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ACCOUNTING FIRM CROP CONSOLIDATES MULTIPLE LEGACY ECM SYSTEMS WITH THE HELP OF XILLIO

CHALLENGE

Content migration from various databases and network drives to a centralized environment in M-Files

SOLUTION

Analyze existing documents, map structure, create business rules, transform and import into M-Files document management system

RESULT

A complete content analysis laid a firm foundation for the efficient migration to M-Files document management. Centralized, structured storage of all documents improves control of the content environment, while also facilitating access management and governance

CROP accountants & consultants enables entrepreneurs to concentrate on conducting their core business. The organization combines a complete service offering for accountancy and tax advice under one roof. More than 300 professionals across multiple branches provide auditing and financial statement compilation services. They also advise organizations on growth plans, financing, business succession and data security. The documents that CROP creates and deploys for the various branches of its client services were spread across a range of databases and systems. To store these documents uniformly and improve accessibility, CROP wanted to map, structure and migrate all its content to a single document management platform. It also uses M-Files for all internal documents.

■ Various source systems

The documents that CROP's accountants and tax consultants use for their services were stored in a range of source systems and across multiple locations. As CROP IT Manager Sigurd Felix explains: "Our content environment was fragmented. Documents for consultation weren't stored in a uniform way, and we were using different systems, each with their own storage structure. Individual branches also had their own procedures. This meant that so many documents in PDF or

Office format, such as financial statements, tax returns or pay slips, were stored across multiple locations as copies, and they weren't always accessible to the entire client team. There was a lack of any clear structure and metadata for easy searching. All this hampered mutual collaboration."

■ Analysis

CROP asked Xillio to analyze all the content in the various systems in order to gain some sort of insight. "We wanted a clear overview of our content," notes Felix. "Xillio performed an inventory of the documents and files in the databases and on the network drives with their Xillio Insights analysis tool. This yielded an insight into what content is where, including discovering duplicates. The results of the analysis gave us a starting point for the process of deciding on a central document management system." As Felix recalls: "The current situation really wasn't ideal for a number of reasons. For example, it was difficult to enable accountants and tax consultants to reuse information, even though such cooperation is one of our customer benefits. And because our tax consultants use supporting documents with the annual figures that accountants create for tax returns, another issue was that they often couldn't quickly find or access that information."

■ Security concerns

Felix noted that there were other risks alongside these practical inconveniences, including when it came to security, storage and backups. "Naturally our IT environment is fully secured, but internally we couldn't always control access to specific documents. There could also be duplicates in someone's e-mail box or home directory, so it wasn't always clear which was the most recent version of a document. Retention periods and the GDPR rules also mean that some information must eventually be destroyed, and that's when you need to know exactly where everything is. Last but not least, duplicate archiving also entails extra costs for storage, and extra lead time for backups."

■ Optimized governance

To improve the control of the content environment, CROP wanted a document management system where all documents are stored in one central location and in a structured manner, and where they can easily be viewed. Other important requirements were effective access management and optimal governance. Felix: "The M-Files document management platform was the best match for our requirements. It's a platform which is metadata-based, making documents accessible through several views. For example you can find a document based on a customer name or project, and that's very efficient for the end-users. You can also set access security for the records very precisely in the DMS, without the complexity of a network folder structure, for instance. Another advantage was the powerful API for the necessary content migration."

The next step was to migrate the content in the source systems to M-Files. First it was necessary to define the

metadata, because CROP had several source systems. "We did the metadata mapping of the documents in the source systems ourselves because we are very familiar with our content environment, and we know how the end-users actually work with the documents. We created our own taxonomy, which also formed the basis for the actual migration of the content to M-Files. Here Xillio performed the extraction, deduplication and transformation, including creating the business rules to store the data in the right place in M-Files."

Shifting gears quickly

It was a distinct advantage during the migration that Xillio has extensive experience in migrations to the major DMS vendors. "A complex migration doesn't work with a standard approach and tapping into the M-Files API. One benefit was that we already had a good view of the content with Insights. The combination of these insights, our own knowledge and Xillio's proven methodology allowed us to shift quickly, and we managed to make the metadata correct, deduplicate content and migrate the relevant documents and all the metadata along with them."

Because business did need to continue uninterrupted throughout, the migration was accomplished in two phases. "First we migrated the permanent data, such as certificates of incorporation and contracts – documents which hardly change but which are consulted frequently. The project files were transferred in the second phase. Now we are live with M-Files thanks to good coordination and consultation. Of course we encountered some challenges during the process, but we were able to solve them quickly in collaboration with the experts from Xillio."

Constructive cooperation

The new situation means that all documents are now stored in accordance with a uniform structure, and they are available centrally. In conclusion, Felix notes: "Our staff still have to get used to a different way of working and a new system, but this content environment offers everything we need to work more efficiently and to cooperate better. In fact, because we have held our processes up to the light and we created a taxonomy for our file structure, now our staff are far more involved in our services outside their own roles. Management and governance are also better organized. In making all this happen, it was really pleasant and practical that Xillio fully understands all the process phases of a migration. Today we can look back on a very constructive collaboration."

With 18+ years of project know-how in executing successful content migrations for enterprise and public sector clients around the globe, Xillio is your go-to partner for content migration software and services. Xillio is headquartered in The Netherlands. For more information, see www.xillio.com.

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