HALO ITSM

DATA MIGRATION
CHECKLIST

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[Moving your data to Halo ITSM](#) might seem challenging, especially when leading with large records. But fear not! With a migration plan and an automated Help Desk Migration service, your Halo ITSM data transfer is on track for success. Move incidents, agents, contacts, and more with just a few clicks, all without downtime.

WHAT MIGRATION WIZARD CAN IMPORT TO HALO ITSM:

Entity	Related data
Tickets	- Created at, Updated at, and Closed at dates - Custom fields - Attachments - Inline images - Requesters - Comments (Author, Created dates, and Visibility) - Public notes - Private notes
Contacts	
Agents	
Organizations	
Groups	
Articles	- Top level FAQ Lists - Low level FAQ Lists - Attachments - Tags - Inline image

Expert note: Make sure you have admin rights on both your Source and Halo ITSM accounts. And create agents, groups, and custom fields before setting up a test migration.

WHAT DATA WON'T BE IMPORTED

Our data migration tool can't shift ticket tags, custom fields for organization and contacts, macros, triggers, automation, and other settings.

Have special requirements for Halo ITSM data migration? Let's discuss your needs and requirements, and our tech team will craft a solution for your migration project.

BEFORE YOU START DATA MIGRATION

To ensure a successful Halo ITSM data transfer, go through these preparation steps.

DATA MIGRATION PROCESS PLANNING

Every data migration is unique, and there's no one-size-fits-all solution for every data transfer. From our experience, we've pinpointed two methods:

1. [Automated data migration](#) or DIY migration

2. Custom data migration

3. Automated or custom data migration + Delta migration

If you require assistance with [planning and carrying out your data migration](#), reach out to us. We're here to help you build your migration project.

PRE-MIGRATION SETTINGS ON HALO ITSM ACCOUNT

For a smooth Halo ITSM data migration, follow these steps:

1. To connect Halo ITSM, you need to fill in

   a. **Authorisation Server**: Go to Configuration → Integrations → Halo PSA API → Authorisation Server.

   b. **Tenant**: Open Configuration → Integrations → Halo PSA API → Tenant.

   c. [**Client ID**](#): Navigate to Configuration → Integrations → Halo PSA API → View Application → New.

d. **Client Secret**: Hover over to Configuration → Integrations → Halo PSA API → View Application → New.

Note: You can connect the cloud-based and on-prem versions in the same way; provide Authorisation Server, Tenant, Client ID, and Client Secret.

