



Help Desk Migration

OSTICKET DATA MIGRATION CHECKLIST



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Data migration takes more than simply migrating help desk records from one help desk to another. That's why our team put up a migration checklist, specifically for osTicket migration.

Before we go into the details, note that Migration Wizard doesn't transfer such records to osTicket:

- Organizations
- Inline images
- Knowledge base
- Tags
- CC in Tickets

If you think about moving the records anyway, [request a Custom Data Migration](#).

BEFORE YOU SET UP THE MIGRATION

Note: All tickets and related data migrate the same way, whether it is the Demo Migration or Full Data Migration. If some ticket data did not migrate or/and was incorrectly transferred during the Free Demo, it wouldn't be moved during the Full Migration.

Ensure that you download the reports on migrated/failed/skipped records. Then, compare the Demo results with the source data.

1. CHOOSE YOUR MIGRATION DATE

While selecting a date for osTicket import, give your agents enough time to prepare for the migration. Your agents can use that time to get used to osTicket before the **Full Data Migration**.

2. SPEAK TO YOUR TEAM

Let your agents know about data import to osTicket. That would help them to close old tickets. Delegate some responsibilities. Your agents can inspect the Full Data Migration results. And set a reminder a day before migration. It can be an email or a calendar event.

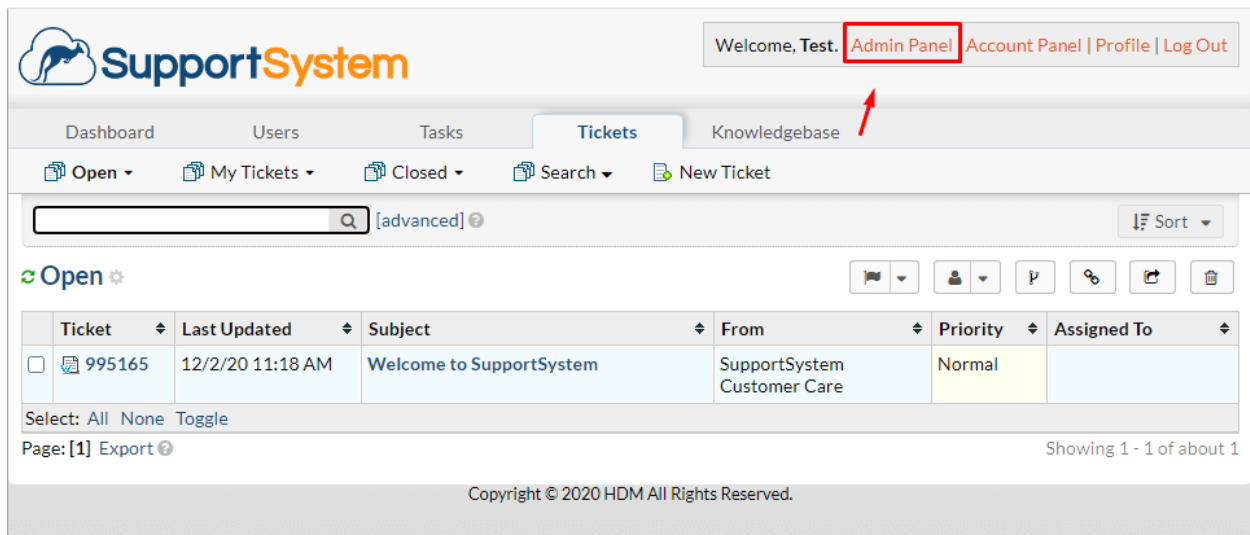
Note: to get your data migrated faster, request the osTicket team to increase API limits temporary.



3. PREPARE OSTICKET FOR THE TRANSFER

Add the same custom fields as you have on the source platform. This way, you can quickly locate the needed records after the migration.

