

# McDaniel & Associates – Migrating Reliably and Consistently with DocKit

**Customer: McDaniel & Associates Consultants Ltd.**

<http://www.mcdan.com/>



**Industry:** Petroleum Consulting

**Products Used:**

Vyapin's DocKIT for SharePoint  
[www.vyapin.com](http://www.vyapin.com)



Microsoft SharePoint:

Microsoft SharePoint 2010 and 2013

<http://office.microsoft.com/sharepoint>

Earning an excellent professional reputation in the petroleum industry doesn't come without paying attention to every detail including proper document handling and storage. McDaniel & Associates trusted Vyapin's DocKIT to effectively move data to a well-structured SharePoint environment to better support the business and its customers.

### *Client Background*

For more than half a century, McDaniel & Associates Consultants Ltd. has provided the petroleum industry with expertise in reserves evaluations, resource assessments, geological studies, and acquisition and disposition advisory services.

McDaniel & Associates has a staff of over 60 professional and technical support personnel working in Calgary, Alberta and Guildford, United Kingdom. Through consistently prepared evaluations and professional dedication to its clients, McDaniel & Associates has gained international recognition and enjoys the confidence of the world's leading private and public companies.

### *The Business Challenge*

While providing evaluation services, consultants gather and create a great deal of information that gets stored in various working files, final reports, and other deliverables created for clients. Historically, personnel would store all of those files in folders on a network file share. With an ever-increasing amount of documentation to deal with and the desire to remain efficient, McDaniel & Associates chose to migrate their data to SharePoint as its preferred document management system.

Deborah Kushner, Database Administrator with McDaniel & Associates' 5-person I.T. team, explains the benefit sought by moving documents away from network file shares:

"SharePoint is so effective for a file repository because of metadata—you can set standards as to how things are laid out and stored, making it easier to find... something you can't do with a network share where



**Challenge:** : Reliably moving tens of thousands of client-related documents from networked file share folders to consolidated SharePoint repository with common structure and correct metadata applied.

people store documents and information based on their individual requirements for retrieval. The challenge we faced was how to get everything moved over to the SharePoint environment with a common structure and metadata so that it can be easily accessed by anybody going forward”.

Simply moving all documents to SharePoint without regard for structure or consistent metadata would not have led to the kinds of improvements the company had in mind. Moreover, attempting to deal with metadata after-the-fact using only SharePoint’s built-in features would have been very time consuming and inefficient.

### ***Solution: Vyapin’s DockIT***

The McDaniel & Associates I.T. team proceeded to get their migration effort going by doing a year-end clean-up on projects. The plan was to prepare files for migration to SharePoint by mapping them to known metadata (e.g. client job number). A custom app developed in-house assisted with the identification and mapping of relevant files to metadata. With that preliminary view, the team then turned to Vyapin’s DockIT to move forward with the actual migration.

DockIT for SharePoint helps organizations migrate content from network file shares, file servers, and local hard drives to Microsoft SharePoint. In the process, DockIT preserves NTFS permissions, file properties, and associated metadata. DockIT requires little training, making it a great choice for time-pressed teams seeking productivity gains.

Deborah and her team consolidated the information about the files to be migrated and the associated metadata, into a spreadsheet that DockIT would accept as a source. Having the source data in spreadsheet form meant that the team could easily sort, filter, and make edits as required. They were also able to split the task between multiple people and work in parallel on different spreadsheets to clean-up metadata as much as possible before the move.

- With source spreadsheets scrubbed and ready to feed into DockIT, the team gained great confidence from the reporting and validation features of DockIT. Deborah explains, “The validation feature that DockIT provides really helps. You can use that to make sure the data is clean before moving to SharePoint.” DockIT’s validation capability also gave the team the assurance that everything that was supposed to get moved to SharePoint, did in fact get moved and that the files in the

### Benefits of Using DockIT:

- **Validation of successful migration**
- **Facilitating seeing big picture of migration effort**
- **Easy export of metadata for scrubbing purposes**
- **Reduction in overall migration time**

***“Dockit helps you see the big picture and organize your SharePoint repository in a way that works most effectively for you.”***

*-Deborah Kushner*  
Database Administrator  
McDaniel & Associates  
Consultants Ltd.

source directories were removed so as not to leave duplicate instances. Without the tool, the team would have had to reconcile manually and clean up files inadvertently left in the source directory—a time consuming and error prone approach.

### **Benefits**

McDaniel & Associates has seen great success in moving documents off of network file shares into the SharePoint environment. The company realized the following benefits from working with Vyapin and DockIT:

- **Ease of migration:** tens of thousands of documents were moved in a relatively short period of time
- **Migration prep:** Effortless export of metadata to a spreadsheet made review easy. The tool facilitated importing metadata, ensuring that personnel could search for and find important client-related documents.
- **Flexibility:** Having the ability to work in a spreadsheet proved easier to visualize the end state and make corrections. This facilitated planning the library structure and metadata in the SharePoint environment.
- **Reduced impact on business operations:** Using DockIT’s pre-migration validation tool, errors were tracked and fixed before the actual move, reducing the overall migration time and impact on day-to-day operations.
- **Responsive support:** The Vyapin support team was highly responsive to questions throughout the project, supporting McDaniel & Associates’ efforts to make the migration as smooth as possible. As Deborah related, “I really appreciate the responsiveness of Vyapin’s support. They are always ready and willing to listen. They were great with responding whenever there was a question or issue. If I was unsure about how something should work with the tool, I would ask and they would get back to me with an answer or explanation, usually within 24 hours.”

DockIT is providing ongoing value to McDaniel & Associates and is now being looked at for moving accounting department documents into the SharePoint environment. As Deborah explains, “When moving documents, it helps to stand back and look at where things are going to go and what metadata is going to be assigned. When you can put everything in a spreadsheet first, it makes it easier to see the big picture,

to make decisions on how you want libraries set-up, and be more organized.”

### ***Conclusion***

The DocKIT solution and the responsive customer service team at Vyapin helped McDaniel & Associates to maintain a level of reliability and consistency that is commensurate with its reputation for excellence.