Data Sheet
# iManage Cloud Migration

## Overview Approach

OIA's approach to successful iManage Cloud migrations starts with a deep analysis of existing platforms, systems, integrations, and business use cases. This takes the form of a Cloud Readiness Review actioned by experienced consultants and delivers reports and recommendations as per core software and supported platforms; general system review & data health; integration software & support; and cloud migration tasks and elements.

Cloud Readiness Review reports give us two key outputs:

1. Ensure we understand all the touch points and inclusion for the migration project, that will translate into a project elements map, a services plan and a realistic project scope & timeline.
2. Surface any areas that the customer needs to address before embarking on an iManage Cloud migration (e.g. replacement/upgrade of legacy software, re-development of COM customisations).

To ensure we commit the required focus to the various element of the migration, OIA's project team includes the assignment of an experienced technical project manager, an experienced technical lead(s) AND engages with the global leader of iManage Cloud migration software. This project team model allows our technical lead(s) to focus on commissioning of the cloud, back-end integration, desktop packaging, UAT, etc. while the contained element of the Work library migration is executed in parallel by proven & experienced migration engineers and software. Essentially allowing the experts in each element to excel while being part of a highly collaborating team.

## Project Governance Activities

> Detailed project plan and critical path
> Task management platform
> Risk, Issues and bug tracking (UAT) platform
> Project documentation deliverables including technical architecture, integration design, desktop design
> Weekly status reports and meetings
> Daily stand-up meetings during high volume work periods
> Close engagement with iManage Cloud services
> Project Overview, peer reviews, iManage reviews

With the definitive scope, proven plan and experts combined to form our overall approach, OIA's underlying project methodology is used to manage and execute the various element and streams.

## Proven Project Methodology & Steps

> Preparation & Scope

Our team will work closely with our customer's technical and business teams to complete solutions inclusions, contracts, start dates, etc. Following that, a complete scoping and definition process including team members & contacts, timelines, charter, comms plan, platforms.

> Technical Architecture

Our technical experts will assess all the elements in the scope, the existing customer environment, and the project deliverables to document the intended solution to be implement, on-prem server & service requirements and network overview.

> Commission iManage Cloud

OIA's experienced iManage consultants will work closely with iManage Cloud and the customer's technical resources, to stand up iManage Cloud services, connect back end integrated solutions (authentication, integrations, notifications), baseline performance testing and functional smoke testing.

> Work DMS Data Migration

Using the best of breed tools, the migration engineer will perform analysis of source data, stage the data and transformations and perform a baseline uplift of each database, working closely with the implementation team to resolve technical and business-related data issues and transformations. Following all database baselines and remediation, delta processes will be run at appropriate intervals until go live.

> Integration Re-Implementation/Redevelopment

Based on the cloud readiness outcomes, OIA consultants will re-configure, or re-implement solutions integrated with iManage Work. Most prominent here in the practice management system / workspace generation integration. During this period, any desktop software (iManage Work Desktop) is repackaged and tested for iManage Cloud.

> Testing & Acceptance / Training

With the iManage Cloud commissioned, data uplifted and integrations redefined, technical testing of the solution is completed before running a User Acceptance Testing phase to validate data, service and desktop functionality. The business is given a period to sign off the UAT phase before moving into go live.

> Cut Over & Go Live

Careful planning in undertaken to collate all the tasks that are either dependencies or need to be completed leading into the cut-over and go live – usually via a go live checklist. Going into the cut-over point, the final delta migration of iManage Work databases is completed, the desktop package is retrofitted or redeployed, technical validation and business validation is completed before moving to go live. Following go live, OIA provides a hyper care period to support the customer with the change, before handing over to Business As Usual support with OIA's dedicated iManage support team.

## OIA Migration Best Practice

Best practices for data uplift & maintaining data integrity:

> Pre-migration data cleansing
> Pre-migration resolution of unsupported data & configurations in iManage Work
> Source data uplifted to staging tables and analyzed for required transformations
> Dress rehearsal data migration run from on-prem to on-prem
> Segmenting of exceptions for remediation and running in isolation
> Segmenting object type imports to manage & remediate individual issues
> Full logging of transaction and iManage Cloud API responses



## About OIA

OIA has over 40 customers in the iManage Cloud cross the APAC region, a 50/50 mix of new sites and migration from legacy on-premise iManage solutions to the cloud. OIA was a pioneer on the iManage cloud journey, being the first and largest iManage cloud implementation partner in APAC and subsequently being the first partner globally to migrate both iManage Work and iManage Security Policy Manager for a large professional services firm.

Winning the iManage Cloud Excellence APAC award for a number of years while building deep expertise around iManage Cloud and developing the right project methodology for complex and high volume data migrations is testament the impact and track record that OIA's consultants & engineers have added to the iManage Partner ecosystem.

Over the journey, OIA engineers have worked with all the major 3rd party vendors for iManage solutions, including Prosperoware, RBRO, SeeUnity and DocAuto – so have a very broad understanding of the migration processes and the capabilities of solutions available to iManage customers globally.

Our team also participates in support and implementation initiatives with members of our global alliance, The Global Efficiency Group. Through this channel, we have access and contribute to a wealth of knowledge and experience of extremely competent iManage consultants and engineers globally.

Visit www.officeinfo.com.au or contact us on +61 8 9223 1700 for more information. Follow OIA on LinkedIn for important updates and news.