



CASESTUDY HYLAND ONBASE

GLOBAL PROFESSIONAL ACCOUNTANCY COMPANY MIGRATES FROM HYLAND ONBASE TO SHAREPOINT ONLINE



CHALLENGE

Migration of content from Hyland On-Base to Microsoft SharePoint Online

SOLUTION

Create metadata/structure mapping, analyze, test, package, and troubleshoot content for import into SharePoint Online

RESULT

Development-based content migration to Microsoft SharePoint Online gives end-users easy access to documents, improves control over data and data governance, and contributes to better compliance with privacy laws and regulations

An international company for financial professionals supports the professional practice for its members. The organization promotes and monitors good professional practice and quality with education and audits. To this end, the organization stored relevant content for its activities and members, in a repository based on Hyland's OnBase enterprise information system. This also encompassed membership information, including privacy-sensitive and confidential data, such as Personal Identifiable Information (PII) and accreditation data. Employees and members can access specific content through 20 to 30 different apps.

■ Compliance risks

The existing content framework was extremely large and complex. The environment included 9 TB of data spread over more than 32 million items, divided over 54 different document categories. The organization faced several challenges because it was using an older version of Hyland OnBase. As the client's Microsoft 365 Consultant explains: "The size and complexity of the environment made management and maintenance difficult and expensive. The functionality of the software also had limitations. OnBase has no mapping scheme, and only limited options for governance. There was no transparency on data sources

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and data management. This created unacceptable problems for compliance with laws and regulations, such as GDPR and other global rules. The organization is legally accountable for the storage of regulated data, and malfunctioning reporting created unwanted risks.”

Other challenges involved the user experience. The On-Base version the organization used had limited content discovery options, resulting finding specific documents complex and time-consuming. Neither did Hyland’s overall support and service satisfy expectations, and upgrading to a new version of OnBase would require a substantial investment. So, a move to Microsoft SharePoint Online seemed an obvious choice. Its functionality is richer and because this environment was already in use, the organization had additional storage available to store content without extra cost.

■ Development-based migration

It immediately became apparent that the existing environment had several limitations when preparing for the migration to Microsoft SharePoint Online. As the client’s Microsoft 365 Consultant points out: “Data and metadata were incomplete and the correct mapping was missing. This meant underlying documents like PDFs, Word files or JPEGs were not properly linked and were not available for end-users. This first had to be properly organized and repaired to enable a successful migration. It was very clear that a lift-and-shift migration would not work. We needed a development-based migration from Hyland 2017 to SharePoint Online.”

■ No lift-and-shift

The IT team focused on fixing the problems with the data model and mapping, but needed an experienced partner for the content migration itself. It was clear that this would not be a standard migration, and they needed a partner experienced in development-based migrations. From the very first contact it became clear that Xillio does indeed have a very clear understanding of data, data mapping, and data merging, from source to target system. The required combination of expertise, tools and capability was evident in the way the experts answered technical questions. “Without Xillio, we would have never been able to get the metadata-structure mapping right.”

■ Proof of concept

The original plan had been to use the Hyland API, but some of the binaries were corrupted. This could have been overcome with an upgrade, but the customer rejected this on cost grounds. So Xillio was also asked to help in analyzing the extracted data to check whether the mapping was correct. In the proof of concept, the first sample that Xillio produced looked complete, but in SharePoint Online some omissions became clear, such as duplicate data and illegal file names. This corrupted the integrity of the migrated data, and so it was decided to rework the data mapping. The IT team created the scripts to solve this, with valuable help from the Xillio team that delivered the insights in the data.

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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■ No impact on daily business

Despite the start-up problems, the migration's turnaround time was about six weeks. Xillio worked via remote access, within a secure environment. This was necessary to ensure the security of the organization's environment and data, as well as compliance with privacy and security regulations throughout the process.

The client's Microsoft 365 Consultant states: "Xillio's understanding of the complete migration process turned out to be hugely effective. Not only were its experts able to identify problems, but often they could also provide the right solutions quickly. They demonstrated their flexibility, responsiveness and availability during such hiccups. At one point some two million files per day were being migrated. And the great thing was that the daily business was not interrupted; the migration itself had no impact on the end-users, internally or externally."

■ A realistic growth matrix

The organization has now regained control of the data and underlying structure following completion of the migration with Xillio. Because the data and mapping are now properly organized and documented, users can take full advantage of Microsoft SharePoint Online's rich search functionality. The client's Microsoft 365 Consultant adds: "An additional benefit is that we now also have a good picture of the current data situation. Based on metadata like last accessed date, creation date and frequency of access, Xillio was able to provide

us with a realistic growth matrix for data. This prognosis helps to scale our cloud environment in Azure, and to optimize investments. All this shows that Xillio not only knows exactly how a migration process works, but also that it has a fundamental awareness of just how important data and content are to the business of a knowledge organization."

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