



IMPLEMENTATION · DATA MIGRATION

What to Migrate When You Move to Halo ITSM

And what to leave behind. A decision guide for IT project leads.

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THE QUESTION THAT SHAPES EVERY MIGRATION

The migration question most projects get wrong

Most organisations approach data migration as a technical task: extract everything from the old system, load it into the new one. The better framing is different. You are not moving files. You are choosing what the new environment should contain. That is a decision, and it has consequences that play out over months of daily use.

The instinct to bring everything feels safe. Every closed ticket, every inactive customer, every asset record that has not been touched in three years migrating it all means nothing gets lost. What it actually means is that the clutter you were trying to escape arrives in Halo before your team does.

Three tests for every category of data

Before deciding whether to migrate any category of data, apply three questions:

- **Is it operationally needed?** Will the team actively use it in day-to-day work?
- **Is it required for compliance or retention?** Some records must be kept for a defined period regardless of operational value.
- **Does it have genuine reporting value?** Not "might we ever look at it" but "do we actively rely on it?"

If a category of data fails all three tests, it is a strong candidate to leave behind. If it is needed for retention but not daily work, archiving in the old system or a separate export store is usually better than a full migration into Halo.

A Halo environment filled with what your team actually needs is faster to use, easier to trust, and far more likely to be adopted than one burdened with years of accumulated data nobody will ever open.

THE FULL PICTURE

What to migrate — and how to think about each category

Not all data is equal, and not all migration decisions are the same. The table below covers every major category, what the recommendation is, and the reasoning behind it.

Data Category	Decision	Rationale
Open & recent tickets	Migrate	In-flight work that needs to continue in Halo. The most important migration of all.
Users & contacts	Migrate	Usually synced automatically via Entra ID or Active Directory, not manual import.
Customer contracts	Migrate	Active billing agreements and service contracts must carry over intact.
Active assets & CIs	If clean	Import from a live source (Intune, RMM) where possible. Carry aged asset records only if accurate.
Knowledge articles	Selectively	Review, prune, and update before importing. Migration is the opportunity to retire outdated guidance.
Custom fields	Selectively	Map only fields still in active use. Years of custom fields almost always include abandoned ones.
Attachments	Selectively	Can be migrated but add significant volume. Confirm what is genuinely needed before bulk import.
Historical closed tickets	Usually not	Rarely referenced after go-live. Reporting resets at go-live anyway, so historical data adds noise.
Service catalogue structure	Rebuild	Always redesign your service catalogue in Halo from scratch. Do not replicate the old structure.
Legacy workflows & config	Never	Workflows, forms, automations: always rebuilt in Halo to the new specification. Never ported.

FIVE CATEGORIES THAT CONSISTENTLY CAUSE PROBLEMS

What to leave behind — and why it matters

Leaving data behind is not the same as losing it. Any category that cannot be migrated into Halo can be exported and archived in the old system or a separate store for whatever retention period compliance requires. The question is not whether to keep the data. It is whether it needs to live in Halo's active environment.

1 Inactive customers and contacts

Records for clients or contacts you no longer serve clutter search results, inflate user counts, and make the active environment harder to navigate. Remove or archive before import.

2 Stale and retired assets

Devices and services no longer in active use do not belong in the live CMDB. Import asset records only if they are current and accurate, preferably sourced from Intune or your RMM rather than carried from the old system.

3 Closed tickets beyond your retention need

If a ticket will never be referenced again, migrating it adds volume without value. Define a history cutoff and be deliberate about it. Six to twelve months of recent history is usually more than sufficient.

4 Abandoned workflows and automations

The migration is the moment to retire old automation logic, not recreate it. Any workflow not documented and actively used should be left behind. Halo's automation engine is configured fresh to the new specification.

5 Duplicate and erroneous records

Migrating bad data relocates the problem. Duplicate customer records, inconsistent asset entries, and obviously wrong data should be resolved in the source system before import begins, or excluded entirely.

