

CASE STUDY

Community Preservation Corporation Migrates Loan Documents to Microsoft SharePoint Online with Ease



Challenge

Migrate content from FileNet to Microsoft SharePoint Online

Solution

Extract content, perform tests and migrate to a new intuitive document structure on the Microsoft 365 platform

Result

Controlled content migration from FileNet to Microsoft SharePoint Online gives employees easy and intuitive access to structured loan content with improved usability

The Community Preservation Corporation (CPC) is non-profit organization, with Head Quarters at NYC in USA, that provides financing for affordable housing and community revitalization. It provides a full suite of construction lending, permanent lending and equity investing products. Working alongside government agencies, local community groups, banks, and other lenders, CPC creates customized loan opportunities to stimulate multifamily housing projects. Today, it is the largest CDFI dedicated exclusively to investing in multifamily housing, having invested more than \$12 billion to finance the creation and preservation of more than 220,000 units of quality housing in neighborhoods across New York State and beyond.

To support loan processing, all relevant documents were stored in IBM's FileNet with Navigator as the user interface. In 2023, CPC chose to migrate all document content to Microsoft SharePoint Online to leverage its cloud capabilities, improve user experience and enhance search capabilities.

CPC used a legacy application to support the loan process, and related documents were stored in the content management system FileNet. This included documents such as contracts, legal documents relating to finance, conditions, investors, real estate, and asset management in various formats. Employees could access this content via this platform. Following the decommissioning of the legacy application, FileNet was used as a standalone application to upload, store, and access documents.

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Archana Bavaswamy Rao, Assistant Vice President, Director Business Data Architecture and Development at CPC, explains: “The usability and search options within FileNet were limited. There was no clear structure, so it took employees valuable time to find the documents they were looking for. There were also limited options for customizing the system. In addition, our IT team had to devote a relatively large amount of time and resources to managing the system.”

● Familiar look and feel

To simplify the day-to-day management of content and to improve the user experience, CPC decided to migrate its content to Microsoft SharePoint Online. The organization was already using Microsoft365 and had a SharePoint environment in place. One of the advantages of this move was that employees were already familiar with the look and feel of Microsoft applications. Because they were already using SharePoint, the transition was smooth and user training could focus on customized features for document uploads and searching. In order to safeguard the integrity of the loan related content across the organization, all existing FileNet documents had to be migrated to the new platform.

● Content analysis

The project was essentially a ‘lift and shift’ migration of the documents and metadata. Archana Bavaswamy Rao explains: “We knew that some of the content were ‘ghost’ content without physical files attached and legacy metadata needed to be applied consistently while moving to SharePoint. Hence we started with our own content analysis to assess the scope of the migration. It wasn’t easy to estimate the exact scope because we had few metrics about the environment. CPC’s FileNet implementation was OnPrem and not on IBM’s Cloud, so there were no IBM provided standard reports, while it was expensive to write custom code to extract data and build metric reports. Hence, a simplified database analysis exercise was performed. From this analysis, it turned out that

we had approximately 1.2 million documents in various formats - PDF, Excel, Word, Outlook, ZIP, and XML. We also identified key metadata that was useful information. This provided quantitative scope and complexity definition for the actual migration.”

● Business continuity

CPC is a relatively small organization with limited IT resources and no technical expertise of SharePoint. In collaboration with consulting partner EisnerAmper, a reliable third party was selected to carry out the migration. “Xillio had good references and backed them up with a clear approach. Based on our analysis, they offered a realistic roadmap. They also provided useful feedback on planning at an early stage, so we were able to develop an effective project plan with clearly defined phases. This was important to us because we wanted to maintain business continuity. A migration shouldn’t impact our business processes.”

● Migration & Deployment

The migration process was collaborative with EisnerAmper managing the project for CPC, CPC providing clear inputs to Xillio’s technical team and Xillio’s project manager maintaining transparency on milestones completed or in progress. “Xillio’s technical team had a sound Plan B to invoke to action when the initial Plan A for SharePoint had issues waiting on Microsoft’s resolution on certain errors encountered.”

After complete source extraction and integrity testing, the content was successfully transferred to SharePoint. Any minor problems were always resolved in close consultation with Xillio’s project manager. Issues were well documented, and they were taken to closure with analytical test results. When necessary, Xillio’s in-house specialists were called in to ensure a quick turnaround.

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● Improved user experience

In the new environment, all documents were sorted into unique loan number specific folder, making them easy to aggregate and access – achieving a key objective of the migration. Archana Bavaswamy Rao: “We wanted to improve the user experience. Together with Xillio, we made sure employees benefit from the Microsoft folder and subfolder structure and the user-friendly search function. All with the familiar Microsoft look and feel. Loan-related documents are now much more accessible, and it’s easier to upload content. We want people to be able to do this with as few clicks as possible, so they can focus on their core tasks. Uploading documents used to take at least five clicks, now it’s just one.”

Searching for documents is also much easier in SharePoint. Since the index is built over time, it was important to take the time to test this and simulate user experience before the new platform was made available to end users. To accelerate adoption, end users were involved early in the process. For example, a transition council of key users was set up to provide user feedback throughout the process.

● An eye for technology and business

Archana Bavaswamy Rao looks back positively on the project and the cooperation with Xillio. “Xillio clearly understands the migration process from A to Z. Everything was well prepared, and the employees were also closely involved. Combined with Xillio’s knowledge and experience, the migration process went as expected. The fact that they not only have an eye for the technical issues but also understand the business aspects is a real bonus. That certainly contributed to the improved user experience we achieved with SharePoint. Our people can now serve our customers even better and faster.”

About Xillio

These days, your organization needs to be agile to stay relevant. The same goes for your enterprise content. But where to start? The more complex your enterprise content, the more daunting it seems to take the leap.

That’s where we come in. With over 20 years of experience, Xillio is your trusted partner for managing complex, high-volume content migrations within the Microsoft ecosystem. From metadata transformation to link redirection, our experts ensure your move to Microsoft 365 is smooth, compliant, and future-proof.