2. Add all source agent profiles you need to shift to Halo ITSM and ensure they have accepted the team invitation. Go to **Configuration** → **Teams & Agents** → **Agents** → **New** → **Details** → **Preferences** → **Save**.
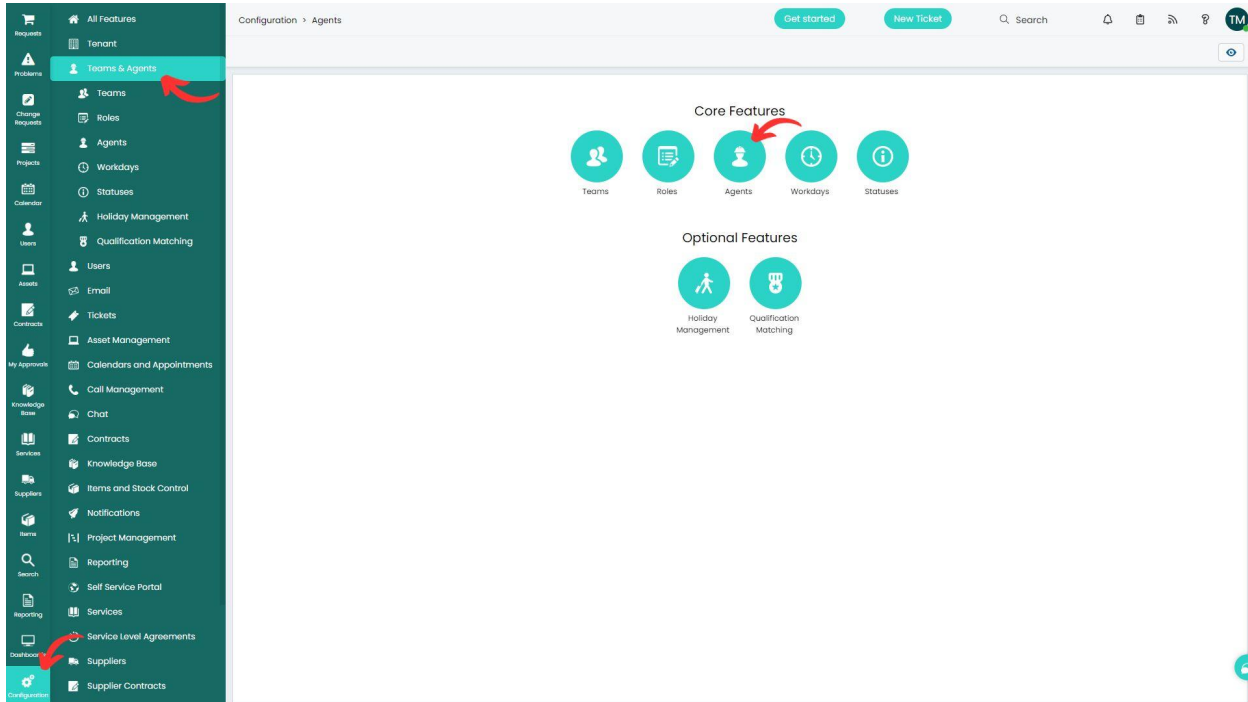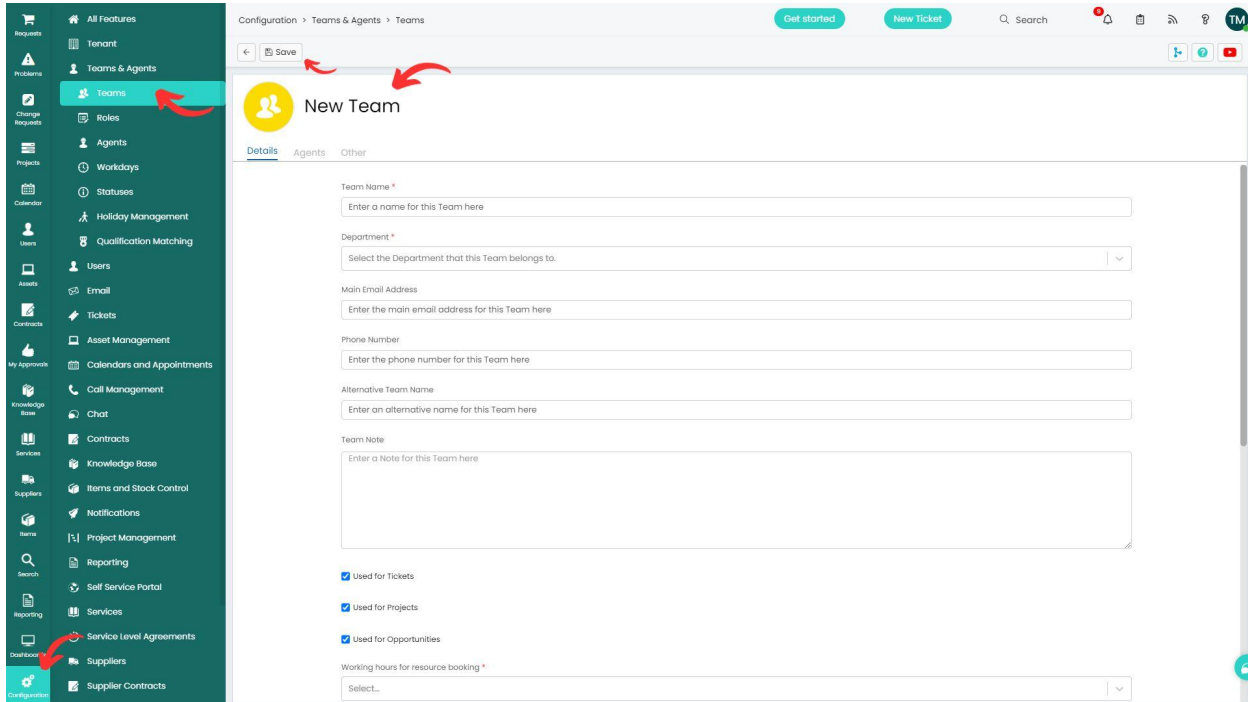
Note:
- Halo ITSM has sample users without emails. Adjust existing agent profiles or set up new ones as needed.
- During a Free Demo setup, you can also create any missing agents using Migration Wizard.

3. Set up all source groups you need to move to Halo ITSM to enable group matching. Navigate to **Configuration** → **Teams & Agents** → **Teams** → **New** → fill in **Details**, **Agents**, and **Other** → **Save**.

> **Note**:
> - Halo ITSM comes with three default groups. Modify them or establish new ones.
> - During Free Demo setup, you can create any absent groups using Migration Wizard.

