

Worldox to SharePoint Office 365 Migration Business Case Study

Company
American Registered Investment
Advisory (RIA) Firm

Industry
Management Services

Country
USA

Solution
Migration from Worldox to
SharePoint o365/OneDrive

Technologies
Worldox, SharePoint o365,
OneDrive.

Background

The company is an American privately-owned, registered investment advisory (RIA) firm headquartered in Farmington Hills, Michigan. It provides personalized wealth management and asset management services, serving as a fiduciary to nearly 800 client relationships with over \$1.1 Billion in assets under management.

It's Wealth Planning process benefits from the practical expertise of our advisors. It addresses the challenges facing his clients' financial situation and provides customized solutions. They guide clients down a pathway toward achieving their long-term objectives.

Our client determined that it was important for them to consolidate their existing Worldox content management platforms into a singular cloud-based solution. Their objective was to migrate away from the existing Worldox platform in favor of Microsoft's SharePoint Office 365 hosted solution. This migration would allow them to decommission an on-premises Worldox system that was difficult to support internally.

The project involved the migration of 100 thousand varying types of documents from Worldox along with the content's associated Cabinets, Taxonomy, Metadata & Permissions over to SharePoint Office 365 under extremely tight timelines.

Customer had the following content migration requirement:

- Migration of their Worldox to SharePoint o365 and OneDrive.

The Challenge

Our client's Worldox migration was relatively straightforward with respect to the extraction of Worldox content. However, they had many documents. During the export process the project significantly proved time consuming due to the large number documents and related consolidation. In addition, certain types of documents created issues pertaining to extraction and to some extent imports, though the client didn't need most of them. The Verion team transformed and rebuilt the relevant metadata in accordance with the client's search related needs. In spite of all noted issues, the migration was delivered on time and on budget.

Solution

To meet these objectives Verion was engaged for global content migration services to accomplish this turnkey migration project.

By deploying our services methodology and using Verion's Easy2Share migration tool, Verion's delivery team was able to complete the migration on time and within the budgetary needs of the client.

Verion's services migration services methodology consists of

- Analysis of the customers World environment Content through robust reporting.
- Planning for issues platform differences requiring change management and possible customizations.

- Export of all Worldox Content and Migration of all exported content and associated Metadata (Created, Created By, Modified, Modified By, Owner, DocType, DocID and etc.,) including custom metadata from the source system to SharePoint o365 business.
- Transformation of all source content and metadata through the Easy2Share tool in to staging environment.
- Loading all different types of Worldox objects into SharePoint o365.
- Validation by the Verinon services team that the content is accurate and migrated per customer requirements.
- Handover Of The Newly Migrated Content To Business owners / users.

Verinon's proprietary content migration methodology is in place at numerous companies across many vertical industries within North America and Asian Pacific Regions. Our methodology is proven and offers guaranteed business result.

This approach centers on the following steps that have proven critical on each such migration:

Planning: This initial step includes an evaluation of existing Worldox environment, including an Easy2Share assessment process which includes a proof-of-concept migration of a sample Worldox content(s) with the purpose of establishing a plan and schedule for the migration process.

Analyze Content: The next step is to analyze the existing Worldox content and make any necessary adjustments, if necessary, from within the source. This is also the necessary step to plan for an in-process data transformation.

Migrate: The next step is to Migrate all the data from Worldox to SharePoint o365 and OneDrive.

Verify / Validate: Finally, this approach calls for an active verification and validation of the results. The Easy2Share process involves a series of Analysis, pre-extract, and post-import reports to validate the process. In addition, there are audit logs at each step review each step in this process.

Result: There are several things one must properly match from the Worldox environment to one in SharePoint o365. In addition to proper matching, the result has to be auditable and verifiable.

Full Auditable: In addition to the fact that detailed logs are created as part of the Process, both summary and detailed reporting both as it relates to users and objects is incorporated into both the Jive and SharePoint o365 end of the process.

Result

The solution has been successfully migrated all Worldox contents to SharePoint o365 and has received very positive feedback after several months of the system's utilization.

Among the most important business benefits noted by the Customer are:

- Vastly reduced the amount of time necessary to migrate content
- Allowed for the customer to focus on critical tasks instead of the migration
- Modification of the migration tool on the fly to accommodate customer's unique needs
- Migration of nearly half a million files with 100% accuracy based on customer need.

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About Verinon

Verinon Technology Solutions is a CMMi Level 3 and ISO-9001 Certified IT Services Company specialized in system integration services around Document and Content Management, Collaboration, Business Intelligence, Data warehousing, Conversions and Interfaces/adapters coupled with a select pool of custom development areas to clients around the globe.

Verinon is a Gold Certified Partner since 2008. Our SharePoint practice consists of 50+ full time consultants serving our esteemed clients at every corner of the world providing Enterprise Content Management and portal solutions to our customers across world.

Easy2Share

Verinon's Easy2Share SharePoint migration tool simplifies the process, Worldox to SharePoint o365/OneDriveApplicationXtender to SharePoint/o365, Jive migration to SharePoint, Google Workspace to SharePoint o365/OneDrive, DocuWare to SharePoint o365, FileShare Files/Folders migration to SharePoint / OneDrive, eRoom migration to SharePoint / o365, Documentum migration to SharePoint, Our SharePoint migration services team helps to analyze your existing data structure and suggests you a planned approach to opt for migration, which helps in mitigating the risk involved in complex migrations.

The Easy2Share Advantage

- Detailed reporting and audit logs to facilitate an easy process of auditing
- Takes into account issues of maintaining meta data, security, permissions, ownership information, access rights in recreating the same environment within Microsoft SharePoint
- Product methodology that takes into consideration:
- Leverage SharePoint's power: SharePoint provides incremental features such as expanded meta data that can be populated as part of the migration process
- Control Change Management: The process includes a customized look and feel and structure to minimize user confusion
- Migrate at own pace: Most such migrations can't be done as a onetime event where support is built to facilitate an easy-as-you-go approach.