Moving the Mountain for Modesto Irrigation District

Corridor Provides Search and Reporting Functionality through Its Contract Management App for SharePoint after Successful Migration from OpenText eDOCS

corridor company

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MODESTO IRRIGATION DISTRICT faced a dilemma. Its central repository for all internal electronic records was an older version of OpenText's eDOCS technology no longer supported by the vendor. This state of affairs needed to be addressed because this older version of eDOCS was not compatible with the version of Windows 7 64-bit to which Modesto was upgrading. MID's choices? Upgrade to the newest version of OpenText eDOCS or consider moving its documents to a more modern platform. Despite the risks associated with a migration, Modesto elected to move its documents and metadata to Microsoft's feature-rich SharePoint platform.

Key to Modesto's risk mitigation strategy surrounding the migration of almost 300,000 documents and their associated metadata was the selection of a vendor with expertise not only in migrations, but also in both eDOCS and SharePoint technologies. Corridor Company, with years of experience in the ECM and document management space, was selected to lead this effort. Coupling Corridor's migration expertise with the search and reporting functionality present within Corridor's Contract Management [,app] for SharePoint has allowed Modesto to realize a multitude of benefits including managed document security, interdepartmental project collaboration, and configurable metadata-based searching.

Modesto Irrigation District (MID)

The Modesto Irrigation District (MID), located in California's Central Valley, is an independent, publicly owned utility that provides electricity and irrigation, and treats surface water for drinking. Established in 1887, MID provides benefits that include community ownership, control by a locally elected Board of Directors, and business operation on a not-for-profit basis. Committed to providing reliable service at the lowest cost possible MID's resources include two major reservoirs, a dam and a water treatment plant.

The Business Problem

The business requirements for MID's document and electronic content management system were multifaceted. With its many departments relying on the technology and document repository for collaboration, compliance and audit needs, MID needed to be extremely thoughtful in the selection of a replacement vendor. More specifically, MID's collaboration process included email communications which required not only sophisticated version control, but also heightened security. Users needed to create and share documents in a secure repository on a daily basis. From a compliance and audit standpoint, MID's many large capital

projects required both collaboration and record keeping. Its audit policy mandated that documents be retained for the life of a project or the life of the capitalized asset. And, access to the documents needed to be in line with both the State of California rules and regulations and MID's own financial and reporting requirements.

In addition to not being compatible with Microsoft's Windows 7 64-bit technology, eDOCS was presenting a variety of challenges to its users. Due to its architecture, client-related issues with the technology had to be resolved for individuals at the PC level. The permissioning approach within eDOCS gave individual users tremendous control over the permission levels for the documents they authored. A "Wild West" environment ensued which prevented applying a disciplined approach to document permissions once the documents were created. The newer versions of eDOCS presented additional challenges as there was a change in the architecture.

Modesto did consider another possibility: converting to a large database system such as Oracle. On examination, however, it became clear that the complex system capabilities of an Oracle solution were far beyond what MID needed for its repository, and the attendant costs were beyond what it wanted to spend.

After evaluating its options, MID decided to move its documents to a SharePoint repository. SharePoint and Microsoft had a record of ongoing product development with constant improvements. The browser-based SharePoint would eliminate client-related issues, and SharePoint's compatibility with Microsoft Office was naturally excellent. The first challenge with this selection was to successfully migrate 300,000 existing documents to the new system along with the metadata and versions associated with those documents. Next, MID would need configurable search capabilities so that department personnel could use that same metadata to find documents as they always had – and hopefully more easily.

Document migrations are complicated. Risks include poor planning, lack of prioritization, failure to migrate all documents, security translation, loss of vital metadata or document versions, and uncoordinated migration efforts that confuse system users. MID realized that moving 300,000 documents required a strategic and a technical partner with expertise in document identification, migration, search and reporting, and most importantly, SharePoint. The size and scope of the migration called for a vendor who could work with MID effectively to develop a migration plan, design a SharePoint environment, implement the migration, and enable searching across the collection within limits of user permissions.

MID's Selection Process

With SharePoint as the chosen path, MID considered several system integrators in a rigorous selection process. MID choose Corridor Company to lead the migration effort and Corridor's Contract Management App as the software to make searching on the rich metadata of its migrated documents easy and effective. Regardless of the source and destination systems, migrations are challenging, and it is here where experience counts. For MID, Corridor's standout

qualities included its glowing references, its detailed presentation, and its ECM consulting history in support of systems such as eDOCS and other comparable technologies. Corridor's SharePoint expertise also meant that it would take a savvy approach to the massive migration.

