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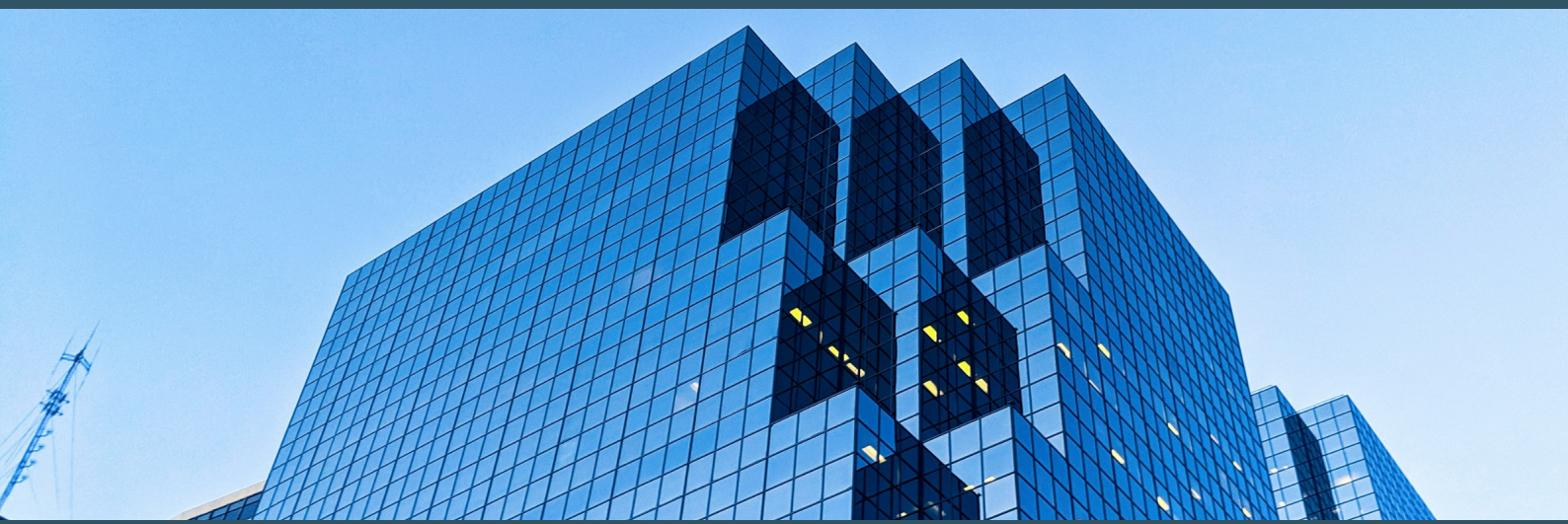
MAJOR US-BASED UTILITY COMPANY MIGRATES CONFIDENTIAL TAX FILES FROM LEGACY ECM PLATFORM TO PRIVATE FILE SHARE

CHALLENGE

Content migration from a legacy ECM platform to improve storage reliability

SOLUTION

Extract, analyze, test, and migrate content to a file share environment

RESULT

Content migration and folder structure of tax documents improves control over data, gives end-users easy access to documents, and realizes better compliance with regulations

A major utility company services its residents and companies in the United States. Integrity and ethical behavior are at the foundation of all activities to realize these goals. The company's tax documents were stored in a legacy Enterprise Content Management system that didn't offer the required stability and predictability. The organization decided to migrate the content to a file share on the corporate network to meet internal and external compliance rules, enhance version management, and improve usability.

■ Unreliable storage

The utility stores nearly 3 TB of data related to direct and indirect tax to support the tax department's activities. The content includes tax plans, supportive documents and legal contracts from mergers and acquisitions, all stored in formats like PDF, Microsoft Word and Excel, and email. The Project Manager responsible for the content migration, explains: "Tax documents contain very sensitive and confidential information, so the storage must meet several security and compliance rules and regulations. Storage in the existing ECM system proved unreliable, and tests showed that documents were not always stored correctly. This risk is unacceptable for such confidential documents. This situation also impacted employee productivity."

Increase control

It proved impossible to solve these problems within the existing platform, where the systems appeared to be both unpredictable and unstable. As content will be migrated to SharePoint Online in the future, the company chose to migrate to a file share on the corporate network as an intermediate solution. "The aim was to increase control over tax data, and to be sure that documents are stored reliably and logically. Initially we decided to put the content on a file share, though this was an interim solution because eventually we want to house the documents in Microsoft SharePoint Online, a migration we will carry out later in phases. For now it was important to migrate the data efficiently and completely."

Clear roadmap

The tax department works in close cooperation with the corporate IT division for system and application management, upgrades, security, and connectivity. Together they put out an RFP for a professional partner who could guide and execute the content migration. "It was very important for us that this partner could oversee the scope of the project and could live up to the tight schedule. Xillio's proposal showed instantly that they had a good understanding of what was intended, and they had a clear roadmap. They pointed out what was sensible in the process, and what was not. All this underlined the impression that they are professionals who specialize in such migrations."

Best in class

The project was a 'lift and shift' migration. The content was extracted by Xillio via an API and direct database access, analyzed, and moved to the file share. This succeeded without any loss of files, which was evident from the validations done by Xillio and the utility itself. Xillio offered practical advice and guidance for tuning the folder structure. "Together we created a best-in-class folder structure. All documents have been transferred properly, with the correct structure, and now the naming has also been updated. The file share had limitations on the length of the document names, so the file names had to be shortened. This was done in close cooperation with the users."

Making different time zones work

Xillio had remote access to the secured utility's environment during the migration project. This required close coordination with the cybersecurity team and was needed to ensure the security of the organization's environment and data, as well as compliance with privacy and security regulations throughout the process. "It was an advantage that the team could work in different time zones. This actually allowed the project to proceed continuously, which helped speed things along, without compromising output quality. There was a daily handover which ensured continuity, and things were coordinated in good consultation where this was needed. Communication was smooth and very open, so that any bottlenecks were solved both flexibly and quickly."

■ Tight schedule

Xillio developed a detailed schedule for the utility company, and followed an incremental approach. "First there was an initial alpha migration, and these files were transferred and checked. Then with the delta migration at a later stage, only changes were included, so that we could meet the tight schedule. An extra benefit from this approach was that the users experienced no downtime."

■ Smooth process

The professional and constructive partnership with Xillio's experts enabled the migration process to be completely transparent. "We had a good overview at each step, and where there were any problems they were always solved very adequately. All this enabled the migration to run efficiently and smoothly. The result is that all tax documents are now stored reliably, and employees can easily store and view relevant documents. In this respect, the goals were achieved within time and budget. Xillio made a very positive impression with their expertise and professionalism."

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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