Migrating Your Data to Lever

Customer Experience & Solutions

What goes into a Lever data migration?

A data migration is a one-time import of historical recruiting data into a customer's configured Lever instance. An assigned Implementation Specialist will work with you to transform and import your legacy data into Lever, if applicable. Lever's data migration tools are only meant to create content in a customer's Lever, it does not allow for deletions of or updates to existing applications.

As part of the process, the dedicated Implementation Specialist will work with you to assess legacy candidate, job, application, and activity data, understand usage goals for historical information, and develop a data migration agreement for review and sign-off by you and your team. Some of the activities may include:

- Advising your team on the best practices for preparing your legacy data prior to extract and import of the legacy data into your Lever account.
- Preparing a plan for active candidate transitions from your legacy ATS into Lever.
- Preparing transformation mapping rules to ready your legacy ATS data for import into Lever.
- Loading a data sample into your Lever account for review, validation, and acceptance before importing the full legacy data set.

Data migrations don't have to be scary. Our team will provide expert guidance throughout the process to ensure a smooth transition.
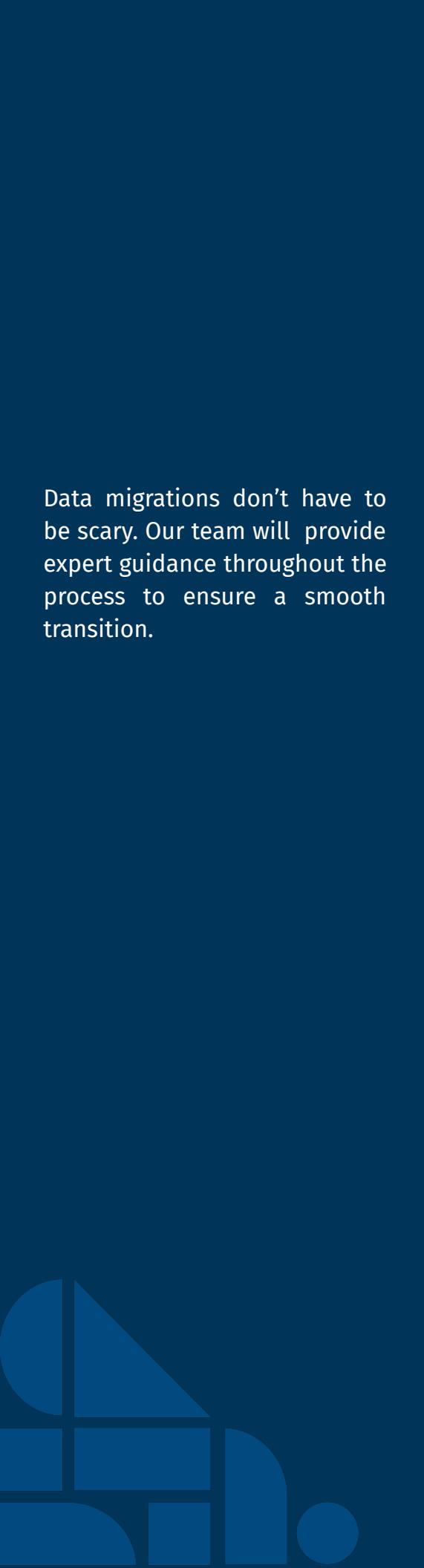
What tasks are we responsible for during the data migration?

Lever will do everything we can to make the migration process as seamless as possible. As long as we're provided with consistently formatted exports that contain all of the information that you want to migrate, our team can ensure a smooth data transformation process.

Beyond pulling the initial set of exports from your old system, you shouldn't need to devote any technical resources to the project. However, we will need your input on how best to map your historical jobs, sources, and statuses to what you have configured in Lever. Therefore, the data migrations point-of-contact on your end should be someone who is familiar with both the source data and with your Lever implementation.

Migrating data from one system to another is just like moving to a new house. Treat this exercise like spring cleaning. The last thing you want to see when you migrate all your data into Lever are a bunch of stale candidates that your team hasn't interacted with. So doing whatever you can do ensure a clean data extract will provide your team with a much cleaner Lever experience.

How can you prepare for a data migration?

Before the export, what can we do to prepare?

- Close out any jobs that no longer open.
- Disposition of any stale candidates.
- Clean-up any unwanted sources/tags.
- Close out any in-flight interviews, offers, and/or tests.
- Validate that your candidate's emails are actually their emails.

What happens after the career site launch?

- Download a copy of your exports for record keeping.
- Confirm with your legacy ATS provider that you have all the data you need and share a copy with your Lever Implementation Specialist.
- Work with your Implementation Specialist to complete the data mapping.

What do we do after data is imported?

- Validate that the data was imported correctly with guidance from your Implementation Specialist. *Your candidates will be tagged accordingly for easy review.*

Frequently Asked Questions

What kind of data can Lever migrate?

