

Major Government Financial Agency Migrates to SharePoint

With SeeUnity's Velocity Content Migration Solution



Major government financial agency

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 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.

About the Project

- Source Repository: eDOCS DM
- Target Repository: Microsoft SharePoint
- Source content volume: over 100,000 objects
- Target content volume: Over 70,000 objects
- Requirements: Preserve security, recreate data structure in SharePoint, improve user experience

Challenges

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

Solution

Velocity Content Migration

- Facilitated disposal of nearly 30,000 objects
- Improved performance and user experience
- Solutions assessment and testing provided input that improved third-party SharePoint customizations
- Better integration between content owners and content consumers through consolidation



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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.

The SA also identified the need to consolidate object references: eDOCS contained multiple references to objects within its virtual taxonomy - so that an object would appear to be in multiple places (similar to file aliases). Steps had to be configured that would migrate an object based on its first reference instance, and either ignore subsequent instances or migrate reference links, instead of reprocessing the same object multiple times.

All of these requirements were reflected in how SeeUnity's Intelligent Content Migration (ICM) product would be configured. The SA also influenced a parallel project to customize the SharePoint user experience - which was being developed by a third-party development team.

Intelligent Content Migration Product Architecture

ICM is SeeUnity's software product for performing migration. Because customer requirements and native systems vary widely, the product itself works as a framework of smaller, modular pieces that work together to perform tasks based on specific requirements. ICM organizes these pieces together in an administrative console using a system of templates, jobs and steps.

Templates are overarching groups of jobs, and define the source and target systems - using the same library of native ECM connectors available to other SeeUnity software products. Within the template structure, jobs refer to a specific group of objects that share identical migration requirements. Jobs contain steps, or individual actions that are performed on data and objects. Steps are selected from a large library, defined, and are then ordered to run sequentially. Steps can be static commands, or can be dynamically driven to allow existing metadata to determine how a step processes content. Custom scripting steps are also available, which allow ICM to handle custom data or unique requirements that inevitably occur during a migration of any significant size. Jobs can be copied, and the copies can be easily edited - allowing the rapid configuration of jobs for content that may be similar but have subtle differences in requirements. The process of how nested steps, jobs and templates can be understood in the following example: SeeUnity defines a single, common template for the agency, with eDOCS defined at one endpoint, and SharePoint defined at the other. For each unique object type (including content, containers and security) with shared needs, a job is created. Inside of that job, steps are daisy-chained, from reading the source data, performing any changes to content or metadata, and then writing the output to the target system.

In addition to the setup, administrators have a console for scheduling, throttling and monitoring the migration process. This console enables restart and rollback, contains audit and error logs, and offers dynamic notifications in the event of a processing error.

Migration Timeline: Planning to Action

Following the solutions assessment, SeeUnity's professional services team worked with the agency to follow the migration plan. To ensure success, SeeUnity performed three migrations using the agency's data:

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- A pilot migration from a test eDOCS library to an on-premise SharePoint test server
- A QA migration from a test eDOCS library to a hosted SharePoint test server
- A production migration from the real eDOCS library to the hosted SharePoint production server

Pilot Migration

The pilot migration took approximately five days, with the first three days being dedicated to installing and configuring the environment according to the SA. The actual processing was slower than expected, because the SharePoint server was a small deployment with limited processing throughput capabilities. To accommodate, the pilot migration was staggered and run in segments. Once the pilot was run, the results were analyzed for a week, creating a report that analyzed errors and identified corrupt data.

QA Migration

The QA migration also spanned five days, using two days to install and configure. Most configurations were already completed in the pilot, and ICM enabled the previous configurations to be transported. The migration template was modified to point to a hosted SharePoint environment. This required the use of Microsoft's Client Object Model, which allows ICM to process the migration with zero install footprint on any SharePoint server. The actual processing was performed over a three-day weekend, with the third day reserved in case of any errors. Processing was completed in two days, and another report was created - this time showing the majority of data was processed as expected.

The QA migration played a role in the third-party SharePoint custom development - the developers were not as far along as predicted, and accommodations had to be made. One advantage was, having seen how the post-migration content would be established in SharePoint, the developers revised and improved some of their architecture to better leverage the content.

Product Migration

The production migration took only three days to complete - again over a three-day weekend. The configurations were again transferred, with the final template pointing to the live eDOCS source system and the live hosted SharePoint system. It was identified that the live environment was going to have throttling restrictions to preserve the performance of the live system for users. SeeUnity used multi-threading to circumvent this challenge, and performed the processing in two days, with a final post-production review on the third day.

Post-Migration Environment

Having successfully migrated their enterprise content to a customized SharePoint environment, users were able to come in after the three-day weekend, and begin working in a SharePoint exclusive environment. All of the data (except disposed records) was migrated with preserved security. Instead of a siloed system where power users create low-volume, high value content on a separate system, everybody works within a secure SharePoint environment. The result is that content is more readily accessible via a hosted SharePoint system with improved uptime and a much lower cost of ownership by eliminating the cost of the on-premise eDOCS system both in terms of paying for ongoing support and maintenance and the complexities of trying to support a completely separate and redundant ECM system.



Content integration experts providing in-depth solutions to connect, sync, or migrate data across on-premise or cloud-based ECM solutions with external business applications. We're dedicated to improving workflow and business processes by extending applications and connecting people with content. SeeUnity supports a growing list of 30 connectors and provides comprehensive migration and synchronization tools to 500+ customers and 30+ partners worldwide. We proudly serve customers of all sizes, including Fortune 500 businesses, Am Law 100 and 200 firms, and government entities.

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