

## CASE STUDY



### SAN FRANCISCO FEDERAL CREDIT UNION®

#### Customer Location

San Francisco, CA

#### Industry

Not for Profit

#### Platform

SharePoint Online  
SharePoint 2013

#### Critical Needs

- Granular migration to SharePoint Online
- Seamless transition to the cloud for users
- Migrate SharePoint content with all metadata

#### Solution

DocAve Migrator  
AvePoint Discovery Tool

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**-Abhiram Adusumilli,  
Web Developer, San Francisco  
Federal Credit Union**

## San Francisco Federal Credit Union Shortens Time to Migrate to Microsoft® SharePoint Online® by Two Months with DocAve®

### SUCCESS HIGHLIGHTS

- Selectively migrated legacy content to Office 365 – SharePoint Online, eliminating clutter that was not needed in the cloud
- Scheduled automatic migration jobs after office hours, ensuring no disruption to users and keeping server performance up
- Migrated content with full fidelity, maintaining correct document categorization in SharePoint Online

### CUSTOMER PROFILE

San Francisco Federal Credit Union is a not-for-profit, member-owned financial institution.

### THE CHALLENGE

As a not-for-profit the San Francisco Federal Credit Union, needed a cost-effective collaboration platform for its employees. While Microsoft SharePoint 2013 enabled the organization’s 250 users to share organizational updates and work together effectively on documents and projects, the hours spent on maintaining SharePoint began to add up. IT decided that Microsoft’s cloud offering, Office 365 – SharePoint Online, would provide them the same collaboration benefits of on-premises SharePoint but without all the maintenance.

However, the organization’s ideal transition to the Microsoft Cloud would require a third-party migration solution. IT wanted to be able to comprehensively look at its existing environment in order to design its SharePoint Online in an effective way. “To ensure success in Office 365, we wanted to be able to look at the sites and subsites we already had,” said Abhiram Adusumilli, Web Developer at San Francisco Federal Credit Union. “I wanted to be able to determine which data we wanted to move to the cloud and also what we could leave behind. Out of the box, there wasn’t an easy way to get that overview.”

The company also wanted the migration to disrupt users as little as possible and enable them to work as usual throughout the project. “We wanted to be able to migrate all of our metadata to the cloud,” Adusumilli said. “Once we get users fully in the cloud and they work with familiar documents, having that metadata will create a more seamless experience for them. SharePoint doesn’t allow us to do that natively, so we needed an outside solution.”

## THE AVEPOINT SOLUTION

For help during its journey to the Microsoft Cloud, San Francisco Federal Credit Union selected DocAve Software, AvePoint's enterprise-class platform for SharePoint migration. "We tested different migration tools in the market but ultimately went with AvePoint," Adusumilli said. "DocAve not only met our migration requirements, but AvePoint's technical support team also really impressed me. We had a lot of customizations in SharePoint 2013, so I knew their support would be key to the project's success."

Before moving anything to the cloud, Adusumilli used AvePoint's free Discovery Tool for pre-migration discovery analysis. The tool allows IT to scan its existing environment, providing insight into what data they already have and guidance during migration planning. "The Discovery Tool was very helpful in analyzing existing site collections, subsites, lists, and libraries," Adusumilli said. "I can see how many I have of each and even their sizes. If a list is about to hit the view threshold, I can flag that and plan accordingly in the cloud."

Using the Discovery Tool also showed IT where it could eliminate old sites and subsites that they didn't need to bring to Office 365. Then, with DocAve, the organization was able to selectively migrate only what was needed. "The Discovery Tool reports showed us test sites that I couldn't see before, which was helpful," Adusumilli said. "Once we knew what we wanted to move, I scheduled incremental migration jobs and completed our content migration within a week. With DocAve, I was able to restructure subsites where we had issues, and also some lists and layouts along the way."

Restructuring content would take some time to plan and execute. This is where DocAve helped save the day – its ability to schedule automatic migration jobs allowed Adusumilli to devote time to other aspects of the migration. "I began running migration jobs during business hours, but saw a slight slowdown on our server," Adusumilli said. "After that, I scheduled jobs to run after business hours and prevented any server performance issues. That way, I don't need to worry about those jobs during the day and users aren't impacted."

As IT worked to configure SharePoint Online, users continued to work in SharePoint 2013. To prevent any work from being lost after migrating the bulk of the company's content, IT regularly scheduled incremental synchronization jobs. "This way, our users can keep working with critical documents and

files without fear of losing any work," Adusumilli said. "We were also able to migrate our content with full fidelity, which was important to us. Being able to bring metadata meant that our documents continued to be categorized correctly and users could continue to work how they always had with on-premises SharePoint."

Another key to the company's migration success was support from AvePoint's technical team. Although other migration solution providers offered similar functionality, the quality of AvePoint's support was a major factor as the credit union's IT team made a decision. "I had a couple of issues during migration that technical support helped me figure out," Adusumilli said. "They were very responsive and easy to work with."

## THE BOTTOM LINE

With AvePoint's Discovery Tool and DocAve Migrator, San Francisco Federal Credit Union easily gained information on its source environment, created a granular migration plan, and conducted a full-fidelity migration to SharePoint Online – all while staying on schedule. The company's IT team was able to successfully migrate only desired content (including workflows and customizations) to the cloud. "I was very happy with the content migration," Adusumilli said. "Without DocAve, it would have taken at least two months longer to move all of our content to the cloud."

## ABOUT AVEPOINT

AvePoint is the Microsoft Cloud expert. Over 15,000 companies and 5 million cloud users trust AvePoint to accelerate the migration, management, and protection of their Office 365 and SharePoint data. AvePoint's integrated cloud, hybrid, and on-premises software solutions are enhanced by 24/7 support. AvePoint is a Microsoft Global ISV Partner and three-time Microsoft Partner of the Year Award winner. Founded in 2001, AvePoint is privately held and headquartered in Jersey City, NJ.

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