Outcome

Corridor held on-site requirements workshops with MID during the design phase, and the project was underway. A third party tool, SeeUnity (www.seeunity.com), was used in helping to migrate the documents and metadata to MID's SharePoint repository, where Corridor's CM[.app] would provide search and visibility once the documents were in the new system. As so often

> **"Corridor skillfully addressed numerous data migration obstacles in order to successfully implement a well-designed, efficient SharePoint solution. The District now has not only a new repository but a solid SharePoint infrastructure upon which to build for the future."**
>
> **Ron Hobbs, Network / Desktop Support Specialist, Modesto Irrigation District**

happens in complex migrations, challenges in migrating from OpenText's eDOCS soon presented themselves (read more below in "A Word about Migrations"). Corridor's consultants stepped in to devise and implement migration scripts as a supplement to SeeUnity's products, and together, Corridor brought MID's documents and metadata from eDOCS to SharePoint.

When it came to search, Corridor duly recognized and educated MID on the benefits associated with SharePoint's powerful searching capabilities. However, SharePoint's potency comes in the form of flexible and scalable full-text searching. It is not strong in the area of metadata-based searching. From an MID perspective, metadata-driven searching played a crucial role in their use of eDOCS and not having a comparable capability would compromise this critical dimension of

the project. With CM[.app] Search implemented, MID personnel can now easily search for and find the documents needed to accomplish their work day-in, day-out.

Using SharePoint and CM[.app], MID has achieved many benefits.

- MID has a repository it can rely on – and build on – going forward. SharePoint's compatibility with Microsoft's Office products makes it easy to use, easy to control, and easy to maintain, giving users reliable access to business and project documents.
- Security can be easily managed. Whereas eDOCS secured documents individually based on author permissions, SharePoint and CM[.app] employ a richer and more powerful security capability. This creates better control over access to materials in such typically sensitive sites as HR or Legal.
- Within the limits of security, MID users can navigate and search across more than 50 departmental sites that reflect MID's organization. An Enterprise Content Type hub is deployed, distributed to over 50 site collections and 50 content databases. A benefit of Corridor's design for MID is that drop-down navigation can be reconfigured to reflect any future reorganization at MID without re-architecture of the underlying site structure – all while maintaining permissions and security.
- MID has Disaster Recovery (DR) it can count on. Corridor set up a fully functional "hot standby" with updates every 15 minutes at a separate geographical location, something MID lacked in its previous system. For a public utility, this is a huge win.
- For project management, MID has the best of both worlds: ease of collaboration and clarity of official site management. As set up by Corridor, SharePoint allows MID staff to spin up sites for project management and collaboration – an empowering feature – while limiting access to departmental or division sites until completed documents are ready to be moved to their permanent home. "SharePoint sprawl" is avoided, thanks to the intelligent information governance by MID and Corridor.
- MID's system functionality benefits from the worldwide SharePoint developer community. As SharePoint is the most widely used ECM platform around the world, a vendor eco-system has been established which adds great value on top of SharePoint. By moving from a legacy system like eDOCS, MID has opened the door to enterprise solutions like Corridor's CM[.app] for robust search and reporting, and function-specific products that benefit specific use cases at MID, such as CopyMove for SharePoint. CopyMove is an add-on product that sits on top of SharePoint and it allows for content to be easily moved between libraries and sites.
- User adoption of CM[.app] for search and document retrieval is successful across departments. CM[.app]'s intuitive user interface and search forms are well received by staff using the new SharePoint-based repository.
- MID has a repository it can trust going forward, with a record it can trust looking back. Corridor set up a logging system in SharePoint to hold migration information, at the same

time updating eDOCS document records to reflect their migration to SharePoint. With experience of the new system, user trust in SharePoint and CM[.app] is strong, and the old repository in eDOCS is now "read only."

