A Project Management Data Migration Checklist

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Plan your project management data migration

Preparing for project management data migration is a critical task that requires careful planning and consideration. The process can be quite straightforward when approached strategically.

We advise you to address the following questions before initiating the migration:

1. **When is the ideal time for your team to begin working with the target project management system?**
Introducing a new project management system requires careful consideration of timing. Consider your team's workload, ongoing projects, and upcoming deadlines. Identify a timeframe when your team can allocate sufficient time and effort to get acquainted with the new system, all while ensuring minimal disruption to project progress. By planning, you can minimize interruptions and achieve a seamless transition.

2. **Which specific data do you intend to transfer?**
Before kicking off the migration, it's crucial to pinpoint the specific data you plan to transfer. Take a close look at your current project management data and identify the information that should make its way to the new system. Understanding your data requirements is key to streamlining the migration process and avoiding the unnecessary burden of transferring outdated or irrelevant information.

3. **Are any modifications required for your records, or can they be migrated as they are? For instance, migrating subtasks as tasks or merging multiple projects into one, among other possibilities.**
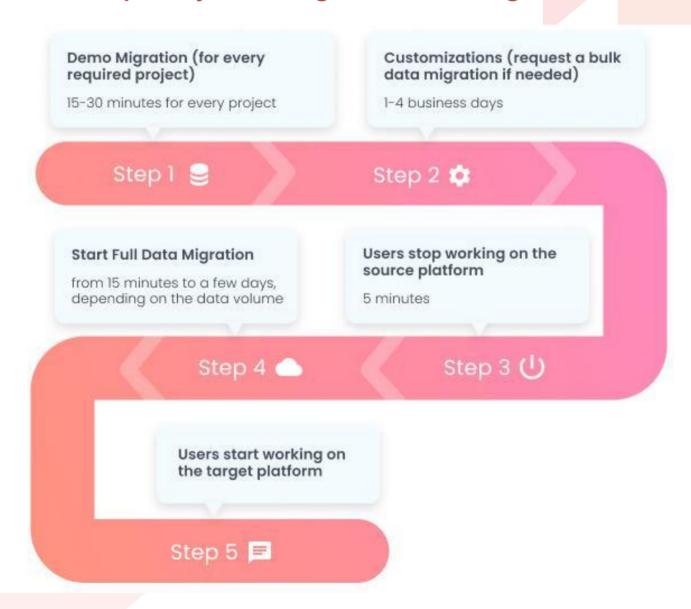During the migration process, you may encounter instances where modifications are necessary for your records. Evaluate whether your data can be migrated as is or if any adjustments need to be made. For example, you might need to convert subtasks into individual tasks or consolidate multiple projects into one. Anticipating these modifications will help you plan and execute the migration more effectively.

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Expert tip: Whether running a Demo Migration or a Full Data Migration, it's important to note that the migration of tasks and their associated data follows the same process. If certain records didn't migrate correctly during the Demo Migration, they will unlikely transfer in the Full Data Migration either.

Download the Demo reports to verify if everything migrated accurately. Got questions, , contact us.

5-Steps Project Management Data Migration Plan

Demo Migration (for every required project)

15-30 minutes for every project

Customizations (request a bulk data migration if needed)

1-4 business days

Step 1

Step 2

Start Full Data Migration

from 15 minutes to a few days, depending on the data volume

Users stop working on the source platform

5 minutes

Step 4

Step 3

Users start working on the target platform

Step 5

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Expert tip: When it comes to project migration, you have options! You can migrate multiple projects all at once using a bulk data migration approach or take a more focused approach by migrating them one by one. The choice is yours and depends on your unique needs and priorities. So, whether you prefer the efficiency of a bulk migration or the control of a step-by-step process, there's a method that fits your project management style.

Setting up a Free Demo Migration

1. Choose the right date

Take into account the following considerations when strategizing your data migration:

Volume of project-related workload: Opt for a day when your team has minimal or no interactions with project data. Doing so will facilitate a faster project management migration while minimizing disruptions to your existing workflows. If your team needs to access the source system during the data import, consider opting for the Signature support plan with Delta Migration to facilitate a smooth PM platform switch.

Allocate the preparation time: Source and Target systems require preparation before initiating project management migration. Dedicate enough time to clean up records, determine the specific project data you intend to import, and familiarize yourself with the different record types. Understanding how they can be mapped between your current and destination project management systems is important. Additionally, creating backups of your data ensures an extra layer of security during the project management migration process.

