

# How MSU Leveraged Document Extractor to Reduce Salesforce Storage and Improve Access to Files

| CUSTOMER SUCCESS STORY



MICHIGAN STATE UNIVERSITY

## Success Story

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### Challenges

Implementing Salesforce while, at the same time, replacing their legacy SharePoint system from the 1990s



### Approach

On-premises deployment of Document Extractor and separate migration of the many documents in the legacy SharePoint



### Results

Documents are now accessible from both the new SharePoint and Salesforce, which means improved document-sharing capabilities and significant cost savings

## PRODUCT APPLICATION



**Document Extractor**  
Built for the  
Salesforce platform™

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“Salesforce storage is incredibly expensive. Having Document Extractor as an alternative to what those fees might be... You can't really put a price tag on that!”

**Andrew DeGarmo**  
Director of CRM

#### Customer

Michigan State University

#### Activity

Higher Education

#### Country

United States of America

#### Product

Document Extractor built for the Salesforce Platform

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### A Little on MSU

Michigan State University (MSU), located in East Lansing, Michigan, is a leading public research university in the United States. Established in 1855 as the Agricultural College of the State of Michigan, MSU has a rich history and offers extensive academic and research programs. The university is also renowned for its athletic prowess, with the Spartans competing in the NCAA Division I Big Ten Conference, particularly excelling in basketball and football.

### The Challenge

MSU had quite a challenge: Implementing Salesforce in their University Advancement department while, at the same time, replacing their legacy SharePoint system from the 1990s, which was no longer adequate. The very high number of documents, Salesforce's high storage costs, and the necessity for university-wide document sharing without universal Salesforce access made it even more complex. The search for a new solution that could help with this transition began!

### Discovery of Document Extractor

Andrew DeGarmo, Sr. Associate Director of Web Application Development at MSU, discovered Document Extractor on the Salesforce

AppExchange. Its promise of seamless integration between SharePoint and Salesforce and the way the tool operated seemed to fit their needs perfectly, so MSU embarked on a trial that eventually led to the purchase of this solution for over 400 users.

### Analysing the Solution

When deployment started, the number of documents was 410,000, but that number kept growing daily. Given the high number of files involved, MSU chose an on-premises deployment of Document Extractor. The solution offered a cost-effective alternative to Salesforce's expensive storage by automating document migration from Salesforce to a new SharePoint. Having the documents in SharePoint aligned well with MSU's Microsoft stack usage, while the fact that Document Extractor left links to SharePoint where the Salesforce documents previously were meant that end-users' workflows did not change.

Of course, the documents that originally were in the legacy SharePoint system had to be migrated as well. This was done separately but also with the assistance of Connecting Software. DeGarmo shares some insights on their journey: ***"It's funny: I had thought that going from the old***

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*SharePoint to Salesforce was going to be the main bottleneck, but that actually went a lot faster than what I thought it was going to."*

### Deployment and Impact

With such a high number of documents, MSU naturally enjoys significant cost savings on Salesforce storage. *"Salesforce storage is incredibly expensive. Having this [Document Extractor] as an alternative to what those fees might be ... You can't really put a price tag on that!"* DeGarmo emphasizes.

The implementation phase involved configuring the new SharePoint document storage structure. This was done iteratively. *"It is more of a trial-and-error thing. Some of the details of how the business would need this set up were super fuzzy to begin with. I think we have it in a good spot right now, but, like anything, it is probably going to change!"* DeGarmo points out.

The software's unobtrusiveness and security were key factors in

its success. *"When we go and buy a third-party tool like this, it has to go through some pretty strict security auditing"*, DeGarmo highlights.

The fact that documents are now readily accessible from both SharePoint and Salesforce had a significant impact because document-sharing capabilities across the university are now available. DeGarmo highlights the ongoing need for adaptation and training to this whole new infrastructure, but not for Document Extractor itself. *"This product is virtually invisible; nobody sees what is happening behind the scenes,"* DeGarmo notes.

### Closing Thoughts

MSU's experience with Document Extractor reflects a successful digital transformation in document management, aligning with their goals of cost efficiency and widespread accessibility. As DeGarmo remarks, the solution met their needs in a non-trivial scenario, and the relationship that was created between Connecting Software and MSU remains solid to this day. *"Everything has been great."*, he concludes.

# Connecting Software



# THANK YOU

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