4. Create custom fields that correspond to the source values. Hover over to **Configuration → Custom Objects → Custom Fields → New →** provide **Details** and **Visibility Restrictions → Save**.
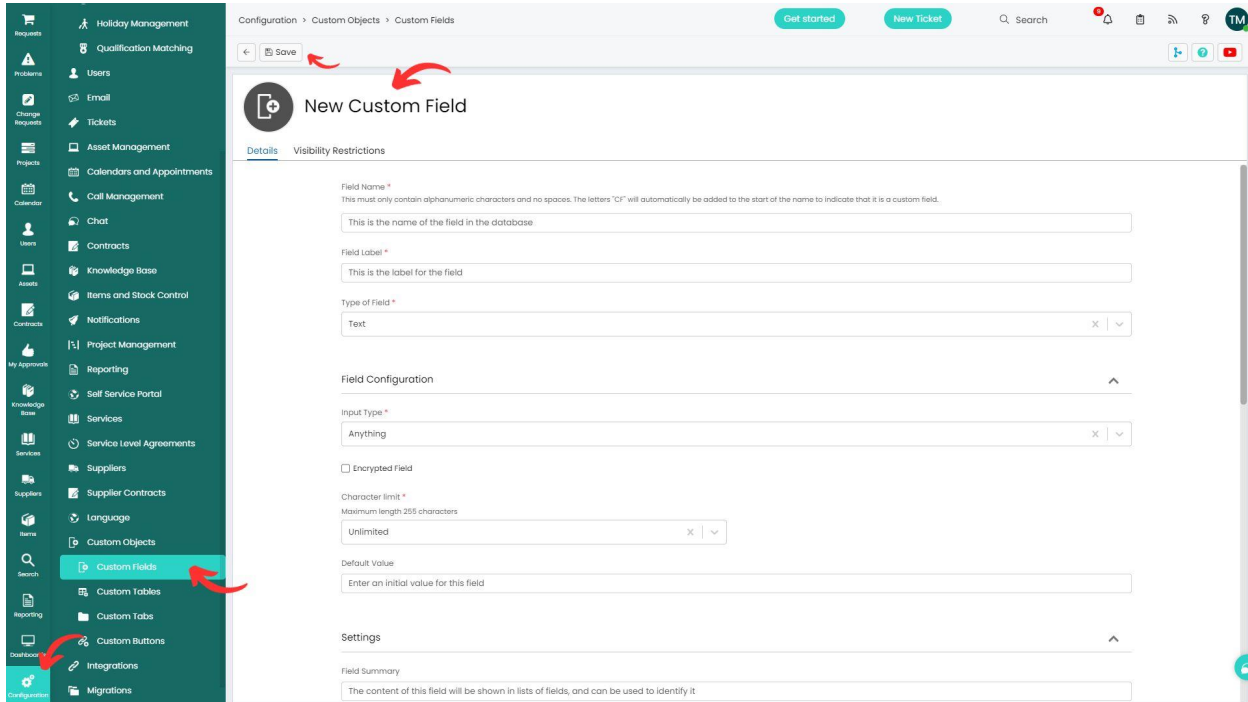
5. Deactivate Approval Process to ensure incident tickets transferred accurately. Click **Configuration** → **Tickets** → **Ticket Types** → open a ticket type → **Edit**. Choose **No** in the **Start an Approval Process** field. Then press **Save**.

6. Switch off notifications during data migration. Navigate to **Configuration** → **Notifications** → **General Settings** → clear the checkboxes next to all notifications.

SETTING UP DATA TRANSFER TO HALO ITSM

Start your smooth data migration by setting up a free Demo Migration. It helps you test-drive migration settings before the big move. You can re-run your Demo as many times as needed to perfect everything.

Here's a simple guide to begin your Halo ITSM data migration:

STEP 1. SIGN UP FOR THE MIGRATION ACCOUNT

Set up a Migration Wizard account using Google, Microsoft, or your work email. If you choose the work email, confirm it by following the instructions sent to your email.

STEP 2. CONNECT YOUR SOURCE AND TARGET PLATFORMS

Depending on your help desk or service desk, you may need various access credentials (i.e., a URL, API token, or logging in with your platform account) to connect your source and target platforms.

The Migration Wizard gives handy tips as you go, making the connection process smooth.

To connect Halo ITSM as your Target platform, provide Authorisation Server, Tenant, Client ID, and Client Secret.

STEP 3. CHOOSE WHAT DATA OBJECT TO TRANSFER

Pick the customer service data you want to move to Halo ITSM, then map groups, agents, tickets, and articles.

