



Migrating from Meridio to the Cloud

info@automated-intelligence.com
www.automated-intelligence.com

Table of contents

Introduction	Pg 1
Decommissioning Meridio legacy platform	Pg 2
Moving from Meridio to the Cloud as part of Digital Transformation	Pg 2
Challenges of Meridio migrations	Pg 3 & 4
Our team	Pg 5
Contact us	Pg 6

Introduction

Automated Intelligence (AI) is a market-leading data management solution provider. AI's flagship solution, **AI.DATALIFT**, provides both the insights and tools to solve data management problems and facilitate a continuous data management strategy.

Using **AI.DATALIFT** organisations can analyse their existing data holdings, improve data quality and governance, reduce data costs and risk, and enable intelligent data migrations to modern cloud platforms.

Businesses can adapt to the rise in remote working by enabling secure online access to critical business data which is currently stored on premise.



Decommissioning Meridio legacy platform

Meridio is an Electronic Document and Records Management (EDRM) system developed in Belfast, Northern Ireland.

After June 2015, Meridio was no longer available for purchase and therefore became a legacy content repository. February 2017 saw the end of (committed) support for Meridio, while in February 2019 self-help support also ceased. Some organisations may still have bespoke support arrangements in place.

Due to mainstream support options ending, in recent years there has been a compelling reason for organisations to move away from the platform to a modern, futureproof solution which is typically Cloud-hosted.

It's estimated that 60-80% of IT budgets is spent on legacy maintenance, and once support ends, such technology is expensive to run and maintain. With support options ceasing, an unpatched issue also leaves organisations more vulnerable to security and compliance issues.

Other issues include data silos, new systems unable to integrate, poor information management capabilities, instability and inflexibility.

Moving from Meridio to the Cloud as part of Digital Transformation

More and more, organisations are realising they need to move away from their current on-premise hosted infrastructure and embark on a Digital Transformation journey.

This is particularly relevant if they have already purchased Cloud platforms such as Microsoft Office 365, and are not leveraging such an investment to its full potential.

Migration from Meridio enables new ways of working and allows organisations to benefit from enhanced collaboration and increased productivity and efficiencies.

Challenges of Meridio migrations

As a team Automated Intelligence (AI) has over 25 years' experience working for Meridio, including our CEO, Simon Cole, who left Meridio to set up AI in 2010. This means we understand how the system works and how its behaviours might result in challenges when migrating to a new system. Without this knowledge 'Business as Usual' would be affected as users struggle to find information they require.

Examples of possible challenges which we can overcome include:

> **Slow Extraction Performance:** A common issue is the length of time it takes to extract the organisational content with Meridio Export tools. Using the APIs is slow and puts strain on the Meridio components. This can cause potential impact to active users. Automated Intelligence goes directly to the database and content store, bypassing the APIs and the Application Servers. This allows us to perform extractions faster, while still protecting the existing system that is in use by users. AI can work from backups of the database, de-risking any impact on the live system. We only perform a final delta across the live system to move users over to the new environment.

> **RTF E-mails and Attachments:** We understand how Meridio splits the metadata, body and attachments of e-mails when storing them. We combine these back into a single MSG e-mail during migration to ensure no loss of data and maintain the content and context of the attachments.

> **Orphaned documents:** One of the challenges with Meridio is that documents can get orphaned as they lose the link to where they are stored. Therefore, these files do not have a location within a fileplan or Personal Workspace but can only be surfaced in Meridio via search. This means you run the risk that these documents will get lost during fileplan extraction. At Automated Intelligence we not only know these documents exist but will ensure that these files are migrated to a new platform as required.

> **Personal Workspace migrations:** Personal Workspaces are employees' own private stores and the danger is that the organisation does not have visibility or access to that information. While it is not company policy, there may be corporate data stored in these. A standard migration of the fileplan will not extract it, potentially losing important data which is not tied into the corporate repository. At AI we can identify it and help the organisation to understand whether it is valuable or not, so they can make the decision about whether to migrate it to the new location.

> **Maintaining versions:** In the process of creating a document, it may go to various stakeholders at various points in time. For many organisations, it is vitally important they know the history of this information. This includes visibility over the work they have undertaken, by whom, at what stage, and when it was sent to a client/customer. A challenge with Meridio is that it provides the documents but it is not straight-forward to extract the earlier 'versions'. At AI our expertise means we know how to extract these to ensure a full fidelity migration.

> **Custom metadata:** Custom metadata is not stored a straight-forward pattern in Meridio and requires understanding to extract that information from the system. It is vital for ongoing work that it gets moved into SharePoint, but it is also imperative from an audit or history perspective to be able to look back and see what the custom metadata was too. Because of our Meridio experience, we provide that mapping capability and ensure it is moved across into the new appropriate fields.

> **Extraction and maintenance of audit metadata:** The metadata of old documents can be difficult to make available in the new environment. At AI we extract audit history, migrate it and maintain it in an accessible format. This ensures that future audit requests can still access the historical information.

> **Long paths re-mapped to a valid location in the target:** There is a limit in Microsoft SharePoint as to how many characters you can have in a path in terms of where data is stored. In Meridio there is no limit, which means that you could have a folder structure that is many levels deep. If you tried to move that into SharePoint, it will break. One of the things we provide is the opportunity for the organisation, ahead of time, to intelligently re-map locations to make sure no data is lost.

Customers We've Helped



Our Team's Experience

For many organisations Meridio is the backbone of their data management and they will have a lot of processes and integration into other programmes that they need to recreate. It is critical, therefore, that all of the information from Meridio moves across so they can, most appropriately and easily, recreate the connectivity. As a result of our expertise, we ensure that all the data is moved so there is no disruption to business as usual.

We have considerable experience of undertaking migration projects from Meridio to SharePoint Online across both the private and public sector. This includes multiple UK Government departments including The Home Office, PHSO and the The Cabinet Office. Additionally, many of Automated Intelligence staff have previously worked at Meridio, including the following senior management personnel:



Simon Cole,
CEO



David Corkill,
Services Director



Pauline Timoney,
COO



Colin Flack,
Security & Operations
Manager



Jon Loomie,
CTO

As a result, we have the knowledge of what to ask organisations to help form their strategy, there is less potential for risk, and we are able to perform migrations within a quicker timeframe. Speak to us today about your intelligent migration from Meridio to the Cloud.

Find out more

For more information on Meridio migrations with Automated Intelligence, please contact us on the following:

info@automated-intelligence.com
or visit www.automated-intelligence.com