

Moving to a new File Share experience

How to save your business time, effort, and money during your file migration



Moving on from file shares

Since the dawn of desktop computers, files, folders, and emails have been central to work across the public and private sector. Information is stored in a cascade of folders that categorize internal and external work, clients, customers, projects, products and everything in between. Organizations have historically stored thousands of documents through this hierarchical folder system in File Shares.

But the enterprise is in a constant state of flux. As the volume of data and information rises, the technology and processes that have served businesses well in the past may not be so well-equipped for the future.



Organizations are realizing there are detriments to storing their documents in countless folders within File Shares:

Content silos

Storing documents in folders puts an unintentional but unavoidable focus on the individual. Workers store content in a way that makes sense to them, but not to the wider business. Search usually involves asking the original author where files are stored, and inconsistent file permissions can prevent other users from accessing files.

No metadata

File Shares cannot classify information on a holistic business scale. Conflicted copies and multiple versions of documents can surface as files are edited and moved from one location to another.

No document versioning

It's impossible to revert to previous versions of documents in File Shares. Any changes that are made are final.

These drawbacks, compounded by the increasing expense of managing File Shares and the current business trend of moving infrastructure to the cloud, have led businesses to search for a new medium for records management. Share-Point is the most popular solution for businesses in this regard. But this presents another challenge: ensuring migration of files, users, and emails goes smoothly.

In this eBook, we will explore the key concerns around file migrations, and how streamlining this process can save businesses their equivalent to blood, sweat, and tears—time, effort, and money.



The biggest obstacles to a successful file migration

SharePoint has succeeded File Shares to the throne of enterprise productivity thanks to its improved collaborative capabilities. SharePoint allows users anywhere, anytime access to their files via a web-browser or mobile device. Version history means edited files can be reverted to a previously saved version. And a traditional folder structure is replaced in favor of metadata-powered search.

While the promise of SharePoint (both on-premises and in the cloud) has tempted thousands of organizations to adopt the platform, a file migration introduces a wealth of new questions: how do you move from the old world of File Shares to the new world of SharePoint? How do you know what information to migrate? Are records management problems guaranteed to disappear, or will they simply take a different form?

Organizations face three core challenges in a SharePoint migration:

1

Size and scale

Moving terabytes of content to SharePoint is a monumental task that requires a lot of time and resources. To minimize downtime, you must prioritize the content that must be migrated and leave unnecessary content behind.

2

Implementing real and lasting change

The content you do migrate needs a new structure. Without it, you'll encounter the same limitations to records management as you did before.

3

How do you keep your users happy?

People are used to working within the same and familiar constructs of files and folders. Your users will need to be convinced the new way of working is better, and taught how to make the most of this new practice.

These problems can make it difficult to embrace SharePoint, even for those that have already migrated to the platform. While SharePoint Online is experiencing its highest ever rate of adoption¹, many organizations that have migrated to SharePoint are still using File Shares. This creates a clear disconnect in terms of user experience, as workers sit on the fence between traditional folder structures and SharePoint document libraries. This confusion prevents users from fully committing to a new way of working.

Whether your organization is anxious about committing to a file migration, or doesn't know how to take advantage of SharePoint, some small improvements can go a long way.

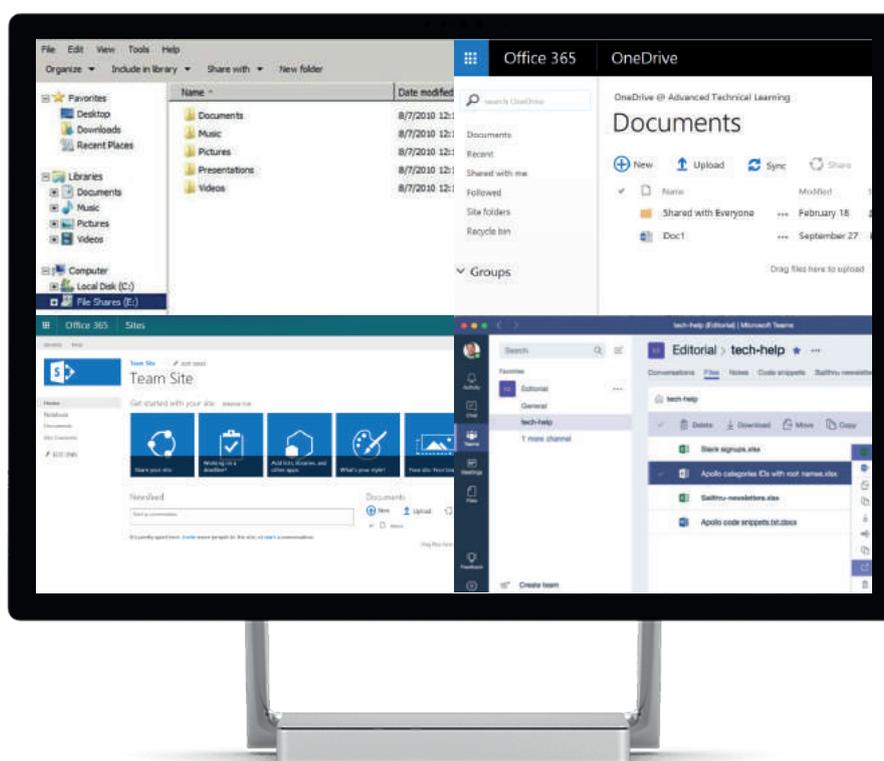


¹ Skyhigh Networks. 2016. Office 365 Adoption Rate, Stats, and Usage.
Online source: <https://www.skyhighnetworks.com/cloud-security-blog/7-charts-reveal-the-meteoric-rise-of-office-365/>

