Quest® Enables Quick and Complete Migration of Data to SharePoint for the Richardson Company

The Richardson Company is a global sales training and consulting firm that has been providing comprehensive sales training solutions for 30 years. Richardson's team of over 130 experienced professionals is committed to helping sales and service professionals and their managers develop the knowledge, skills, and processes they need to exceed sales goals and build lasting, profitable relationships with clients.

Richardson relies on SharePoint to manage and share information among its associates worldwide. For help migrating information to SharePoint, Richardson called on Quest Software.

The Challenge

SharePoint is an increasingly important collaboration tool at Richardson. As more employees began to use the platform, Richardson needed to migrate additional information to SharePoint 2007 from two sources. The first was data from outside SharePoint in a file share. "We are bringing in more subdirectories from a corporate file share so that every department will be saving files into individual SharePoint sites," explained Melanie Rutberg, IT Manager at Richardson.

The second source of information was SharePoint 2003. Richardson saw value in upgrading from SharePoint 2003 to Microsoft Office SharePoint Server (MOSS) 2007 because of the enhanced document collaboration features.

Richardson found native migration tools too cumbersome and time-consuming for the company's purposes. To minimize user impact, the company planned to perform the migration over a weekend. "We had actually planned out a full 48 hours over a weekend to migrate the data," explained Rutberg. "And, using the native tools, this may not have been enough time."

In addition, the native tools simply did not provide the functionality Richardson needed for its migration. Richardson wanted a solution that would carefully log migration progress, including what had been migrated and the details of any failures. The company also needed a tool that would handle special characters (such as ampersands) in file names better than the native tools. Finally, the migration tool needed to preserve as much additional data as possible, including formatting, file permissions, and metadata like when and by whom the file was last modified.

The Quest Solution

Richardson evaluated several third-party SharePoint migration solutions. Quest's excellent reputation, along with Richardson's positive experience using Quest Spotlight on Exchange to monitor the company's messaging environment, were key factors that led the company to choose Quest's SharePoint migration tools.

To migrate content from its SharePoint 2003 server to SharePoint 2007, Richardson selected Quest Migration Manager for SharePoint. Migration Manager enables organizations to map SharePoint 2003 sites, document libraries, and lists directly to the desired location in SharePoint 2007. This feature, Richardson recognized, would enable it to easily maintain the data structure it had already built in SharePoint 2003.

To migrate content from its corporate file shares to SharePoint 2007, Richardson chose Quest File Migrator for SharePoint. File Migrator filters documents by type, size, date, and other criteria so only what is really needed is migrated and migration time is controlled. And file shares are mapped directly to the desired location in SharePoint 2007, so the data structure created meets organizational needs.

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– Melanie Rutberg
  IT Manager
  Richardson

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Overview

Headquarters

Philadelphia, PA

Services

Sales training and consulting

Critical Needs

To migrate files into SharePoint 2007 from file shares and from SharePoint 2003.

Solution

Quest® Migration Manager for SharePoint and File Migrator for SharePoint

Results

• Delivered successful migration in a fraction of the allotted migration window

• Retained critical source formatting and metadata, saving time for IT staff and end users

• Provided complete migration monitoring and logging of errors during migration

QUEST SOFTWARE®

Both migration tools feature an easy-to-use administrative console and job scheduler to manage and monitor the migration and get complete information for troubleshooting—a key feature for Richardson.

The Bottom Line

Quest's migration tools enabled Richardson to complete its migration in short order. The company had allotted a full 48 hours over a weekend for the migration, but only needed 15 percent of that time, "We ended up doing almost 90 percent of our migration within an eight-hour period," reported Rutberg. "I was very surprised that on the Sunday that we had allocated for the migration, I was at home doing personal things and not working. The time savings was huge for us."

Moreover, the Quest tools migrated the content intact, with very little data loss. "I would say it retained 95 percent of my formatting of the web site," said Rutberg. "In fact, [the Quest migration tools] retained the last modified date and the person who last modified it within the SharePoint environment. I would not have gotten that with the native tool—it would have just shown me who had imported the data."

Richardson was also pleased that its faith in Quest as a reliable vendor was rewarded throughout the migration. When the Quest tools did not provide a few functions that Richardson needed, Quest technical support responded quickly. "The tech support people actually rewrote some things that I needed done on the spot to help my migration go easier," reported Rutberg. "[The lead tech support person] was on the phone with me two to three times a day. He really owned the project, and he kept going back to his developers. He demonstrated a very big interest in ensuring my solution was the way I need it to be."

Now that the migration is complete, Richardson is exploring the ways Quest Site Administrator can help manage the entire SharePoint environment; Rutberg says she now provides site usage information to department heads. She looks forward to adopting Quest Web Parts for SharePoint, which will enable the company to get more from its SharePoint investment by building applications, menus, and dashboards through configuration rather than code.

About Richardson

For 30 years, the Richardson Company has been providing comprehensive, total sales training solutions to improve the performance of its clients' sales personnel. The Richardson solution reaches beyond the classroom, integrating diagnostic tools, eLearning, robust sales performance support tools, and sales coaching. For more information, visit **www.richardson.com**.

About Quest Software, Inc.

Quest Software, Inc., a leading enterprise systems management vendor, delivers innovative products that help organizations get more performance and productivity from their applications, databases, Windows infrastructure and virtual environments. Through a deep expertise in IT operations and a continued focus on what works best, Quest helps more than 100,000 customers worldwide meet higher expectations for enterprise IT. Quest also provides customers with client management through its ScriptLogic subsidiary and server virtualization management through its Vizioncore subsidiary. Quest Software can be found in offices around the globe and at **www.quest.com**.