

Migrating bulk files quickly and accurately with SmartMove



BRIEF SYNOPSIS

Company Details

A large department within the Queensland Government, this organisation has an annual budget of well over \$15Billion, employing almost 100,000 people.

Industry

Government

Location

Queensland, Australia

Challenge

To migrate large quantities of unsecured and unmanaged documents from SharePoint into Micro Focus Content Manager, with correct metadata, tagging and locations.

Solution

Use SmartMove by WyldLynx.

Overview

Migrating between one hundred and two hundred thousand documents out of multiple data sources, including a long-standing SharePoint storage system, multiple network drives, and a third-party hosted file share, and across into Content Manager, a fully compliant content management system.

Every document needed to be correctly named, tagged and sorted to ensure effective and accurate records management in the new system.

Disruption was to be kept to the bare minimum.

Business Challenge

Even with enough well-trained staff available to assign to the task, the longer this assignment takes, the more work will be put on the backburner from the staff's normal day-to-day tasks, which will eventually begin to cause its own issues.

With just 4 people assigned to the task, the initial estimates to complete the migration successfully using traditional methods, were between 5 and 7 months.

A potential delay of 7+ months before the organisation could successfully use the new system was deemed unacceptable, and well outside the scope of impact management were willing to accept.

A delay of this long could also cause potential problems with either changes being made to old copies of documents already moved over, or staff needing to be trained to run two concurrent systems.

A solution was needed that could allow staff to perform the migration with extremely high quality outcome levels, but with a much shorter time frame and impact on the organisation.

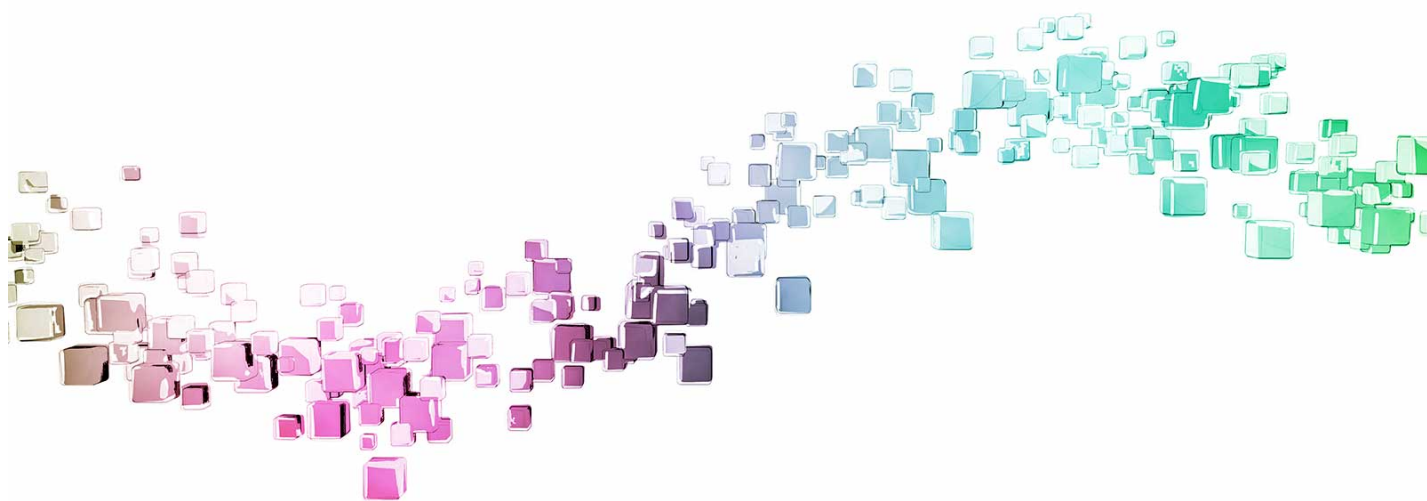


WyldLynx Solution

Enter SmartMove, one of the products in the SmartTools range from WyldLynx.

SmartMove had been designed and developed in-house at WyldLynx as a powerful and useful tool for small- or large-scale file migrations, which was perfectly suited for use in this situation.

Designed as a stand-alone application (not a Content Manager plugin), SmartMove was simply installed on the desktop computers of each of the four staff assigned to the task, and after a short training period, each of the migration staff were ready to import their assigned groupings of files into Content Manager.



With multiple types of files, many requiring slightly different results after checking in, the use of Content Manager's native 'Check-In Styles' was an important feature in SmartMove to allow quick and accurate migrations.

Each user was given access directly from within the SmartMove interface to the multiple 'Check-In Styles' created in Content Manager to suit the various requirements. These styles could also be created at any time, even by others not directly involved in the migration, allowing Content Manager experts to be involved at this point where needed, but not continually being brought in.

Users then simply needed to pick the appropriate style for the bulk group of files being checked in, select certain check boxes from the input screen (such as creating TR5 reference files), and begin the transfer.

While thousands and thousands of files were being transferred from the SharePoint stores, network drives and third-party hosted file share and into Content Manager, from multiple machines all at the same time, the users were still able to actively use their desktop computers for other tasks.

The use of reference files (TR5) for documents migrated allowed staff accessing the documents from their original file stores to immediately begin using the version controlled within Content Manager, greatly reducing the impact and training requirements for staff accessing the documents via the old methods.

Client Observations

The ease of the file transfer, along with the massively reduced timeframe left the client very happy with their choice to use SmartMove.

Staff members involved in the transfer regularly reported to the coordinator on their progress, and any issues that were coming up during the transfers.

All staff reported in that they were very happy with the day-to-day usage of the tool, and that things were going along great.

A competition of sorts even arose among the staff, around not only how many files could be transferred in a day, but also who could transfer the largest file.

As their experience and proficiency arose, so did their 'scores'!



Results

The final results displayed an impressive effort for the staff involved, and SmartMove's ability to allow bulk migrations.

A total of more than **158,000 individual documents**, ranging from very small but up to 8GB (gigabytes) in size, accounted for the **over 307GB of files** migrated with SmartMove.

With 4 staff members, operating on this project for only 70% of their work day (the other 30% being reserved for their regular day-to-day requirements), the total migration was achieved in **less than 7 weeks** in total.

| | |
|---------------------|--------------------------|
| Documents: | 158,000+ |
| Size: | 307GB+ |
| Person-hours taken: | approx. 750 hours |

Much more than a simple file transfer, the end result was a fully and accurately populated CMS.

“SmartMove was so easy to work with, and so fast, that we completed the whole job faster than we thought possible!”

Stephen V, Migration Coordinator

The newly created records within Content Manager displayed searchable, coherent details about each document, gleaned from a combination of file metadata and check-in style settings, resulting in a robust and accurate CMS.

The original documents were immediately and readily available to the thousands of users who relied on them, with the added features of compliant content management, document tracking, disposal etc. that Content Manager provides.

When compared with initial estimates of more than 7 months, the quality result achieved in less than 7 weeks left the client very happy indeed.

Lessons Learned

The expertise gained in use of the product for such a large migration has been filtered throughout the organisation, with the tool still being used today by many more than the four initially involved.

Moving documents into Content Manager will always be a task that is needed, and across the organisation SmartMove has become the standard when moving more than one or two files in.

The adherence to policy that the strict automated functions of SmartMove and the use of check-in styles provides, ensures compliance from the documents initial import into Content Manager, reducing errors in the initial creation of Records.

As migrations into Content Manager from other departments continue, the lessons learned allow the organisation to offer faster and more accurate migrations, with less disruption, ultimately saving taxpayer dollars!

Talk to us about how you can see this amazing result in your organisation - contact us today on 1300 WyldLynx!