Legacy Data Migration: *Best Practices* for a Smooth Transition to HR Acuity

Integrating legacy data into HR Acuity is a strategic opportunity to strengthen your HR insights. Thoughtful planning ensures a smooth transition from varied legacy systems. With the right approach and support, you can migrate your data efficiently, enabling robust reporting across both legacy and current data within HR Acuity.

A Few Things to Keep in Mind:

- **You Own Your Legacy Data:** Your team is responsible for preparing and mapping this data — HR Acuity cannot clean or interpret it for you.
- **Consider Your Future Reporting Needs:** Define what data matters, how it will be used and who needs to be involved.

1. Define Your Legacy Data Needs

Ask these questions before you begin:

- What data is essential?
- Where is it stored?
- Who understands its structure and integrity?
- How far back do you need to go? (Your organization's data retention policies could be a helpful guide in this review.)
- What reporting needs will this data support?

Examples:

- **Trend Reporting:** If you need to show actions taken over the past year, map actions to employee IDs. Full case details may not be necessary for data migration but would continue to be accessible in your legacy system data export to reference as needed.
- **High-Risk Cases:** For issues like harassment or discrimination, manually enter a few cases first to understand how they fit into HR Acuity's structure.

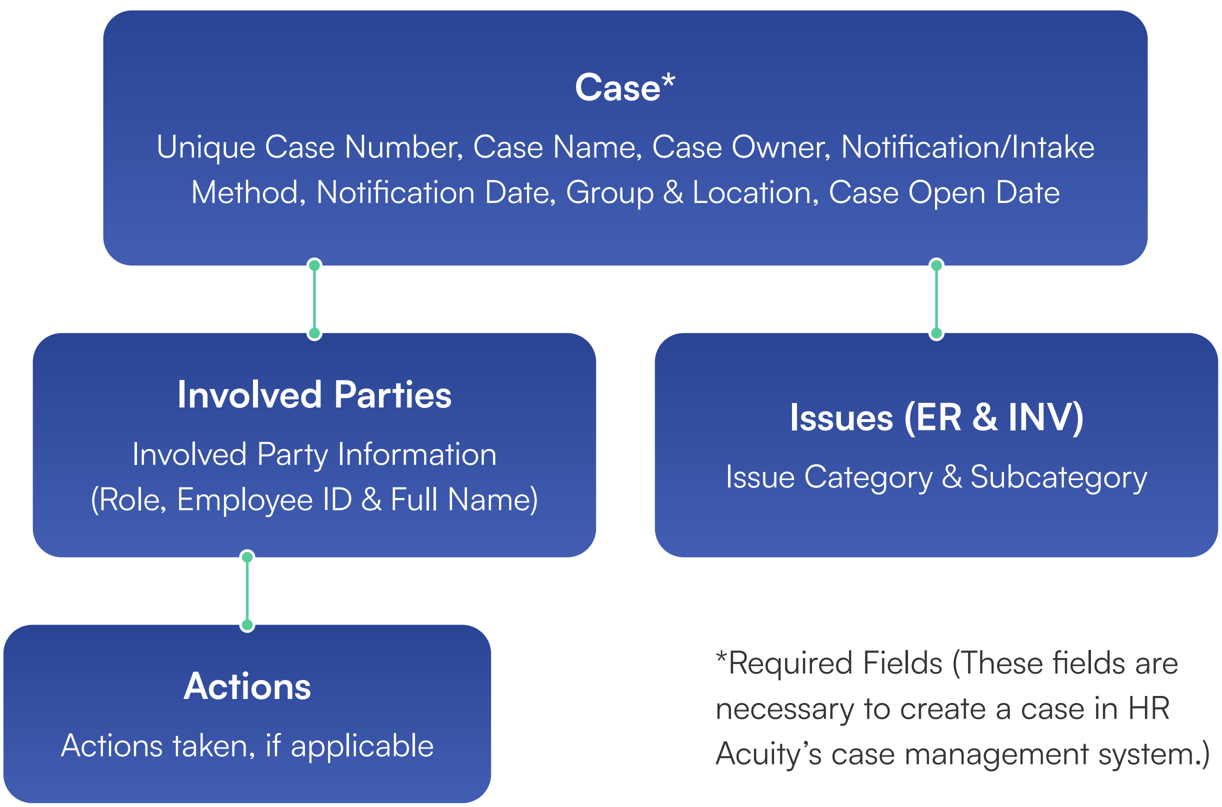
Examples:

- **How will the data be used in HR Acuity?**
    - Recognize differences in case structure.
    - Consider creating a “Pre-Migration” subcategory for legacy cases.
- **What level of detail is truly necessary?**
    - Focus on high-priority cases.
    - Manual entry can help refine what’s useful and how to optimize your ER strategy.