Lever can usually migrate the following candidate/application data points as long as it exists in your legacy data.

- Candidates/Applications
- Candidate Information (Name, company, location)
- Contact Details (Phone, email, links)
- Application Status (stage, rejection reason, job)
- Application Information (application date, rejection date)
- Sources/Tags
- Notes
- Resume
- Consent Status

*Additional documents like cover letters, offer letters, NDAs etc. cannot be migrated into Lever.

We recommend that your team manually create new jobs during implementation, but we can bulk-create historical jobs. We can usually bring over the following fields as long as it exists in your legacy data.

- Job Title
- Date Created
- Status
- Department/Team
- Location
- Work-Type
- Recruiter
- Hiring Manager
- Followers
- Opening Statement
- Lists
- Closing Statement

Frequently Asked Questions

What if there are other fields that are not part of your dataset Lever typically migrates?

If there are other fields (i.e. feedback, test results, etc.) in the exports from your old system that you want us to migrate, we can usually bring them over as candidate activity feed notes (which are full-text searchable), or as tags. This is not part of a standard migration process and may require you to purchase a custom Lever migration package.

When should we request our data export? When should we migrate our data and how long does it typically take?

The export date should align with the day you launch your Lever-hosted careers page. Since all your new applications are now coming into Lever directly, this will ensure that your legacy ATS provides you with a true historical dataset. A legacy ATS can require up to 30 days of notice to the legacy ATS vendor for a data extract. After you provide us with the data extract, it's best to plan for the process to take approximately 2-3 weeks (depending on the amount of data) to complete. *If you want to migrate your active candidates first, our recommendation is to run a report out of your current ATS for only your active candidates and jobs in your pipeline and we can do the mapping and migration a week prior to your go-live.*

Frequently Asked Questions

Should we migrate all our data? Will it mess up my live data?

Starting out with a clean slate on Lever will always allow you to have the most accurate reporting within Lever. Ultimately, it's up to you whether or not you choose to migrate your historical data. It is not necessary to finish a migration in order to start using Lever. The most common reasons that customers choose to migrate their data are:

1. To keep records on all the candidates they've interacted with.
2. To maintain all historical and recent recruiting data in a single system of record.
3. To source from an existing candidate database for any new opportunities.

Most companies will choose a cutoff point for how much of the historical data they want to bring in (i.e. only go back 2 years) and keep a copy of all the data saved offline for audit/compliance purposes. Even if your old data isn't as consistent and clean as the information you'll be collecting from Lever moving forward, importing it shouldn't interfere with your effective use of the system. Importing any and all historical data will have no impact with your live data as the historical applications will be added to a candidate's profile based on an exact match of their email address.

Frequently Asked Questions

Can we migrate EEOC data?

EEO data collected through your Lever careers page will be automatically anonymized and not surfaced anywhere on a candidate's profile. We recommend that you retain a final set of EEO reports from your old system and collect this information for new candidates in Lever going forward. If needed, we can load these fields as private notes, so they are only accessible to users who can view private candidate data. This is not a recommended practice because it might require some adjustments to how your organization assigns Lever access roles and sensitive information privileges.

Can we migrate our data on our own? Can we import more data later on?

If you want to import your own data, you can follow the instructions here listed out in option 2. You can fill out our pre-formatted template and submit a ticket with the attached CSV through our help center. One of our Customer Service Representatives will be in touch with you to help complete this action.

Frequently Asked Questions

Can we build reports off of our migrated data?

The fidelity of the reports you build will depend on the data integrity from your source system. You will still be able to run reports off of the migrated data and get a true sum of applications and the breakdown of the population of the applications. However, since we don't migrate interview events and stage progressions, you won't be able to truly utilize the Conversion Rates, Interviews, and Interview Calibration reports for the migrated data.

Can we migrate our candidate's consent status?

This is not part of our standard deliverable, but it is possible if this is provided by your source system. In addition to the actual consent status, we can also import the date the consent expires and/or was updated.
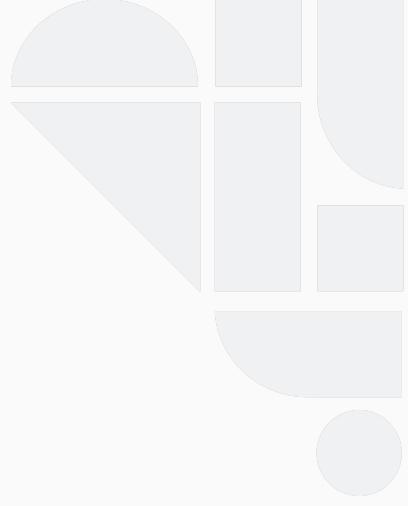
Additional Resources

[Lever Talent Suite](#)

[Lever Resource Videos](#)

[The Talent Innovation Blog](#)

[Lever Help Center](#)

[Lever Launchpad](#)