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# Content Migration Into SharePoint

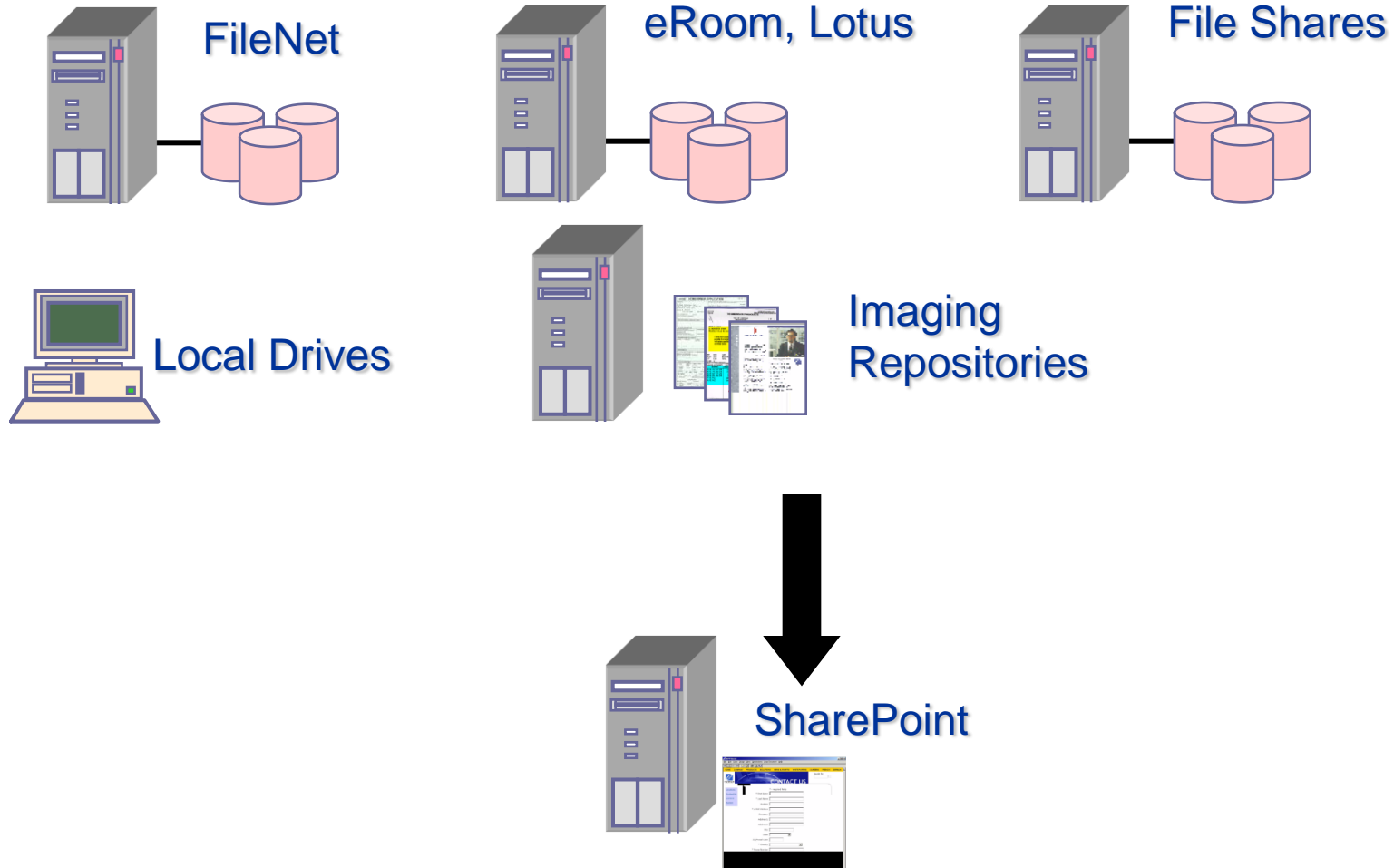
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# Agenda

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- Introduction
  - Content Migration Strategies
  - ROI?
  - Conclusion

