

File Shares to SharePoint: 8 Keys to a Successful Migration

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White Paper

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Updated—July 3, 2008



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INTRODUCTION

Microsoft released Microsoft Office SharePoint Server (MOSS) in January 2007. Its rich feature set, which includes enhanced workflow, record management, and improved security, provides increased functionality compared to previous versions of SharePoint and other collaboration or horizontal portal technologies.

SharePoint's functionality, along with its low cost of entry and deployment, has made it the natural nexus for collaboration within organizations. SharePoint sits in the center of the Microsoft infrastructure, linking with Exchange, Office Communication Server, and Office, and uses SQL as its data storage back end. This integral connectivity means true collaboration through the entire Microsoft infrastructure.

However, in most enterprises, data for collaboration is stored using a variety of technologies, including Exchange public folders, file shares, Novell eDirectory, and Notes applications. File shares have been valued as high-performance locations for information, despite their limited collaboration functionality. For this reason, migrating file shares to SharePoint is becoming increasingly common. Organizations appreciate the control SharePoint offers: version history, check-in/check-out capabilities, and workflow. This paper explains the most important considerations when embarking on a migration of file shares to SharePoint.

EIGHT KEYS FOR A SUCCESSFUL MIGRATION

1. Think, Plan, Communicate

Technology is only one aspect of a migration. Equally important is planning and communication. You need to set goals (including the migration pace), work with all stakeholders to ensure their understanding and buy-in, and understand that some flexibility has to be built into the project plan. Once the project plan has been defined, it must be communicated to the end users. And when the project is underway, you must refer often to your original goals and measure how well you're meeting them.

Probably the biggest issue of any migration is taking end users out of their familiar environment. Habits are hard to break and change can cause anxiety even when the end state is an improvement. You'll need to communicate, set expectations, and be ready to change your plan to accommodate natural push-back from your users.

A smart strategy is to start by migrating small groups of files with a small set of users, beginning with users who are most accepting of change, such as users of progressive technology. Listen to their constructive criticism about the transition and use it to structure a better roll out to the entire organization.

2. Follow Migration Best Practices

Following best practices can help you overcome migration challenges and rapidly reap SharePoint benefits. The most important rule is: plan, and then plan some more. Being prepared will pay for itself many times over in the future.

Other best practices:

- Approach your migration as a project, not as an ad-hoc job. Having a clear timeline, test plans, process management, and change control will help to ensure your success as it would any other project.
- You may want to restructure some of your data during the migration process; you may be forced to restructure other data because of name length, file type, and other requirements. Make as few changes as necessary with structure and content types to allow for a similar look and feel.
- Be prepared for some confusion about where users can find their data in the new environment.

- Build in the time to deal with unanticipated obstacles. Surprises and barriers will arise during any consolidation.
- Be cautious about adding new features and capabilities, such as workflow and automation. But take advantage of them where it makes sense, as it will help to gain the support of employees who keep asking why the consolidation project is necessary.

3. Move Only What Makes Sense

Not everything fits into SharePoint, such as files that are not updated on a regular basis (like video or audio) and files larger than 50MB. The table below outlines the important differences between a SharePoint document library and a file share. These differences need to be considered when planning a migration.

	File Shares	SharePoint
Hardware	High-fidelity server	SQL server/web portal
Capacity management	Unlimited based on available disk capacity	Bound by SQL Server limits
Documents per folder	Unlimited	2,000
Naming standards	Unlimited	File and folder names cannot exceed 128 characters; total URL length cannot exceed 260 characters
Blocked files	Unable to block files based on type	Can limit file types
Search	Search by file name	Searchable metadata

4. Have a Plan for Permissions

File shares and SharePoint have different permission structures, so permissions don't map on a one-to-one basis. Therefore, synchronization is usually not the best way to manage permissions during a migration.

One alternative is to set up a new permission model within SharePoint that is geared specifically for SharePoint, as opposed to one that is anchored in the file share permission model. This option should be assessed very early in the migration planning process. However, be aware that changing the permission structure may be difficult for your IT security or permissions staff if they already have a structure built within file shares.

It's important to note that unique permissions break inheritance within the SharePoint permission framework. This can make managing permissions in SharePoint more difficult and involved than managing file shares. The best way to simplify this is to clearly define how you will be managing permissions going forward in SharePoint.

Prior to your migration, ensure that you are a full administrator of the source and target environments. Information often resides in locations beyond the file share; check the service and registry access as well. You will need to have read access to the file shares you're migrating and high-level permissions in SharePoint; access only to the document library won't be enough to complete the migration.