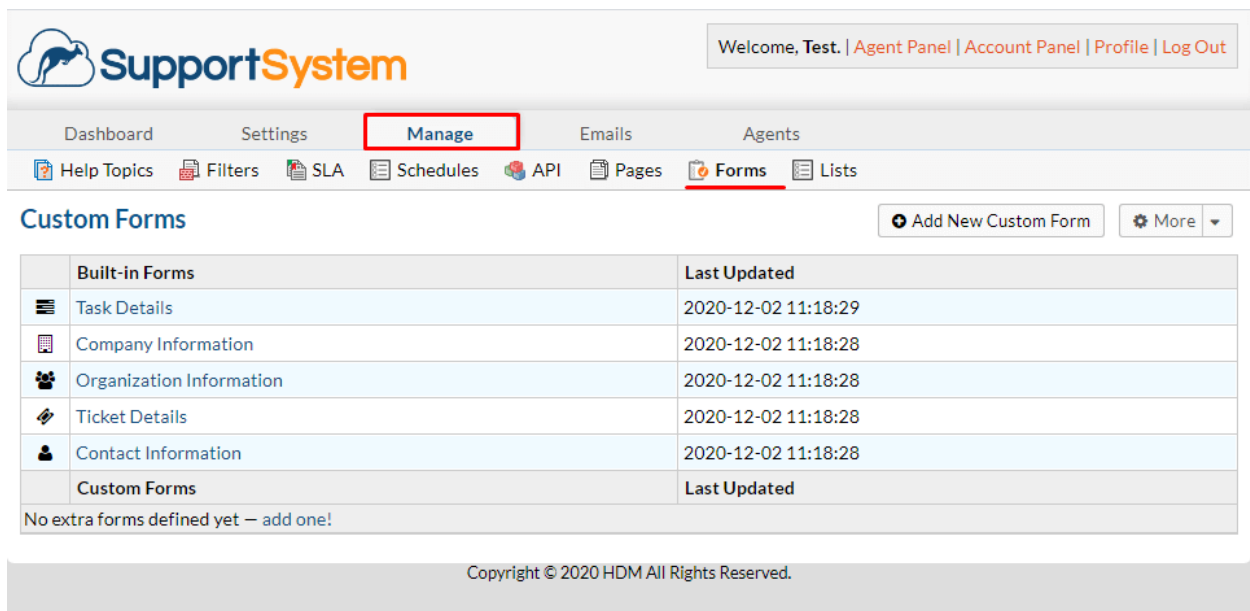
Go to **Admin Panel** from **Agent Panel** > select the **Manage** tab > click on **Forms** > **Ticket or Task Details** > create the needed custom forms > **Save**.



The screenshot shows the SupportSystem Admin Panel. The top navigation bar includes 'Welcome, Test.', 'Admin Panel' (highlighted with a red box and a red arrow), 'Account Panel', 'Profile', and 'Log Out'. The main navigation bar has 'Dashboard', 'Users', 'Tasks', 'Tickets' (selected), and 'Knowledgebase'. Below this, there are tabs for 'Open', 'My Tickets', 'Closed', 'Search', and 'New Ticket'. A search bar with '[advanced]' and a 'Sort' dropdown are present. The 'Open' section shows a table with one ticket:

Ticket	Last Updated	Subject	From	Priority	Assigned To
995165	12/2/20 11:18 AM	Welcome to SupportSystem	SupportSystem Customer Care	Normal	


Below the table, there are links for 'Select: All None Toggle', 'Page: [1] Export', and 'Showing 1 - 1 of about 1'. The footer says 'Copyright © 2020 HDM All Rights Reserved.'



The screenshot shows the SupportSystem Admin Panel with the 'Manage' tab selected. The top navigation bar includes 'Welcome, Test.', 'Agent Panel', 'Account Panel', 'Profile', and 'Log Out'. The main navigation bar has 'Dashboard', 'Settings', 'Manage' (selected), 'Emails', and 'Agents'. Below this, there are tabs for 'Help Topics', 'Filters', 'SLA', 'Schedules', 'API', 'Pages', 'Forms' (selected), and 'Lists'. The 'Custom Forms' section shows a table with built-in forms and their last updated dates:

Built-in Forms	Last Updated
Task Details	2020-12-02 11:18:29
Company Information	2020-12-02 11:18:28
Organization Information	2020-12-02 11:18:28
Ticket Details	2020-12-02 11:18:28
Contact Information	2020-12-02 11:18:28
Custom Forms	Last Updated

Below the table, there is a message: 'No extra forms defined yet — add one!'. The footer says 'Copyright © 2020 HDM All Rights Reserved.'


SupportSystem

Welcome, Test. | [Agent Panel](#) | [Account Panel](#) | [Profile](#) | [Log Out](#)

Dashboard
Settings
Manage
Emails
Agents

[Help Topics](#)
[Filters](#)
[SLA](#)
[Schedules](#)
[API](#)
[Pages](#)
[Forms](#)
[Lists](#)

Update form section – Ticket Details

Forms are used to allow for collection of custom data

Title:
Ticket Details

Instructions:

Please Describe Your Issue

User Information Fields (These fields are requested for new tickets via the Contact Information form)

Label	Type	Visibility	Variable	Delete
Email Address	Short Answer	Required	email	<input type="checkbox"/>
Full Name	Short Answer	Required	name	<input type="checkbox"/>
Phone Number	Phone Number	Optional	phone	<input type="checkbox"/>

Form Fields fields available where this form is used

Label	Type	Visibility	Variable	Delete
Issue Summary	Short Answer	Required	subject	<input type="checkbox"/>

4. CONSIDER OSTICKET SPECIFICATIONS

Before the osTicket transfer, you should know that:

- Enable remote [access to the MySQL data server](#). This way, our Migration Wizard can establish a connection between the tool and your database.
- CC users do not migrate to osTicket. However, our team can import the emails of CC users into a custom field instead.

