EBSCO Industries Inc.

National Conglomerate Adopts Data Lake Archive & Reduces Risk Profile

Streamlined Integration of Outlook, SAP and SharePoint with Compliant Cloud Archive
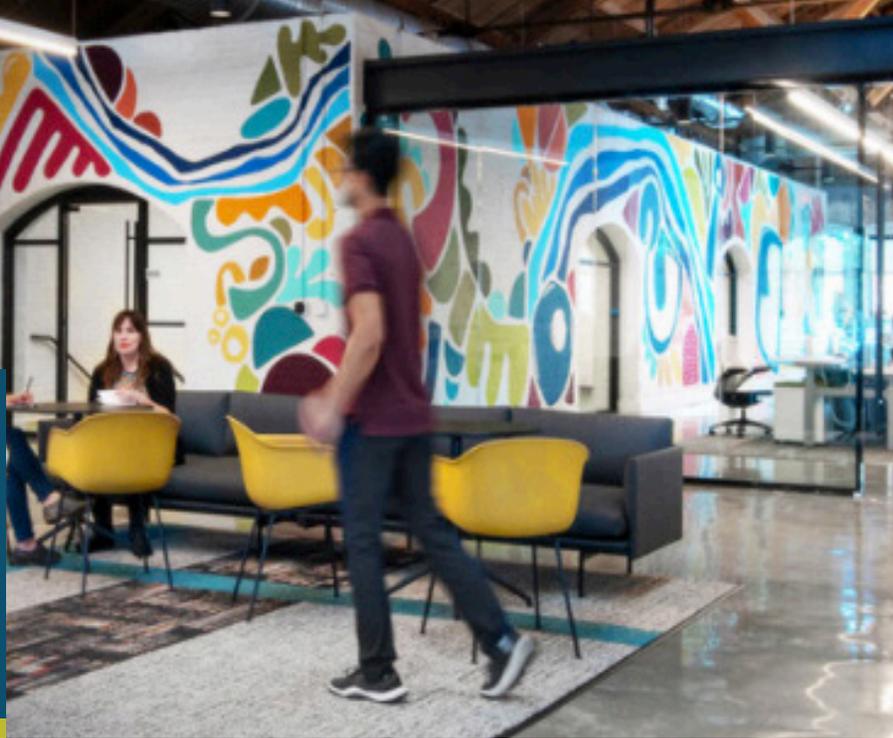
"We have worked with so many partners, and I can honestly say that Collabware was the best I've ever worked with. Their team is excellent."

Alexa Napoleon
Sr. Mgr. Architecture & Innovation, Corporate IT

COMPANY

Name

EBSCO Industries, Inc.

Industry

This diverse conglomerate comprises of nearly 40 businesses including Information Services, Manufacturing, Publishing & more.

Employees

5,000+

www.ebscoind.com

BUSINESS CHALLENGES

- A Need to Modernize Document Management Processes
- Dependency On Legacy Servers
- Inconsistent Middleware Between SAP and Servers
- Lacked Efficient Search Capabilities
- Heavy Ticketing and Burden on IT Team
- Wanted to Leverage Enterprise Tools (O365 & SAP)

EXISTING ENVIRONMENT

- Legacy Servers
- Custom Accounts Payable Tool
- Office 365 (SharePoint, One Drive, Team sites)
- SAP

ECM SOLUTIONS

- Collabspace
- Collabmail

BENEFITS

- Transitioned to Scalable Cloud Platform
- Ensured Security Compliance
- Attained Seamless Integration between Outlook, SAP and SharePoint
- Superior Search Capabilities for Text and Image-Based Files and Attachments
- Greatly Reduced Burden on IT
- Empowered to Deploy Collabspace Quickly and Efficiently Themselves
- Maintained User Experience without Disrupting Internal Processes

CUSTOMER PROFILE

Founded 77 years ago, EBSCO Industries has grown from a team of friends selling magazines door-to-door into one of the largest privately held companies in Alabama. This conglomerate now comprises over 40 businesses, including information services, publishing, manufacturing and more.

With a mission to better understand their customers' needs and deliver meaningful products and services, EBSCO needs to ensure their business-critical information is properly stored and quickly accessible for sales and organizational continuity. The EBSCO IT team worked with Collabware to stabilize their environment and build a foundation to allow for future tech adaptability.

