

Get Ready to Migrate:

Step-By-Step Checklist

Transitioning your data map can be daunting; it doesn't have to be.

Osano simplifies data privacy, transforming complexity into actionable clarity. Our platform provides teams with the visibility and insights needed to take control of their privacy program, supported by expert assistance and world-class customer service.

That starts with implementation.

Transitioning to Osano doesn't mean starting over. You might be surprised to find that much of the groundwork for a successful migration is already in place. Our platform builds on your prior work, enhancing your data mapping experience with advanced tools, like:

- › Efficient and automated discovery and classification of data stores.
- › Visual, interactive maps that enable deeper insights into data relationships and prioritization based on risk.
- › Streamlined workflows for non-automatable systems to ensure robust compliance, adding greater value and clarity to your data mapping efforts.

Privacy compliance is complicated. Working with Osano isn't. This guide will help you identify necessary steps and prepare your team to quickly benefit from Osano's robust data privacy solutions.

STEP 1

Loop in the Right Stakeholders

Before you've even considered the technical requirements for implementation, think about who to loop into the discussion to ensure the implementation process is a success. Bringing these folks into the conversation early ensures they can make their voices heard, address any concerns up front, and get everyone ready to stack hands when turning the software on.

Teams to consider bringing into the conversation include:

- › IT/Security Teams to manage permissions and access rights.
- › Compliance/Legal Teams to address record-keeping, retention, and audit trails, especially for jurisdictions with unique data processing regulations.
- › Operations/Data Teams to minimize disruptions to your internal processes, data management, and reporting.

STEP 2

Identify the Sources for Your Data Map

Evaluate your current process and decide on data sources for your Osano data map.

Options include:

- › SSO (Single Sign On)
Ex. Okta, OneLogin
- › CDP (Customer Data Platform)
Ex. Segment, RudderStack
- › Manual Entry via an Assessment
Ex. Record of Processing Activity, Source Discovery Assessment, etc.
- › Enter Data Stores individually
- › Import via a CSV
- › A combination of the above

Not sure which sources are available within your organization or connectable from a security perspective? **See Step 1.**

STEP 3

Pick Your Data Stores (Which Ones, and How You Will Interact With Them)

Next, you need to decide how to populate your data map with the systems identified. Keep in mind that some systems are more likely to contain personal information than others, such as your customer marketing system as opposed to a graphic design tool. Establishing a framework to triage which systems to include as data stores will help streamline the classification process, reduce validation time, and simplify migration.

With this framework in mind, you next need to determine how you want Osano to interact with those systems. You have three options:



Automatically: Where Osano connects to your systems via API to perform predetermined, automated tasks (ex. summarization of data or deletion)



Manually: Where some of your systems are not automatable (e.g. disconnected, niche systems) and require guided discovery workflows for incorporation into your data map



Hybrid: A mix of manual and automated discovery.

Your approach will impact the resources you bring to bear in Step 4.

STEP 4

Bring Together Your Technical and Personnel Resources

With your data source strategy in hand and a list of stakeholders ready, now it's time to make sure that you've got the right technical resources on deck to get your data sources set up in Osano, ensure the right people have Osano access, and set up your processes to meet the needs of your organization. Here are two examples:

EXAMPLE 1:

Who should you include based on the sources of data that will be populating the data map?

- › **SSO and CDP Administrators:** If you're using SSO or CDP as data sources, involve their administrators early. They need Osano user accounts and admin credentials to connect Osano in a read-only manner.
- › **Department Heads:** Identify individuals responsible for managing tools and data within each department. These heads can audit their departments for data locations and processing activities, ensuring accurate records.

EXAMPLE 2:

Who needs an Osano account based on your approach to creating and interacting with your planned data stores?

- › **Automated Data Stores:** Aggregate owners for each automated data store. They need Osano user accounts and their admin credentials to connect Osano, providing read or write access as needed.
- › **Manual Data Stores:** Engage individual data owners. They can highlight where PI is kept within their systems, providing necessary feedback for setup.
- › **Hybrid Approach:** If you combine both manual and automated data stores, identify the right people for each role. Ensure they have Osano licenses and set up appropriate permissions within the app.

STEP 5

Transition Your Data Map to Osano

With the pre-work out of the way, let's move on to the star of the show—getting your data map into Osano from your existing process. This is the easy part.

Format Existing Maps for Import into Osano

STOP: Before making any modifications to your existing manual data maps, create backups of the data to ensure you have a copy. This is not only in case of any issues during the transition but also helps to ensure you've got an auditable history to refer to as part of your broader compliance efforts.

- › Manual data maps can be stored in any number of formats, including XLX, CSV, HTML, and more. Regardless of how your existing map is formatted, you'll need to reformat or convert it to a CSV, as Osano requires uploads of Data Stores to be in CSV format.
- › Next, work with your Osano Implementation Manager to ensure your CSV conforms to Osano's formatting and column naming conventions.

Set up and Configure Osano

- › Your Osano Implementation Manager will meet with you to explain the features and functionality of the Osano Data Mapping tool. They will walk you through the steps and answer any questions you may have.
- › Work with your implementation manager to identify appropriate user permissions and roles for any additional stakeholders engaged in the data mapping project based on your decisions made in Steps 1–4.

Bulk Upload and Validate

- › Use Osano's import functionality to import your formatted CSV file with your existing data map. Your implementation manager will assist with this process.
- › Once imported, validate that the data has been imported correctly and that there are no discrepancies or missing information. Depending on the field disparity between Osano and your existing map, you may need to make manual adjustments.
- › Connect any automation that you desire in the Osano tool, e.g., for SSO or specific applications.

With that, you're ready to get started leveraging Osano's Data Map within your organization!

Expert Support and Resources at Your Fingertips

Osano partners with you throughout the implementation process. Our experts provide guidance pre-implementation, hands-on support during setup, and ongoing assistance post-implementation. With comprehensive documentation, dedicated Implementation Managers, and Customer Success Managers at your disposal, we ensure a smooth and hassle-free experience from start to finish.

