# VC Data Migration
# FAQs

**SmartVault**

## Be prepared for your migration to SmartVault

Migrating your data or client files from Virtual Cabinet over to SmartVault is a critical step and best practice for clients to achieve an efficient workflow.

We have helped thousands of customers migrate their data big and small over the years. Below you will find a list of frequently asked questions to help you alleviate any fears and prepare you for your migration to SmartVault.

### WHAT IS A DATA MIGRATION? HOW IS IT PERFORMED?

When you choose SmartVault as your Document Management System and client portal, if you prefer, we can migrate your data from Virtual Cabinet to SmartVault. This task is a part of our Customer Onboarding process and is carried out within a formal project.

1. The first task will be to extract your data from VC into a consumable format for SmartVault (a windows folder structure). There will need to be enough space on your server to save this second copy of your data.

2. The transfer of data will then be arranged through our SmartVault Upload Tool to a staging area inside your SmartVault account. This tool was built by SmartVault and adheres to strict security procedures according to our Terms and Conditions.

3. Client Matching and Verification is completed with the client and your migration specialist.

4. After review and sign-off, your migration is completed.

### HOW LONG DOES IT TAKE TO MIGRATE MY DATA?

It will depend on several factors, such as the time it takes to export your data from Virtual Cabinet, the size of the data being transferred, or Internet speeds. During your Migration Consultation call with the Migration team, we will be able to provide you with time expectations.

The below is only an approximation and will vary between accounts.

- ○ Once kicked off exporting your data may take several hours to 2-3 days to complete depending on the amount of data.

- ○ Uploading your data to SmartVault would be several hours to 1-2 days depending on internet speeds and the amount of data.

- ○ Client matching requires your assistance to complete and will depend on when this task is completed.

- ○ Routing your data from staging to clients will take around 1 day.

## HOW MUCH DOES THE MIGRATION COST?

The cost is £1,500 + VAT for the end-to-end service from Virtual Cabinet to SmartVault.

## SHOULD I USE VIRTUAL CABINET AND SMARTVAULT AT THE SAME TIME?

Once the export is started (your cut-off date), you should stop storing data in Virtual Cabinet as further work and updated files will not be included in the import into SmartVault. All new work should be added to SmartVault. You can use SmartVault while the data is being uploaded.

## HOW DO I EXPLAIN THIS PROCESS TO PEOPLE IN MY ORGANISATION?

Migrating to a new system is the same as any other IT project an organization takes on.

This project follows a proven methodology and process with a dedicated Migration Specialist and a Customer Success Manager. They will oversee communicating all tasks and activities via a project plan. All members of the project will meet regularly to review the process of the migration. A set of milestones are agreed to measure progress and a timeline established for the project to be completed.

## CAN I MIGRATE MY OWN DATA?

You certainly can. However, moving a large amount of data is a daunting task. With a migration service, you'll not only get one on one expert advice, but we'll import your clients and data during the process, so you don't have to go at it alone.