5. Move Only What You Need

Migration is a good time to clean house. Take advantage of this opportunity to make sure your new SharePoint structure reflects usable data.

Documents tend to exist long past their useful life. Most IT organizations use the 80-10-10 breakdown for assessing documents:

80% is important but dead data (used infrequently, yearly at most)

10% is somewhat active data (used monthly or quarterly)

10% is very active data (used regularly—daily or weekly)

Considering this breakdown, you likely have a lot of dead files in your file shares. Storing useless data in either file shares or SharePoint is expensive. Also, version control puts extra strain on a SharePoint environment, so eliminating dead files is even more important.

Before migration, remove the files you don't need: consider archiving them or putting them into alternate storage. There are many cleanup tools available on the market for this purpose. Move only active files into SharePoint.

Once your data is in SharePoint, develop a plan to periodically clean up aging data to minimize storage costs and maximize SharePoint performance.

6. Leverage SharePoint's Metadata

SharePoint is a rich environment for metadata. Simply put, metadata is data about your data. You may be most familiar with metadata as the properties file that you can view by right-clicking on a document in Windows Explorer. The most obvious benefit of metadata is the added context it gives to your end users. But it also helps SharePoint easily categorize and index your data so your users can find things more quickly and easily.

Another benefit is that metadata can be mapped to **all** documents in SharePoint, rather than only certain file types (such as Word documents, image files, or .PDF files). This maximizes the usability of all the content you migrate. Document-specific metadata can also be set up so that searches are more effective.

Either during or shortly after your migration, you should add metadata where it makes sense. It may be helpful to define some organization-wide metadata settings that are common to the entire SharePoint structure. Meeting with department heads and other executives will help you determine what to include, such as office locations, project numbers, project leads, and department names.

Metadata helps SharePoint become a more valuable tool. Your data will expand exponentially as people use it. A properly structured SharePoint infrastructure that includes standard metadata for your organization will quickly become a functional collaboration tool instead of a simple file share.

7. Plan the Switch to SharePoint and Prepare End Users

The switch to SharePoint can be most difficult piece of a migration project because end users will use their traditional habits to get to the data. **Do not** surprise end users with the switch. A single e-mail about the switch is not adequate. Send e-mails, offer training sessions, post information, and get sign-off from your departments that they acknowledge the change and its timing.

Determine how you will cut over from the file shares during and after the migration. Disabling access to the file shares is a necessary step, because managing two separate systems is too hard and costly. Do not delete the file shares; instead, use permissions to revoke access. This helps to ensure you have a back-up plan if the migration does not go smoothly due to issues such as SharePoint bandwidth limitations or overloaded servers.

8. SharePoint Management Post-Migration

Once you've completed your file share migration, SharePoint needs to be managed. The data in SharePoint is now crucial, dynamic and needs to be addressed as any other core data component would. SharePoint deployments directly impact resources that IT oversees, such as network bandwidth and shared storage. This often leads to increased demands for support. In some cases, SharePoint applications create bottlenecks on network resources. This not only degrades the system's overall performance, but it also wastes valuable time as network administrators try to identify the issue. Without a management plan, data integrity can be compromised.

Building an efficient SharePoint management and infrastructure support plan is a critical step towards making SharePoint your one-stop shop for collaboration. Consider these questions when setting up a SharePoint management plan:

- **Administration** – What is your plan for SharePoint discovery, reporting, and usage analysis?
- **Recovery and Auditing** – What is your plan for recovering lost items? How can your organization best remain in compliance and manage SharePoint in the core IT infrastructure?
- **Migration** – Will you move data to SharePoint from other sources (such as Exchange Public Folders or Lotus Notes)?
- **Application Development** – How will the organization use SharePoint? What applications might be built on SharePoint?

- **SQL Server Management** – Is the organization properly managing SQL Server and planning for capacity and other issues that affect the SQL Server back end?

CONCLUSION

Migrating file shares to SharePoint can be a challenge; however, following the strategies outlined here will make your efforts worthwhile. Once your migration is complete, the reduction in resource management time and increased user productivity will define the true success of your file share migration project.

ABOUT THE AUTHOR

Doug Davis has worked in the IT industry for almost twenty years. He is a noted SharePoint expert, responsible for the strategic roadmap for Quest's SharePoint products. His current role at Quest is Product Director of the SharePoint Business Group. Doug came to Quest through its acquisition of FastLane Technologies. Before Quest, he worked in IT and development at Telesat Canada, a Canadian satellite company. Doug has a degree from Carleton University in Ottawa.

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