Case Study: A Livelink to SharePoint Migration

Client Background	**A mid-major energy Client with offices across North America, with use of Livelink for over 5+ years, resulting in over 2,000,000 documents company wide. Heaviest business area usage represented by Engineering, Financial/Audit and Regulatory departments.** Company had experienced several mergers over the past ten years which had led to multiple instances of Livelink (different versions), SharePoint and several other smaller EDRMS Systems with differing structures, taxonomies (organization), and security models. Governance, management and support of these environments proved to be a significant challenge for this Client. Economic priorities were the key driver for Company to look to reduce costs on non-essential services where high operating costs and lower oil prices were the new reality. An IT committee was formed to review opportunities for consolidation and cost savings. It was identified that consolidating ECM platforms could result in potential savings of $800,000 USD per annum on licensing and over $2,500,000 USD per annum on IT staffing to support multiple EDRMS (primarily Livelink and SharePoint 2010). Furthermore a decision was made to outsource SharePoint support to realize further savings and support the organization wide objective of reducing non-op costs.
Project Details	**Business Case Assessment and Project Approvals** We first performed a fit gap assessment of Livelink and SharePoint. Producing a high level plan to IT committee recommending and supporting the **business case** for the feasibility to decommission Livelink. Resulted in Client decision to proceed with the project to migrate from Livelink to SharePoint. **Project Planning and Analysis** Provided input and support to IT to define a **project plan and strategy for migrations**. Delivered **architectural suggestions** for optimization of environments for migration considerations and sizing. Assisted IT in **defining the detailed migration plan** and master design specification for migrations. Facilitated analysis and steering committee signoff on the master design specification: • Definition of source and destination mappings for structures • Identification of system wide metadata mappings (company-wide Content Types) and recommendations for migration methodology to SharePoint • Definition of new organizational permissions structure and mapping roles in SharePoint • Developed mechanism to support historical links (a high priority requirement) **Migrations and Closeouts** Assisted IT **providing advisement and analysis services** on migration groups as required. Provided the **ECM Wise Migration Tool Suite** for IT to perform migrations from Livelink to SharePoint and Network drives. Tool supported the master design specification and specific migration area configuration needs. Our development team worked with IT to optimize and address specific migration needs. Our tools provided auditable logs of all migration activities as proof of migration Assisted Livelink team to decommission Livelink servers and retired environments.

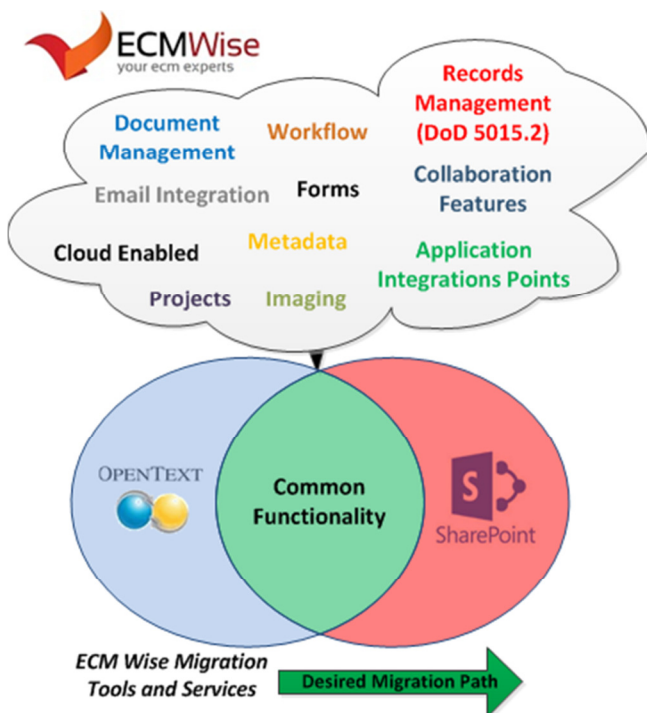| Conclusion and Benefits	The ECM Wise **Migration Tool Suite** and **Advisory services team** enabled the Project Team to facilitate successful migrations - transferring the desired content to SharePoint, and **preserving key metadata** (created and modified dates, original paths, and important key business category attributes). **Audit logs** were stored as proof of migration for all migration content and facilitated the validation of each migration group. Our Tool Suite **preserved vital historical links** to documents which avoided headache of broken links and removed need for IT to attempt to update all links across intranet pages, business systems and in documents and emails. Approximately 10% of documents were determined to be archived as non-records and were **exported to Network Drives** for additional costs savings for storage, effort, and complexity. Furthermore our **unmetered migration** model allowed large volume document migrations at a low fixed cost which further enhanced project return on investment for the Client. Client achieved final state of **Livelink Retirement** to realize significant licensing and labour costs savings and allowed for one single EDRMS repository (reducing user confusion).

"ECM Wise can make your migrations manageable, fast, effective and efficient."

ECMWise
your ecm experts

Document Management Workflow Records Management (DoD 5015.2)

Email Integration Forms Collaboration Features

Cloud Enabled Metadata Application Integrations Points

Projects Imaging

OPENTEXT Common Functionality SharePoint

ECM Wise Migration Tools and Services Desired Migration Path

Quick Benefits of the ECM Wise Migration Tool Suite

- ✓ Support SharePoint on or off premise as destination
- ✓ Support network drive as destination (w/metadata)
- ✓ Analysis wizard to assist with migration planning
- ✓ Granular mapping of folders to destinations
- ✓ Clone or collapse folders as metadata
- ✓ Options to map Category and System attributes
- ✓ Preserve original locations as metadata
- ✓ Preserve original Livelink creation dates
- ✓ Options to map permissions and groups
- ✓ Option to preserve historical document links (prompt user to update and redirects)
- ✓ Audit logging of all migration operations

ECM Wise are the pre-eminent experts in Content Server to SharePoint migrations!

➔ **Contact us now to find out more about any of our products or services.**

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