, Sybase, and DB2, just to name a few), text files (flat files, delimited, and fixed), tag formatted files (HTTP and XML), as well as ECM systems (Livelink 9.7.0 – Content Server 10.5, Documentum, FileNet®, and Microsoft® SharePoint®).

OTIC has client applications for: design; scheduling; administration that includes managing repositories; configuring services; defining hosts, client hosts, users, and projects; and importing and exporting projects—plus the ability to manage real-time tasks and communication and view process execution details.

**OpenText Content Analytics (OTCA)**

**OTCA** is a next-generation natural language processing software that allows information-rich organizations to extract meaning from vast amounts of unstructured content. Its different modules allow the extraction of detailed semantic metadata to help structure, understand, and reuse content. When used in conjunction with OTIC, it provides the ability to extract and analyze content before it is moved into Content Server, this process is known as Smart Migration solution.

### OpenText iHUB

**OpenText iHUB** equips IT leaders and teams with a single platform to access data sources; transform, integrate, and apply business logic to data; and secure, filter, format, and present results to users. It has powerful built-in features, including hundreds of HTML5 charts, gadgets, and maps; commercial data drivers; a metadata layer; and data model design and caching capabilities.

To maximize your time and investment, iHUB comes bundled with sample applications, reports, and dashboards that provide development teams with ideas and inspiration for their own projects.

#### Benefits

- Personalize and share customized reports, dashboards, and data visualizations
- Explore data using interactive features (such as drill-downs, sorting, filtering, aggregating, and grouping) and HTML5-based graphics and charts
- Work offline in PDF, Microsoft® Office: Excel®, Word, and PowerPoint®
- Use self-service capabilities to create and customize dashboards and reports quickly, without IT support

### OpenText Smart Migration

OpenText is the leading document management system in the market, however moving documents from scattered locations always poses several challenges. Smart Migration, through OpenText Consulting Services, helps you speed up the transfer of information by classifying your content and facilitating the creation of business and transformation rules, thus minimizing the risks of delay and error. Our proven migration methodology outlined below will further enhance your project results.

- **Access and scan:** During this phase, the migration framework is built by identifying requirements, creating a functional and technical design and mapping rules template, and developing a CIS model. This is also where we connect to data repositories in order to scan and validate the content, metadata and data links, reports and repository locations, WEB connection services, OTCA connections, and Content Server connections.
- **Analyze and enrich:** During this phase, scanned content is analyzed in regards to metadata, sample statistics are gathered and extracted, and unnecessary information is filtered or eliminated. System and semantic metadata is fully extracted and summarized, documents are classified and annotated (by OTCA), and manual analysis is compiled.
- **Mapping:** All content is fully mapped and assessed during this phase. Mapping rules and patterns are defined to search against the metadata analysis. Customers will make informed decisions during this phase based on the results of the analysis.
- **Download and upload:** The migration rules that were determined in the mapping phase are applied and the content is migrated over to the new repository in three steps:
  - Downloading and uploading the content (how the target folders are populated)
  - Validating workflow through reports, samples, and logs (OTIC process validation report)
  - Updating CS categories according to results from the data scan.
- **Maintain:** Classifications and post-migration cleanup for migrated content are automatically applied at ingestion during this last phase. Migration reports are visualized using BI analytical tools, thus providing information for quality assessment.

Access and scan	Analyze and enrich	Mapping	Download	Upload
<ul style="list-style-type: none"> <li>• Source repositories scanned</li> <li>• System metadata identified</li> <li>• Staging database updated</li> <li>• Content review</li> </ul>	<ul style="list-style-type: none"> <li>• Content converted to OTCA input</li> <li>• Semantic metadata extracted</li> <li>• Staging database updated</li> </ul>	<ul style="list-style-type: none"> <li>• Metadata based rules in place</li> <li>• CS components mapped and created</li> <li>• Clean up rules in place</li> <li>• Data mapping document in place</li> </ul>	<ul style="list-style-type: none"> <li>• Content downloaded</li> <li>• Content exported to temporary directory</li> <li>• Conversion code in place</li> </ul>	<ul style="list-style-type: none"> <li>• Rules applied</li> <li>• Content moved to target repository</li> <li>• Metadata uploaded</li> <li>• Cats and Atts updated</li> <li>• Classes inherited</li> <li>• Logs validated</li> <li>• Exception reports in place</li> </ul>

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