A Word about Migration

Corridor's implementation of CM[.app] for search was the finishing touch on a challenging migration that freed MID from reliance on its legacy system. At a high level, Corridor – working with partner SeeUnity – accomplished the migration of documents and metadata in eight phases – termed "the batting order" – with the express purpose of avoiding duplicate migrations and prioritizing the files to be moved according to MID's technical and administrative needs. As a bridge from the old eDOCs way of thinking to the new SharePoint architecture, Corridor set up a temporary "document center" site with user-secured folders to hold all the migrated documents, as they had formerly been individually permissioned eDOCS-style. Users then moved the files to their final secured departmental and divisional locations. The "document center" site is now scheduled for removal.

The sticking points were the exceptions to the normal rules for automated migration that particular documents presented. The unlimited length of file names in eDOCS and the use of special characters in names or paths that is unfeasible in a modern web-based system were two items on the list of possible "go-wrongs" in the planned migration of 300,000 documents. These potential show-stoppers might have trapped MID in their old system, with costs to efficiency that the organization did not wish to pay. Given the size of the migration, automation was the only way forward. Corridor's analysis scripts intelligently shortened file names while identifying other characteristics that might keep an individual document and its metadata from migrating to SharePoint. Along the way, Corridor used SharePoint to create a migration log in both the new system and the old. Dealing with exceptions during automation could have required a major detour for MID. Instead, the exceptions proved to be a series of road bumps that did not keep Corridor and MID from reaching their destination: a trusted repository of MID's documents and metadata in SharePoint.

MID proved to be a strong, attentive partner in the migration. For example, MID determined that a cleanse of data before migration was a goal of the organization. The risk of that approach is that the cleansing is never finished and the migration never happens. In this case, however, MID communicated clear deadlines to the departments and users, affording opportunity for cleanup before the migration while allowing the migration to proceed on schedule.

Lessons Learned

Document migrations are a fact of life in the digital age. What is often not understood is their complexity. Corridor's shared experience on the project with MID yields a few insights:

- Migrations take time. Even if it were possible to move all one's documents and metadata overnight, the need for testing and content validation across all document types demands a measured approach.
- Test migration runs and content validation are not solely technical exercises. Business users need to be involved, especially where content sampling will confirm that a migration is a success. Business users can spot at a glance whether all their metadata has migrated successfully. Identifying key business users and training them to help with content validation should be a priority.
- Give thought upfront to the pros and cons of a phased migration (moving a category of documents, perhaps by department, geography, function, or status) vs. other approaches, including parallel migrations. Corridor can offer planning documents and professional advice on how to approach migration.
- What to migrate – and what not to – requires planning among document users. Answers may vary across departments, and company-wide decisions may need to he made as well. Corridor recommends consideration of options beyond "complete migration," including use of offline storage for legacy files, migration of active files only, or a "day forward" strategy.
- An automated analysis tool is vital, especially for large migrations where file names, special characters or traits specific to a legacy system can create uncertainty of a migration's success – or stop it cold without explanation.
- The inclusion of CM[.app] for search turned this project from a mere technical success to a great business success for users. A vital lesson learned by Corridor and shared with MID: make life as simple as possible for the end users. And, for these end users, metadata-driven search was a very important aspect of the system.

Beyond these lessons, MID suggests giving careful thought to interdepartmental collaboration and the impact of any new system on all users who may need to work together. MID realized they needed to give departments some control over the permissions for documents that needed to be shared across departments or during projects. The answer was "collaboration libraries" where departments can grant access to documents frequently needed by those outside the department.

MID also strongly recommends having an IT person participate in all product trainings.

Future Considerations

MID's IT team monitors and maintains the health of the organization's SharePoint farm. With SharePoint used by hundreds of thousands of professionals worldwide, additional support by SharePoint professionals should also be considered. For MID, this means quarterly assessments and discussions with a Corridor consultant so SharePoint and CM[.app] continue to perform at their best and change can be planned. Given the success of CM[.app] internally at MID, future considerations include deploying additional components of Corridor's feature-rich technology.

About Corridor Company

The leading provider of a Contract Management Application powered by the SharePoint platform, Corridor Company is committed to continuously evolving our product line to meet the challenges of contract management. With a business application platform that readily provides solutions for Proposal, Contract and Supplier Management, our end-to-end solutions enable our customers to create proposal and contracts more efficiently, to manage all processes more effectively and to ensure that revenue, profit and compliance are fully optimized. Our flexible licensing model, complimentary implementation packages, and delivery options which include on premises, in the Cloud or Office 365, ensure a solution tailored to fit the needs of your company.

For any questions or additional information on this implementation of our Contract Management App for SharePoint, please reach us directly at:

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