STEP 4. MATCH GROUPS

Select '**Match items**' to map groups between the Source and Halo ITSM. For unassigned tickets or deleted groups, choose a default one. Plus, you can create any missing groups - whether it's one or multiselect!
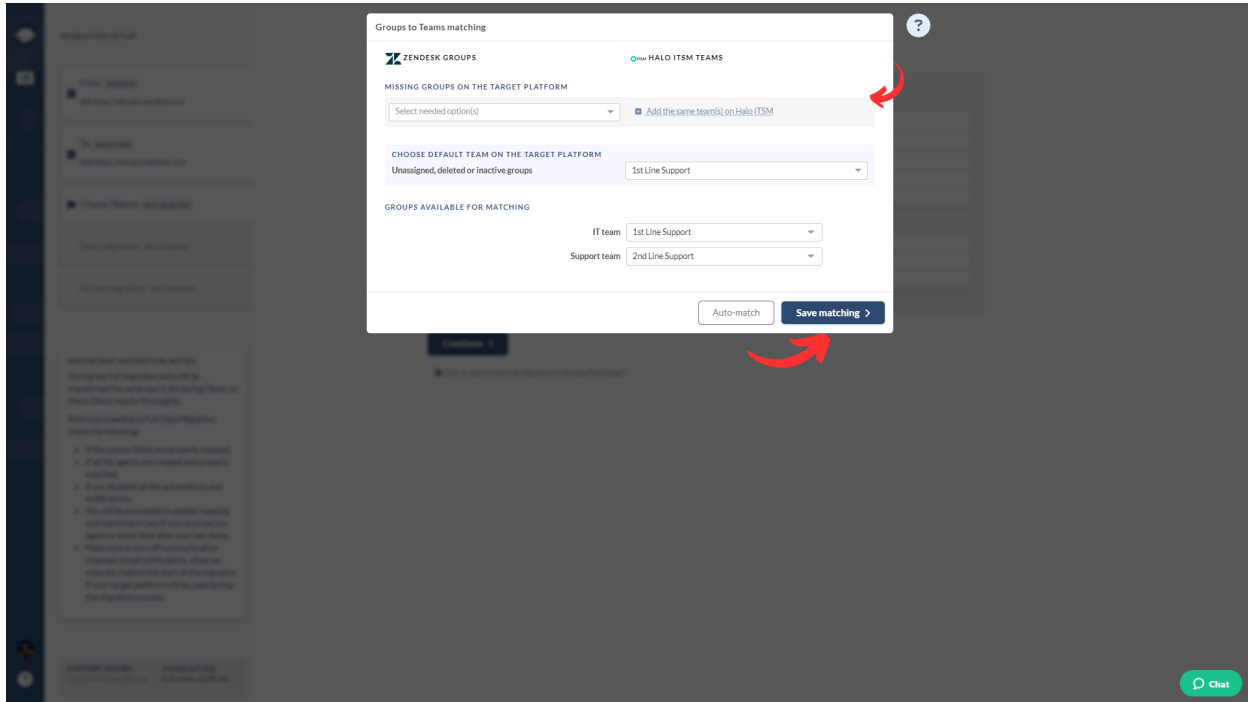
Click '**Save matching**' to proceed. Use '**Auto match**' for groups if you run the Free Demo again.

STEP 5. MATCH USERS

Match users between Source and Halo ITSM users. If you've any unassigned, inactive, or deleted users, pick a default user to those records. In Migration Wizard, you can add any missing user profiles right to Halo ITSM while matching.

