

# MIGRATING OPENTEXT EDOCS TO IMANAGE WORK WHITE PAPER

# INTRODUCTION

A Fortune 500 telecom corporation approached DocAuto with the need to consolidate disparate document management systems by migrating an OpenText eDOCS system into an iManage Work environment. The plan's initial objectives included migrating three of sixteen legal department Practice Groups' eDOCS and file share based documents to iManage Work while retaining document information, versions, applicable security, and folder structure. This White Paper discusses the processes and technology used to achieve the migration goals.

# CHALLENGES

The client faced multiple challenges to their migration, including:

- Varied requirements for different Practice Groups
- Minimizing disruption during work hours
- Ensuring compliance with inherent bureaucratic layers
- Ensuring documents retained their proper versions, metadata, and security
- Preserving organizational structures, regardless of source of the migrated content

The client was also only able to supply limited scoping information and was only given a small budget for the migration.

# MIGRATION

To accomplish the migration while addressing the client's challenges, the DocAuto Professional Services team outlined the following project steps and deliverables:

- Conduct Practice Group user meetings to collect information on current and desired document governance and management
- Configure an iManage Work environment to demonstrate iManage Work concepts
- Collaborate and develop the iManage Work Requirements Document to guide configuration decisions
- Collaborate and develop Metadata Translation Documents
- Conduct test migrations and develop a step-by-step Migration Plan utilizing DocAuto solutions
- Perform eDOCS to iManage Work initial and delta migrations
- Provide "train the trainer" services to the client's internal trainers
- Using test and production migration results, collaborate on iManage Work environment sizing
- Conduct the engagement closeout meeting and compile the lessons learned for subsequent migrations
- Provide engagement long Project Management services with typical project management artifacts

The Practice Group user meetings also provided the client's users the opportunity to explain how they use the current file shares and eDOCS system to create content and describe what changes are required with the iManage Work system. Along with the scoping information, the feedback from these meetings was used to create the first of several iterations of the Requirements Document that guided the configuration of a test iManage environment used to validate concepts, training, and test migration jobs.

Metadata translation tables were then developed to ensure the desired eDOCS metadata would be properly assigned to documents during migration. Using DocAuto's [ilimport](#) solution as the core migration tool, the DocAuto Services team created a comprehensive import process utilizing SQL tables to track and manage document import status and processes. ilimport jobs were also created to import documents into the iManage Work flat space where they would later be properly moved into the correct Workspace or location using the Provisioning functionality of DocAuto's [Workspace Manager](#). To minimize document production interruption, documents were divided into groups by date with the oldest documents included in an initial migration, followed by multiple delta migrations until a final migration represented a small enough data set to be migrated within a weekend timeframe. The import and provisioning process requirements, tasks, and procedures were fully documented within the Migration Guide provided to the Client in the event they wished to perform future migrations.

The DocAuto Services team conducted "train the trainer" sessions with the Client's technology trainers who are responsible for training end users new to iManage Work. This engagement concluded with DocAuto facilitating the Project Closeout meeting to review the documented lessons learned, deliverables, and plans for future migrations.

## RESULTS

The primary objective of migrating approximately 500,000 documents from eDOCS and file shares to iManage Work with their pre-defined metadata, folder structure, and security intact along with minimal work disruption was accomplished with a 99.9% success rate. Through its partnership with DocAuto, the Client successfully moved the Practice Groups to iManage Work, eliminating their reliance on eDOCS. A practical and successful migration process was implemented for the Client that directly led to additional migration engagements awarded to DocAuto, solidifying DocAuto as a trusted partner to accomplish business and technical objectives.

## ABOUT DOCAUTO

DocAuto is an internationally utilized solutions and services provider focused on Enterprise Content Management and E-mail Management for iManage Work and SharePoint. DocAuto prides itself on rigidly working within iManage Work's 3-tier architecture, Microsoft's SharePoint architecture, and by following Enterprise Content Management best practices. At DocAuto we are committed to creating innovative solutions that improve our clients' unique work environments, foster growth, and meet the future needs of our customers.

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