

# Eight Best Practices when Migrating Calendar Data

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Migrating your calendar data from one platform to another is a lot like a plane flight: the most challenging parts are the take-off and landing. And like travelling via plane, getting to your final destination may end up taking different routes or even involve alternative forms of transportation.

The purpose of this paper is to share the best practices we've identified that have helped our clients over the past eight years decide which migration strategy is right for their organization. If you'd like to learn more, please get in touch.

## 1. Establish clearly defined business objectives.

What are your business goals? Hard to believe, but many customers skip this step. Having business goals will help you know which migration strategy is best suited to your organization. Here are some questions to help you get started defining your business objectives:

- What are you trying to accomplish (e.g., lower costs; improve user workflow; simplify support; minimize impact on the organization; require the smallest possible outage window)? Something else?
- When do you want to 'go live'?
- How much calendaring history do you want to migrate?

## 2. Understand any constraints and technical requirements

You selected the new calendaring system. Make sure you understand any constraints that your business or software places on this project. For example:

- What kind of financial and human resources are you able to devote to this project? (E.G., we can only dedicate one person and \$500 to the project.)
- What are your most important technical constraints? (e.g., must work with Macs; the conversion must complete within a 12 hour 'outage' window.)

- What calendaring functionality is critical in your organization (e.g., conference room scheduling, group calendars)? Does the new calendaring system support this functionality? How does this affect what you require for calendar data migration?

### 3. Understand the different migration strategies available.

No solution is perfect! Over the years we have learned that migration solutions can be fast, inexpensive, or high-quality. No solution offers all three. Some solutions allow you to pick two (i.e., if you want “fast” and “inexpensive” forget about “high-quality”). Our customers evaluate solutions in terms of their cost and disruption to their organization. Here are six approaches our customers typically consider, and what they’ve said about each.

Type	Method	Costs		Disruption
		Financial	Time	
Cold Turkey	Switch	Low	Immediate	High Users must re-enter all calendar data and re-book all meetings. Users lose existing conference room bookings
User does the work	Sync calendars w/ handhelds	Low	IT: Low User: Medium	High <ul style="list-style-type: none"> <li>• Lose meeting details. (Users must now rebook meeting rooms, re-invite guests; in turn guests must edit calendars to delete double bookings.)</li> <li>• Organization must stop work and sync at the same time or must maintain two calendaring systems. (Wasn't removing one a business objective?)</li> <li>• Must provide all employees with handhelds or those without handhelds must go “cold turkey.”</li> </ul>

Type	Method	Costs			Disruption
		Financial	Time	Time	
Pre-packaged tools	Use existing "shareware" tools to create export files	Low	IT: Medium User: Medium	High	<ul style="list-style-type: none"> <li>IT: Can take a long time to generate the export (iCal, CSV) files</li> <li>Users: If Export and Import fields do not match up (users will have to type in missing data, re-create recurring meetings and re-invite guests)</li> </ul>
DIY	Your development team decrypts and reformats data	Low incremental cost; high opportunity cost	IT: Short if have legacy system expertise; otherwise long User: High if developers don't get it "right"	High	<ul style="list-style-type: none"> <li>Require developers with skills to read the legacy system &amp; reformat the data for insertion</li> <li>Takes developers away from other projects that require company specific knowledge</li> <li>Users may still have to input missing data</li> </ul>
Mail "Wizards"	CalMover; Intellisynch	Medium-High	IT: Low Users: High	High	<ul style="list-style-type: none"> <li>Mail wizards' calendaring solutions seen to be not as robust as email solutions</li> <li>May incur additional costs for each test system files</li> <li>Users have to fix everything that tools don't do correctly.</li> </ul>
Calendar Geeks	Sumatra	High	IT: Low Users: Low	Low	<ul style="list-style-type: none"> <li>Sumatra has years of experience moving calendars from Meeting Maker, Lotus, Oracle, into Exchange and Zimbra</li> </ul>

Be cautious about a vendor that offers to just “copy” calendaring data as is done with email migrations. This approach won't work because calendaring data, unlike email, has embedded state and relationship information that connects meetings to allow meeting updates and cancellations. Copying files does not convert calendar data into the (often proprietary) proper format, so you may be left with disconnected, one-time appointments rather than true live migrated meetings.

#### 4. Trust, but Verify (a.k.a. TESTING, TESTING, 123)

OK, you've identified a few solutions that look like they will meet your business goals. Each has pluses and minuses. Don't rely on anyone else's claims. Before you sign a contract, prove the solution works by setting up a test lab to see if it is successful with your data in your environment (unless you like the thrill of the unknown). Your test lab results helps you decide which solution works best for your organization. Remember to make your test lab's environment match your production environment. You do not want to discover a legacy application running in production strips crucial information out of meeting requests, or your handheld synch tools are dependent on outdated O/S patch versions.

