

Lanyon Bowdler Modernizes to Increase Efficiency with Move to the iManage Cloud

Quorum Saves Time and Money Using Velocity Content Migration to Move Content Directly to the iManage Cloud



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Lanyon Bowdler has offices in Shrewsbury, Bromyard, Conwy, Hereford, Ludlow, Oswestry and Telford. The firm is ideally positioned to deliver legal advice to people and businesses throughout the region. Their solicitors combine the best of both worlds with local knowledge and understanding, backed up by the highest levels of legal expertise. And no matter where you're based, you can expect superb customer service. Lanyon Bowdler's client surveys repeatedly show that they meet, and very often exceed, their clients' expectations.

They are recognised by the leading UK legal directory, having been recommended in 14 categories in the 2020 edition of The Legal 500.

Whether you are breaking new ground, overcoming a challenge or simply getting your life in order, the team at Lanyon Bowdler can support you with the very best legal advice delivered locally by nice people.

Challenges

With future scalability in mind, Lanyon Bowdler chose Quorum to help them migrate their on-premise legacy document management system, a component of Elite Envision to the iManage Cloud. Quorum is an iManage partner with an extensive mix of skills and experience related to the Lanyon Bowdler ecosystem of applications, making them an ideal fit for the project.

The project required a significant amount of upfront and complex metadata transformation and needed a more efficient way to process the data and map it over to the iManage environment as part of the migration to iManage Cloud.

With offices across western England and Wales, the desired rollout plan was phased by office to ensure a high level of local support was available as iManage was rolled out.

Solution

iManage has shifted towards requiring a migration process that is focused on efficiency and risk-mitigation for customers moving to the iManage Cloud. For this reason, they've mandated that implementation partners must use an iManage approved solution. After evaluating the choices, the Quorum team selected SeeUnity's Velocity Content Migration product (Velocity).

"It was important to complete Lanyon Bowdler's move to the iManage Cloud as efficiently as possible. When we evaluated the approved solutions, Velocity was the only product capable of moving content directly via the Rest API, without the extra steps and time involved with building an on-premise iManage Instance first." – Crawford Hawley Groat, Consultant Chief Technical Officer, Quorum Consulting

Industry

Legal

About the Project

- On-premise Thomson Reuters Envision Practice Management System to iManage Cloud Work
- 7 million documents
- 260 Users

Challenges

- Preferred to go direct via API from source to the iManage Cloud
- Tedious file by file process to amend and fix large amounts of metadata – needed a more efficient way to provide data transformation
- Required a phased migration for the many office locations and complexity due to weather and flooding circumstances



iManage

iManage is the leading provider of work product management solutions for legal, accounting and financial services firms and the corporate departments they serve worldwide. Every day, iManage helps professionals streamline the creation, sharing, governance and security of their work product.



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Other solutions considered did not meet project requirements to migrate directly to the iManage Cloud environment, and involved far more resources. The client did not have space to build an on-premise iManage system and to store an additional copy of all the documents.

In this case, the Quorum team used their expertise in SQL to transform metadata prior to migration and Velocity templates were used with rulesets to map the content directly into the iManage Cloud workspaces.

Delta syncs were used to phase the go-live process in each of the office locations, allowing employees to continue working with access to their content and without interruption.

Benefits

Benefits from utilizing Velocity to migrate content to the iManage Cloud:

"Our initial estimate for migration performance was 150,000 documents in one day, but we were very pleased to find that migration throughput would have transferred 1 million documents in one day." – Crawford Hawley Groat, Consultant Chief Technical Officer, Quorum Consulting

- **Simplified Process** - Using Velocity to go direct via API from the source to iManage Cloud saved valuable time and resources as opposed to traditional methods requiring several extra steps to stand up a new iManage on-premise instance and then move the contents to the iManage Cloud.
- **Phased Migration** - Using Velocity's delta syncs Quorum was able to rollout the go-live for users as each office's new system was ready, reducing stress and risk of lost data.
- **Efficient Processes** – Rule sets were incorporated into continuous syncs to expedite moving content and metadata transformed by Quorum directly into the new iManage Cloud environment workspaces.
- **Detailed Reporting** – Audit trail and reconciliation reports provided invaluable information to aid in the migration process as well as keep the client informed of progress.
- **Performance** – 1 million documents were transferred in one day compared to an estimated expectation of 150,000 documents in one day.
- **Productivity** – Users were able to continue working with minimal disruption using Velocity's delta syncs to ensure access to their content and the latest versions of documents.
- **Information Governance** – Velocity's data validation, reporting, and delta sync capabilities enable document visibility.

Solution

Velocity Content Migration

- On-premise or cloud directly to iManage Cloud capable via API
- Flexible configuration:
 - Reusable migration templates save days of scripting time
 - Optional C# scripting
- Advanced metadata mapping and custom translations
- Error reporting, batch error reprocessing
- Source data validation helps identify issues for clean-up prior to migration
 - Test, verify, and identify issues prior to and during runs
 - Duplicate document detection across multiple sources
- Matter-centric:
 - Preserve workspace structures, folders, and original document numbers
 - Create matter-centric workspaces in target repository on-the-fly
- Delta syncs mean less downtime
- Rollback
- Performance tuning
- Automated scheduling



Quorum is an IT Consultancy and Managed Services company, headquartered in Edinburgh with offices in London. Quorum provide a range of Modern Workplace, Cloud, Data, Development, and Managed Services solutions to customers of all sizes. As a Microsoft Cloud Solution Provider and Gold Partner, Quorum take a cloud and security first approach to their projects and services.

Quorum's mission has always been to deliver high quality IT solutions with outstanding customer service and care for their employees. They continue to uphold the passion, teamwork, and technical specialisation which sets them apart in this industry. Quorum became employee owned in 2019 to secure the future of the company for their customers and employees.

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