



ABOUT FILEHOLD

FileHold document management and records management software is an off-the-shelf solution that ships preconfigured with user roles and an intuitive and friendly file structure that mimics the physical filing hierarchy of filing cabinets. The software installation is fast and easy compared to "platform" based products that can require consultation and IT resources often measured in weeks and months.

The software reduces the time searching for information, decreases paper storage costs, while increasing worker collaboration and workflow efficiency across the entire organization. Our standard software features and optional modules can transform your organization into the paperless office.

Migration from Microsoft SharePoint to FileHold

Introduction

Taubman Ventures Management is a single-family financial services company, headquartered in Bloomfield Hills, Michigan.

The Business Problem

Taubman was seeking a dedicated document management system (DMS) to replace Microsoft® SharePoint®. While SharePoint is capable of being used as a DMS, it lacked a number of key features other systems provided out of the box. The new DMS would need to provide certain document management features without having to customize, code, or reverse engineer the system. Other issues reported with SharePoint were:

- Poor performance and reliability. SharePoint was found to be unstable in its every day performance.
- Too big and complicated for what is needed, which was core day-to-day document management.
- Difficult to get support. The original SharePoint site creators were no longer available so a second and third company were contacted but neither was able to provide a full resolution to the problems they were having.

The documents the company routinely produce include various financial, tax, employee, legal, and other types of business documentation. Approximately 70,000 documents needed to be transferred from SharePoint into the new DMS. It also would have to be able to replicate the current schemas in SharePoint and force the entry of required metadata fields. Other requirements included to be able to find documents quickly, directly email documents from the document management system, on premise infrastructure, integration with Microsoft Office, version control, built-in OCR feature, good technical support, and cost.

Solution

After looking at a handful of document management systems, Taubman chose FileHold since the product met with all of their requirements. FileHold is an "out of the box" software product that is easy to install, easy to use, and is fully supported by a team of training and support technicians.

Taubman presented the opportunity to migrate their documents from Microsoft® SharePoint® 2013 to FileHold. Taubman and the FileHold Professional Services team worked together to gather and create the specifications for the project.

The migration was a two-step process. First, Windows PowerShell® was used to create an intermediate format of the data and documents in Microsoft SharePoint. Windows PowerShell is a task automation and configuration management framework, consisting of a command-line shell and associated scripting language built on the .NET Framework. Once the documents and associated metadata were exported out of SharePoint, the usage of it was frozen.



Next, the Automatic Document Importation (ADI) tool in FileHold was used to import the data into the repository. The ADI mechanism allows importing a large number of documents into the document management system with minimal user intervention. It runs on the FileHold server to facilitate the mass migration of documents.

The entire project was performed in approximately 3 weeks' time. This included the time required for gathering the requirements and writing the specification, developing the Windows PowerShell script, migrating the documents and metadata, and validation and cleanup of the data. See a complete list of the tasks for the migration in the table below.

	Task	Responsible Party
1	Document migration analysis and report.	FileHold and customer
2	Build tool to convert SharePoint metadata to FileHold metadata.	FileHold
3	Source data cleansing as described above.	FileHold and customer
4	Configure FileHold to accept imported documents.	Customer
5	Copy data from source system to temporary migration location.	Customer
6	Run metadata export tests and verify results.	FileHold and customer
7	Validate how many days will be needed for shutdown to complete the migration. Shutdown may not be necessary.	FileHold and customer
8	Source data cleansing, part 2 based on outcome of task #6.	Customer
9	Run migration tools in execute mode and verify results.	FileHold and customer
10	Stop adding documents to SharePoint	Customer
11	Import documents into FileHold using ADI.	FileHold and customer
12	Destination data cleansing as required.	Customer
13	Perform delta migration to capture any documents added to the source system after the main migration. This activity may not be needed depending on the outcome of number 7.	FileHold and customer

When asked to comment on the migration process with FileHold, Taubman replied, “*The FileHold team did a great job migrating our documents from SharePoint to FileHold. They interviewed me to determine how our documents were profiled in SharePoint and stored on our server, then they developed the mapping script. We tested it out, tweaked it based on the tests and then tested it again. Within a few days, our 70,000 documents were all migrated from SharePoint to FileHold with exact precision. We even had a metadata field with multi-select options and the FileHold migration team were able to migrate those without issue. They were able to do the migration to my exact specifications and under budget. They were easy to work with and when I had thoughts or questions, they listened and adjusted based on my decisions.*”



Business Benefits

Taubman Ventures Management reported a number of benefits of using FileHold over SharePoint once the migration was complete and the system was in production:

- FileHold is much faster than SharePoint at performing searches and finding files. Keyword searches are returned in a standard grid unlike SharePoint which returns results in a Google-like result page which is not good when trying to view the most relevant documents. In FileHold, the search results view can be modified to display certain metadata in the grid.
- Watched folders are an incredible time saver. This feature has saved at least 20 hours of work in the first month alone.
- Server-side OCR has allowed for old documents to become fully searchable in the system.
- Virtual folders allow users to keep documents organized for frequent use or to keep track of documents that our users may not use frequently.
- Saved searches not only let you perform the same searches over and over again but also works as a starting point to run similar searches where you only need to change one variable.
- Editing metadata is easy and fast with the ability to select thousands of documents at a time and modify all the metadata in a couple mouse clicks. In SharePoint, the process of changing the metadata was a drawn out process.
- Being able to type and auto-fill a drop-down metadata search field is something that SharePoint could not do. This is a beneficial for those that use the keyboard over a mouse.
- The ability to have FileHold delete the original file once it is added into the library. Not having to go back to the source file, confirm the file was uploaded, and then manually delete the source file saves time and ensures that there are not duplicate copies laying around.
- Being able to make duplicate files directly within FileHold saves a lot of time. In SharePoint, files would have to be saved to the desktop and then re-uploaded as new files.
- The ability to have FileHold standardize file names based on metadata.
- In FileHold, one to ten different metadata fields can be used to search on all at once, with no waiting for the system to filter each individual piece of metadata. With SharePoint, one metadata field was filtered at a time.

If you are looking to migrate your organization's documents from Microsoft SharePoint and would like speak with FileHold, contact us at sales@filehold.com.

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