> **Tip:** Avoid importing overly complex or unstructured data — it can recreate the same reporting challenges you’re trying to solve. Your historical data will still exist outside HR Acuity and will become less critical over time.

2. Use the HR Acuity Legacy Data Templates

Use the provided templates with required fields to format your legacy data. This ensures compatibility with dashboards and analytics.



*Required Fields (These fields are necessary to create a case in HR Acuity’s case management system.)

Attachments (Optional):

If you choose to include attachments in your legacy data migration, each case's attachments should be placed in a folder named after the Unique Case Number listed in the case template.

Note: Before proceeding, consider whether attachments are necessary for your use case. Including them can increase complexity and file size. If attachments are not essential, you may opt to exclude them and instead reference the case details via the Involved Party card or other structured fields.

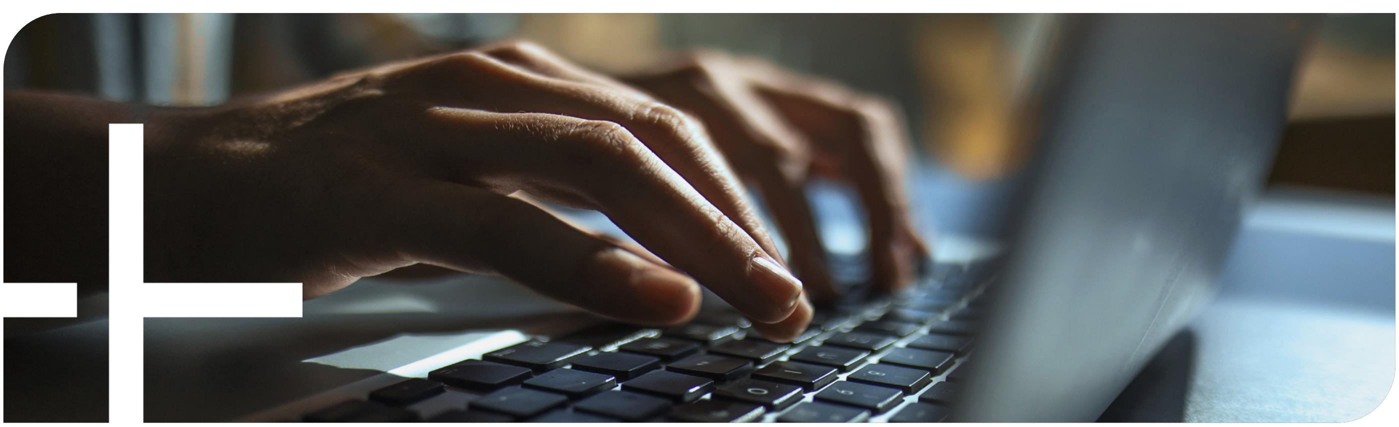
Tip: The templates align legacy data with your new case management structure — ideal for historical reference and stakeholder context. Be selective. Too much data can dilute insights. Maintain legacy systems for full access if needed.

3. Be Strategic About Relevance

Not all historical data is equally valuable. Consider:

- What informs current decision-making?
- What can remain archived?
- Do you need to import all case attachments or is a reference to an attachment sufficient?

Tip: As HR Acuity becomes your source of truth, reliance on legacy data will naturally decline. Focus on actionable insights to build trust and elevate employee relations as a strategic function.