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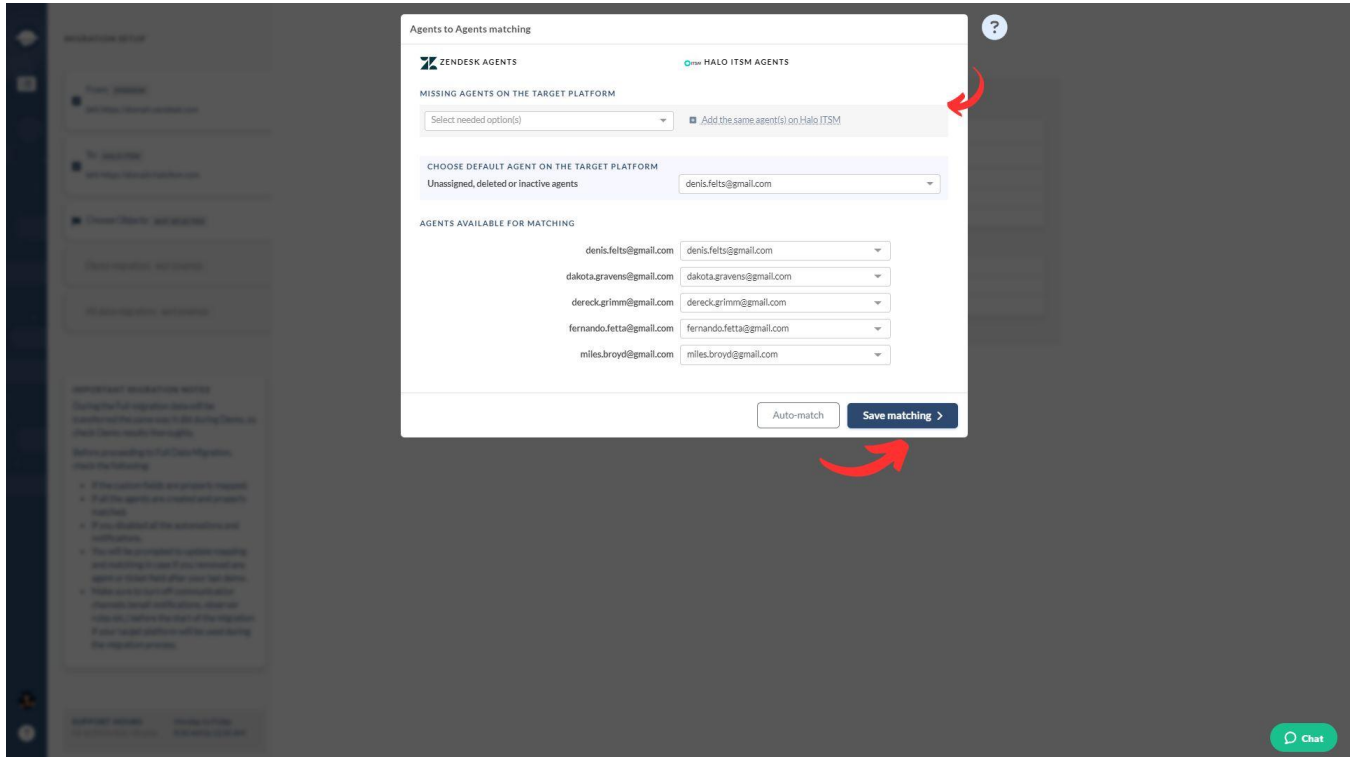
Hit '**Save matching**' to move on to the next step in mapping your data.

STEP 6. MAP TICKETS

Selecting the ticket checkbox opens a window to map ticket fields. System fields like subject, organization, and group are automatically mapped. Navigate to default and custom ticket fields.
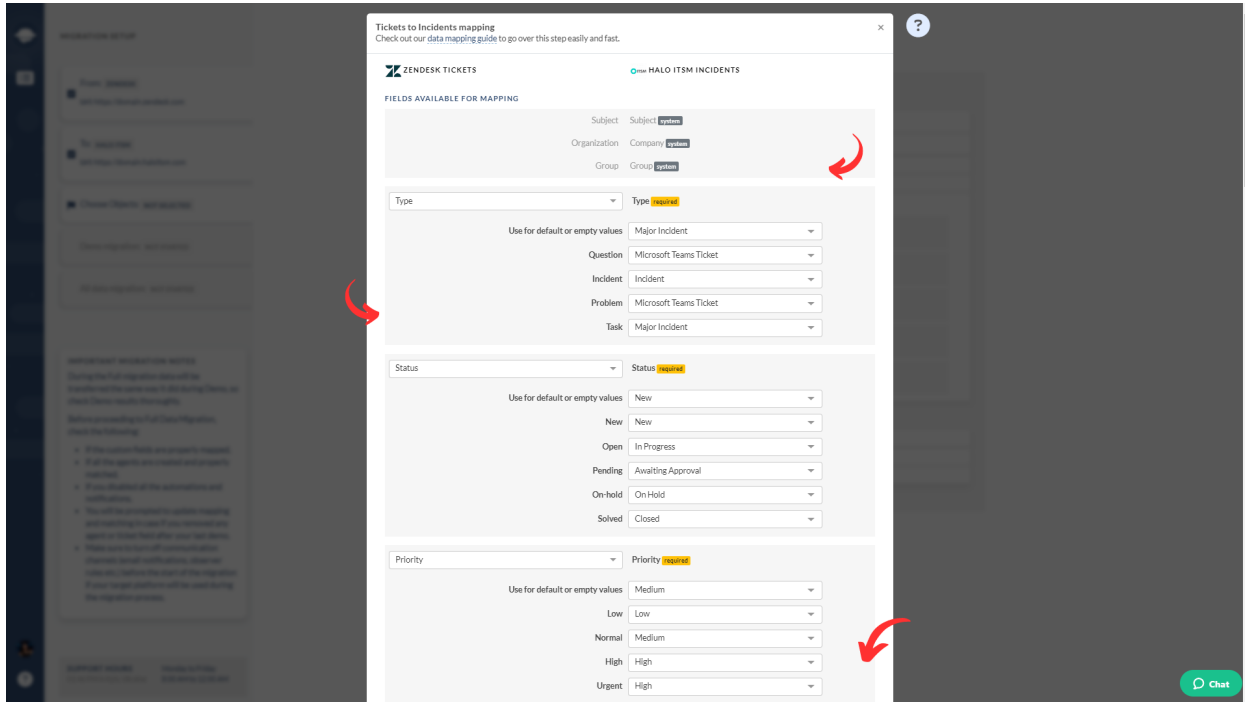
For custom field mapping, make sure to set them up in Halo ITSM beforehand. Once everything is set, click '**Save mapping**' to proceed.