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2. Empower your team with timely updates

To ensure a successful project management data migration, it's crucial to maintain open lines of communication with your team and stakeholders. Engage in meaningful discussions and collaborative exchanges to create a comprehensive data migration plan. You can facilitate a seamless transfer between your current and destination platforms by sharing valuable insights and project management data migration checklists. These can encompass various aspects such as data filtering, closing old tasks, or reviewing project data post-Full Data Migration.

To streamline the onboarding process, make it a priority to introduce your team to the new project management system as soon as possible. Providing them with the necessary training and resources will prepare them to take action once the project management migration is underway.

Expert tip: Before embarking on the data migration journey, consider sending an email or reminder to your team. This simple act helps keep everyone informed and sets the stage for a smooth project management data migration.

3. Clean up your records on the source project management system

Take a deep dive into the data stored in your current project management platform. Dedicate the necessary time to verify and validate your project data, ensuring its integrity. Pay special attention to uncovering duplicates or empty fields that may have slipped through the cracks.

Carefully scrutinize your source project management data, looking for any signs of damaged or broken records. Evaluate each instance and decide whether to merge, complete, or bid farewell to these records.

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Now, let's talk about the Full Data Migration cost aspect. The price tag associated with this endeavor is directly influenced by the number of records you plan to migrate. This is precisely why conducting a comprehensive data audit serves two pivotal purposes. Firstly, it allows you to trim migration expenses by discerning which records warrant the move. Secondly, it safeguards against the transfer of problematic records into your brand-new project management tool.

Remember, meticulousness is key when it comes to navigating the intricacies of your project data. Adopting a meticulous approach and conducting a thorough data examination will set the stage for a seamless and cost-effective Full Data Migration.

4. Prepare your target project management platform

The target-related work often depends on the project management tool you're migrating to. Note that certain project management software may have specific requirements and limitations.

Before diving into the project management migration process, reviewing data migration checklists is essential to ensure thorough preparation.

- [Data Migration Checklists](#)
- [Pre-migration Preparation](#)
- [Assistance Setting up Your Demo Migration](#)

4.1 Find access credentials to current and target platforms

You need to provide the appropriate access credentials to connect your Source and Target platforms in the Migration Wizard. Depending on the project management platforms involved, these credentials may include API keys, API Tokens, email addresses, passwords, URLs, or others. Alternatively, you may need to sign in with your product management account.

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Be mindful that certain credentials, such as API keys, API Tokens, and REST API, may have expiration dates, so starting the migration process before they expire is important.

Check our Knowledge Base sections with data transfer checklists for assistance in gathering the necessary access credentials for both your Source and Target:

- [Assistance Setting up Your Demo Migration](#)
- [Pre-migration preparation](#)

4.2 Creating corresponding user profiles on the target platform

To ensure a smooth project management migration, creating user profiles on your target platform that mirror those on the source platform is crucial. This step ensures tasks are assigned to the correct individuals and maintains consistency across user profiles. Visit [our Help Center](#) for detailed instructions on creating user profiles tailored to your target platform.

Note: You should manually add all necessary users before setting up a Free Demo.

4.3 Do the specific preparation for your Source and Target platforms

Different project management platforms have particular requirements to ensure a seamless data migration. Here are a few examples:

- Change email visibility when migrating to GitLab, GitHub, and Jira Software.
- Add task lists when importing data into Teamwork or ClickUp.
- Turn off notifications in Asana when importing data.

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During connecting your Source and Target, you will be informed if any specific preparations are needed. However, we strongly advise you to prepare before the Demo migration. Go through the following migration checklists:

- [Assistance Setting up Your Demo Migration](#)
- [Pre-migration preparation](#)

5. Unveiling the Power of the Free Demo Migration

The journey towards seamless project data migration begins with the Free Demo, offering a valuable opportunity to observe the data migration process firsthand and assess the need for adjustments or customization to meet your unique requirements.

Before initiating your Demo, ensure you have the admin rights for your current and target project management software.

The Demo Migration follows a 6-step setup:

1. Sign in or create an account with Migration Wizard.
2. Connect your Source and Target project management systems.
3. Select the specific records you wish to transfer.
4. Match users.
5. Map the route for tasks.
6. Check the results for your Free Demo Migration.

