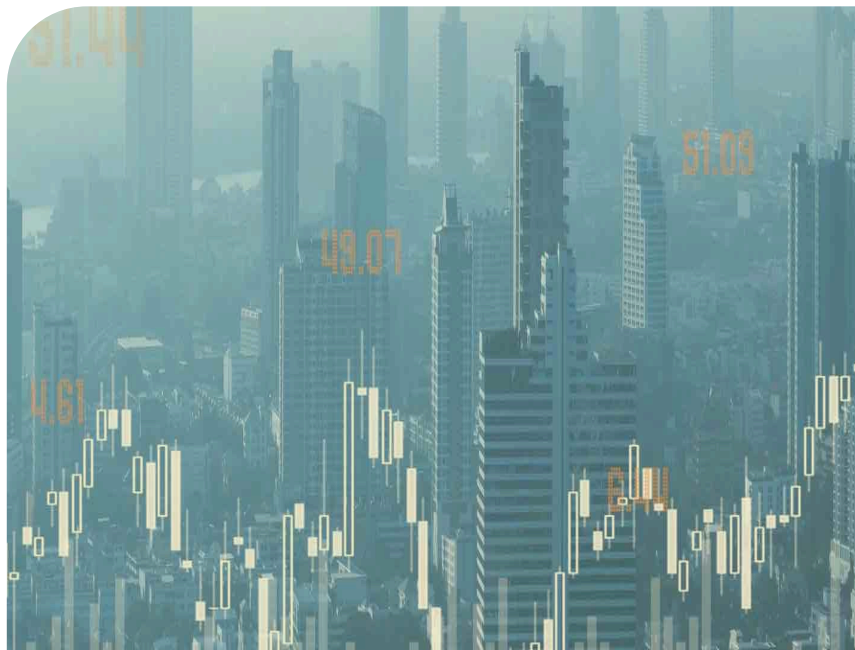


CASE STUDY

International Exchange Company Migrates Unstructured Content from FileNet to Microsoft SharePoint Online



Challenge

Migrate diverse content from a scanning application from FileNet to Microsoft SharePoint Online

Solution

Content analysis and the structuring, mapping and testing of content, including migration and advice on the best setup for the target system and retention

Result

Content analysis and migration from FileNet to Microsoft SharePoint Online provides end users with a clear document structure, secures data from a scanning application and makes that data easily accessible across the global organization

An Exchange company that is headquartered in the US and operates all over the world, offers a variety of investment options for its global clients. The company is driven by continuously providing innovative solutions to help its clients to stay ahead in the financial market. In order to ensure that data within the organization is stored in compliance with legislation and regulations, and to make this data easily accessible, signed documents have been transferred from a dedicated FileNet scanning application to Microsoft SharePoint.

As a result, over 400,000 documents were migrated from FileNet to Microsoft SharePoint Online in a reliable and efficient manner. Curious about the whole story?

● Mapping the content

The first step was to identify the content. Corné van Leuven, co-founder of Xillio, explains: “This was a labour-intensive process, as it sometimes required looking at certain files at document level. Once we had conducted a detailed analysis using our tool Xillio Insights, we mapped the content and identified all the content types. This included, for example, invoices, identity documents and contracts. This inventory also included dating. The analysis showed that there was a lot of variation, and in many cases, metadata was missing. Hardly conducive to transparency.”

“After conducting a detailed analysis with Xillio Insights, we mapped the content and identified all the content types.”

Corné van Leuveren, Co-founder at Xillio

● No lift & shift

To enhance content control, the content structure was defined in close consultation with the client's IT department; this also included mapping and business rules for content migration. At the start of the project, no decision had yet been made about the target content system. The global organization uses both Salesforce and Microsoft SharePoint Online. Given the nature of the content and the access requirements, Xillio recommended a migration to SharePoint Online. Xillio has extensive experience in migrating from FileNet to SharePoint and was able to help the company set up the target system. Although this was not a lift and shift project, content was automatically transferred to the new environment by content type. As well as adding additional metadata fields, Xillio also included the relevant retention rules in the setup. It is precisely these additional consulting services that underline Xillio's added value.

● Best practices

After careful preparation and analysis based on Xillio's best practices, the unstructured data was migrated on time and on budget. All content is now easily accessible to the company's employees; thanks to correct metadata and a logical structure, they can now find and access files quickly. And, of course, the new content structure and rules also apply to new digitized documents.

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.