Egnyte Cloud Migration

CHECKLIST

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Introduction

With all the benefits of migrating your data to the cloud, it's not surprising that most organizations are considering replacing on-premise file servers with cloud-based storage. This Is especially true as users have become comfortable with consumer grade online file storage from Google, Box, Dropbox and other vendors. However, the thought of migrating terabytes of your most sensitive data can be intimidating. After all, one slip-up could disrupt business processes and bring your organization to a halt.

That's why it's important to think through the process ahead of time. We have built this checklist based off of our experiences with many thousands of customers, large and small, and across all types of industries.

CHECKLIST SUMMARY	☐ Document your Needs	☐ Formal Testing
	☐ Identify the Players	☐ Preparation for Migration
	☐ Discovery	☐ Migrate
	☐ Create a Plan	☐ Monitor and Optimize

DOCUMENT YOUR NEEDS

The first, and often overlooked step is to identify the triggers that are causing you to consider moving to a cloud-based solution. Do you have increasing hardware and software maintenance costs with your current system? Is the current solution draining staff resources? Is the current system incapable of scaling with your organization? Often, the answer to all of these questions is yes. However, analyzing these factors can help you prioritize the features you need in a cloud solution. More importantly, they will drive the metrics that you'll use to measure success after the migration

IDENTIFY THE PLAYERS

Identify the stakeholders in the project. You'll need a project champion who will have direct ownership and ultimate responsibility. That person will then need to identify the management team / committee / council necessary to approve the planning and budget for the project. Keep in mind that it is usually necessary to communicate plans and potential trade-offs with these individuals before going into a formal meeting to make decisions. You'll also need to identify any help (if needed) from other departments and who will represent those teams.

DISCOVERY

The discovery phase is intended to provide a complete assessment of your current environment to determine the scope of the project. Obviously, you should be able to identify the amount and types of data to be migrated. However, you also need to understand its sensitivity, confidentiality, and criticality based on your business processes. Understanding where data came from and how the data is used is critical to managing it correctly. This is also the phase where you'll likely uncover "shadow IT" projects that should also be included in the migration which may add to project cost. On the other hand, you may also find data that should be deleted rather than migrated. This can reduce cost and save time for the project.

CREATE A PLAN

At this point, you'll want to identify the vendors and partners you'll use for the migration project, and begin detailed planning for the migration. To start, you'll need to know:

- [ ] The data to be migrated by repository and folder structure
- [ ] Existing permissions
- [ ] Existing tools used to access the data

Once you have that, you'll need to outline the order you'll migrate the data and what tools you'll use to do it. At this point, it's often appropriate to do some testing of tools and processes, paying particular attention to performance and stability during the migration. It's also best to use actual data where possible rather than dummy data to help uncover quirks in the tooling. Pay particular attention to verify permissions that are to be transferred as well. You should also be able to review post-migration reports and develop the format you'll want to use during the actual migration. Testing will allow you to estimate the duration of the entire project. Finally, you can outline the plan itself. It should include the order that you'll transfer various data repositories as well as verification testing that you'll perform on the migrated data. The plan will include the step to move users to the new data location. You should plan to hold the old data for some period after migration to allow it to revert back. Finally, think about contingency plans to implement if the migration is interrupted due to technical or business issues.

FORMAL TESTING

Although some testing was performed in the previous step above, it was only intended to validate the tooling and process for a small amount of data. If a large amount of data will be migrated, it may be necessary to do formal testing to include transferring a large amount of real data and measuring the performance as well as verification processes. This tests the migration processes at scale.

PREPARATION FOR MIGRATION

At this phase, you'll have a good idea of the scope and duration of the project as well as the tools. You'll have a good estimate for final budgeting and sufficient information to build an actual schedule for the migration. Besides notifying management and department heads, you'll also want to send a general communication out to all employees. You'll want them to notify any partners (distribution and supply chain) to be aware of and report any disruptions. It's critical that your staff is trained at this point to understand and operate the new cloud system. You'll want to go ahead and preconfigure the cloud repository so that the system can be up and running immediately once the data arrives. Hopefully, your users won't need any new training, but if they want it, you should be prepared to provide it as well.

MIGRATE

If you've done the previous steps well, this should be the easiest step of all. You'll kick off a migration tool, typically over a weekend, and return Monday morning to a new environment. You'll want to review reports of the migration immediately, and provide appropriate updates to management.

Migration is typically done in phases, where the first phase is simply seeding data. That is a simple copy operation from the source to the destination. Note that this is a "copy" not a "move" action, and the source data is unaffected. Then, for some period of time, you'll operate from the source data while the system does periodic "true-ups" to copy over any changed data during the period. At this point, you'll move all your users onto the destination data and verify accuracy. You'll also apply permissions to the destination repository at this time.

After your users are satisfied that all data is in place, you'll lock the source repository as read-only so that it becomes static as your users work from the new repository. This will remain in place until you are comfortable that it can be deleted.

MONITOR AND OPTIMIZE

Immediately after migration, you'll want to monitor the system and continue to verify configurations. Respond to user questions and verify performance of the new cloud-based solution. This is when you'll start taking advantage of any new features and capabilities that were simply not available in your old system.

CONCLUSION

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For most organizations, migrating business data to the cloud is not a question of "if", but "when" to make the move. Thankfully, cloud-based solutions are mature and capable - your data will be safer, and more reliable than in an on premises file server. You'll enjoy ease of administration, lower costs, and the agility of scaling with your business needs. Further, if you pick the right partner, migrating to the cloud can be an enjoyable rather than stressful experience. Contact your Egnyte representative today to discuss how migrating to the cloud will benefit you and your organization.

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Egnyte provides the only unified cloud content governance solution for collaboration, data security, compliance, and threat prevention for multi-cloud businesses. More than 17,000 organizations trust Egnyte to reduce risks and IT complexity, prevent ransomware and IP theft, and boost employee productivity on any app, any cloud, anywhere. Investors include GV (formerly Google Ventures), Kleiner Perkins, Caufield & Byers and Goldman Sachs.

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