Jive 4.0 migration to SharePoint o365 for Canada based Life Insurance Company

Company
Insurance, Reality

Country
Canada

Solution
Migration from Jive to
SharePoint o365

Technologies
Jive 4.0, SharePoint o365

Background

Our customer is a leading is a Canadian based Corporation, which includes companies in the domains of Life Insurance and Realty (property and asset management). The company is focused on improving the financial, physical and mental well-being of Canadians. As a leading Canadian insurer, they have interests in life insurance, health insurance, investment, retirement savings and reinsurance businesses operating primarily in Canada and Europe.

The Challenge

Our client's major challenge is ensuring that internal and external collaboration standardizes on a single platform. In this case, the company determined that Microsoft SharePoint Office365 was the desired platform moving forward. Jive collaboration had been the system of choice for a long period of time and as such had wide usage / adoption by their user community. There was a strong need to seamlessly transition Jive Content and their associated permissions over to an existing SharePoint o365 environment. This transition needed to happen swiftly and with as minimal impacts as possible.

Main Challenges Associated with Migration Approach:

➢ Even though our client is one company, they have many different branches of the Company and each had their own unique migration approach for its specific branch.

Unique Approach 1:

Space/Sub Space Level Hierarchy, Groups, Projects	Customized Hierarchy based on Input Sheet Provided (With New Titles, URL names)
New Migration approach for Documents	Documents were migrated as Folder structure and the body as HTML file. Current version of a document has been migrated to Active or Archive as per the mapping sheet we provided. Migrate all the previous versions of a documents in Jive into Archive Site collection in SharePoint.
New Migration approach for Discussion, Blogs, Documents	Jive Objects (Documents, Discussion, Blogs) were migrated as per the input sheets provided. The input sheet contained different parameters like Y, N, A. The migration was executed based on the parameter value. For example, Y means migrate, N mean No migration, A mean Archive and these archive objects were moved into archive Site Collection. The migration approach was fully dependent on the input sheets provided by the client.
New migration approach for Tags and Categories.	Tags and Categories were migrated as lookup columns.
Jive permissions	Permissions were fully re-organized from the root level site.

Unique Approach 2:

Space/Sub Space Level Hierarchy, Groups, Projects	Customized Hierarchy based on Input Sheet Provided (With New Titles, URL names)
New Migration approach for Documents	Documents were migrated into Discussions as topics. All Document physical attachments were moved to a separate Doc Library and built corresponding attachment link from the topic. Current version of a document has been migrated to Active or Archive as per the mapping sheet our team provided. Migrated all the previous versions of a documents in Jive into Archive Site collection in SharePoint.
New migration approach for Tags and Categories.	Tags and Categories were migrated as lookup columns.
Jive permissions	Permissions were migrated as per the input sheet provided by the client. Customized permissions assigned for different group types (Private, Secret, Open, Members Only) as per the input sheet. Private, Secret means Jive permissions migrated same as Jive and Open means grant permission Read to everyone in the organization.

Unique Approach 3:

Space/Sub Space Level Hierarchy, Groups, Projects	Customized Hierarchy based on Input Sheet Provided (With New Titles, URL names)
New Migration approach for Documents	For a few spaces/groups' the client wanted a unique requirement for a Document migration approach. As per this scenario, the client wanted to migrate only document attachments into root level document s library and no document body required to migrate. Current version of a document had been migrated to Active or Archive as per the mapping sheet our team provided. Migrated all the previous versions of documents in Jive into Archive Site collection in SharePoint.
New migration approach for Tags and Categories.	Tags and Categories were migrated as lookup columns.
Jive Permissions mappings	Permissions were migrated as per the input sheet provided by our client. Customized permissions assigned for different group types (Private, Secret, Open, Members Only) as per the input sheet. Private, Secret means Jive permissions migrated same as Jive, and Open means grant permission Read to everyone in the organization.

Solution

To meet these objectives the Verinon team was engaged for global content migration services in order to accomplish this turnkey migration project.

