Everlaw

Migrating to Everlaw

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Migration Process Overview

The migration process can be divided into four parts: Understanding the Process, Assessing Your Data, Data Ingestion, and Quality Assurance and Completion.

Understanding the Process

SCOPING CALL

If you are thinking about migrating to Everlaw, the first step is to ask your Account Executive or Customer Success Manager to schedule a Scoping Call for you. The Scoping Call is a short conversation with one of our Platform Migration experts. On the call, they will talk you through the migration stages, address any high-level questions or concerns, and explain what your responsibilities will be throughout the process. They will also introduce you to the team that will support you throughout the migration.

MIGRATION INTAKE QUESTIONNAIRE

Once you have decided to migrate your databases to Everlaw, we will send our Migration Intake Questionnaire to you. This questionnaire is an in-depth review of the data that you will be migrating. It covers the scope of databases to be migrated and details about the data in those databases.

Assessing Your Data

MIGRATION DATA CALL

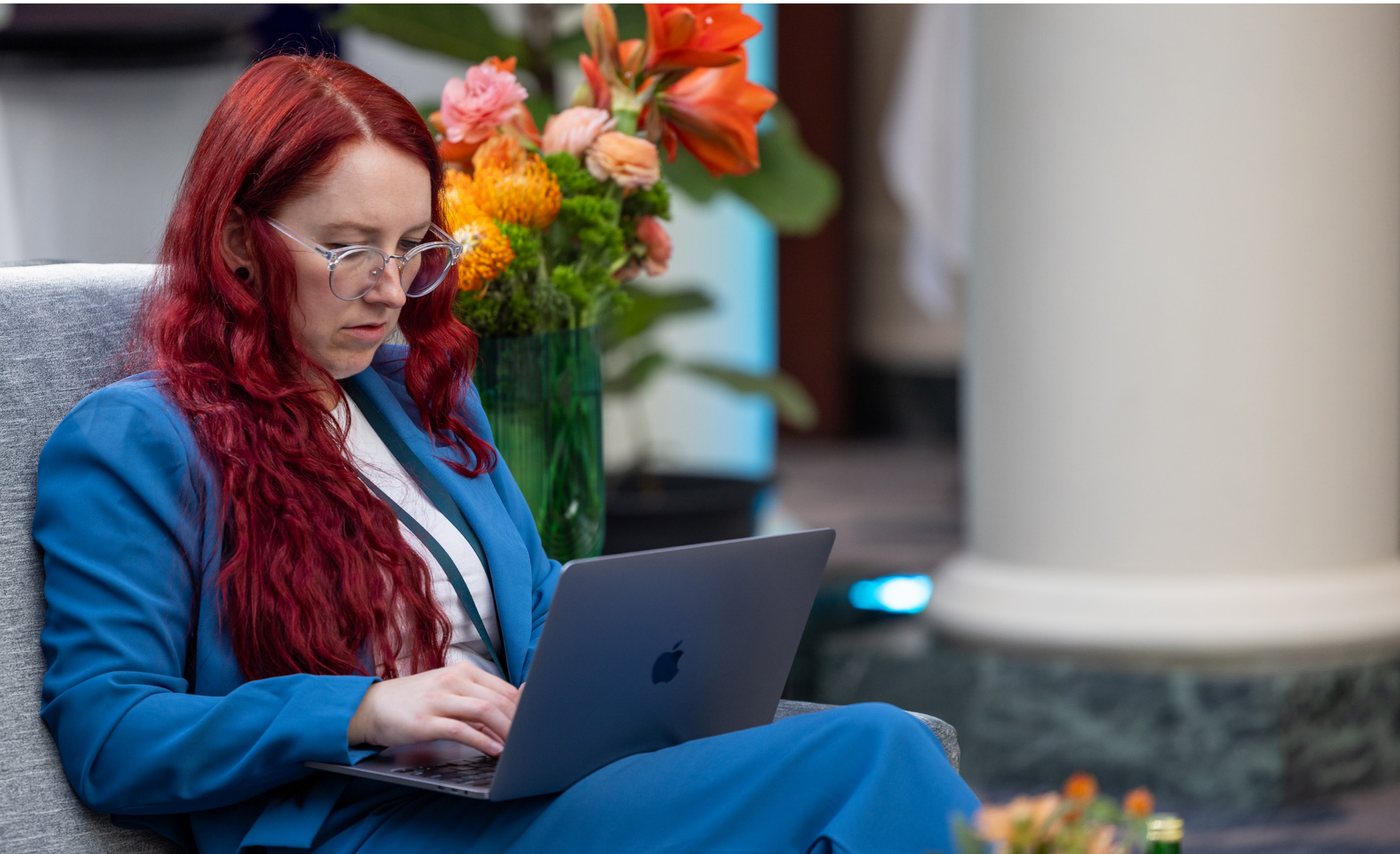
As soon as we receive your completed questionnaire, we will schedule a Data Call for you. On the call, your Data Operations Migration Lead will review your answers to the questionnaire, ask clarifying questions where needed, and confirm requirements depending on the data.

