

CASESTUDY

BUILD AMERICA MUTUAL



## EASIER RECORDS MANAGEMENT, THANKS TO DOCUMENT SETS IN SHAREPOINT

### CHALLENGE

Migrating enterprise content dispersed across 41,000 Alfresco sites to Microsoft SharePoint

### SOLUTION

Designing a new SharePoint environment and implementing records management via Microsoft Purview

### BENEFITS

Successful content migration and integration, for easier records management within the Microsoft suite

### ■ Migrating to Microsoft SharePoint to meet evolving content management needs

For many years, Build America Mutual relied on Alfresco as their primary enterprise content management system. Although they were in the middle of a conversion to cloud-based Alfresco, they decided to look at potential alternatives.

Measuring at almost 2TB, the overall volume of enterprise content to be migrated wasn't overwhelming per se. However, it was dispersed across numerous sites within Alfresco, presenting a complex scenario for both content migration and records management. This experience underscored the need for a more flexible and integrated solution to meet the customer's evolving enterprise content management needs.

### ■ Devising a strategy for simplified business processes

In addition to their content migration request, Build America Mutual also asked us to help them simplify their records management. In order to do both, we needed to design a user-friendly SharePoint environment

*"It was a pleasure to work with a company that understood our needs. From the very first conversation, it was clear they knew exactly what they were doing, and how to do it well. They asked all the right questions, delivered on their promises and completed the project on time. That expertise was an important part of why we wanted to work with Xillio."*

*David McIntyre, CITO, Build America Mutual*

that would support both the insurance company's operational and internal business processes. Any enterprise content relating to insurance was spread across approximately 41,000 Alfresco sites. However, the customer had also set up 116 additional sites in Alfresco, used to store internal documents.

After analyzing the enterprise content and the folder structure in Alfresco, the project team settled on a strategy that would migrate content from each Alfresco single-risk site to a new document set in SharePoint. Any redundant content was excluded from the migration entirely.

### ■ Rewriting Alfresco links in SharePoint

Another complicated project element involved approximately 200 links between the different Alfresco sites. Rather than simply redirecting them to SharePoint using the Xillio Redirection Service, our Xillio experts were asked to rewrite the links entirely. This approach allowed us to clean up and optimize the links.

Our team was able to consolidate the many sites, creating an easily accessible content structure in SharePoint. And with each document set now containing optimized metadata automatically linking to its underlying documents, record management and document retention are much more efficient. David McIntyre: "This is a perfect solution for us."

### ■ Technical expertise across the project team

Build America Mutual's Finance and HR departments used separate sites with restricted-access folders for

each of their nearly 100 employees. From a business case perspective, it was deemed more beneficial to migrate this content without individual user permissions, rather than write separate optimizing automations for each folder. Fortunately, the Build America Mutual team already had the in-house technical expertise to manually configure the user permissions in the new SharePoint environment.

The Xillio team also provided a full SharePoint implementation. This also involved training users on how to navigate the new environment themselves, rather than rely on external consultants to make changes. David McIntyre: "The Xillio team provided exactly the user support we needed." The in-depth approach ensured Build America Mutual employees could leverage SharePoint with minimal support from Xillio.

### ■ Smooth sailing

Although the migration project took longer than average, the extended timeline fostered a positive working relationship and allowed for thorough discussions on implementation strategies. Throughout the project, we met with the customer multiple times and adapted our migration strategy to address emerging challenges, ultimately staying within the estimated timeline. David McIntyre was impressed with the team's dedication: "The time difference was never an issue for Xillio; they always accommodated us." This collaborative effort across time zones highlighted the importance of partnership and expertise when navigating complex content migration projects.

## 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. Our migration experts are ready to help your organization shift seamlessly into the hassle-free cloud environment of Microsoft 365. It's time to unlock your organization's full potential. Let's liberate your content!

Let's go **xillio** 