This case study will share the challenges EBSCO experienced with previous server systems and integrations, how they came across Collabspace and Collabmail, the implementation process and immediate wins ESCBO achieved as they modernized their information storage environment and significantly improved their security risk profile.

"

Collabware solutions provided us with getting our business processes to interact with the storage solution... we basically built the foundation upon which we can now modernize our accounting processes."

Alexa Napoleon

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EBSCO CHALLENGES

EBSCO used SAP as their enterprise resource planning (ERP) tool, a custom developed accounts payable (AP) tool and held licenses for SharePoint that were not yet being utilized for the SAP accounts payable integration. Previously, the stored business-critical attachments were stored on aging servers based on the architecture of the legacy, custom accounts payable tool.

They experienced the following challenges and limitations:

Expiring and near Capacity Legacy Servers

The servers EBSCO stored these files in were aging operating systems quickly nearing end-of-life.

Connections to these servers were not optimal, and because of their age, provided limited ability to interact with new systems, limited storage and required stabilizing. For an organization with massive storage requirements, including over 4TB of SAP-related attachments and company branches producing thousands of invoices monthly, a new, more reliable content repository was necessary.

Needed to Improve Risk Profile

Beyond age and storage limitations, these servers also posed a potential security risk. They were becoming more vulnerable as they neared end-of-life. Options to upgrade the operating systems were not enough of migration due to the custom application. Since they contained business-critical data, the EBSCO IT team knew they needed to store this content on a platform that provided dependable security, accessibility and control measures.

Inconsistent Middleware Between SAP and Servers

Moving SAP-related files to the legacy servers was an unreliable process. Prior to implementing Collabmail, EBSCO staff would have to directly email documents, such as invoice attachments or customer notes, to the old server. They also had an email middleware solution which linked the stored attachments with an SAP document once the document was created in SAP. Unfortunately, at times this legacy middleware failed, generating additional work to force the document to link and attach to SAP. Transfer of emails and attachments out of staff members' inboxes to the servers was also sometimes inconsistent.

Lacked Efficient Search Capabilities

Searching content on old servers was limited. Other integrated systems, such as SAP, lacked appropriate content discovery. If an EBSCO staff member needed to access an invoice, they would have to go to the actual document and pull up the attachment. There was no way to search based on vendor, customer or date: team members with access to SAP could only pull up documentation one-by-one if they knew the exact invoice number or date it was saved. In addition, the IT team was unable to see IT invoices without worrying about compromising SAP Security practices, limiting their documentation visibility.

Heavy Ticketing and Burden on IT Team

These legacy servers and storing processes required constant attention and maintenance by the EBSCO IT team. When files were not being saved correctly, it would generate a regular cadence of support tickets for IT to resolve.

Wanted to Benefit from Paid Microsoft 365 Licenses

With established Microsoft enterprise agreements already in place and an internal platform team ready to support, SharePoint was a natural point of progression into which to migrate their business-critical information. However, the legacy servers did not allow for this integration support of newer products. IT staff needed to find a way to safely and securely move their data to SharePoint, without interrupting their coworkers' everyday business processes.

BREAKING POINT

The trigger for an upgrade? One of the legacy servers had reached its retirement date and held no promise of keeping the data securely intact much longer. The EBSCO team knew they had to address this potential risk immediately and wanted to utilize their Microsoft enterprise licenses. This would require a solution that could support their current processes while integrating SAP, and other apps down the road.

FINDING A SOLUTION

While researching various options online, the IT team at EBSCO found a particular webinar topic: How To Manage SAP Records with SharePoint. This session showed how ECM cloud solution, Collabspace, with their SAP docuflow connector by VersaFile, could achieve ongoing document synchronization between SAP and SharePoint.

After more research, demos and validation, EBSCO selected Collabspace and Collabmail for the following reasons:

- Discussions with the Collabware Services Teams demonstrated that they could support EBSCO's needs to integrate and sync SAP and SharePoint.
- Collabmail offered a reliable solution for staff to quickly and easily transfer SAP-related documents from email inbox to SharePoint with minimal change to their current process.
- This was the only solution they found with end-to-end content management coverage and advanced search capabilities beyond title and metadata, including OCR.
- It was established that the Collabspace platform would provide a solid foundation for fully secure infrastructure, scalability, future development and integrations.

