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FileShare to SharePoint Online migration at PWN

Issue description

PWN decided to implement Sharepoint Online to support their daily work processes. One of the reasons to use Sharepoint Online was to get rid of their current fileshares with millions of documents. Documents within Sharepoint online should be easy to find and also easy to archive. To do this successfully, adding extra metadata was needed. The use of multiple fileshares introduces the risk of content duplication. Moreover, by collecting files for several years one ends up with large volumes of data that are, on one hand, difficult to manage and on the other hand, require a big storage capacity. Some of these files are old and no longer used. In an earlier stage PWN decided to perform the document migration manually. But after several months decided that the migration should be done in an automated way. Migrating the documents by hand was taking up too much time.

Solution approach

Merge the current content on the fileshares into Sharepoint Online. It was decided that the content migration would be done per department instead of the whole company.

In the project we followed the following approach:
- Company wide analysis; We started with an analysis of the file shares, to give the client insights in what they had and what would be valuable. We defined some first selection rules and mapping rules. This phase ended with a detailed report and plan for the following phases
- Department specific analysis based on the department fileshare locations.
- Extracting data from file shares
- Creating reports for the business
- Performing workshops and interviews to specify rules
- Building selection and mapping architecture
- Build rules in selection and mapping robots
- Migrate to SharePoint according to rules

Technical solution

The migration to the new SharePoint system has been realized by applying a set of selection rules determining whether a document should be migrated or not. Here are a few examples: only migrate files with allowed extensions, do not migrate temporary files, Further selection was done through means of reports.

The purpose of a report is to show what documents are good candidates to be kept or eliminated at migration. Here are some examples:
- reports with duplicate files (exact matches based on hash)
- reports with almost identical files (versions of the same file) reports with duplicate folders (folders that are identical
- in size and child hashes)
- reports containing filesizes and location
- reports with a folder structure (not all lower levels) of the department specific locations

By means of workshops, the users were asked to use the folder structure report and mark which folders should be migrated or excluded and which folders should be archived. They also needed to provide the new location per folder and which keywords needed to be added as metadata.

Results and value for the client
- Successful delivered a migration street from fileshares to Sharepoint Online
- Insights in ROT (redundant, obsolete and trivial) data within the file shares
- Elimination of the Fileshares
- Optimized search of information because of relevant content with relevant metadata in SharePoint Online.