

NAL Resources Modernizes Capabilities with Move to OpenText eDOCS

SeeUnity's Velocity Content Migration Product Handles Complex Migration



Expertise developing, producing, and managing oil and gas assets

Industry

Oil and Gas

About the Project

- 1.5 year project to digitize and streamline processes to increase capabilities and efficiencies
- Microsoft SharePoint to OpenText eDOCS migration
- Complex collection of document types from 8 different repositories totaling ~ 5 million documents (~ 6 TB data)

Based in Western Canada with more than 300 dedicated employees, thousands of oil wells, and two natural gas processing plants, NAL Resources offers expertise in developing, producing, and managing oil and gas assets.

Established in 1990, the company has grown through strategic corporate and property acquisition, as well as by prospecting and managing oil and gas assets on behalf of investment partners. NAL currently produces approximately 40,000 BOE (barrel of oil equivalent) per day in southeastern and southwestern Saskatchewan, and central and northwestern Alberta.

Challenges

Nicole Haddow, Team Lead, Document Management Services for NAL Resources, set out to digitize and automate system processes at NAL in order to streamline workflows and create a more nimble organization. Part of this modernization process entailed addressing NAL's current document management system, as it was lacking functionality and required too much administration and overhead. Nicole turned to Concerta Consulting, a trusted system integration partner, for a solution.

After assessing the organization's ECM needs and desired capabilities, the decision was made to shift to OpenText eDOCS. In order to handle the large volume of content and complexity of this type of data migration, Troy Olson, Senior Systems Integration Consultant at Concerta, recommended leveraging SeeUnity's Velocity Content Migration product (Velocity).

"We were looking at migrating nearly five million documents from eight different collections of content, with a hard stop deadline of December 31, 2019. It was quite the undertaking and we knew it would require a tool capable of expediting the process and assisting us with the reconciliation." – Troy Olson, Senior Systems Integration Consultant, Concerta

Document Collections

Accounting (1.5M)	Engineering Drawings (40K)
Land (2M)	Engineering Measurement Schematics (25K)
Well Files (1M)	Contracts (5-10K)
AFE/Finance (50K)	Environmental Docs (15-20K)

Challenges

- The complexity and volume of NAL's content required a robust migration product with advanced discovery, mapping, reporting, and error processing capabilities.
- The end of life for NAL's current SharePoint system was Dec. 31, 2019, creating a hard deadline for cutover.
- Proper reconciliation and proof of successful document migration was very important due to the SharePoint server end-of support date.

"The project was a huge success. We were really impressed with the Velocity product's maturity and functionality. SeeUnity is an industry leader."

– Troy Olson, Senior System Integration Consultant at Concerta

CONCERTA

Concerta is the leading systems integrator in Western Canada for Open Text, Kofax, Ultimius, SeeUnity, and Fujitsu. We design and deliver Enterprise Content Management solutions that enable organizations to optimize business processes, increase operational efficiency, reduce costs, and maintain regulatory compliance. <http://www.concerta.com>



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Solution

The entire project spanned 18 months. The solution was built in eDOCS and then each individual collection from SharePoint was mapped and migrated over using Velocity with a one to three month gap between the migration of each collection. Collections were broken down into mini-migrations. Olson used Velocity to configure 40-50 of these smaller migrations, which he estimates to have taken approximately 14 days in total.

“Without Velocity, it would’ve been a two-step process. We would’ve had to build something custom to extract documents from SharePoint, store that data, then put it into eDOCS. The migration would’ve taken ten times longer. We were very pleased with Velocity’s speed and performance. The ability to fine-tune settings with each migration was useful.” - Troy Olson

Olson leveraged Velocity’s error tracking and reporting features during the reconciliation process to account for failures and reprocess them. *“It was easy to identify failed documents and take corrective action. Had this process been manual, it would have been really painful,”* said Olson. Concerta used a systematic approach for the confirmation process. For each SharePoint collection, they exported all metadata out into a data dump and did a count of expected document numbers for each section. The numbers needed to match exactly. *“Reconciliation is the most important part of a migration because it’s proof that everything was successful.”*

Benefits

Utilizing Velocity to migrate NAL’s SharePoint contents to eDOCS:



Concerta successfully tackled the complex 5 million document migration by taking advantage of Velocity’s many robust features, including migration templates, data validation, metadata mapping, detailed reporting, and error reprocessing capabilities



Using Velocity eliminated extra steps and made the whole project 10 times more efficient. The project was completed by the Dec. 31st deadline



Velocity’s performance settings are adjustable to accommodate each migration’s specific variables



Velocity’s detailed error reporting and error reprocessing features aided in a thorough reconciliation process

“I can say with confidence that everything from SharePoint has been migrated successfully. This is the most seamless content migration I’ve ever experienced and it has a lot to do with the tool,” noted Nicole Haddow, Team Lead, Document Management Services, NAL Resources.

SeeUnity

SeeUnity is the leading provider of API-based enterprise content integration and migration products with more than 500 customers and 30 partners worldwide. We’ve been helping professionals securely synchronize and migrate data across on-premise or cloud-based ECM systems and external applications since 2004. With unprecedented capabilities and a growing list of over 25 connectors, SeeUnity’s products extend the value of technology investments for both customers and business partners by streamlining workflow and improving productivity. SeeUnity serves Fortune 500 businesses, large global law firms, government entities, and more. Find our complete connector list on our website, including: Amazon S3, Anaqua, Azure Storage, Box, eDOCS, Google Drive, HighQ, iManage, NetDocuments, Office 365, OneDrive, Salesforce, SharePoint, Teams, and more.

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Solution

Velocity Content Migration

API-based migration product

- On-premise, cloud, or hybrid capabilities (API to API)
- Flexible configuration:
 - Reusable migration templates save days of scripting time
 - Optional C# scripting
- Advanced metadata mapping and custom translations
- Source data validation helps identify issues for clean-up prior to migration
 - Test, verify, and identify issues prior to and during runs
 - Duplicate document detection across multiple sources
- Delta syncs mean less downtime
- Error reporting, batch error reprocessing
- Rollback
- Performance tuning
- Automated scheduling
- Performance tuning
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opentext™
eDOCS