5. ADJUST YOUR DATA MIGRATION CUSTOMIZATIONS

If you have any specific requirements for data migration, [contact our support team](#). Among popular customizations you can find:

- migration inline images as ticket attachments
- importing email addresses of CC users into the custom field

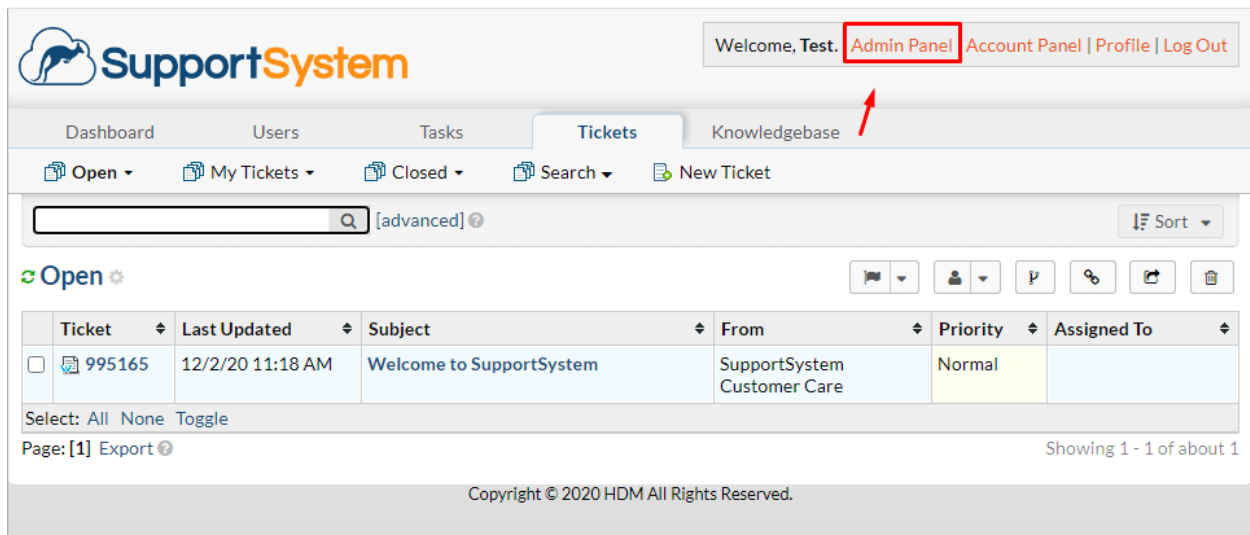
- adding a tag to all migrated tickets
- migrating the original Source ticket ID into the subject of the ticket

YOU'RE ALMOST READY

1. TURN OFF NOTIFICATIONS

Switch off notifications to avoid receiving tons of emails during the migration.

Go to **Admin Panel** from the **Agent Panel** > click on the **Tickets** button > **Alerts and Notices** > go through all alerts and disable them > **Save Changes**.



The screenshot shows the SupportSystem Agent Panel interface. The top navigation bar includes links for 'Welcome, Test.', 'Admin Panel' (highlighted with a red box and a red arrow), 'Account Panel', 'Profile', and 'Log Out'. Below this is a secondary navigation bar with tabs for 'Dashboard', 'Users', 'Tasks', 'Tickets' (selected), and 'Knowledgebase'. A toolbar below the tabs contains buttons for 'Open', 'My Tickets', 'Closed', 'Search', and 'New Ticket'. A search bar with a magnifying glass icon and a '[advanced]' link is present. Below the search bar is a table of tickets. The table has columns: Ticket, Last Updated, Subject, From, Priority, and Assigned To. The first row shows a ticket with ID 995165, last updated on 12/2/20 at 11:18 AM, with the subject 'Welcome to SupportSystem', from 'SupportSystem Customer Care', and priority 'Normal'. Below the table are links for 'Select: All None Toggle', 'Page: [1] Export', and 'Showing 1 - 1 of about 1'. The footer contains the text 'Copyright © 2020 HDM All Rights Reserved.'

Ticket	Last Updated	Subject	From	Priority	Assigned To
995165	12/2/20 11:18 AM	Welcome to SupportSystem	SupportSystem Customer Care	Normal	



SupportSystem

Welcome, Test. | [Agent Panel](#) | [Account Panel](#) | [Profile](#) | [Log Out](#)

Dashboard

Settings

Manage

Emails

Agents

Company

System

Tickets

Tasks

Agents

Users

Knowledgebase

System Settings and Preferences

General Settings

Helpdesk Status: ☒ Online ☐ Offline ?