STEP 7. MAP ARTICLES

Select '**Map items**' to match article fields. Here, you can map article statuses between your Source and Halo ITSM accounts. Once you're finished, hit '**Save mapping**' to move forward.
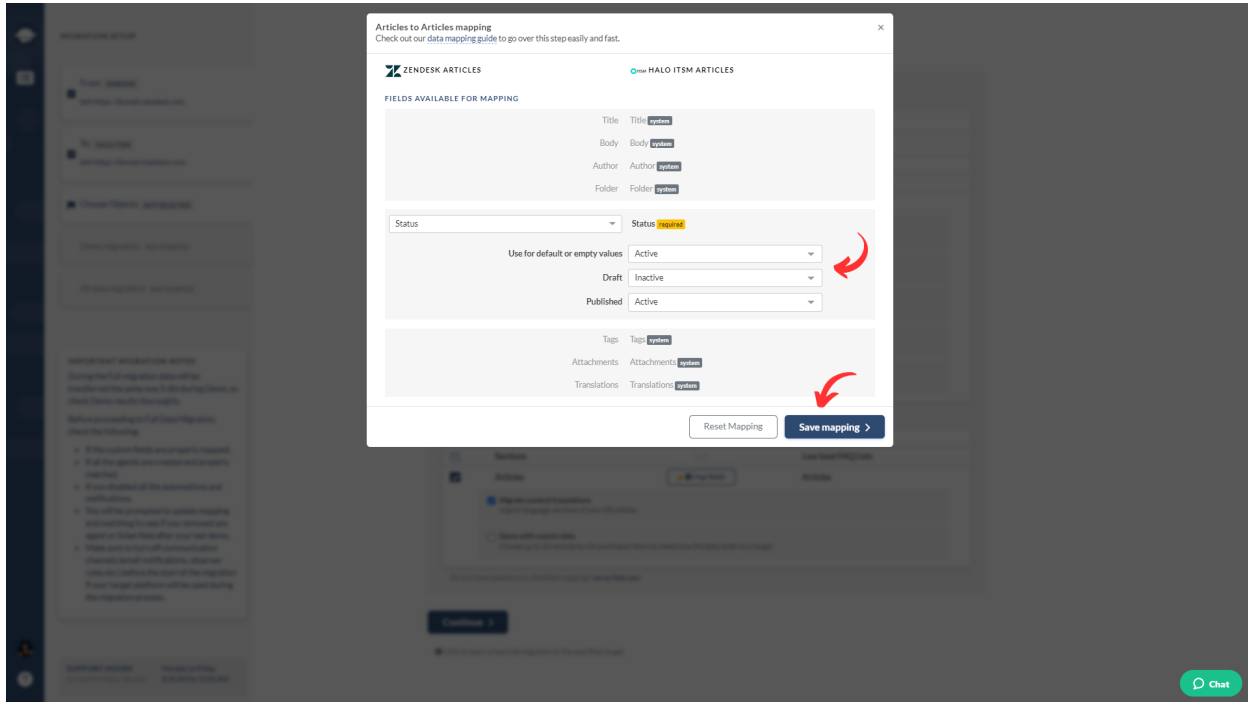
STEP 8. OUT-OF-THE-BOX CUSTOMIZATION OPTIONS

The pre-built customization options depend on the specific data migration pair. For example, if you're moving from Zendesk to Halo ITSM, here are your customization choices:

- **Import inline images as ticket attachments**. Keep all details of your customer communication history even if your Source platform is down.