Metadata: the key enabler to a new File Share experience

Transitioning to a new process for records management, and doing so on a new platform, is going to come with growing pains. These pains are worsened with the number of new interfaces users may have to deal with—organizations may deploy a combination of SharePoint Server, SharePoint Online in Office 365, OneDrive

for Business, and Microsoft Teams. All of which have considerably different interfaces. Asking users to change from one working process to another is one thing—if they must constantly flit between multiple interfaces, you can expect user adoption (production) to suffer.



The trick is changing the underlying technology to something more sophisticated than File Shares without changing how users intuitively search for and access content.

harmon.ie functions within Outlook, but brings a user's workspaces—SharePoint Online Sites, legacy on-premises Sites, OneDrive, Microsoft Teams, etc.—onto one screen. So, content can be moved from location to location within their

Outlook inbox. This is done through a 'drag-and-drop' interface for an experience akin to traditional File Shares, without the constraints of storing and organizing content in folders.

**At the heart of this practice
is metadata.**

Creating a new folder experience

harmon.ie drives adoption of SharePoint by providing simple yet fully-featured access to SharePoint document libraries from the convenience of Outlook. All it takes is three steps:

1

Select one or more folders or files you want to upload to SharePoint and drag them to the harmon.ie sidebar

2

harmon.ie will prompt you to fill in metadata fields to help you correctly classify your records

3

Files are uploaded to the desired location in SharePoint to be viewed, edited, and shared by colleagues.

By assigning metadata to multiple documents or entire folders, users can create SharePoint Views grouped by metadata properties, displayed in a similar fashion to a traditional folder structure.

In a traditional folder structure, moving documents to different locations (due to changing projects, archiving information, or even being moved accidentally) can cause problems. But if you change metadata properties with harmon.ie, the document remains in the library, with differently assigned values. This means you don't create conflicted copies of files, confuse users with file locations, or risk losing or corrupting information. You get a 'single version of the truth'.

Transparency and control are key to helping users transition smoothly to SharePoint. harmon.ie maintains the familiar experience of File Shares, removing the need to learn how to manipulate web-based SharePoint for the uploading of files for a seamless user transition.

Posting a successful SharePoint adoption

After resolving an otherwise disjointed user experience, the remaining challenge is making sure only the right content is migrated to SharePoint. harmon.ie eases the scale of migration with Selective Migration, placing the onus of what information needs to be migrated on the individual so they only migrate the content they see value in.

Canada Post is a leader in providing physical and electronic delivery to customers and employees across Canada, and a prime example of how harmon.ie can enable Selective Migration.

Canada Post needed a way to manage the terabytes of information it had produced in

the past and the new data it was producing daily. The company implemented SharePoint 2013 as its records management solution, as workers were already familiar with Microsoft. They wanted users to be able to create and save their documents in a manner that had structure.

harmon.ie was implemented to increase user adoption, deployed as an add-on to Outlook and to allow for selective migration. Canada Post employees were given a set period of time to move their important content over, during which File Shares were made 'read only' to encourage users to prioritize mission-critical content. Any content that remained in Files Shares was archived.

“harmon.ie really was the key for us in terms of user adoption. To be honest, 97% of the stuff we're migrating, people weren't looking at it ever again anyway. Because of harmon.ie, we were able to teach users how to upload what they believe to be valuable—the key documents they're working on. We implemented over 180 sites to close to 8,000 users. We developed a Help Site with training materials and job aids around records management. We believe we've saved between three to four million dollars.

Ross Herbert,
former Director of Compliance, Canada Post.²

² Harmon.ie. 2018. Canada Post Case Study.
Online source: <https://harmon.ie/case-studies/canada-post>

A brighter future for file shares

As people, projects, products and more come and go in organizations, File Shares struggle to successfully organize and manage these moving parts. As such, they become document graveyards, home to masses of unused and duplicated content. But when businesses look to move on, their new horizon is obstructed by the challenge of migration and adopting new and often overlapping working processes.

harmon.ie not only broadens the horizons of those working in SharePoint, allowing them to more accurately classify (and therefore search) their content; it does so maintaining the drag-and-drop experience they are used to. It's the modern approach to records management, while keeping it the way it's always been.

To find out more, get in touch with a member of the harmon.ie team today.



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