#### 5. Connect What You Test To Your Business Goals

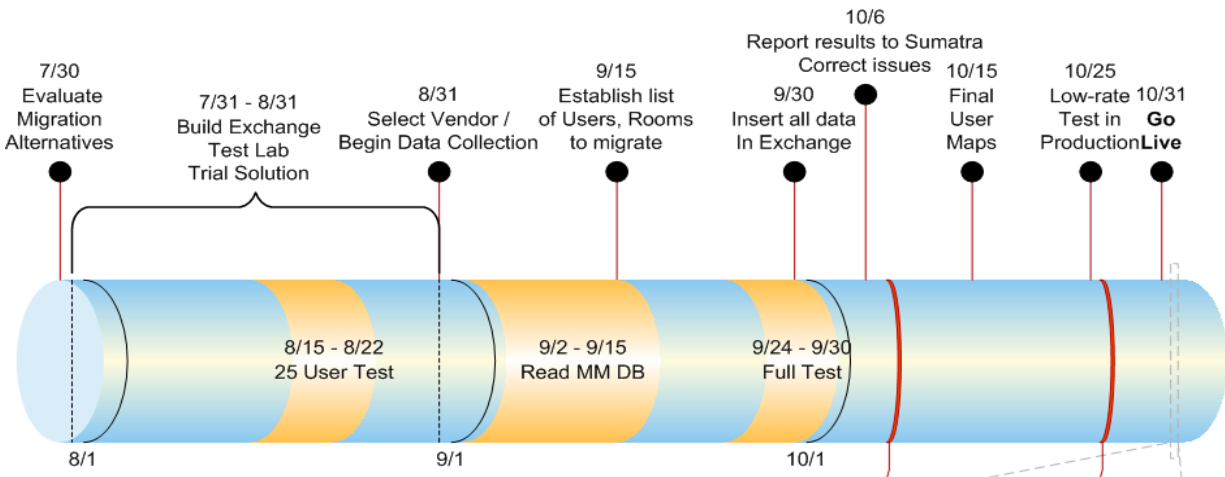
Migrations present numerous testing opportunities. But if you're smart, you'll test those parts that tie back to the goals.

If your goal is to...	...then test...
A. Minimize the impact on your organization	<ul style="list-style-type: none"> <li>• How long the process takes.</li> <li>• What data get migrated, and what does not.</li> </ul>
B. Have the highest possible data conversion accuracy	<ul style="list-style-type: none"> <li>• How much data gets converted (or, make sure you can get a list of the items that do not get converted).</li> <li>• Check the meetings to ensure they have all of the attendees, and their responses. Is the meeting time correct (especially around daylight savings time)?</li> <li>• Is the meeting agenda present?</li> </ul>
C. Re-create conference room bookings	<ul style="list-style-type: none"> <li>• Look at each resource's calendar. Compare the results with the legacy calendar. Are the calendars identical?</li> </ul>
D. Minimize time users (especially senior ones!) spend re-keying data	<ul style="list-style-type: none"> <li>• See B, above.</li> <li>• Test delegate/proxy access to others' calendars.</li> <li>• Make sure you can update (and cancel) meetings, and that attendee calendars receive those updates.</li> </ul>

- E. Ensure the smallest possible outage window
- How long the end-to-end process takes (remember to include the time to configure users, run backups, disable hand-held devices, etc).
  - What happens when things go wrong? Test the solution to ensure there it has a viable 'rollback' option.
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## 6. Define a timetable

Things go wrong. Tasks take longer than you might have initially believed. By having a timetable you'll understand the impact of "X" factors like systems that have to be rebuilt, users re-created, resources re-provisioned. (But you already know some of what can go wrong because you tested the solution



as part of your vendor selection process.) Here is a sample timetable:

Figure One: Sample timetable

## 7. Communicate, communicate, communicate

Changing a tool users tap into every day can unsettle them. If one of your goals is to minimize the impact on the organization, develop a communication program to help your users understand why you are undertaking this migration and how it will affect them. Engage the organization, invite questions, and be ready with answers. Customers with the most comprehensive communications plan had the most satisfied users after the migration. Provide interim updates to keep them apprised of your progress.

## 8. Training for a successful rollout

The data migration looks like it's going to be successful. How are you going to make your users as happy as you are? By showing your users how it works with *their data* in action. So why not invite administrators for your top brass into the test lab to have them review their boss' calendars? By seeing how thoroughly the information has been imported, folks will get excited and tell others in the organization.

**Sumatra has been migrating calendars for organizations large and small since 2001. Whether you use Meeting Maker, Lotus Notes, Oracle, or have a home grown system, we have successfully moved more than a billion calendar events**



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