



Department
for Education

Organisation Name

Department for Education

Location

London, United Kingdom

Sector

Government Administration

Project

Migration from ECHO/Meridio to SharePoint Online

The UK Department for Education is responsible for children's services and education, including; early years, schools, higher and further education policy, apprenticeships and wider skills in England.

<https://www.gov.uk/government/organisations/department-for-education>



CASE STUDY SUMMARY

The UK Department for Education were utilising ECHO, a customised Meridio EDRMS instance as the primary document and metadata store for their public correspondence system.

The system had been in place since 2004, and stored over 7 million documents. ECHO was complex and costly to manage, and had left content difficult to navigate, govern and distribute to both internal and external stakeholders.

DfE also had over 700,000 scanned images which required full text conversion and classification. A lack of searchable digital versions of these items had led to a gap in the completeness of the department's available digital content portfolio.

DfE decided to migrate content to SharePoint Online to:

- Reduce the total cost of ownership of information management
- Achieve intelligent search for hardcopy documents and images
- Enable a seamless experience for the department's existing Office 365 users.

"A unique and complex migration, with problems solved in flight in order to deliver successfully. We have validated that the entire content has been migrated. Return on investment has been proved in terms of our ongoing DfE savings, having moved from Echo Meridio."

PHILLIP HUMPHRIES

Head of Knowledge & Information - Department for Education

THE CHALLENGES

Complex legacy platform

DfE's entirely bespoke, domain-specific application required reverse engineering due to a lack of internal platform administration expertise.

Inconsistent source metadata

File types & extensions were incorrectly stored, requiring a deep file inspection to determine the correct file types prior to migration to SharePoint Online.

Full text conversion of image scans

Over 700,000 scanned images needed optical character recognition and full text extraction prior to migration to the SharePoint Online.

Target system thresholds

A new structure needed to be derived from the source content metadata to comply with SharePoint Online's technical thresholds.

High content volume

With over 7 million content items stored in the existing ECHO platform, DfE required full fidelity migration of all content to SharePoint Online.



THE STRATEGY & SOLUTION

To overcome the challenges presented by the transition from DfE's customised Meridio instance to SharePoint Online, Proventeq executed a tailored 5-stage content migration and transformation project plan.

Discovery & Analysis

Migration Accelerator's rich discovery and analysis capabilities were used to ascertain the true volume and distribution of DfE's content. During this phase, many inconsistencies in the source content and associated metadata were identified and addressed.



Information Architecture Optimisation

In-depth analysis of ECHO Meridio file structure and metadata schema was used to design an optimal target information architecture. The source system's folder hierarchy exceeded SharePoint's URL length limits, which was resolved by loading documents in a shortened folder hierarchy.



Pilot Migration

To demonstrate that the migration design fully met DfE's project objectives, Proventeq carried out a pilot migration stage. This allowed DfE's internal team to evaluate the migration, and SharePoint Online document management capabilities in a production-like environment.



OCR Conversion of Scanned Files

The department's scanned images were in a number of differing formats, including multi-page PDF files, stand-alone images, handwritten and typed documents. Proventeq extracted text from these images and exposed these as metadata; making the content searchable.



Full-Fidelity Live Migration

Once DfE's internal project team were satisfied with the migration design and target system architecture, Migration Accelerator was utilised to execute a full-fidelity migration with item-level audit trail. This ensured that over 7 Million items were successfully migrated.



THE RESULTS

Significant reduction in annual costs

Transitioning to SharePoint will remove the cost of maintaining the ECHO platform, saving the Department an estimated £170,000 per annum.

Greater control over provisioning and security will result in lowered ongoing maintenance costs; further reducing the longterm total cost of information infrastructure ownership.

Smarter content and accelerated search

SharePoint has given DfE the power to consolidate content in a centralised online repository which is easy to govern, manage and access. DfE also took full advantage of Migration Accelerator's OCR functionality to perform full text conversion of over 700,000 documents previously stored as non-searchable images.

This combination of consolidation, OCR text conversion and intelligent classification helps DfE users find the content they need to accelerate collaboration and meet the challenges of departmental responsibilities and administration.

Enhanced productivity

Migration to SharePoint Online enables DfE's Records management team's longer-term plans to include retention labels and make items clearer when they can be destroyed; providing significant time saving.

Risk of content loss mitigated

SharePoint Online has removed the risk of content loss presented by DfE's previous unsupported ECM system, thanks to its built-in content administration capabilities.

£170K ANNUAL SAVINGS



7.3 MILLION ITEMS
migrated to SharePoint



"The excellent collaboration between Proventeq, colleagues from Technology Directorate, MPCD (including IICSA) and KIM teams, have meant we successfully delivered a solution that meets the needs of the DfE and will facilitate easier searching of information by colleagues"

CHARLOTTE SAXON

IT Delivery Manager - Department for Education