The golden rule: don't migrate bad data. If your current system is full of inconsistencies, Halo is the opportunity to start clean. A lean, accurate environment is the foundation of a go-live that builds team confidence from Day 1.

ADDITIONAL CONSIDERATIONS FOR SERVICENOW ENVIRONMENTS

The ServiceNow migration: specific considerations

The migration considerations on the previous pages apply to all Halo implementations. Organisations coming from ServiceNow face additional complexity that makes selective migration not just advisable but necessary. The data volume is larger, the schema is more complex, and the migration is also a data governance exercise.



Ticket volume

ServiceNow environments typically contain significantly larger volumes of historical ticket data. An enterprise that has run ServiceNow for five or more years may have millions of closed records. The case for a selective history cutoff is stronger, not weaker, at this scale.



Schema complexity

ServiceNow's data model uses table inheritance and custom schema objects that do not map directly to Halo's record structure. Every custom table and extended field requires an explicit mapping decision. This is a planning exercise, not a technical problem, but it takes time to do properly.



Custom field sprawl

ServiceNow instances accumulate custom fields and tables over years of development. Audit which fields are in genuine active use before any mapping work begins. Most organisations find a significant proportion of custom fields are unused, abandoned, or duplicated.



Attachment volume

ServiceNow attachment stores can be substantial. Bulk-migrating the entire archive adds storage cost and import time without proportionate operational value. Confirm which attachments are genuinely needed and scope the import accordingly.

Allied ESM is the only Halo implementation partner in both the UK and the US with certification in both Halo ITSM and ServiceNow. That dual credential means we understand both data models and can lead the migration conversation from direct experience on both sides of the transition.

WHY THE DATA ENVIRONMENT SHAPES USER CONFIDENCE

The adoption case for starting clean

The link between data quality and user adoption is direct and consistent. It shows up in every post-implementation review where adoption has stalled, and it is almost never cited by the people experiencing it, because clutter does not feel like a data problem. It feels like the new system being slow, confusing, or less capable than the one they left.

IMPACT 01

Clutter slows the team down

When agents search Halo and wade through thousands of irrelevant historical tickets, inactive customers, and stale asset records, the platform feels worse than the one they left. Confidence erodes quickly, and once it does, workarounds emerge that are very hard to remove.

The platform is not slow. The data environment is noisy.

IMPACT 02

Lean data accelerates training

A clean, accurate environment is significantly easier to learn. Users can find relevant records, trust search results, and build correct habits from Day 1. Training time is shorter, and first-week support volume is lower when the environment behaves predictably.

Clean data makes every training session shorter and every support call less likely.

IMPACT 03

Good data drives good reports

Halo's reporting resets at go-live. The reports that matter in the first three months, SLA performance, ticket volume, first-time fix rate, are only meaningful if the underlying data is accurate from the start. Migrating bad data compromises the first reporting cycle and the decisions made from it.

The first reports your leadership sees will shape platform confidence for months.

The most common reason teams revert to email after go-live is not that Halo was too hard to use. It is that the environment did not feel trustworthy. Starting with clean, accurate, relevant data is one of the highest-leverage decisions in the entire project.

PURE-PLAY HALO PARTNER

Ready to plan your migration?

Allied ESM handles every data migration as part of our fixed-price implementation plans. Our team works through your data category by category, advising on what to migrate, archive, or retire, and handles import sequencing and validation before go-live.

- 26 import templates covering every Halo data type, free to download at alliedesm.com/halo/halo-importing-data
- Fixed-price implementation plans with migration included: Micro (5 weeks), Standard (8 weeks), Complex (17 weeks)
- Allied ESM reviews your files, advises on data decisions, and loads the data into Halo. You are never left to figure out the import process alone.
- Dual-certified in Halo ITSM and ServiceNow, the only partner in the UK and US with both credentials, making us the right choice for ServiceNow migrations

Contact us at info@alliedesm.com or visit alliedesm.com