# Introduction



# Introduction

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- Migrating *content* from a repository to a SharePoint system library
- For the purposes of this presentation, *content* is unstructured office-type documents
  - Word
  - PowerPoint
  - Excel
- And documents like Adobe PDF files
- Although, with certain limitations, SharePoint can hold any type of digitized file

# Content Migration Strategies

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- Content can be located on
  - File Shares
  - Personal drives
  - Common drives
  - eRooms (Documentum)
  - Lotus Notes
  - Public Folders

# Content Migration Strategies

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- Content can also be located on
  - Enterprise Content management systems
    - FileNet
    - Documentum
    - Hummingbird
    - Hyland
    - etc
  - Document imaging systems

# Content Migration Strategies

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- Design your SharePoint site
  - Talk to and work with your user community to understand
    - What work they do
    - How they do it
    - *What documents they work with*
  - Research & take into account content to be migrated
  - Design to overcome existing issues & problems

# Content Migration Strategies

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- Identify all of the repositories that have potential content that can be migrated into SharePoint
  - Multiple file shares
  - eRooms
  - Legacy systems
- Determine types of the files/documents
  - Active – current “in use” documents
  - Semi-active – referenced frequently but on active
  - Inactive – not used or referenced but need to be kept

# Content Migration Strategies

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- Identify characteristics of content is being migrated
  - Simple documents – single document
  - Complex documents – many documents linked together
  - Discussion threads, embedded links, center of excellence
- Identify how content is being organized on the source repository – this will be input to the SharePoint library design

# Content Migration Strategies

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- Security
  - Determine what security is employed in the current document repository
  - Is security an issue? Can SharePoint resolve issue?
  - Map existing security to new SharePoint security

# Content Migration Strategies

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- Content cleanup – it is possible that 50% or more of all existing files on all repositories can be deleted
  - Common content issues to look for
    - Duplicates (name and content matching)
    - Old files (>10 years old for example)
    - Empty files (Excel workbooks opened but not used)
    - Files that are no longer relevant or active
    - Files that belong to dead projects
    - Files that belong to employees who have left
    - Etc.
- When possible, clean files prior to migration
- Why spend money to move dead files?

# Content Migration Strategies

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- SharePoint Limitations - while reviewing and documenting existing content, identify file types, naming conventions, and file sizes that are restricted in SharePoint
  - Out-of-the-box, SharePoint restricts 87 file types (.exe, .dll)
  - File name restrictions (certain characters are restricted)
  - File size restriction - Out-of-the-box, SharePoint sets file upload size as 50 MB. Can be configured up to 2 GB
  - Take into account potential performance issues when dealing with large file sizes

# Content Migration Strategies

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- With the content identified in source repositories, determine potential migration strategies
  - Migrate complete repository
  - Migrate partial repository
  - On-demand (migrate as needed)
- Different repositories may require different strategies
  - A COE may be a complete migration
  - A team file share site may be a partial migration
  - A personal repository may be on-demand

# Content Migration Strategies

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- Once content has been identified
  - Map source metadata to target
    - Metadata attributes (State) and values (CA)
  - Map security
- Model and test a sample lot for each application to be migrated
- QA migrated material for missing documents, misplaced metadata
- Evaluate migrated test material with the business user
- Redesign migration if needed
- Begin migration

# Content Migration Strategies

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- Content migration is not the only answer. It may turn out after the research that SharePoint is not the answer and will not solve current issues or make current repositories better!
- SharePoint can coexist with other repositories
  - SharePoint for collaborative work
  - File Shares for long-term storage
  - Third-part programs for records management (SharePoint also has records management, but review estimated volumes)
- Other repositories can be made read only to encourage use of SharePoint (on-demand strategy)

# ROI?

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- File Shares

- File Share disk space is most likely cheaper
- Cost to manage a File Share is lower
- Basic file sharing is simpler for most users

- SharePoint

- Offers real collaboration and file management
- Reduces emailing of files and file share duplication
- Provides better security
- Enforces information management policies
- Additional functionality such as dashboards

# Conclusion = Take Aways

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- Migration is a complex task and *will affect* the success of your SharePoint project
- SharePoint may not be the archival storage area for all documents
- SharePoint may be expensive as an archival storage system
- **People get cranky when they can't do their work!**