Preparation

- Client team prepares data using templates provided by HRA required to facilitate the migration
- ER and INV case types have different templates based on unique fields for each

Transmission

- All templates must be completed and provided to begin the validation process
- Attachments may be placed via FTP or secure link provided by Implementation Manager

Validation

- Validation runs are provided as part of migration
- Data must match HRA configurations exactly to avoid errors
- HRA will provide data errors back to client team for correction

Migration

- Complete and successful validation must be completed before any case data can be uploaded
- Once migrated, case details are available for confirmation in client view

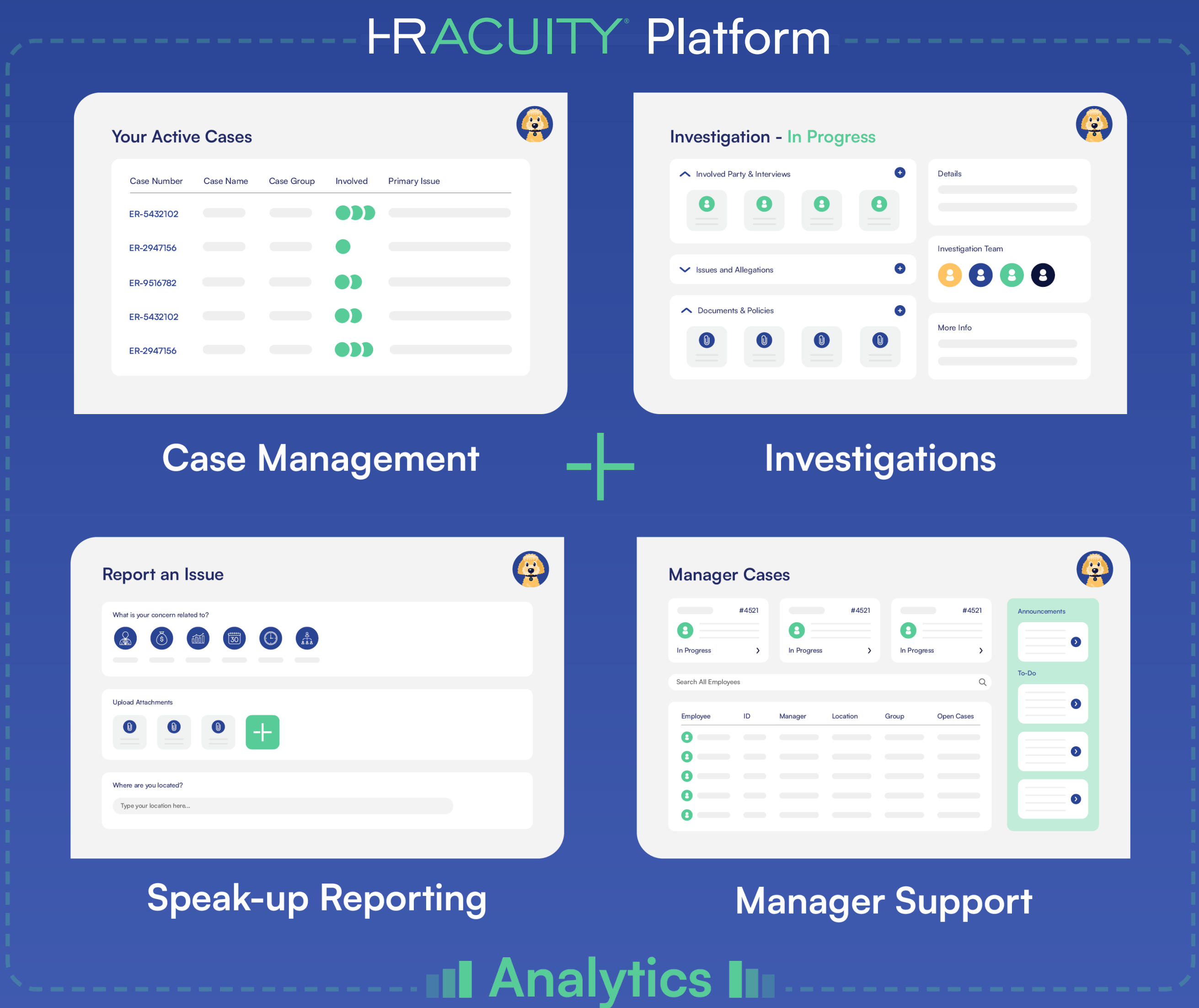
Confirmation

- Client acceptance and signoff on migrated data
- Migration closed out

Final Thought

Legacy data migration isn't just technical.

It's a chance to clean, simplify and align your ER data with the future you're building in HR Acuity.



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