

Berger Schatz Ensures Business Continuity and Resiliency With Move to iManage Cloud

SeeUnity's Velocity Content Migration Product Provides Data Verification and Transformation for Optimal iManage Cloud Experience

Berger Schatz

Matrimonial and Family Law Attorneys

One of the largest law firms in the nation
dedicated exclusively to matrimonial law

Berger Schatz was established in 1987. The firm's founding partners shared a passion for bringing the highest professional and ethical standards to the practice of family law. They envisioned a firm that offered sophisticated legal and financial analysis, combined with a personal approach based on the belief that everyone involved in a divorce-related case - the clients, their spouses, and the children - should be treated with respect and compassion.

Since its founding, Berger Schatz has built a reputation for successfully representing clients in cases involving high net worth, complex business or personal assets, and difficult legal questions. The firm has grown to become one of the premiere matrimonial law firms in the nation, with a team of 39 attorneys in two offices, in downtown Chicago and in Lake Forest, representing clients throughout Illinois.

Challenges

In order to keep pace with an increasingly competitive market, Michael Sauriol, Director of Information Services for Berger Schatz was looking to optimize the firm's existing systems and update disaster recovery processes. His team's goals included modernizing their critical IT infrastructure to improve efficiency, increasing mobility and agility for the attorneys, and reducing the firm's overall risk.

After research and a thorough cost-benefit analysis of systems, the iManage Cloud was chosen, as it met and exceeded Berger Schatz's document management requirements. The firm was already utilizing an on-premise iManage DMS, and Michael had good rapport with the iManage team. Netrix, a trusted integration partner, and SeeUnity, were selected to assist with the transition from the on-premise system to the iManage Cloud. Netrix, founded in 1989, has helped clients operate their businesses more efficiently and effectively by improving business performance and profitability. They design, implement, and support superior information technology solutions.

Solutions

The iManage Cloud not only provides Berger Schatz with the state of the art disaster recovery solution they were looking for, but it offers levels of security and information governance that would otherwise be cost prohibitive for firms of their size. The ability to get to the iManage Cloud while maintaining their current user desktop minimized costly training, while simultaneously providing the ability for users to transition to the new iManage Work 10 interface at their pace for increased productivity and user adoption.

Industry

Legal

About the Project

- iManage on-premise to iManage Cloud
- Blank cloud database - included migration of users' groups, lookups, classes, etc.
- Identified 59K documents with no client or matter number
- Performance was 20-40K documents average throughput/hour

Challenges

- Wanted an effective business continuity and disaster recovery solution
- Preferred to allow employees to continue working during migration
- Data transformation was needed to create a matter-centric iManage Cloud environment
- Required data clean-up
- Needed flexibility on cutover date to address compatibility of third-party integrations
- Desired more agility and mobility for users



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.



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To make the move, SeeUnity's Velocity Content Migration (Velocity) product was selected for its comprehensive and robust capabilities.

Velocity's migration process includes validating the source system data in preparation for the move. This step uncovered 59,000 invalid documents with no associated client or matter number. As those documents represented a risk to the customer, they were cleaned up pre-migration to mitigate that risk.

Data transformation was necessary to create matter-centric content in the new iManage Cloud repository from the flat filing space in the on-premise source repository. The target was a blank cloud database, requiring the migration of users' groups, lookups, classes, etc. With Velocity, users' worklists and favorites, as well as other criteria, were preserved and transferred to the new environment.

Delta syncs ran during and after migration, enabling users to remain productive while other essential applications were aligned for cloud compatibility. The firm chose their production cutover date when all systems were ready to go.

Benefits

By utilizing SeeUnity's Velocity product, with its deep set of features and tools, Berger Schatz was able to make a smooth transition to the iManage Cloud on the roll out date of their choice. Data validation and transformation ensured that the new environment did not need further configuration or clean-up. The impact to user productivity was minimal and information governance was maintained with the delta syncs.

"Being able to identify invalid data pre-migration and clean it up, rather than simply transferring the problems to the new system, is really beneficial. And having the capability to transform data from a flat filing structure into a matter-centric structure saves time on the other end. The content is set up in the new system, ready for work. The users can then take full advantage of the iManage Cloud features." – Jay Parekh, Partner, Director of Enterprise Computing and Mobility, Netrix, LLC

"Velocity delta syncs enabled our attorneys to continue working during the migration, and it gave us the option for a flexible production cutover date afterwards to fine-tune our other application integrations cloud compatibility details." – Michael Sauriol, Director of Information Services, Berger Schatz

Solution

Velocity Content Migration

- On-premise or cloud directly to iManage Cloud capable
- 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, identify issues prior to and during runs
 - Duplicate document detection across multiple sources
- Matter-centric:
 - Preserve workspace structures, folders, original document numbers, and project ID's
 - Create matter-centric workspaces in target repository on-the-fly
- Delta runs mean less downtime
- Error reporting, batch error reprocessing
- Rollback

Benefits

- Save time by migrating content directly to iManage Cloud
- Feature-rich Velocity product addresses entire migration, reducing cost and complexity
- Data validation to identify exact source contents allows for clean-up and data transformation
- Users able to be productive and continue working during migration
- Schedule cutover when ready
- Maintain Information Governance
- Increase user adoption with matter-centric folder structures in new environment



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 30 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, Am Law 100 and 200 firms, and government entities.

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