

# Arctera Enterprise Vault™ Compliance Accelerator Data Migration

From Arctera Enterprise Vault™  
Compliance Accelerator to Arctera™  
Insight Surveillance



# Arctera Enterprise Vault™ Compliance Accelerator Data Migration Guide

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# Managing Data Migration

This document includes the following topics:

- [Introduction](#)
- [Prerequisites](#)
- [Limitations](#)
- [Migration workflow](#)

## Introduction

This guide describes the prerequisites, limitations, and phases of migration workflow to migrate surveillance data from Arctera Enterprise Vault™ Compliance Accelerator to Arctera™ Insight Surveillance.

See [“Prerequisites”](#) on page 4.

See [“Limitations”](#) on page 5.

See [“Migration workflow”](#) on page 5.

## Prerequisites

Before you begin migrating discovery data, you must review and ensure the following aspects:

- **Principal Account Readiness:**
  - All the users with Compliance Accelerator department and review permissions (henceforth Principals) have been created in Arctera Insight either as primary account or as an Alias. This is a mandatory step.
  - If any Principal does not have a corresponding account in Arctera Insight management console, the migration process will pause, and will not proceed

until this step is completed. If the Compliance Accelerator migration scripts identify even a single Principal that does not have a corresponding match in the Arctera Insight management console, then the migration will pause. The only alternative to this is to provide an 'overriding acct id', which will be used to replace any of the missing Principals.

**Note:** Actions performed by unmatched Principals will be attributed to the overriding account during and after migration.

- **Search Mapping Readiness:**
  - To preserve mapping between review items and their original searches in Compliance Accelerator, create corresponding searches in Insight Surveillance using the same names.
  - If you do not reuse the original search names, the system creates search placeholders to retain the associations.

See ["Limitations"](#) on page 5.

See ["Migration workflow"](#) on page 5.

## Limitations

The following items are out of scope and will not be migrated:

- Research folders
- User groups
- Hotword analytics

See ["Prerequisites"](#) on page 4.

See ["Migration workflow"](#) on page 5.

## Migration workflow

Migration is performed in two distinct phases:

- Phase 1: Pre-Review Cutover
- Phase 2: Review Data Migration

### Phase 1: Pre-Review Cutover

This phase of Compliance Accelerator migration happens prior to beginning the live journaling and legacy data migration. This stage is intended to help the customers in configuring Arctera Insight Surveillance to streamline their transition

from on-premises environment to the cloud. The following components are migrated:

- **Role and Permission Mapping**
  - All permissions will be migrated due to a 1:1 mapping between Enterprise Vault Surveillance and Insight Surveillance.
  - All customization to system roles and custom roles will be replicated.
  - Role permission mapping will be preserved.
  - If reviewers are migrated to Insight Surveillance, reviewer roles and permissions remain the same at both the application and case levels.
- **Department Migration**
  - Department metadata migration includes Department properties and sampling configuration.
  - Mapping of Monitored Users to Department will be preserved for all migrated users.
  - History of User and Department mapping will also be migrated upon request.
- **Search Migration**
  - Searches will not be automatically created as part of the migration. Therefore, guidance for replicating the Scheduled Searches and Guaranteed Sample Searches will be provided to the customers. This will be an important step for the customer to start capturing new items for review in Insight Surveillance, once they stop journaling in Enterprise Vault.
- **Hotwords and Hotword Sets**
  - All Hotwords and Hotword Sets will be migrated from Enterprise Vault Surveillance to Insight Surveillance. After this phase is completed, the live journaling and data migration can begin. The phase 2 described below can begin only after the entire data migration is complete.

## Phase 2: Review Data Migration

This phase starts after the completion of message migration from Enterprise Vault to Arctera Insight Archiving. Only messages successfully migrated to Arctera Insight will be included in Phase 2, so they can correlate to Compliance Accelerator / Insight Surveillance. Messages not available in Insight Archiving will not appear within Insight Surveillance reviews.

The following components are migrated:

- **Review Data**

- Review Mail data will be migrated to the Review Set in Insight Surveillance.
- Messages include review items, statuses, history, and comments.
- For review filtering, if the same search is created in phase 1 of the migration, the item is automatically mapped to that search. Otherwise, it is mapped to a placeholder search created with the old name.
- **Audit and Learning Data**
  - Audit and Intelligent Review 2.0 are relatively new features in Compliance Accelerator / on-prem Insight Surveillance; these features are excluded from migration.

See [“Prerequisites”](#) on page 4.

See [“Limitations”](#) on page 5.