**Data Migration Response for RFPs**

Customers make the switch to Convercent from a range of systems and other solutions; from other vendors’ systems, to internal systems, to systems designed to perform other core functions. What and how they track E&C cases and data can also vary greatly between companies. As a result, Convercent has dedicated Migration Specialists who manage the entire migration process; they will work with you, utilizing best practices, to ensure you are leveraging your legacy data in the best way possible.

Customers have a few options when it comes to data migration and we have different Professional Services packages which support the different options.

**1 – Basic Migration to Convercent – Metric-Driving data only**

Convercent can migrate ‘top-level’ information that supports **metric reporting**, from the legacy system to Convercent - this is subject to which fields are available within the legacy data itself, but typically includes case ID, open date, closed date, severity, status, location, department, intake method, resolution type and case types.

This metric-driving data will surface in the Convercent Insights application, allowing you to report on and compare data from the legacy files and new cases in the Convercent application.

The legacy data migrated across for each case itself will **also** be viewable within Convercent Case Manager, however, as only the metric-driving information is pulled into Convercent, items such as messages and attachment files etc.. that were held within the case in the legacy system will not be visible. The Customer can maintain a copy of their legacy data to access attachments information as needed.

Many of our customers utilize this solution as they are able to see current trends in their organization against historical information, and have access to top-level case data from the legacy files in Convercent’s Case Manager system. Other case data like messages and attachments can still be accessed via the archive, and the migration cost itself is lower as not all data is migrated.

**2 - Advanced Migration to Convercent – Metric-Driving data and Notes/ Messages**

Convercent can migrate the same ‘top-level’ information that supports metric reporting, as in option 1, and additional items such as notes and messages that are available in the file as fields. Most legacy data extracts record information in this way. The migration process involves some additional pathing and verifying to migrate these additional fields.

Any files or attachments in the data set are not migrated across under this option.

As with Option 1 - The legacy data migrated across to Convercent will be visible in the Convercent system and the Customer can maintain a copy of their legacy data to access attachments as needed.

**3- Complex Migration to Convercent – Migration of Attachments**

Convercent will migrate ‘top-level’ information that supports metric reporting with nots and messages (outlined in option 2) **in addition to** the attachments within the cases themselves.

We term this migration ‘complex’ because the legacy system can contain a high number of files, of varying size, that require additional processing and multiple steps to migrate and validate.

The benefit of this approach is twofold; the metric-driving data and notes will surface in the Convercent Insights application, allowing you to report on and compare data from the legacy files and new cases in the Convercent application. Secondly, the additional case data - attachments, messages etc. are migrated across for each case itself and are viewable within Convercent Case Manager.

Customers also typically maintain a separate archive file from their previous Case Management system as a backup but can now effectively access all of their legacy data and files within Convercent.

**4 – Customer archives legacy data – No Migration to Convercent**

Customers can archive their legacy data and maintains that archive for future reference. It is not migrated to Convercent and will not show in the Convercent system, only cases reported through Convercent are maintained.

For many customers, whilst they have the need to maintain their legacy data, their legacy system did not offer the functionality that Convercent offers, so they may not have legacy data they want to migrate to Convercent and decide to just have the archive as their point of historical reference.

**Migration Overview**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **Migration Type** | | | |
| **File / Data Availability in Convercent** | **Basic**  **Migration** | **Advanced**  **Migration** | **Complex**  **Migration** | **No**  **Migration** |
| Legacy Metric Data available in Convercent Insights | **✓** | **✓** | **✓** |  |
| Legacy Metric Data available in Convercent Case Manager | **✓** | **✓** | **✓** |  |
| Legacy Notes and Messages Data Available in Convercent Case Manager |  | **✓** | **✓** |  |
| Legacy Attachments available in Convercent Case Manager |  |  | **✓** |  |
| Purpose of Archive  (hosted by the customer) | Access to notes, messages, attachments / Backup | Access to attachments / Backup | Backup | Access to data, notes, messages, attachments / Backup |

**Data migration requirements**

Migration packages assume that legacy files are extracted into an industry standard file-construct. Generally, this is the case when the files originate from a recognized helpline provider.

If using a non-standard helpline application or helpline provider additional scoping work / guidance around standard file construct may be required ahead of the migration.