

UPGRADE TO SOFTDOCS: The Migration Process

Facing a document management system that's hitting end of life, or has been acquired by another company, is always a challenging position to be in. On one side, you've got a solution that users are accustomed to that works well. On the other, you begin to fear whether the application will break when the next round of Windows updates are installed.

Tried And True Migration Process

Softdocs is experienced in helping guide schools through just this type of situation, with a tried and true migration process to help meet the needs of your users while also providing a product that will keep working as Windows (or Mac) updates are released.

Lately, the most common conversion we've been engaged to undertake has been from Lexmark's Nolij Web solution. With support for this application becoming a thing of the past, we're receiving more calls than ever before to help schools migrate to our solutions.

We've also converted from about a dozen other applications, so our processes are refined and will meet your needs. And if your school isn't using an application we've come across before, it's ok! Our data team can massage the data for proper export before importing to our solution. This route involves some extra steps to ensure quality, but the end result will meet your specific needs.

Four Phases of Migration

I ANALYSIS

Prior to discovery, a Softdocs Conversion Specialist connects into your system (with your supervision) to analyze and gather information. Common information gathered includes:

- ▶ Document classes/types/categories (how you organize and file documents)
- ▶ Document counts (how many documents there are of each type)
- ▶ Document owners (user types, groups, etc.)
- ▶ Key fields/index fields/metadata (by document type)

This analysis is to find any anomalies of how the system is set up. At this point database queries are formulated that the conversion program needs in order to pull the data back to

know which tables are going to be involved. A "crosswalk" is then built between your existing application and Softdocs.

II INITIAL CONVERSION

After analysis, the conversion program is modified to satisfy any unique requirements.

- ▶ The conversion program is run to gather indexes and build Softdocs imports
- ▶ The crosswalk table is used in setting up translations for imports
- ▶ The imports are run into Softdocs to gather the documents and file them in the system
- ▶ The date, time and last system folder are documented at this time

III REVIEW

- ▶ Your project lead is contacted for a brief training on how to log in and review documents. (Additional departmental users or groups are trained to review at this time as well.)
- ▶ A date is set for review to be completed by.

IV FINAL CONVERSION

At the point of conversion approval, users will stop adding or making alterations to documents in your existing system. In short, you will set your existing program to operate in a "view only" mode.

- ▶ Softdocs begins to convert any documents that were added after the initial conversion phase
- ▶ Files are imported into Softdocs
- ▶ For more insight on moving digital files from your existing solution to Softdocs, contact us and we'll get back in touch shortly!