

So, What's To Know About A SharePoint Migration?

A conversation between ECM Connection and Ron Cameron, President and co-founder of KnowledgeLake



Ron Cameron is a businessman and a software architect who has been successfully creating document imaging technology for over 18 years. Ron's passion since the age of 14 has been software development. Ron is also an avid entrepreneur who throughout his career has started and grown several successful technology companies. In 1997, he partnered with Bob Buelmann to create Doctex, an ECM systems integration company that was acquired in 1998. Since co-founding KnowledgeLake with Bob Buelmann in 1999, Ron and his team have architected and built a SharePoint based product set that has been sold and installed in over one thousand Microsoft accounts globally.

About Microsoft SharePoint, one thing is certain — it's popular. Love it or hate it, you'd be hard-pressed to find anyone involved or interested in ECM that didn't have at least a basic knowledge of SharePoint. Despite it's popularity, however, SharePoint continues to raise questions in the minds of users and potential users everywhere. Why SharePoint? How do you make the move to SharePoint? Is it worth it? ECM Connection recently spoke with Ron Cameron, president and co-found of KnowledgeLake, to explore the answers to these questions.

What is the initial argument in favor of migrating to SharePoint?

SharePoint provides an ECM system with a lower total cost of ownership than legacy systems. Many companies already have a technology investment in Microsoft, making SharePoint a desirable solution. In addition, the ROI that most clients experience when moving from a legacy system to SharePoint is very compelling. Many customers desire to leverage the many capabilities that are add-on expenses with legacy platforms, such as workflow, records management, collaboration, portals, enterprise full text search, etc., all of which are standard features of SharePoint. In addition, there are hundreds of thousands of trained Microsoft developers and SharePoint trained professionals available, so specialized knowledge and training is generally not required as is often the case with legacy platforms.

What are the benefits of migrating to SharePoint?

In migrating to SharePoint, most clients experience a lower total cost of ownership. Annual legacy maintenance fees can be very high, and often a client can recognize an immediate ROI just based on the elimination of the annual maintenance fees. The internal support costs for SharePoint are also a benefit, especially in training and resources. Specialized training on proprietary platforms is no longer required, and SharePoint resources are abundant in the marketplace.

We also encourage clients to look at the upgrade path of their legacy system. It's not uncommon to find that in order to maintain support from the legacy vendor, you may be forced into a costly upgrade. It is critical to understand the ramifications of such an upgrade because many times it is simply a migration disguised as an upgrade. And often that 'upgrade' is more costly than a migration to SharePoint.

Then there are the SharePoint benefits, such as a completely web-developed application platform — from the foundation through each and every application — as well as multiple integrated technologies for portals, collaboration, business intelligence, ECM, search, and integration to line-of-business systems. Finally, all of these capabilities are bundled into a single platform that is very low cost and brought to the market from the world's largest and most successful software company, Microsoft.

What are the most important things to consider when doing a SharePoint migration?

There are many things to consider when planning a migration. I would say that planning and analysis, architecture, and expertise are the three most important.

As with any migration, you need to do the proper planning and analysis of the legacy system and how it will map to SharePoint. This includes evaluating the number of documents that you have in your legacy system and determining if they all need to be migrated. In our experience, most clients find that they don't need to migrate all the documents and this can reduce the cost of the migration and the storage capacity needed in SharePoint.

The proper SharePoint architecture will ensure that your solution provides users with quick access to needed documents both today and in the future. You will need to consider the number of documents to migrate, the type of documents, the ongoing volume, the number of system users, and many other factors when designing the architecture of the SharePoint system.

Having the right expertise can make all the difference between a painful migration and a successful one. There will certainly be challenges in any migration, even with proper planning and analysis beforehand. The key is to have the expertise involved that can handle such challenges and keep the migration running smoothly.

What type of planning is involved in a migration?

Planning and analysis are the keys to reducing the amount of time required to complete a migration. There are many things to consider such as: number of documents, types of documents, where and how are the documents currently stored, are the documents annotated, are the documents foldered, security, versioning, etc. The list is quite long, and, depending on the answer to these questions, there may be additional planning involved. For example, if the documents are annotated, you need to determine how the annotations are stored. Are they burned into the TIF image, or are they stored separately from the image? This will have an impact on how the document is migrated to SharePoint.

The SharePoint architecture is another important part of the planning process. You need to make sure you have the SharePoint expertise to architect your system properly. The system needs to be architected so users will have quick access to documents, especially as the repository grows. Before you begin, make sure you have secured the SharePoint expertise that will understand your migration needs and have the knowledge to architect SharePoint as a document imaging repository.

What challenges are commonly encountered during a SharePoint migration?

Any migration will present its own set of challenges. The key is to perform the proper planning and analysis to minimize the challenges during the actual migration, and to have the personnel involved that has experience handling the issues that may arise.

A common challenge that we have seen in many migrations is the proprietary document types that exist in many legacy systems. Often the client is not aware that these documents exist. If you can involve the right expertise during the planning stage, you can plan in advance for how to handle these documents.

Another common challenge is systems that involve OSARs (optical storage and retrieval units). These are very common in older legacy systems. All of the documents must be retrieved from these optical devices, and many times the OSARs are old and no longer covered under a maintenance program.

What are some pitfalls users should be aware of and work to avoid during a SharePoint migration?

Again, I can't stress enough the importance of planning and analysis prior to the migration. This can help avoid issues that may arise regarding unknown document types, inadequate SharePoint architecture, or many other unforeseen issues. It is also important to consider the network infrastructure and architecture of the migration system itself, as this will have an impact on the speed of the migration. It is hard to measure exactly how long a migration will take because there are so many variables, but you don't want to get your migration started and then find out it will take twice as long as expected.

What type of ROI can be expected from a successful SharePoint migration?

The ROI can vary of course, but typically our clients are able to reduce their annual maintenance by 80%. This is often coupled with the fact that they are avoiding an expensive upgrade of their current legacy system. The out-of-the-box functionality that SharePoint and KnowledgeLake provide will typically further increase the ROI because many of the existing, custom applications added on to legacy systems are no longer required.

Finally, the ECM platform can be extended to the entire enterprise versus being limited to a departmental solution, which is the case with expensive proprietary legacy systems. Everyone in the enterprise can leverage the ROI benefits of ECM, including enhanced compliance, user productivity, more efficient business processes, and improved security of business information contained in all documents.

KnowledgeLake, Inc. develops document imaging related products and solutions for Microsoft SharePoint. KnowledgeLake extends the ECM capabilities of SharePoint, enabling businesses to reduce shipping costs, streamline operations, and achieve regulatory compliance using familiar Microsoft products that most businesses already own and use. KnowledgeLake products and solutions are deployed globally in thousands of organizations in many different horizontal and vertical industry sectors including public sector, healthcare, financial services, transportation and more. For more information, visit www.knowledgelake.com.