- **Skip attachments**. By default, Migration Wizard moves all attachments, but you can skip them for storage efficiency or a quicker data migration.

- **Move call recordings** as attachments for easy future access.

- Use "**Demo with custom data**" to move 20 chosen tickets and articles for a preview.

- **Transfer side conversations** into private notes to keep customer context.

- **Migrate content translations** to keep your Help Center multilingual.

Once you're done mapping data, click '**Continue.**' If you missed anything, the Migration Wizard will remind you to review it.

WHAT TO DO AFTER THE DEMO DATA MIGRATION

After finishing your Free Demo to Halo ITSM, follow these steps.

ASSESSING DEMO RESULTS

It's important to check the Demo migration results because the process mirrors the Full Data Migration. If some records weren't imported in the trial migration, they won't be extracted in the Full Data Migration.

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Open reports for migrated, skipped, and failed records, and verify each by checking IDs on the Source platform and Halo ITSM.

WHAT TO LOOK FOR WHEN CHECKING MIGRATED RECORDS

- All comments were moved, and the authors remain the same.

- Tickets are correctly assigned to users.

- Contacts and organizations migrated accurately.

- Articles migrated with their original statuses.

- Attachments were transferred as expected.

- The Demo data wasn't affected by automation rules.

MANAGING SUSPENDED DEMOS

If your Free Demo gets suspended, stay calm and let our support team assist you in resolving the issue. Ensure they have access to your Halo ITSM data migration for a quick resolution.

If you encounter any failed reports, identify the issue by checking record IDs. If possible, fix the problem, tick the '**I've fixed errors**' box, and restart the Demo.
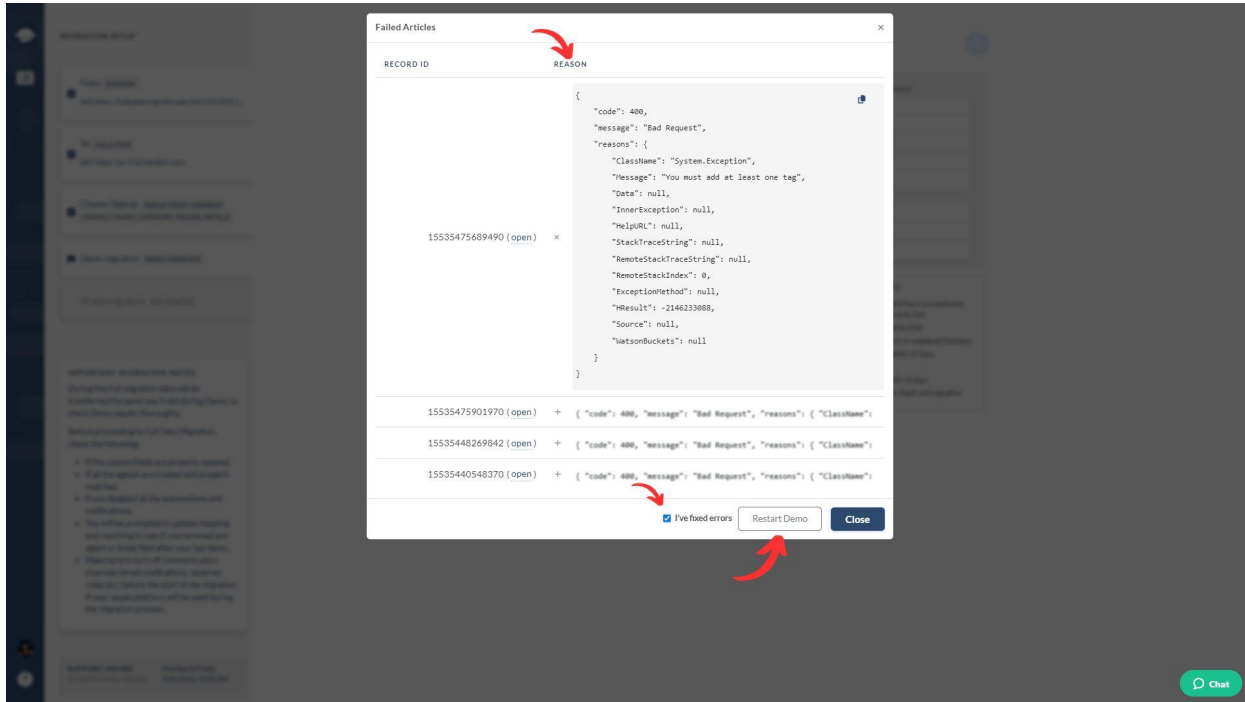
CHOOSE SUPPORT PACKAGE

No matter the size of your data migration project, Help Desk Migration has support that fits. Whether you prefer basic help or need extras like Delta, re-migration, or Interval migration, pick the support plan that suits your data transfer requirements.

