Meridio Migration Case Study

Automated Intelligence recently undertook a Meridio migration to a Microsoft SharePoint EDRMS for a large UK ombudsman

The ombudsman wanted to leverage the capabilities of SharePoint, which was currently being used by the complaints body, in order to improve its information management and to address cost-saving challenges.

They needed to be off Meridio by the end of the government fiscal year, as that is when its contract expired, so time was of the essence in this program.

Working with Automated Intelligence

The ombudsman selected Automated Intelligence due to its extensive knowledge of the Meridio platform. They knew that it faced the following migration challenges:

> The current structure that existed within Meridio could not be migrated directly to SharePoint as it was. AI was able to extract the information and map it across into the new destination, transforming the way they managed data without losing any of the information on the way.

> Due to the fact that the ombudsman had been using Meridio to capture emails, it risked losing important information during the migration program. Automated Intelligence was able to ensure the full integrity of the emails were maintained as part of the move.

> Meridio had an Outlook integration tool and users relied on this as part of their data management. Employing Automated Intelligence's Outlook integration solution, **AI.SYNCPOINT**, meant the ways of working for the ombudsman did not need to change. From a training perspective this significantly reduced the impact of the migration, and the ombudsman reported that many users did not realise the solution had changed.

> The ombudsman was unsure about the extent of data that was not immediately available through the fileplan. Through Automated Intelligence's knowledge of the

platform we were able to expose hidden information, including orphan documents and those on Personal Workspaces, and ensure they were dealt with as part of the digital transformation.

Outcomes

Working with Automated Intelligence, the ombudsman was successfully able to decommission its Meridio legacy platform before the existing contract expired. All of the objectives of the program were achieved on time and to budget.

Results included:

> No loss of data, with full fidelity migration

> Operational effectiveness and efficiencies within day to day processes

> Enhanced internal controls and information governance requirements through automation

> A platform that supports cost-reducing initiatives for long-term preservation of content

> Existing SharePoint infrastructure leveraged, enhanced with AI solutions, to meet organisational and regulatory obligations