

## FIRM SECURITY

# Moving your files to SharePoint.

What to expect, what to prepare, and what to watch out for. A migration from your file server to SharePoint is not just a technology change — it touches every person in your firm who opens a file, shares a document, or relies on a folder shortcut to do their job.

## Zero

downtime for end users

## 100%

data & permissions preserved

## Phased

migration — never a single cutover

## BEFORE WE MOVE A SINGLE FILE

### **This is a decision that affects everyone in the firm.**

A migration from your file server to SharePoint is not just a technology change. It is a decision that touches every person in your firm who opens a file, shares a document, or relies on a folder shortcut to do their job.

Done well, it leaves you with better access, better organization, and a platform built for the way your team actually works today. Done without proper preparation, it can disrupt your operations, break access for staff, and create problems that take weeks to untangle.

This guide walks you through what we need to know, what you need to decide, and what to expect along the way.

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## DISCOVERY

### What we need to understand about your firm.

We will ask you questions at the start of this process. Some you will be able to answer quickly. Others will take some digging — and that is completely normal. The gaps are exactly what we are here to find before they become problems.

#### 01 Firm Profile

How long has your firm been operating, and how many staff and locations are involved?

#### 02 User Readiness

What is the age and technical comfort level of the people who use files every day? This shapes how we plan training and support.

#### 03 Local Champions

Is there someone at each office who can be the go-to person for their colleagues during the transition?

#### 04 Server Details

How old is your current file server, and what operating system is it running?

#### 05 Storage Volume

How much total storage are we working with — and how much of it is still actively used?

There are no wrong answers here. The goal is an honest picture of where you are starting from.

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## THE QUESTION MOST FIRMS CANNOT ANSWER

### Who has access to which folders today?

Most firms do not know the full answer. Permissions have been added over the years, mapped drives were set up and never revisited, and access decisions were made informally as the firm grew. That is not a criticism — it is the reality for nearly every organization running a long-standing file server.

The reason this matters: if we do not document your permissions before the migration, we cannot reliably reproduce them after it. Someone will lose access to something they need, and it will not be obvious why.

This is the part of the migration that takes the most time. It is also the part that protects you the most.

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## PRE-MIGRATION DECISIONS

### What we need you to decide before anything moves.

These decisions cannot be made during the migration. They need to be made — and agreed on — before the first file is touched.

#### 01 Folder Structure

What should your folder structure look like in SharePoint? We will help you design it, but you need to approve it before we start.

#### 02 Mapped Drive Replacement

What replaces your current mapped drives (the F: drive, S: drive, or similar shortcuts your staff use today)?

#### 03 Ownership After Go-Live

Who owns each area of SharePoint after go-live — meaning, who can grant access and is accountable for keeping it organized?

#### 04 What Stays Behind

What files are not coming over? Old archives, duplicates, and files no one has opened in years do not need to make the move.

#### 05 Internal Point of Contact

Who is your internal point of contact for staff questions during the transition?

#### WHY THIS MATTERS

*If any of these are left open, the project will stall — or worse, decisions will get made on the fly and create a structure that is harder to manage than what you started with.*

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## RISK AWARENESS

### The risks we want you to understand upfront.

We will work hard to prevent every one of these. But you should know they exist.

#### BROKEN SHORTCUTS

Staff who click a mapped drive every day will need to learn a new way to access their files. Without communication and preparation, this creates frustration and support calls on day one.

#### PERMISSION GAPS

Anyone whose access is not documented before the move may find themselves locked out of folders they rely on.

#### DUPLICATE FILES

Years of saves and resaves mean there are likely duplicate files and multiple versions of the same document. Moving them as-is just moves the problem. We will help you address this — but it takes time.

#### TRANSITION DISRUPTION

Even a well-run migration creates a period of adjustment. Your staff need to know what is changing, when, and where to get help.

“If no one inside your firm is accountable for the SharePoint structure once we hand it over, permissions drift back and folder organization deteriorates. We will help you put that ownership in place.”

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## THE PROCESS

### What this migration actually looks like.

A proper migration happens in phases — not as a single cutover. Here is what to expect:

#### 01 Discovery

We review your current environment: file structure, permissions, storage size, staff profile, and mapped drives. We document everything and identify the gaps.

#### 02 Design

We work with you to define the SharePoint structure, agree on ownership, and map out what replaces your current drives.

#### 03 Test Migration

We move a small, low-risk set of folders first to validate that permissions and structure land correctly before anything important moves.

#### 04 Phased Move

Files migrate in stages, not all at once. This limits disruption and gives us room to catch and fix issues as they come up.

#### 05 Parallel Access Period

For a defined window, both your old server and SharePoint are accessible. No one is stranded while the transition completes.

#### 06 Handover & Training

Staff are briefed in plain language — not IT language — on what changed and how to use their new environment.

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## TIMELINE EXPECTATIONS

### **This process takes months, not weeks.**

We know that is not always what people want to hear. But the firms that try to rush a migration are the ones that end up with staff locked out of files, lost documents, and a SharePoint environment that nobody trusts.

The time invested upfront — in discovery, design, and testing — is what makes the go-live clean.

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## WHERE WE START

### **A structured discovery engagement.**

We begin with a structured discovery engagement. At the end of it, you will have a written report covering your current file environment, a recommended SharePoint structure, a plain-English risk register, and a phased project plan.

No files move until you have reviewed that report and signed off on the plan.

#### WHAT YOU GET

##### **Discovery Report**

Current file environment audit, permission mapping, storage analysis, staff readiness assessment, and a recommended SharePoint structure.

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#### WHAT HAPPENS NEXT

##### **Phased Project Plan**

A plain-English risk register, timeline, migration phases, training plan, and ownership assignments — all reviewed and approved before the first file moves.

That is the right way to do this — and it is how we protect your firm throughout the process.

## Ready to start your file server migration?

FCI works with broker-dealers & branch offices, insurance carriers & agencies, and RIAs. Let us schedule your discovery session and take a clear-eyed look at what you are working with.

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