STANDARD(FREE)	PREMIUM(+$200)	SIGNATURE(+$500)
✓ 9/5 via email, phone & chat	✓ 16/5 on weekdays and 8 hours on weekends support via email, phone & chat	✓ 16/5 on weekdays and 8 hours on weekends support via email, phone & chat
✓ Regular SLA response time (within 24 hours)	✓ High priority response time	✓ Highest priority response time
✗ Dedicated support on weekends	✓ Dedicated support on weekends	✓ Dedicated tech support on weekends/holidays
✗ Data re-migration	✓ 1 data re-migration within 5 days	✓ 1 data re-migration within 10 days
✗ Interval migration	✗ Interval migration	✓ Interval migration
✗ Delta migration	✗ Delta migration	✓ 1 Delta migration within 10 days
✗ Skipped/failed records check and migration	✗ Skipped/failed records check and migration	✓ Skipped/failed records check and migration

Explore the extra perks provided in Premium and/or Signature plans:

Data re-migration	Re-migrate your data within 5/10 days after the Full Migration.
Interval Migration	Pause your migration on workdays and resume on weekends or a schedule your data transfer.

Delta Migration	Update or add tickets and articles created during or after the Full Migration with Delta Migration. Be cautious about potential duplicates if you continue working on the source platform.
Skipped/Failed Records Check	Use the Skipped/Failed Records Check for a comprehensive custom migration.

PRICE BREAKDOWN AND PAYMENT

Review the detailed price breakdown to get a clear explanation of the Full Migration cost.

Once you're ready, input your billing details and click '**Submit order**' to finalize the payment.

GRANT ACCESS TO YOUR TEAM AND CUSTOMIZA THE MIGRATION NAME

The mapping step might seem a bit tricky, so feel free to get a hand from a colleague by sharing your Halo ITSM data transfer.
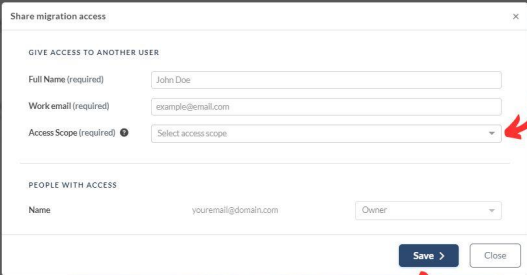
You're in control—you can grant full or restricted access, and if needed, you can revoke it.

If you're handling multiple data migrations, give each a unique name for quick and easy recognition.

START FULL DATA MIGRATION

Once your payment is confirmed, you can start or schedule your data transfer. Avoid last-minute changes in your source platform for a hassle-free migration experience.

The data migration duration depends on the number of records; on average, about 2000 tickets per hour. Need it faster? Ask your vendors to boost your API limits—just give us a heads-up before diving into Full Data Migration.

If any questions appear, our support team is here for you. Your seamless Halo ITSM transfer is our priority.

WHY MIGRATING WITH US

It's much quicker compared to transferring your records on own

Take advantage of the rapid transferring process due to the full automation of the Migration Wizard software and the chance to instantly initiate the full data migration if you're transferring records between the backed platforms.

Your data continues to be safe and sound throughout the moving process

Move your records around a safe connection and benefit from a regularly updated privacy policy that assures the security of your data both during and after the migration procedure.

The customers of our service appreciate and approve it

Join thousands of happy customers who transmitted their data with the Help Desk Migration service and helped it to attain reputation and earn a variety of customer service-related rewards.

Broad mapping opportunities will assist you to retain your records connected

Benefit from an opportunity to map both standard and custom fields while determining the route of your data and, thus, adjust the migration of your records according to your individual wishes and sustain the relationships between your data.

You can schedule the most convenient time for your data transfer

Migrate your entities at the most suitable time by booking your data migration for the time that will work best for your team and your customers.

You can rely on the expert and assisting support team

Obtain the assistance of a team of data transfer specialists who have years of records moving experience behind their shoulders and you will be happy to help you out through the whole transferring process at any time (even on weekends).

LOOKING FOR MORE DATA MIGRATION DETAILS?

Let's talk now