# Centerbase

# Preparing for Your Document Management Data Migration

We're excited for you to begin taking advantage of our new Document Management Solution that supports seamless functionality between your matters, documents, emails, billing, timekeeping, and Microsoft Office 365 and SharePoint!

To ensure your firm is ready to transition to our new Document Management, we highly recommend following the migration preparation best practices detailed below. *If you do not review these best practices, your migrated document data may not be organized according to your firm's needs, which can result in delayed user adoption and manual document reorganization.*

Before reviewing best practices, please note a prerequisite you must have to utilize new Document Management is ensuring that *Microsoft Log in (Single-Sign-On)* is enabled for your site.

If you see the *"Continue with Microsoft Account"* option on your log in screen, you're all set and will be able to utilize new Document Management!

**Centerbase**

Welcome

Log in to continue to Centerbase

Continue with Microsoft Account

OR

Email address*
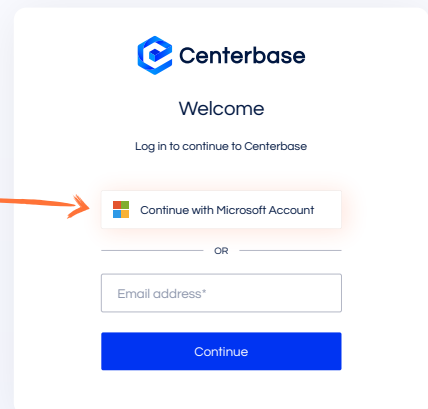
Continue

If you *do not see* the *"Continue with Microsoft Account"* on your log in screen, you do not have this enabled and will not be able to utilize new Document Management.
For instructions on how to do this, please visit here.

## Please review these best practices to ensure your firm is prepared to migrate and enabled to utilize our new Document Management:

**1  Mark matters your firm is not actively working as Inactive**

- The document migration process prioritizes Active Matters. By marking closed matters as Inactive, we are able to migrate the most important documents you need first.

- When deciding if a matter should be marked Inactive, keep in mind that Inactive matters are excluded from Global Search, some reports, and lookup fields.

- To review how to find and mark matters as Inactive, please read here.

**②** **Decide which documents you would like migrated to new Document Management**

- This is a good opportunity to consider alternate storage solutions for historical documents or archiving / deleting files that are no longer subject to retention rules.

- Ensure that any documents you do wish to migrate to new Document Management are stored in the Mapped Drive / File Explorer before the start of your document migration period.  You can do this by navigating to the matter's "File Explorer" tab, then dragging-and-dropping files to the appropriate folder.

**③** **Choose a firm cut-off date for using the Mapped Drive / File Explorer**

- To ensure the most updated versions of all documents are migrated to new Document Management, set a date on or prior to the beginning of your firm's document migration and communicate to all firm users that they can no longer upload or edit documents within the Mapped Drive / File Explorer.

- You must begin uploading and editing documents in new Document Management to ensure no documents or revisions are lost during migration. Once the document migration from Mapped Drive / File Explorer has begun, new files uploaded there will not be migrated to new Document Management.

**④** **Purchase any additional Microsoft SharePoint storage prior to your migration**

- Centerbase Document Management accesses files stored on your firm's instance of Microsoft SharePoint.  The amount of storage included in your firm's Microsoft subscription is 1 TB, plus an additional 10 GB per Microsoft license. Any required SharePoint storage beyond that incurs additional charges.

- Purchase any additional storage space needed prior to your firm's document migration. If you do not have the proper amount of SharePoint storage for your documents, your migration will not be successfully completed.

- To explore additional SharePoint storage options, please visit here.