By deploying our services methodology and using Verinon's Easy2Share migration tool, Verinon's delivery team was able to complete the migration on time and within the budgetary needs of the client.

Verinon's services migration services methodology consists of 1) Analysis of the customers Jive Content through robust reporting. 2) Planning for issues platform differences requiring change management and possible customizations. 3) Export of all Jive Content to FileShare and Migration of all exported content and associated Metadata (Created, Created By, Modified) from the source system to SharePoint o365 business 4) Transformation of all source content and metadata through the Easy2Share tool into a staging environment. 5) Loading of all different types of Jive objects into SharePoint o365. 6) Validation by the Verinon services team that the content is accurate and migrated per customer requirements. 7) Handover of the newly migrated content to business owners/users.

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Verinon's proprietary content migration methodology is in place at numerous companies across many vertical industries within North America and Asian Pacific Regions. Our methodology is proven and offers a guaranteed business result.

This approach centers on the following steps that have proven critical on each such migration:

Planning: This initial step includes an evaluation of existing Jive environment, including an Easy2Share assessment process which includes a proof-of-concept migration of a sample Jive content(s) with the purpose of establishing a plan and schedule for the migration process.

Analyze Content: The next step is to analyze the existing Jive content and make any necessary adjustments if necessary from within the source Jive. This is also the necessary step to plan for an in-process data transformation.

Migrate: The next step is to Migrate all the data from Jive to SharePoint o365

Verify / Validate: Finally, this approach calls for an active verification and validation of the results. The Easy2Share process involves a series of Analysis, pre-extract, and post-import reports to validate the process. In addition, there are audit logs at each step review each step in this process.

Result: There are several things one must properly match from the Jive environment to one in SharePoint o365. In addition to proper matching, the result has to be auditable and verifiable.

Full Auditable: In addition to the fact that detailed logs are created as part of the

Process, both summary and detailed reporting both as it relates to users and objects is incorporated into both the Jive and SharePoint o365 end of the process.

Result

The solution has been successfully migrated all Jive contents to SharePoint o365 and have received very positive feedback after several months of the system's utilization.

Among the most important business benefits noted by the Customer are:

- Vastly reduced the amount of time necessary to migrate content
- Allowed for the customer to focus on critical tasks instead of the migration
- Modification of the migration tool on the fly to accommodate customer's unique needs
- Migration of nearly 1Terabyte of data with 100% accuracy based on customer need

About Verinon

Verinon Technology Solutions is a CMMi Level 3 and ISO-9001 Certified IT Services Company specialized in system integration services around Document and Content Management, Collaboration, Business Intelligence, Data warehousing, Conversions and Interfaces/adapters coupled with a select pool of custom development areas to clients around the globe.

Verinon is a Gold Certified Partner since 2008. Our SharePoint practice consists of 50+ full time consultants serving our esteemed clients at every corner of the world providing Enterprise Content Management and portal solutions to our customers across world.

Easy2Share

Verinon's Easy2Share SharePoint migration tool simplifies the process Jive to SharePoint/o365,FileShare Files/Folders migration to SharePoint/OneDrive, eRoom migration to SharePoint/o365, Documentum migration to SharePoint, Stellent migration to SharePoint. Our SharePoint migration services team helps to analyze your existing data structure and suggests you a planned approach to opt for migration, which helps in mitigating the risk involved in complex migrations.

The Easy2Share Advantage:

- Detailed reporting and audit logs to facilitate an easy process of auditing
- Takes into account issues of maintaining meta data, security, permissions, ownership information, access rights in recreating the same environment within Microsoft SharePoint
- Product methodology that takes into consideration:
- Leverage SharePoint's power: SharePoint provides incremental features such as expanded meta data that can be populated as part of the migration process
- Control Change Management: The process includes a customized look and feel and structure to minimize user confusion
- Migrate at own pace: Most such migrations can't be done as a onetime event where support is built to facilitate an easy-as-you-go approach