

Burford Capital Leverages SeeUnity's Velocity Content Migration with Successful Cloud to Cloud Move

SeeUnity Simplifies Migration to iManage Cloud

Burford

Global finance firm focused on law

Industry

Legal Finance

About the Migration

- Target repository iManage Work 10 - Cloud
- Content volume = < 1 Million docs, > 1,000 workspaces

Challenges

- Using legacy NetDocuments DM and many other systems. Wanted to unify into one platform to improve standard for managing documents and emails
- Wanted a robust system to meet growth and future Information Governance initiatives
- Required a ND cloud to iManage Cloud move
- Required a solution capable of preserving existing workspace folder structures and nesting
- Solution needed to be able to perform on-the-fly mappings of document-level metadata from NetDocuments
- Preferred a working migration to lessen impact on down time and productivity

"Given the much higher capabilities and lower risk, we chose SeeUnity's Velocity product as our top choice. It had all functionality desired, most notably, the ability to migrate whole ND workspaces and SharePoint structures directly to the iManage Cloud. Additionally, the ability to sync, allowing for a working migration, substantially mitigated the risk of productivity disruption to our team." — Leah Guggenheimer, CPIO, Burford Capital

Burford Capital, founded in 2009, is a leading global finance and investment management firm focused on law. Its businesses include litigation finance and risk management, asset recovery and a wide range of legal finance and advisory activities. Burford is publicly traded on the London Stock Exchange, and it works with law firms and clients around the world from its principal offices in New York, London, Chicago and Singapore.

Challenges

The original document management system for Burford was NetDocuments. Due to specialized needs and acquisitions however, employees were also utilizing other systems to store content, such as Dropbox, Box, and SharePoint. Users had become accustomed to complex folder designs of highly customized nesting structures within their NetDocuments workspaces. Use of document types was limited. Users ignored the need to profile each time upon saving, so a large portion of the document collection was simply labeled as "miscellaneous," making it critical to maintain these folder structures when moving content to iManage.

While NetDocuments had served Burford well in its early years, Burford's tremendous growth and increased scale required a more robust document management system. Features Burford was seeking included automated workspace creation using standard folder templates, syncing of workspace metadata from a Salesforce database, better integration with Office products (especially Outlook for saving emails and sending attachments), more powerful and precise searching in multiple languages, full compatibility with all document types, better performance, integrated OCR capabilities, better file-sharing capabilities, world-class security and BCP/DR, and high quality mobile access.

To make the most of migrating to a new platform, the Chief Process & Innovation Officer (CPIO) Leah Guggenheimer and CTO Ed Thieberger believed a major simplification, standardization, and reorganization of the firm's document collections and processes was in order. Content needed better organization and more consistent structure across workspaces in order to enable more efficient access by any team member to any workspace across Burford's global footprint as well as to conform with information governance initiatives. The solution entailed creating multiple standard templates, one for each "flavor" of business use and then migrating all content, preserved in the original nested folder structures so that documents could be easily refiled into their new standard locations on the iManage platform.

Timing was a factor for the firm. Content needed to be migrated on a schedule with some level of certainty to maintain deadlines. In addition, Burford did not want the pressure of an "over the weekend" migration, but wanted to be able to migrate slowly, keeping the databases in sync as needed during the process.



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Solution

With multiple document storage solutions already in place, Burford had sufficient experience to assess what they were looking for in a new system. After an extensive search comparing multiple products, iManage was chosen as the platform with the best overall fit to Burford's needs.

Burford as a matter of policy generally does not host or maintain servers; instead it prefers to rely on the greater expertise, security, and business continuity of major industry vendors. As a result, Burford chose iManage Cloud rather than the on-premise application. While the cloud-based iManage Work 10 is early along the maturity curve, it fit in with Burford's larger technology design and cloud-based platforms, including Azure Active Directory, Salesforce, Office365, dual authentication and single sign on.

Duff & Phelps was brought in to deploy the project. Prosperoware's Matter File Transfer tool had at first been considered for the migration, but it did not meet all of the requirements to successfully move such customized content. SeeUnity's Velocity Content Migration product was suggested as a solution, as it is the only migration tool available that can handle a NetDocuments cloud to iManage Cloud migration and move the existing workspace content over with the preserved folder structures Burford required.

Benefits

Migrations vary from customer to customer and can be quite an arduous process without the right solution. SeeUnity's Velocity Content Migration leverages iManage libraries at the API level, allowing content to be moved directly from on-premise or cloud systems to iManage on-premise or the iManage Cloud, bypassing extra steps normally required to get there.

The Velocity product can be easily configured to preserve the custom workspace's structure and content from NetDocuments and bring it over to pre-created iManage workspaces, matching case ID and inserting the associated folders and documents into the correct new workspace. Other migration tools exist but are not sophisticated enough to move content with this amount of detail and accuracy. Velocity is also a comprehensive solution with a wide range of features that address the whole migration, such as advanced metadata mapping and clean-up, configurable and reusable migration templates, document reference handling, rollback action options, digital fingerprint, batch error reprocessing, and performance optimization.

"In the end, SeeUnity's Velocity product managed to completely duplicate every idiosyncratic workspace exactly in the new iManage environment, despite the fact that no two workspaces were the same. SeeUnity scripts also deposited useful metadata from the old environment into the Comments field, allowing it to be searchable rather than lost in migration. Exception reporting was clear and easy to review and remediate. Perhaps most importantly, providing a transitional environment – the old folder structure on the new platform in the new workspace structures – greatly reduced user stress and anxiety. This resulted in enhanced user adoption and higher satisfaction with the migration process in particular and the outcome of this major change initiative in general." – Leah Guggenheimer, CPIO, Burford Capital



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.

Contact Us: sales@seeunity.com, +1 970.776.8300, www.seeunity.com

Solution

Velocity Content Migration

- ND cloud directly to iManage Cloud capable
- Delta runs mean less downtime, help maintain compliance
- Matter centric - preserves workspace structures, folders, original document numbers, 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

DUFF & PHELPS

"The ability to customize and configure complex migration scenarios and run them by jobs is very powerful. This allowed for non-developer resources to be able to run migration jobs and delta processing. Another critical capability of Velocity is its ability to give administrators real-time feedback on job processing status and a full audit trail to determine remediation steps."

– Mike Ferrara, Director, Duff & Phelps,

Benefits

- Save time by migrating content directly to iManage Cloud
- Employees able to be productive and continue working during migration
- Feature-rich Velocity product addresses entire migration, reducing cost and complexity
- Increase user adoption with familiar folder structures in new environment