

# Major Government Financial Agency Migrates to SharePoint with SeeUnity

*An undisclosed major government financial agency recently migrated from OpenText eDOCS to Microsoft SharePoint. This case study details their extensive requirements, and how they used SeeUnity's migration software and expertise to successfully transition to SharePoint.*

For this financial agency, eDOCS had played a sustained role for high value content. A small user group was responsible for generating information – much of it sensitive – for an internal audience. Content included daily digests of action items, which Case Officers would use as action items. Access to this content was provided via eDOCS WebTop, a web based client that the agency had customized extensively.

## A MANDATE TO MIGRATE

The agency was directed to transition to a privately hosted SharePoint environment. The organization understood that migration was no small task, and that it needed to identify key requirements that would have to be met to ensure success. These included preserving security, and finding a way to bring over the metadata and taxonomies that were associated with the content. The agency wanted to minimize any disruption to user productivity and behavior. In addition, there were strict regulations forbidding any software to be directly installed on the SharePoint hosted environment. Migration wasn't optional, but neither were the key requirements. The organization realized that it must locate a vendor that could deliver migration on the agency's terms.

## EVALUATING PRODUCTS AND SERVICES

This government agency solicited proposals to perform; SeeUnity responded with a proposal that combined its own software complemented with services. The response was evaluated among several others, including service bureaus that also recommended using SeeUnity products. Citing the depth of expertise, and a proposal that best reflected an understanding of the complexity and cost of migration, the agency awarded SeeUnity a Proof of Concept (PoC) in the form of a pilot project.

## PERFORMING A SOLUTIONS ASSESSMENT

The cornerstone of SeeUnity's migration services centers on a Solutions

## Migration profile

- Source repository: eDOCS DM
- Target repository: Hosted Microsoft SharePoint
- Source content volume: >100K objects
- Target content volume: >70K objects
- Requirements: preserve security, recreate data structure in SharePoint, improve user experience.

# The Power of Portal-Driven Content Management

Assessment (SA), which includes a discovery process and involves recruiting key project stakeholders. SeeUnity spent 3 days onsite, building a cross-functional team that included individuals responsible for eDOCS, SharePoint, the custom SharePoint development, and business process experts.

This process enabled both SeeUnity and the agency to identify and understand data volume and structure, existing eDOCS customizations, the structure of the SharePoint environment, the effect on SharePoint customizations, what changes needed to be made to data to successfully migrate, and making sure end users requirements would be met. The assessment was captured in report form and was used to carry out the migration.

## SOLUTIONS ASSESSMENT DISCOVERIES

One outcome of the SA was the discovery that out of approximately 100,000 objects in the eDOCS library, nearly 30,000 objects met disposition requirements. SeeUnity planned to automate the omission of qualifying records – effectively deleting them from the new environment. The SA uncovered a number of document authors who were no longer with the agency, which could create a metadata conflict in the new system; and a plan was devised to create a new “Author identifying” field that would not depend on actively licensed users.

Security planning was a large component of the SA, which identified that up to 10,000 objects would require very specific access restrictions. This content would be manually bound to specific users; the remaining content would inherit security settings from parent objects – which would simplify the management of both object-level and user/group security moving forward.

SeeUnity’s SA confirmed the need to perform data cleanup – many field values could be made more readable or user friendly. Other metadata structures require mapping so that field types can be converted to match corresponding fields in the SharePoint structure. It was determined during the SA process that Document Types would need to be changed, which would control the permissions to content in SharePoint, and how that content would be presented and formatted.

## ABOUT SEEUNITY

SeeUnity has over 40 combined years of experience with successful integration, migration, and synchronization of ECM systems. Our products and solutions help you make the most of your ECM systems. Our products have helped many industries, including legal, government, real estate, and entertainment, take control of their content by helping them implement publishing plans, extend security across repositories, integrate multiple repositories, or enact archiving policies across all of their repositories.

## Challenges

- Mandate to migrate to hosted SharePoint environment
- Needed to retain eDOCS data structure in new environment
- Migrate content to be compatible with 3rdparty SharePoint customizations