

CASE STUDY

More Than A Migration: A Change Management Story

 **INDUSTRY**
Energy

 **COUNTRY**
USA



An agency responsible for an organization's environmental record-keeping wanted to make the move from an outdated legacy system to a Cloud-based records repository. While SharePoint Online (SPOL) matched all the client's requirements, the appointed system administrator had no previous experience working with the system.

However, to help support the client, Access Sciences provided in-depth training throughout the journey to the Cloud, maximizing system understanding and proficiency. Here's how:

PHASE 1: FINDING THE BEST-FIT SOLUTION

The client embarked on its mission to build a records repository with set end goals in mind. Rather than just constructing a place to house documents, it wanted to also address several other issues they had with managing records.

ISSUE

Client needed to migrate from a legacy system to a Cloud-based solution that was new and unfamiliar to the system administrator

The repository needed to be mobile, accessible from anywhere for three reasons. One, the client often experiences power outages and network issues, making its Virtual Private Network (VPN) and its records unavailable for a period of time. Two, end-users needed the ability to reach documents from home or other areas of the country. Three, some external users needed the ability to view and collaborate on documents.

Also, the client was operating under a tight budget and sought a cost-friendly option. Due to the number of

SERVICES DELIVERED:

- Content Analysis
- Content Migration
- Executive Coaching
- Requirements Development
- System Configuration & Implementation
- Taxonomy Development
- Training & Communications

records, an enhanced level of organization within the repository was desired to enable findability.

Taking into account all of the agency's wants and needs, Access Sciences vetted various options to determine which Cloud-based system would be the best fit and ultimately landed on SPOL.

PHASE 2: PREPPING ACCESS TO THE CLOUD

The next phase of the project consisted of setting up and implementing the SPOL environment. Access Sciences configured workflows, using Power Automate, that would facilitate the automatic naming of documents once uploaded to ensure standardized naming conventions. The team also designed the taxonomy – a task that would help accomplish the client's goal of enhanced organization and findability.

However, the would-be administrator was hesitant to move forward with SPOL due to unfamiliarity with the system and a full schedule of competing priorities, which would make it difficult to learn the system before go-live.

In response, Access Sciences quickly adapted the project plan to incorporate more training and support. Helping the administrator gain a full understanding of SPOL became one of the team's top priorities. In the end, the extra change management effort would help achieve comfortability and ease of use with the system, contributing to SPOL success even after the project closed.

As part of this phase, several migration tools like DocAve Migrator, ECM Wise, and Tsunami were analyzed to ensure that they would fit the needs of the client. The tools were vetted through product demonstrations and specification analysis. Through this analysis, the best fit was chosen and tested within the client's environment.

PHASE 3: MIGRATING RECORDS & READY FOR USE

In the last phase, Access Sciences migrated all the environmental records to SPOL. The team then validated that all content was accurately migrated, and all metadata was properly assigned.

Access Sciences continued with administrator training, reaffirming knowledge gained throughout the process to establish an advanced level of SPOL proficiency. To further

SOLUTION

- ✓ Built a records repository in SharePoint Online (SPOL), providing in-depth system administrator training throughout the process
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the change management effort, the team also provided end-user training for external collaborators through virtual, step-by-step presentations.

BENEFITS

- ✓ New records repository in SPOL
 - ✓ Training to use the Cloud-Based solution
 - ✓ Enhanced level of organization and findability for records
 - ✓ Ability to collaborate externally on documents
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The project team continues to support the client's day-to-day activities in an ongoing reinforcement role. This includes performing enhancements, resolving technical issues, and providing additional training on new features as required.

The change management efforts of a system implementation are key to long-term success. At the end of the project, the client had not only gained a records repository but also built up a high level of ability in SPOL.