SAMPLE DATA ASSESSMENT

After the Data Call, we will ask your team to send over a sample data set. This will allow your team to test the export process and give our team a chance to review the resulting data. At this stage, we may request modifications to the export configuration that you used or determine that manipulation will be needed in order to ingest the data. We will confirm any necessary manipulations with you at this stage.

STATEMENT OF WORK

Once we have determined any manipulation steps that will be required to migrate the databases, we will issue a Statement of Work, or SOW, for your team to sign. This contract will confirm the amount of data to be migrated, as well as the time frame in which we anticipate completing the migration. As soon as the SOW is signed, we can begin migrating!



Data Ingestion

TRACKER CREATION

If you are migrating a large number of databases, we will work with you to create a shared master tracker. The tracker enables us to keep you informed on the progress of the overall migration and the status of each database. It also establishes intermediate deadlines to ensure the project stays on track. Generally, the tracker takes the form of a spreadsheet.

UPLOAD

We will upload your databases on a rolling basis as we receive them. If there are particularly urgent databases in your set, your team can establish priorities in the tracker. For each upload, we will ensure the database is in alignment with the format we expected, perform any needed manipulations, and communicate any issues or concerns with you. Once the database has been ingested, we will confirm with you, either by email or within the tracker, that the database is complete and ready for review.

Quality Assurance and Completion

QUALITY ASSURANCE

Your team will take a look at the resulting Everlaw database and perform a quality check to ensure everything that existed in your previous space was successfully migrated and that everything looks good.

COMPLETION

Once all databases have been migrated, we will notify you that everything we received has been ingested. We will ask that you review the migrated databases over the following week or so and raise any questions or concerns. After this period, we will formally close the migration project.