Helpdesk Name/Title: ?

Default Department: ?

Collision Avoidance Duration: minutes ?

Default Page Size: ?

Default Log Level: ?

Purge Logs: ?

Show Avatars: ☒ Show Avatars on thread view. ?

Enable Rich Text: ☒ Enable html in thread entries and email correspondence. ?

Allow System iFrame: ?

Embedded Domain Whitelist: ?

ACL: Apply To: ?

Date and Time Options ?

Default Locale:

SupportSystem

Welcome, Test. | [Agent Panel](#) | [Account Panel](#) | [Profile](#) | [Log Out](#)

Dashboard

Settings

Manage

Emails

Agents

Company

System

Tickets

Tasks

Agents

Users

Knowledgebase

Ticket Settings and Options

* Settings

✉ Autoresponder

🔔 Alerts and Notices

📋 Queues

New Ticket Alert: ?

Status: ☐ Enable ☒ Disable

☐ Admin Email

☐ Department Manager

☐ Department Members

☐ Organization Account Manager

New Message Alert: ?

Status: ☐ Enable ☒ Disable

☐ Last Respondent

☐ Assigned Agent / Team

☐ Department Manager

☐ Organization Account Manager

New Internal Activity Alert: ?

Status: ☐ Enable ☒ Disable

☐ Last Respondent

2. FIND ACCESS CREDENTIALS

When launching your Free Demo, you need to find all required access credentials to the source platform and osTicket. Besides, you should have admin rights for your source and target platforms.

To connect osTicket with Migration Wizard, you need:

- **Host:** The hostname of the server your osTicket database is hosted on.
- **Port:** The port number of your osTicket database.
- **Database:** The name of the database your osTicket data is stored in.
- **Username:** The username used in your Helpdesk install to log into the database server.
- **Password:** The password to access the database server.

3. RUN A DEMO MIGRATION

Launch your Free Demo to see how Migration Wizard transfers 20 random tickets and whether you need some adjustments or customizations to a default migration flow. You can edit your settings and re-run Demos as many times as you require. Note that if you run Demos with the same settings, the results will also be the same. Go through this mini-guide:

1. Log in to your Migration Wizard account.
2. Connect your source and target solutions.
3. Pick up the data you want to import.
4. Match [agents and groups](#).
5. Map tickets.
6. Choose the available automated options.
7. Start your Free Demo Migration.

Note: The [available automated options](#) depend on the source help desk.



AFTER THE DEMO MIGRATION

1. CHECK THE RESULTS IN OSTICKET

Free Demo finished, you should check the results and download reports. As you inspect the migrated records, pay attention to:

- all comments got migrated and if the authors of the comments are the same
- the tickets are assigned to the correct agents
- all the custom fields and attachments got migrated (download the attachments from your destination platform to check if they were imported correctly)

For more information, [read the detailed guide](#) on how to check the results of demo migration.

Note: In case you have any skipped records, reach out to our support reps.

2. REQUEST A CUSTOM DEMO

Depending on your Source platform, you can run a Custom Demo by yourself: just hand-pick specific tickets and fill in their IDs. Or [contact our team](#) to set up Custom Demo for you.

BEFORE THE FULL DATA MIGRATION

1. CHOOSE YOUR MIGRATION FLOW

While the **Full Data Migration** is in progress, you can use the source or target platform. Yet Migration Wizard doesn't import any source data created or updated during the migration. To fix this, you can import that records in the [Delta Migration](#) and avoid any duplicates.

Delta Migration is offered in [Signature support plan](#).

Your **Full Data Migration** runs in cloud, you can check the progress any time you need or expect an email notification about the completed migration.



2. START FULL DATA MIGRATION

Your **Full Data Migration** only starts after:

- **The payment has been confirmed.** Make a payment if you have an ideal time in mind. Or schedule the osTicket import to set it up based on that timing.
- **You've agreed to the provided checklist.** Inspect each point, and check the corresponding box.

AFTER THE IMPORT IS DONE

1. EXAMINE EVERYTHING

Once the **Full Data Migration** has finished, inspect if everything transferred correctly. Ensure that migrated records are readable and in place. You have five or ten days to check the results until your migration gets archived.

If you can't find any data check if you've set up the correct filters for all tickets. If the problem remains, [reach out to our support team](#).

2. SET UP A NEW PLATFORM

- Enable all the notifications you previously had to turn off
- Redirect email forwarding
- Set necessary settings



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).



Help-Desk-Migration.com

contact@help-desk-migration.com

LOOKING FOR MORE DATA MIGRATION DETAILS?

Let's talk now