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IMPLEMENTATION

While EBSCO took charge of the implementation and rollout of Collabspace and Collabmail, it started with both the Collabware and Versafile Services Teams providing guidance during the Discovery and Design phases and remaining on hand to help throughout the implementation. This implementation included the following steps:

Assigned Roles

To begin, EBSCO ensured that the right stakeholders were designated the correct roles for this high priority project. They included an EBSCO Solutions Architect, Collaboration Architect and a Senior Developer for applications architecture. This team was very knowledgeable and could also lean on strong design planning and SAP integration support from the Collabware and VersaFile Services Teams.

Performed Risk Assessment

Prior to implementation, the EBSCO team did their due diligence to evaluate their overall situation so they could clearly articulate the current state to management. They conducted an assessment to confirm that risk and security compliance was the main project driver, and that it was crucial to get off the old servers.

Next, they conducted a similar assessment to validate a future state using Collabspace, Collabmail and SharePoint to confirm this was the right direction for EBSCO.

Achieved Stakeholder Buy-In

By knowing clearly where they were at, what needed to be done and how this process would look, EBSCO IT members created a key decision document. With this documentation and a regular cadence of daily meetings for several weeks' time, the project scope and requirements were clearly communicated to stakeholders, allowing decision makers to fully understand the expected outcomes, and confirm their support along the way.

Aligned with Discovery Phase

The Collabware Services team came in for a Discovery phase, and EBSCO IT was impressed at how well they understood EBSCO's unique challenges and how Collabspace and Collabmail could address them. A robust Statement of Work (SOW) by Collabware was provided to ensure the project scope was well defined, setting clear directions for the Design and Integration phases.

Detailed Design Phase

With the right minds in the correct roles, solid communication and excellent prep work: the design phase was set up for success, and the business leads and decision makers understood what was going on.

Confidently Implemented and Integrated

By this point, EBSCO was well prepared to take charge with implementing Collabspace and Collabmail, with the VersaFile team on hand to support SAP Integration.

> "
> *The attitude during this project was that we're all in, we're all one team and that was an excellent experience. We felt spoiled!"*
>
> *Alexa Napoleon*
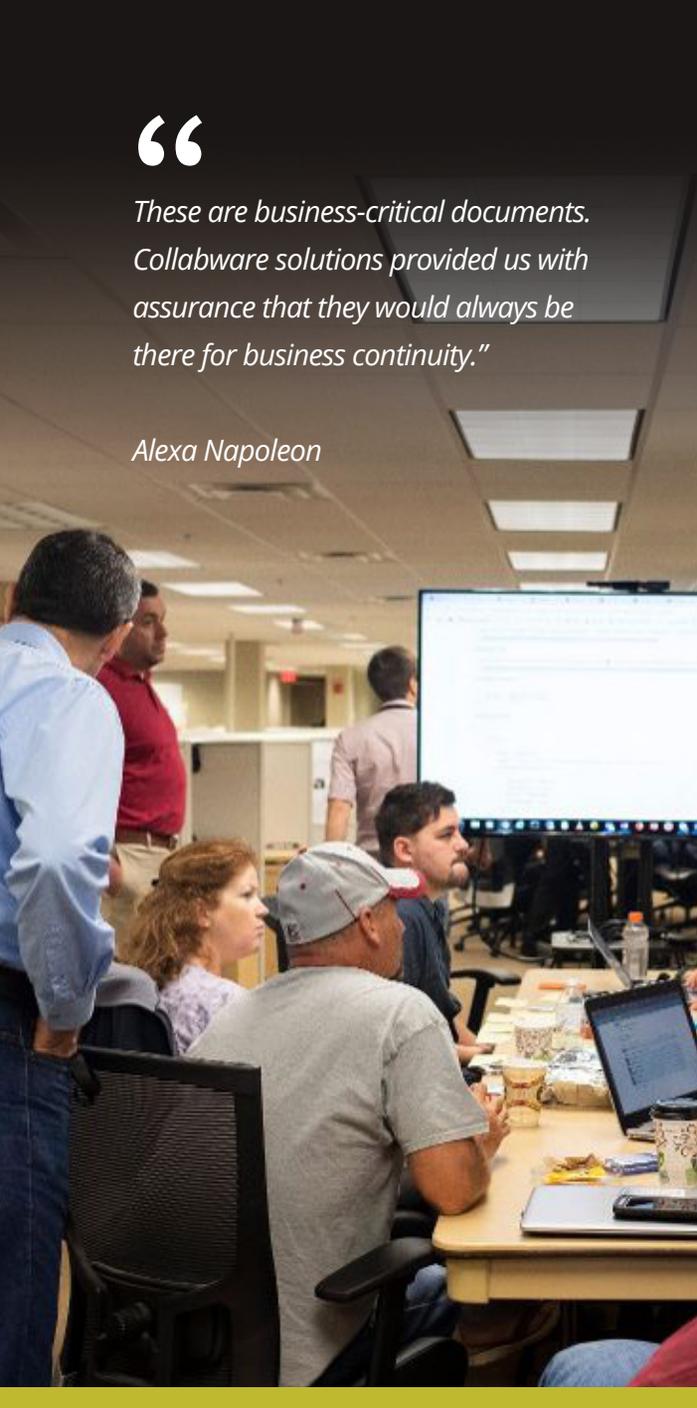
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VICTORIES/ADDRESSING THE CHALLENGES