Note: Migration Wizard only transfers one project per Full Data migration. Opt for bulk data migration if you want to import multiple projects simultaneously.

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List of Migration Peculiarities

1. If you want to migrate multiple projects in a single migration (500-1000), our service provides such a possibility. Our migration tool can also transfer all custom fields for some target platforms in a bulk data migration. Contact our team for more details.
2. Our tool can migrate subtasks from Asana, ClickUp, and Teamwork. Plus, they can get transferred to Feedcamp, ClickUp, Asana, Teamwork, Jira Software, and Zoho Projects. But, if your Target doesn't support subtasks, we can import them as custom tasks.

6. Check your Demo Migration results

Once a Demo Migration is complete, you'll see a summary table with reports for:

- All available records (for migration)
- Migrated records
- Failed records
- Skipped records

Ensure that the reports are opened to check the Demo results. The skipped records report comprehensively explains why specific data was not transferred. Should you require information regarding the failed records, contact our support team.

Here, you can also see the Full Data Migration price, accompanied by a detailed cost breakdown. If you need to enhance your migration experience, select the most suitable support plan.

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What Is Customization?

The Project Management System Migration tech team can customize your data switch according to your preferences. This can include moving specific records, filtering historical data before migration, matching pre-existing records on your Target, or migrating specific data to another field (provided it meets the required input data type).

Before requesting any customizations, set up a Free Demo to find out what Migration Wizard covers automatedly. If you have specific requests beyond the automated features, submit a ticket or initiate a live chat with our support team to discuss your requirements.

Have any questions regarding your specific migration pair? Contact our support team.

Check out the Platform-Specific Tips

You can find enlisted data transfer checklists for importing and exporting data from a specific platform here.

Data import tips	Data export tips
Asana Import ClickUp Import GitLab Import Jira Software Import	ClickUp Export GitLab Export Jira Software Export

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Frequently Asked Questions

What is bulk data migration?

Bulk project management migration involves transferring data from multiple projects within one project management system to another system in a single data migration. During a bulk migration, you can transfer specific projects simultaneously or merge selected projects with their target counterparts.

Once you've set up a Free Demo, contact our support team to discuss a bulk migration. Plus, read our [checklist on bulk data migration](#).

What data migrates in a default migration?

During the Demo Migration, the Migration Wizard will import 20 tasks and their related data (such as task lists, comments, attachments, tags, custom fields, inline images, etc.) to your target platform. The availability of other records for transfer depends on the specific combination of your Source and Target platforms.

To determine which records you can migrate, you can follow these steps:

1. Visit the Supported platforms section.
2. Select your Source and Target project management systems.
3. Scroll through the list of available data in the record block for your particular migration pair.

Expert tip: If you need to transfer data not included in the default help desk migration, request a Custom Data Migration.

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How much time will the Full Data Migration take?

Various factors influence [the duration of the Full Data Migration](#):
- The total number of records you intend to transfer
- The quantity and size of attachments
- API limits of the Source and Target systems
- API specifications
- Your Target project management tool

Data migration involves retrieving all records from the Source help desk and transferring them to the Target help desk. Therefore, the speed of the migration process also depends on the design of the APIs and the API limits set by your help desk vendor.

Some help desk platforms allow retrieving a ticket with all its comments using a single API request, while others require separate requests for each record, such as one for the ticket and another for its attachment. Hence, it is crucial to understand the number of API requests involved:

1. How many API requests do your Source platform need to fetch and count per record
2. How many API requests does your Target platform need to search and create per record

To estimate the time required for your Full Data Migration, you should:
- Determine the maximum number of API calls per minute by your source and target platforms.
- Calculate the number of API calls needed to migrate a specific record type.
- Count the total number of API calls required on both the source and target platforms to migrate all records.

Expert tip: Consider requesting a temporary increase in API limits from your Target vendor to speed up your record transition.

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What is Delta Migration? Do I need it?

Delta Migration ensures uninterrupted work on your project while achieving a clean and seamless data transfer to the destination platform.

During Delta Migration, Migration Wizard transfers only new or updated tasks created during the Full Data Migration on your source project management system.

Delta Migration is exclusively available as a part of the Signature plan in our support service offerings. You can select your preferred support plan during the Demo Complete step.

LOOKING FOR MORE DATA MIGRATION DETAILS?

Let's talk now

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