



CASESTUDY INTERNATIONAL EXCHANGE COMPANY

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.

The scanning application was used specifically to digitize and store signed documents, which were then automatically stored in FileNet. However, this was done without a clear structure; the scanning software did not provide consistent metadata or file names, which made it difficult to locate and access this often confidential data. Additionally, the lack of overview hampered the organization's ability to demonstrate compliance with prevailing laws and regulations. The challenge here was to secure and migrate the content - over 400,000 documents - in a reliable and efficient manner. To do this, the company turned to the experts at Xillio.

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■ Mapping the content

The first step was to identify the content. Corné van Leuveren, 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.”

■ 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.

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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