



Free eBook

Planning An Email Archive Migration

Whatever your reason for migrating your email archive, ensure your data is transferred successfully by following the steps in our planning guide.



Planning an Email Archive Migration

Email archiving is best practice in many industries. If you're working in a heavily regulated sector like financial services, healthcare, energy, life sciences, education or government, it is essential.

Whether you're migrating your email archives to consolidate, centralise or provide greater security for your data, it's important to plan properly to ensure the transfer is thorough and secure. Otherwise, you risk data loss, failure to comply with regulatory requirements and issues for end-users.

In this guide, we cover the fundamentals of migrating your email archive - what this entails, why it's important and how to ensure you're prepared.

By 2027, the number of emails sent and received worldwide each day is expected to reach 408.2 billion

The Radical Group

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What Is Email Archiving?

Put simply, archiving emails means storing them safely in a central location. An email archive securely and compliantly stores all the data and attachments from sent and received emails, so that they can be searched for and retrieved whenever they're needed.

Before email archiving, emails were normally just stored in individual inboxes, with organisations often backing up data for disaster recovery. Anyone who has searched for an important email in their inbox knows how inefficient this is, with email chains, attachments and data being difficult to source. From an organisational perspective, it also may not be sufficiently secure.

Email archiving solves these issues - allowing businesses to quickly find emails and ensure that the data is securely stored.



Why is Email Archiving Important

Email archiving is important for a number of reasons, including:

Store Management

It reduces the amount stored on mail servers. As the number of emails is constantly growing and email data is increasing in size, transferring the data to an archive reduces the pressure placed on the mail server. Emails can also be replaced by a stub or shortcut to the original message, reducing the amount of data without impacting email retrieval.

Disaster Recovery

Separating email storage from the mail server means that data can be recovered in the event of a disaster. Downtime is minimised, with email data remaining fully available to users.

Data Retention & Compliance

When properly archived, emails are stored in a separate location that protects companies from data loss and reduces the impact of data corruption - ensuring they stay compliant with legal and regulatory requirements.

E-discovery

Archiving simplifies Electronic Discovery (e-discovery) - the process of searching, identifying, collecting and reviewing electronically stored data. It's normally part of a legal request, so it's important to stay compliant at all times.

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What is an Email Archive Migration?

An email archive migration is the transfer of email data from one location to another, from one archiving platform or file format to another. There are numerous different variations, but no other email archive migration solution supports data migrations and shortcut management for as many archive versions and platforms as Transvault.

Archive Vs Mailbox Migration

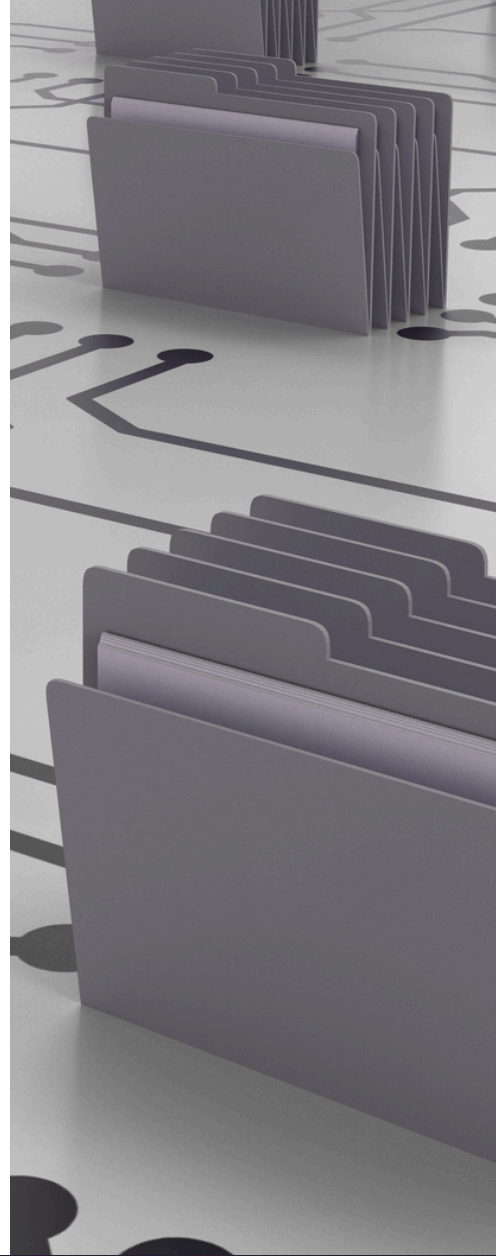
Although they both refer to the transfer of email data, archive and mailbox migrations are different things.

Archive Migrations

Involve moving email data that has been stored on an archiving platform. This covers archived journal and end user mailbox archive data.

Mailbox Migrations

Involve moving live email data on a mail server like Microsoft Exchange. For example, transferring a mailbox from Exchange 2016 to Microsoft 365.



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Why Would You Migrate Your Archive?

Key reasons for migration include:

End of life

This occurs when an email archive becomes obsolete. At the end of its lifespan, software will no longer be developed or supported. This leads to security risks, as there will be no bug fixes, compatibility issues and no technical support. When this occurs, it's time to migrate your archive..

Cost

On-premises email archive storage is often more expensive than cloud storage due to hardware costs, maintenance, scalability challenges, data extraction expenses, and hardware depreciation.

Compliance

e-discovery is essential for litigation readiness. Legacy archives often lack security and auditing capabilities, increasing legal, financial, and reputational risks in highly regulated industries.

Digital Transformation

Cloud-based archiving enhances cost savings, security, and compliance. As part of digital transformation, archive migration is essential.

Data Consolidation

As storage ages, organisations upgrade to advanced solutions. Consolidation reduces managed devices, streamlines archives for compatibility, and improves e-discovery, costs, and productivity.

