Saul Ewing's iManage Cloud Database Consolidation
a Successful Industry First

Innovative Team uses SeeUnity's Velocity Content Migration Tool to Accomplish Groundbreaking Project

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Challenges

With a client-centric commitment to excellence in mind, Saul Ewing LLP merged with Arnstein & Lehr LLP in September of 2017, providing their clients with expanded capabilities and greater depth in key practice areas. The merger happened to take place in the middle of Saul Ewing's DMS deployment to the iManage Cloud. For efficiency and productivity's sake, Saul Ewing Arnstein & Lehr LLP (Saul Ewing) found they needed to consolidate all of their databases into one primary database. As a trusted integrated service provider, Cornerstone Information Technologies, LLC had been assisting with the project.

Due to the timing of the merger, Arnstein & Lehr LLP databases were wholesale lifted directly to the iManage Cloud as is, causing the need for the consolidation to take place within the cloud environment. This presented significant challenges, as cloud environments require API access. There is no access to SQL or SQL tools. A database consolidation within the cloud had never been done before. Additionally, the firm requested no down time for its users during the project in order to maintain productivity.

Solutions

Lisa Stone, Client Systems Architect, and Suzanna Wilson, Systems Integrator, were tasked with finding a way to make this all possible. Lisa contacted SeeUnity to ask if the Velocity Content Migration product (Velocity) was capable of performing this type of migration within the cloud. SeeUnity verified the possibility but had never done one before. This would be a first.

"We've been doing integrations API to API for years, so we are in a good position to handle these migrations. Because our products are API-based, our processes have always been through the API versus the database level whenever possible," said Dan Hunsinger, CTO, SeeUnity.

Industry

Legal

About the Project

- Unprecedented iManage Cloud to iManage Cloud database consolidation
- > 8 million documents
- 16 offices

Challenges

- Required 4 iManage Cloud databases (over 8 million documents) to be consolidated into one primary database
- No access to SQL or SQL tools
- Requested no down time - users continue working during consolidation
- Discovered need for data clean-up of content in source database
- Needed to reclassify data to merge like content

CORNERSTONE.IT

"Integrating systems in M&A situations can be quite complex and slow down productivity during the transition. Because this process required no down time, our users were able remain productive. Data transformation during the consolidation delivered an environment that was ready to go, allowing users to quickly come together to function efficiently as one unified organization."
– Leonard Oliveri, Director of Information Systems, Saul Ewing

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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Under Lisa Stone's leadership, and working closely with SeeUnity, the team Solution worked to develop a plan to tackle the complex migration. The project entailed merging four databases and over eight million documents into one efficiently organized and user friendly primary database.

"We crunched some numbers and figured out that we could bring over the last 350,000 documents recently edited by the users over a single weekend without shutting the system down. This would move the bulk of the current documents to the firm's primary database," explained Lisa Stone, Client Systems Architect.

Velocity's migration process includes validating the source system data in preparation for the move. During this discovery stage, it was clear that the source databases needed clean-up. In addition, data transformation would be necessary to merge documents of the same type with different classifications, combine client matter numbers that didn't correspond with each other, and make other adjustments to create a cohesive database.

Using delta syncs, over 358,000 documents were merged to the new database over a weekend without shutting down the system for users. The old main database was then made read-only so that all documents could only be saved to the new database. The rest of the documents were transferred during regular business hours over the next few days.

Benefits

This ground breaking project took a tremendous amount of innovation. With collaboration from the client, the iManage team, and SeeUnity, Lisa and Suzanna were able to accomplish a new content migration first, paving the path for future cloud consolidations. Lessons learned will contribute to best practices for the next migrations.

By utilizing SeeUnity's Velocity product with its deep set of features and tools, a consolidation of cloud-based databases was possible. Data validation and transformation ensured that the new environment was ready to go for users and did not need further configuration or clean-up. The impact to user productivity was minimal and information governance was maintained with the delta syncs.

"This was an exciting first for everyone. It wasn't easy, and it wasn't flawless, but we figured things out along the way, and the client is satisfied. We were able to accomplish a successful cloud consolidation by utilizing the Velocity tool's API to API capabilities. With lessons learned, we've paved the way for future cloud consolidations." – Suzanna Wilson, Systems Integrator

Solution
Velocity Content Migration

- On-premise or cloud directly to iManage Cloud capable (API to API)
- Flexible configuration:
  - Reusable migration templates save hours of scripting time
  - Optional C# scripting
- Advanced metadata mapping and custom translations
- 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
- Error reporting, batch error reprocessing
- Rollback
- Performance tuning
- Automated scheduling

Benefits

- Consolidate cloud-based databases within the cloud environment
- Feature-rich Velocity product addresses the entire migration, reducing cost, risk, and complexity
- Cleanse data set to be target ready: identify exact source contents for clean-up and data transformation
- Minimize time and effort to go-live
- Increase user adoption: improvements to content during uplift optimize iManage Cloud experience
- Minimize disruption: users are able to be productive and continue working during migration with delta syncs
- Schedule cutover when ready
- Maintain Information Governance

SeeUnity