



File Share Migration 101

The Open Box Software Approach



The File Share Migration Journey



The journey from file share to document management system can be a bumpy one, but we'll help you avoid the potholes with a simple roadmap and some clear signage along the way. Let's start with a few basic milestones:

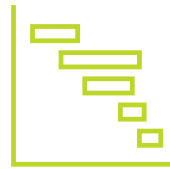
1. Select

Know what you're looking for.

Where is your current solution failing your users?

What are your future needs?

What are your deal-breakers?



2. Plan

How many phases are needed?

Availability of SMEs?

Change management and onboarding plan?

A Proof of Concept can help to decide what success looks like.

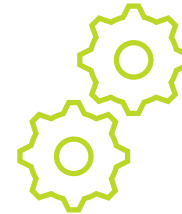
3. Clean

Archive old files.

Re-organize folders into new structure.

Rename files and folders to support meta-data.

Get end users involved in cleaning up their own files and folders.



4. Configure

Get your target system set up the way you need it.

All configuration, target sites, sources, folders and containers ready to go.

Custom features complete and tested.

5. Migrate

Test your migration at least once before live execution.

Migrate using automated tools, not manual intervention.

Know your signoff criteria and plan for downtime.



6. Support

Expect and plan for teething issues.

Train and onboard users to the new features.

Plan for additional support resources.

Triage and quick resolution are key.

File Share Migration: Lessons Learned



We've paid the school fees so you don't have to. Every migration is different, but some themes recur. Here are a few of the lessons we've learned along the way, which can help make your migration go as smoothly as possible.



Keep it simple

Granular permissions and detailed metadata options can seem to offer many possibilities, but be cautious of overdoing it. Align them to your actual processes and make sure they're easy to maintain. Don't add complexity unless you have a use case for it.

Remember your links

Excel spreadsheets in particular will be highly dependent on linked documents. Migration will break all of these links and render your interlinked workbooks useless. Use a tool like ReplaceMagic to avoid this and plan for a lot of user testing.

Expect limitations

While they have many drawbacks, mapped drives and on-prem storage are often very fast and simple to use. Don't just educate users about the benefits of the new system; prepare them for the limitations. Some things may be slower or take more steps.

Don't lift-and-shift

Your existing file structure has grown around its system. Understand the architecture, features and future growth path of the new system to design an information architecture that works with it, then map the migration path from old to new.

Clean before you go

Take the time to clear out duplicate files, archive old ones, and remove unnecessary clutter before migrating. This will speed up the migration process and give you less to test and validate. Think about adding a data retention policy into the new system too!

Learn through phases

Practice makes perfect. Phasing the rollout to one department at a time can give you a chance to learn and adjust before tackling the hardest targets. Start with your smallest department, region, or portfolio, and incorporate feedback as you extend and expand.

Product Selection Considerations

Start your product selection by first determining what your users actually need, then evaluate the products for their best fit to your requirements, and their ability to scale and grow with you. Here are a few key areas to get you started:



Document Requirements Vary Considerably

Real Estate enterprises in particular can have distinctly different and often competing requirements from different departments and types of users. Never assume one department's needs or pain points can represent all users.

Leasing **Angela**

Trevor Finance



Needs to share with legal and send to tenants for signing. Documents moved to Read Only folder once signed.



File access through links in Salesforce would be a priority. Browser is fine for searching or file creation.



Collaboration is minimal, files generally edited, reviewed and approved by one user at a time.



Files generally not large, folder structure not very deep (4-5 levels).



Need to search by tenant name, building & unit. Would be nice to filter by status or lease type.



Workflow would be preferable, especially for approval. E-signature integration a bonus.



Locking files while editing would be preferred. Version should be connected to workflow.



Integration with Salesforce required, digital signature and lease abstraction future needs.



Access requirements can depend on role and portfolio. Files typically zipped up and sent to auditors, not shared.



Access through Windows file explorer strongly preferred. Excel files should open in desktop client by default.



Collaboration is high priority, files frequently edited by multiple internal users at the same time.



Some files can be extremely large (+40MB), very high volumes of files kept in folders for audit.



Need to search by legal entity, accounting period. Invoices would be nice to search by vendor too.



Workflow not a priority. Most approval processes occur in ERP, files are input, output or workings.



Version history and version restore nice to have. Retention policy for auditable documents ideal.



Invoice integration with ERP required. Solution for adding metadata on invoice scanning ideal.

Our Experience... SharePoint Online



Urban Edge: a case study in long-term partnership

BACKGROUND

Urban Edge is one of Open Box's clients that utilizes all our service offerings including Enterprise Solutions (MRI), Custom Software, Business Intelligence, Salesforce and Consulting.

Since partnering with us in 2017, we have helped them to migrate their on-premise, legacy document repository systems to cloud-based Microsoft SharePoint Online. The solution includes a structured document management solution with a custom-built user interface and integration to MRI, and an unstructured file system for working files.

The case study alongside looks at the **Unstructured File Migration** project

THE CHALLENGE



Legacy System

Existing, outdated on-premise FileShare server accessed in office via VPN



No Structure

The filing system was not in a meaningful structure – Department, Property, Tenant



Security Inadequate

The File Share security and permissions were inadequate and did not adhere to best-practise

THE SOLUTION



Documents can be accessed from anywhere, anytime, on any device with internet connection



Documents are in Department structures designed for efficiency and performance



SharePoint

SharePoint Online with OneDrive is used as the backbone to store documents



Integrated security for internal users and external vendors

THE RESULT



All existing on-premise documents migrated to new cloud-based system



Users can share and collaborate on documents with automatic version control – less emailing



Time saved and accuracy increased with best-practice security and data retention



Contact us to start your migration journey

info@openboxsoftware.com