Mergers and acquisitions

When a merger or acquisition occurs, there will be multiple archives that will need to work together. Consolidating migrates the archives, ensuring e-discovery works across the merged companies.

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Considerations for Migrations

Migration is an important process. You should ensure that you go into it with a thorough understanding and an idea of challenges and future considerations.



Considerations for Migrations

On-prem vs Cloud

Some organisations can be daunted at the prospect of moving their archives from on-premises to the Cloud. But migrating to the Cloud delivers numerous major benefits, including significant cost savings, technical and operational benefits and improved risk management.

Which Cloud platform?

You need to decide which Cloud platform to migrate to. This includes platforms like Microsoft Office 365, ProofPoint and Arctera Insight platform.

Who should do the migration?

Due to concerns about the cost of migration or a desire to retain complete control over the process, it can be tempting to do the migration in-house. If you have the correct expertise and a full understanding of the process, a DIY migration can be a viable option. However, due to its complexity and the risks of getting a migration wrong, using a specialist like Transvault is the safest option.

What data should you migrate?

When you undergo an email migration, you have an opportunity to audit the data that you want/need to retain. At Transvault, we also give you more transparency over the data as it moves - we keep you updated as to which data is moving during the process.

Challenges:

What limitations are there on ingestion capabilities?

Do you have sufficient bandwidth? Is there potential for data loss?

Compatibility:

What format is the existing data stored in? Can it be converted?

Compliance:

As we've discussed earlier, e-discovery is vital for compliance.

Will this be retained after the migration?

End users:

How will the migration affect the end user? Will they be able to access the archive during migration? Will they be able to access and navigate easily once complete? What implications does this have on productivity? What training will be needed?

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Preparing for an Email Archive Migration

Being properly prepared is key to a successful migration. There are lots of things that can go wrong when migrating and a lot of considerations you need to take into account.

Pre-Migration Actions

Project Objectives

What do you want to achieve? You should clearly outline the goals and objectives of the migration.

Scope

What are you migrating? Identify the data that is to be moved. Which method will you be using? A staged, hybrid or complete migration?

Stakeholder Identification

Communicate with all stakeholders involved in the migration.

Risk Assessment

What's the potential for something going wrong? How would that affect your organisation? It's important to conduct a risk assessment at the outset and plan for any challenges.

Budget & Resources

How much will the migration cost, and what other resources will it involve? Allocate the budget and resources necessary.

Timeline

How long will the process take? Does this have the potential to interfere with any other business objectives? Develop a detailed project timeline with key milestones and deadlines.



Proper preparation for an email migration is critical to safeguard your data, ensure business continuity, and avoid disruptions to communication.

Without careful planning, you risk data loss, prolonged downtime, and compliance issues that could impact your organisation's productivity and reputation. A thorough approach ensures a smooth transition, preserving email integrity and keeping your teams connected seamlessly.

Darwin Lee, CEO, Transvault



Migration Plan Development

After you've gone through the initial considerations, start developing your migration plan.

Migration strategy

Develop a detailed migration strategy based on the type of migration you're planning. For example, will you go for a phased approach where you migrate emails in stages? Or an archive first approach.

Communication plan

Ensure all stakeholders are kept up to date with any changes or effects that may impact them with a communication plan. Agree on who needs to be included and make a note of key deadlines and dates that stakeholders need to be aware of.



Infrastructure Preparation

Before the migration, you need to ensure that the infrastructure is suitably prepared.

Migration environment setup

Set up and configure the migration environment, using prerequisites defined in the statement of work (SOW). This can include things like the migration plan, strategies, process, backup/rollback and communications plan.

Security configurations

Make sure you implement your recommended security measures to ensure data isn't compromised during the migration. This includes things like firewalls, access controls and third-party remote access.

Migration Validation

Before proceeding with a full-scale migration, it's essential to validate your approach to minimise risks and ensure a smooth transition.

Proof of Concept

Planning is one thing, proving the concept is another. By performing a pilot migration, you can make any necessary adjustments before the full migration and ensure full buy-in from all stakeholders.

A pilot migration involves a smallscale implementation that can identify any flaws before the full rollout.

After following these steps, you should be ready to implement the migration.



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Migration Tips & Best Practices

With so much to consider, we've collected some email archive migration tips and best practices to help things run as smoothly as possible.

Be Selective with Your Data

Migrating your email archive is a great chance to review what you have. But if your current system struggles with e-discovery and the new one offers better tools, it may be smarter to assess the data after migration.

Safeguard Compliance During Migration

If you operate in a regulated sector, ensure your archive remains legally compliant after migration. Will emails keep their original format? Will conversions affect data integrity? What about orphaned or corrupted files? Either plan for these risks - or work with a migration expert who can manage compliance for you.

Align Your Team

A new archive means new processes. Make sure employees understand how things work and receive any training they need.

Work with a Trusted Migration Partner

Email archive migration is high-stakes - mistakes can have serious consequences. If you don't have the expertise in-house, choose a partner like Transvault. Our proven technology, experience, and integrity ensure a smooth, secure migration.



Why Transvault?

Transvault is the migration partner that organisations rely on. No other email archive migration solution offers the same level of support for data migrations and shortcut management across as many archive versions and platforms as Transvault.

We have successfully completed thousands of migrations across a wide range of industries. By combining cutting-edge technology, advanced techniques, and sophisticated algorithms with decades of collective experience, we ensure your migration is seamless - from a business, compliance, and end-user perspective.

- ✔ **World-class products and services**
- ✔ **A suite of solutions to power success**
- ✔ **The best people behind the best technology**
- ✔ **100% focused on the outcome you need**

Work with the Migration Experts

Get in touch via our website or LinkedIn to find out how we can help with your email archive migration project.

