Migrating files to Claromentis Documents

Overview

Migrating your company data and files to the Claromentis Document Management System requires careful planning to be successful. The purpose of this article is to provide you with an overview of the process.

Type of Migration

1. 'Spring Clean' rather than migrate

Most organisations use the deployment of a new Intranet as an opportunity to purge outdated files and documentation and only store the most relevant files and documents. Often, migration may not be necessary here, and you can simply set up a new folder structure and upload relevant files to the new system.

2.'Lift and Shift' Migration

You may have hundreds or even thousands of files in which it is impractical to upload manually and you would much rather have 'lift and shift' migration, meaning grouping the files at the destination that closely resembles the source. If Lift and Shift is your preferred method, then follow this guide to help you with the process.

### 3. Complex Migration with version history

In some situations, you may have years of version history that you wish to retain in the Claromentis Document Management system, it is a complex process, and in this situation, there will be a bespoke solution for you. Do contact us via change request to discuss further.

Migration Process
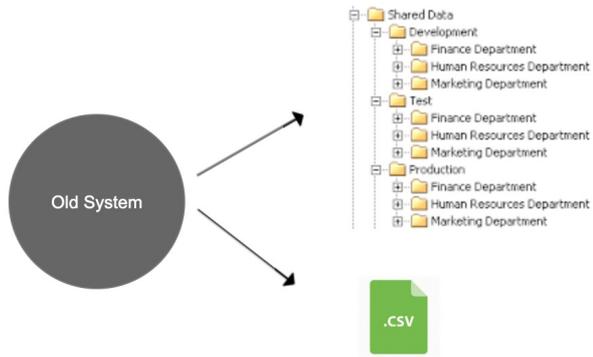
Step 1: Organise the files

Curate and organise your files into a logical folder structure that you wish to have in Claromentis. Once you have done this create a single archive ready to be sent to us.
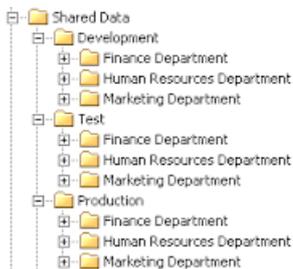
Step2: Prepare Document Metadata CSV file

Prepare a CSV (Comma Separated File) file containing metadata, tags, and a description of the file

Download CSV Template

Explanation:

path: Path of the document in the folder structure

title: Title or filename of the document

description: file description

tags: tag keywords (separated by comma)

owner_id: document owner (owner_id 1 is Administrator)

refcode: document reference code (optional)

type (metadata): example of metadata (optional)

area (metadata) : example of metadata (optional)

date(metadata): date must be stored in format YYYY-MM-DD (optional)

Step 3: Send the archive file (zip) to Claromentis

ON-PREMISE

For on-premise clients, you can simply upload the structure into the same server as Claromentis (zip is not required) or on the same network which Claromentis can access, then run a document import to upload these into the Intranet.
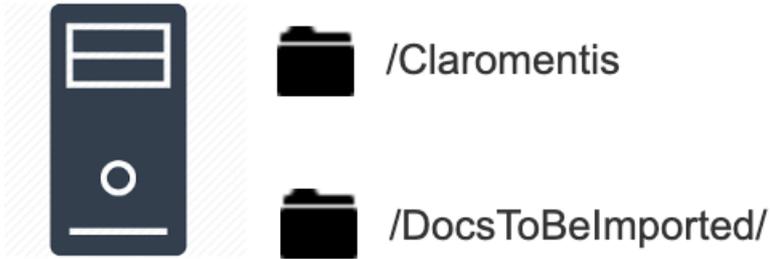
CLOUD

For cloud customers, you need to put these structure and files into a single zip file and send it to us along with populated CSV files for metadata.

Here are 3 possible ways to transfer a large amount of volume to Claromentis.

1. WeTransfer https://wetransfer.com/

It's free up to 2G Per transfer, Ideal for sending the file through the internet reliably for up to 30Gb.

2. Cloud Storage

Use popular cloud storage such as Dropbox, Box, Microsoft Azure, Google Drive, and Amazon AWS let us download your files.

3. Portable storage and send it by courier

Store the file into a flash drive or portable hard drive and send it by courier to us.

Step 4: Claromentis to perform bulk-import

A Change Request will be raised on your behalf (if it hasn't already) to track the progress.

Related Article

Migrating policies to Policy Manager

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Tags: advice, documents, intranet, files, migration