



CUSTOMER

Christoph Merian Foundation (CMS) — is a non-profit foundation under public law with its headquarters and sphere of activity in Basel.

Promotes social cohesion, cultural diversity and careful treatment of nature in the city of Basel.

SOLUTIONS

- ✓ Microsoft SharePoint Online & Subscription Edition
- ✓ ShareGate Migration Tool

RESULTS

CMS uses SharePoint Online as unified content management and Intranet platform with an Information Architecture tailored to their needs and existing content.

Content collaboration using Microsoft Teams and a new Intranet based on SharePoint Online leverage co-working and team spirit.

SUCCESS STORY

SharePoint Information Architecture & Content Migration from File System



cms
Christoph Merian Stiftung

PROJECT BRIEF

The existing content of more than 5 TB in the File System needed to be analysed, active content be prepared and migrated while existing custom metadata in file names shall be extracted and used in SharePoint. Remaining inactive Content in the File Share shall be made searchable in SharePoint. Business documents stored in Abacus Dossiers need to be synced to SharePoint.

CHALLENGE

Business related content is stored in different applications and hard to find and manage.

The Christoph Merian Foundation has chosen Microsoft 365 as its main collaboration and productivity tool. Microsoft Teams including the standard document storage in the background on associated SharePoint pages is already in use today.

Today, most documents are still hosted on a file server or, more recently, also stored in dossiers in the ERP Abacus.

“ We received excellent support from IseoSolutions throughout the migration and were able to contact Mr. Freitag and our internal team at any time with any question.

Their assistance was top-notch. IseoSolutions did a great job to prepare an individual SharePoint Information Architecture to improve internal and external collaboration for us.

Using SharePoint and Teams for our active documents has been a great success, and we're highly satisfied.



Andrea Bikle, Publishing Department
The Christoph Merian Foundation

TARGET

Use M365 as unified content management and collaboration platform. Content from different applications and storage systems shall be consolidated into a new information management architecture in Teams & SharePoint.

PROJECT TASKS

- ✓ Analyse existing Filesystem content
- ✓ Design Target Information Architecture and Metadata structure in SharePoint
- ✓ Design and create customer-specific SharePoint Site-Templates
- ✓ Migrate Filesystem & Abacus Dossier content to SharePoint

“ With the SharePoint Online Information Architecture provided by IseoSolutions, we can access our data from everywhere, multiple users are working on the same document and we can share documents also with externals where permitted.

Finding documents fast even on the File Server is possible. Our collaboration has also improved by using the new SharePoint-based Intranet and the funding application process with status-based workflows.



Martin Fackler, Head of IT at the Christoph Merian Foundation

IMPLEMENTED SOLUTION

- Microsoft SharePoint Online with a pre-defined Information Architecture through department and collaboration hubs and sites using custom Site Templates.
- Migrated active content from File System into SharePoint Online Sites with metadata extraction & transformation
- New Intranet granting access to shared information, specified news and events from all sites. An Advanced Search Page provides a further improved search experience.
- Status-based decision-making process for funding & property requests which runs through several stages of working groups, committees and internal and external participants in approvals.
- Hybrid Search enabling SharePoint Online search also on local File System inactive content. The implementation is using an on-prem SharePoint Subscription Edition farm for indexing and a Microsoft Reverse Proxy.
- Integration into ERP Abacus for syncing Abacus Dossier structure & content from Funding /Projects into SharePoint Online Sites and vice versa for finalized SharePoint documents.



RESULTS

CMS is using Teams and SharePoint Online for collaboration, extended document management and unified search.

The new Intranet, the document approval process and the ERP Abacus integration substantially improve the daily business operations.

The permission concept ensures flexible and compliant sharing of information with internal and external business partners.

PROVIDED CONSULTING EXPERTISE

- ✓ SharePoint Information Architecture
- ✓ SharePoint Online & Subscription Edition configuration
- ✓ File System migration using ShareGate
- ✓ ERP integration using Abacus DMS Connector
- ✓ SharePoint Online Rollout & Training