Thompson, Coe, Cousins & Irons, LLP Makes Seamless Move to iManage Cloud with SeeUnity's Velocity Content Migration Product

Complex Migration Simplified, Saving Time and Money

Comprehensive Legal Services

Since its inception in 1951, Thompson Coe has dedicated itself to being recognized as a national authority on insurance defense and sophisticated coverage issues. Thompson Coe's experience in this highly regulated, cost-conscious industry has enabled the firm to bring a level of discipline and efficiency to its clients that translates into tangible value. Today, Thompson Coe provides this value to its clients through a spectrum of legal services spanning multiple industries. Clients choose Thompson Coe because the firm provides a total, integrated solution to their legal needs.

Challenges

As a long time eDOCS customer, Thompson, Coe, Cousins & Irons, LLP (Thompson Coe) was looking to mature their DM footprint and move to a cloud-based solution. Growth initiatives to remain innovative and competitive called for a cutting-edge solution.

There was concern about how disruptive this project would be while moving processes to the cloud. Thompson Coe has offices nation wide, adding to the complexity of the migration. It was essential for employees to be able to keep up, for example, with the steady stream of corporate audit letters, making information governance and security high priorities. In order to save time, money, and to maintain productivity, it was decided that employees would need to be able to continue working during the migration process if possible.

Overall cost and being able to address latency issues related to the on-premise system were important considerations for the firm.

Some of the key requirements included being able to bring over existing eDOCS document ID numbers, permissions, and other pertinent metadata. Older, unnecessary eDOCS files needed to be archived.

Solution

Jeff Mina, Director of IT at Thompson Coe, and his team chose to move to the iManage Cloud Work 10, in part because they felt this solution could address latency problems and it would be robust enough to unite their many U.S. locations, supporting collaboration with a secure platform. Their strategy called for stricter document governance which would be addressed by storing their content in one of the world class iManage data centers.

Duff & Phelps was brought in to help the Thompson Coe team determine the best course of action to complete this project. Duff & Phelps is the global advisor that protects, restores and maximizes value for clients in the areas of valuation, corporate finance, investigations, disputes, cyber security, compliance and regulatory matters, and other governance-related issues.

Industry

Legal

About the Migration

- Target repository iManage Work 10 - Cloud
- Content volume = 2.5M docs, 15 doc types

Challenges

- Wanted to unify and centralize offices for efficiency and collaboration
- Need to address latency issues with on-premise system
- Strategy to mature DM footprint required content migration from eDOCS DM to iManage Cloud
- Required a solution capable of preserving existing eDOCS document numbers, along with all metadata, including security
- Due to nation-wide office locations, content needed to be migrated in order of priority and from both on-premise and cloud systems
- Preferred a working migration to lessen impact on down time and productivity

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. Over 3,000 organizations around the world—including more than 2,000 law firms—rely on iManage to help them deliver great client work. Headquartered in Chicago, IL, iManage is a management-owned company.

Duff & Phelps had recently been part of another customer's successful migration using SeeUnity's Velocity Content Migration product, making it a clear choice for Thompson Coe in order to expedite their project and greatly simplify the process.

Due to the complexity of having many office locations and the large amount of content involved, it was determined that the best course of action in order to maintain productivity and workflow was to move content from several key office locations to iManage on-premise, and then migrate that data to the iManage Work 10 Cloud via Deltas. During this process, data with any changes from the key offices was synced to the iManage Cloud. All other office locations' content was moved directly to the iManage Cloud.

"Velocity is really the only solution that delivers on all requirements: delta run capabilities to allow users to continue working, API level connection to move content directly to the iManage cloud with structures and metadata intact," commented Mike Ferrara, Director, Duff & Phelps.

Benefits

There are multiple reasons SeeUnity's Velocity Content Migration product was the right tool to move Thompson Coe's content successfully to the iManage Cloud:

- Velocity leverages iManage libraries at API level, allowing content to be moved directly from on-premise or cloud systems to the iManage Cloud along with workspace structures and folders, and other metadata. This eliminates the need for the extra steps normally required, saving time and money.

- Delta runs allow employees to continue working throughout the process, saving time and money by significantly reducing normally expected downtime.

- Built-in scripting for the custom requirements, along with the configurable and reusable migration templates saved a large amount of time normally spent on SQL scripting and FTP's.

- The Velocity product was extendable and agile enough to make changes mid-project through a special API to adjust for newly identified requirements that were not originally in the project scope. Specifically, Thompson Coe needed document numbers from eDOCS, along with history and other metadata to be brought over to iManage intact with permissions maintained.

- Velocity is capable of handling large, complex migrations.

"Other migration tools exist but are not sophisticated enough to move content with this amount of detail. We couldn't have done it without SeeUnity's Velocity tool. There is no alternative". — Mike Ferrara, Director, Duff & Phelps.

Solution

Velocity Content Migration

- On-premise or cloud directly to iManage Cloud capable
- Delta runs mean less downtime, help maintain compliance
- Matter centric: preserves workspace structures, folders, original document numbers, and project ID's
- Advanced mappings for workspaces, metadata
- Configurable, reusable migration templates
- Error reporting, batch error reprocessing capabilities
- Out-of-the-box product with C# scripting for custom requirements

Benefits

- Save time by migrating content directly to iManage Cloud
- Employees able to be productive and continue working during migration
- Maintain Information Governance by syncing and archiving
- Feature-rich Velocity product addresses entire migration, reducing cost and complexity
- Increase user adoption with familiar folder structures in new environment
- Clean-up and archive old files

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SeeUnity

Content integration experts providing in-depth solutions to connect, sync, or migrate data across on-premise or cloud-based ECM solutions with external business applications. We're dedicated to improving workflow and business processes by extending applications and connecting people with content. SeeUnity supports a growing list of 20 connectors and provides comprehensive migration and synchronization tools to 500+ customers and 30+ partners worldwide. We proudly serve customers of all sizes, including Fortune 500 businesses, AMLaw 100 and 200 firms, and government entities.

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