CASE STUDY

A Financial Oversight Agency migrates confidential content from OpenText LiveLink to the cloud

Problem

The Financial Oversight Agency migrates confidential content from OpenText LiveLink to the cloud.

Solution

Extract, analyze, test and package content for import into SharePoint Online.

Result

Controlled and reliable content migration ensures that all documents are moved to the cloud, that employees can quickly find and access all relevant documents and that security and compliance are streamlined and transparent

A Financial Oversight Agency regulates financial services firms and financial markets in Northern Europe. It works to ensure the optimal functioning of financial markets and to benefit the economy. The Agency oversees the conduct of tens of thousands of businesses, supervising nearly 50,000 firms. To fully support the activities of its thousands of employees, the Agency is moving its technical infrastructure to the cloud. Part of this strategic transformation included migrating document management from OpenText LiveLink to Microsoft SharePoint Online.

Safeguarding data integrity

Content migration was a key part of the digital workplace strategy and affected everyone at the organization. Ensuring user experience and a seamless way of working during and after the transition was therefore critical. The Agency was keen to ensure that all content was migrated securely from the old to the new cloud-based document management system. It also needed to ensure the data integrity of the 17 million documents being migrated. Given the nature of the Agency's activities, the focus had to be on operational priorities. Data availability is key to being able to respond in real time to protect consumers. As a public body, the Agency also needs to respond quickly to requests for information. Employees need to know where data is at all times, and for sensitive issues, data protection is paramount. The project was part of a wider infrastructure transformation to the cloud. As a result, there were many interdependencies as well as a strict timeline.

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Due to the scale and importance of the content migration process, the Agency decided not to manage the project in-house; they did not have the resources to take it on. Xillio was selected as the migration partner and worked closely with this Finacial Oversight Agency and their delivery partner North Highland, to prepare the migration process from OpenText LiveLink to Microsoft SharePoint online. The business was closely involved in the mapping.

● Streamlining retention and security

Xillio extracted and analyzed the content in LiveLink and found the relevant metadata. In the source system targeted searches were difficult and time-consuming. In close cooperation with the Agency, a structure was set up to enable more targeted searching within SharePoint Online. Once the analysis was complete, Xillio prepared the content for migration. This process is highly automated, which helped to quickly identify any inconsistencies or errors to ensure that the project remained on schedule.

Xillio was able to show that the project had achieved 100% coverage and security with summaries and reports. And whenever an issue was flagged, it was resolved promptly. During the project, Xillio also enriched metadata to improve insights via audits. In addition, retention rules are now automatically applied, ensuring control, enforcement and transparency.

Besides streamlining retention, security has also been improved; all documents now have their own ID number,making it easier to keep track of their history.

● Well-documented process

At the same time as the migration process, Xillio also analyzed the content stored on file shares and transferred it to an archive. After a detailed analysis of the 21 million documents using Xillio's Insights tool, the content was mapped, and all content types were identified. This also ensured that no duplicate files were included. The various file types were then transferred. The fileshare split and migration was used to become compliant, as the Agency had already achieved in SharePoint Online.

● Full control

Despite the complexity and scale of the project, the content migration process was completed on schedule. All documents are now accessible in a very user-friendly environment. In addition, the Agency now has more control over the content, and employees can easily search for and quickly access the information they need to do their jobs. From a management perspective, the Agency is now fully in control. Thanks to the added transparency, the organization is guaranteed to be compliant.

About Xillio

Every organization wants to be agile. But if your content is scattered across legacy systems, that's not possible. Xillio helps large organizations get a grip on their enterprise content. We migrate and structure information from outdated environments to Microsoft 365 and prepare it for secure management, smarter collaboration, and AI applications.

With our combination of tooling, knowledge, and flexibility, we ensure that even the most complex migrations run smoothly.