Transitioned to Scalable Cloud Platform

One of the biggest benefits brought by using the Collabware products was stabilizing their storage. As Collabspace was able to backup old server data (in the event of an emergency), migrating content to SharePoint became less stressful. The EBSCO team could breathe easy knowing their business-critical data was protected in a solid environment, and accessible whenever needed.

Ensured Security Compliance

From legacy servers into ransomware-proof, access-permissions protected, WORM-compliant cloud storage: EBSCO's security risk profile significantly improved.

Attained Seamless Integration between Outlook, SAP and SharePoint

Collabspace and the VersaFile docuflow connector provided the gateway between Microsoft tools and SAP that EBSCO had been looking for. Not only did they get integration, but Collabmail gave staff a way to easily move their SAP documentation from email directly (and reliably) into SharePoint with simple drag-n-drop.

Superior Search Capabilities for Text and Image-Based Files and Attachments

Collabspace DISCOVERY was a new and valuable feature for EBSCO staff. While old servers had limited search, and the SAP platform restricted content accessibility to those with a user license, Collabspace provided advanced search capabilities where staff could immediately pull up results including any metadata or keywords from within documents. In addition, powerful OCR capabilities and automated transcription made scanned pdfs, TIFFs, images and emails available for search. For example, invoices are in PDF (an image-based format) and before, staff members would need to know the invoice number or create date to find the file. Now, staff could search by vendor name or any keyword written within the file (not just the document name or metadata) to locate it quickly.

Greatly Reduced Burden on IT

Lack of ticketing is a tangible example of the value that both Collabmail and Collabspace brought for the IT Team. What used to be a stream of maintenance requests and tickets has diminished down to virtually no tickets regarding saving email-received files, and linking these files with SAP.

Empowered to Deploy Solutions Quickly and Efficiently Themselves

Positive, professional and exceptionally well communicated sessions with both Collabware and VersaFile teams helped EBSCO feel even more confident and prepared when implementing this solution suite.

Maintained User Experience without Disrupting Internal Processes

User adoption was a success! Why? EBSCO IT had found well-built solutions that were designed to be easily implemented, to seamlessly integrate with other systems, and had little impact or affect on staff members' day-to-day routines. For example, staff had previously used email to send their SAP documentation to legacy servers. Now, they drag and drop emails and attachments directly into SharePoint storage. A parallel, yet increasingly more reliable, experience.

CONCLUSION:

By implementing Collabspace and Collabmail, the EBSCO team was able to stabilize content storage, ensure security compliance and enable accurate discovery across their organizational content. Their once vulnerable servers can be decommissioned, critical content is backed up and archived while accessible to those who need it. Their risk profile is in good standing and regulatory compliance standards are being met. With easy training sessions, users have had little to no impact on their regular tasks and user adoption never became an issue with automated processing happening in the background. The IT team is enthusiastic and relieved to have a system they can rely on to begin modernization projects for other departments, and to expand on even more capabilities Collabspace has to offer.

WHAT'S NEXT FOR EBSCO & COLLABWARE?

With stable infrastructure in-place, the EBSCO IT team is looking forward to several modernization projects, including implementation of an improved AP automation tool. Also, the EBSCO HR department is looking at following the same model of digitizing physical records and storing their files in Collabspace. They can then take advantage of Collabspace automated records retention workflows, holds, and much more. The EBSCO team will be able to produce audits and insights from Collabspace to better optimize their assets and therefore make better business decisions.

For help on your next project, call us at 1-855-268-0442 or email: contact@collabware.com