Data Contingencies

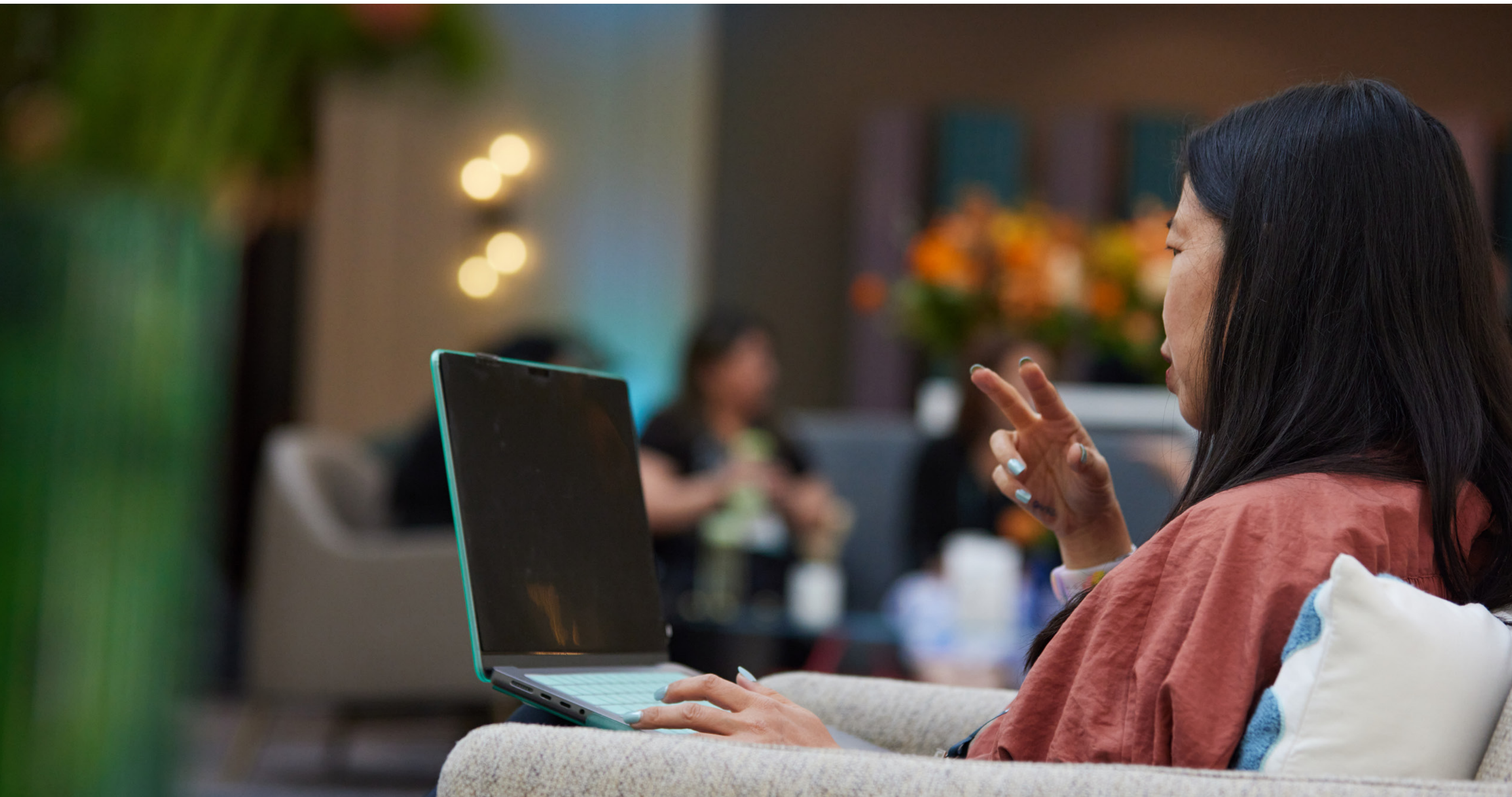
Often, data manipulations are required for an export from one platform to be ingested smoothly into another ediscovery platform. Our Data Operations team is prepared to address the many components of your database that must be preserved when migrating to a new ediscovery space. We will work closely with your team to ensure transparency in any manipulations before they are performed.

Document Numbering Conventions

Everlaw uses a document's Bates prefix and number as its unique identifier in the Bates/Control # field. This means that we require each document in a database to have a unique prefix and number, and the documents will be ingested under this identifier.

We understand that some other platforms use a different system of document identification that allows for deviations from this prefix and number requirement. In these instances, our process is to assign a new Everlaw-specific numbering convention to the documents. This numbering is for the purposes of ingestion, and we preserve your original Bates numbers in searchable metadata fields for your team.

To demonstrate, say you have two documents in your migrating database: ABC001 and ABC001.001. Because these share the same prefix and number, we cannot ingest both documents into the same database as they are. Our team will add a new column to your load file with new Everlaw numbering, such as EVER_0000001.1, EVER_000002.1, etc. This modification will allow us to ingest the documents and all their accompanying metadata and will also allow you to continue to search across the ABC numbering.



Production Versioning

In Everlaw, when a document is produced, a new version of the document is created. This version is an entirely separate document that lives in the Everlaw database under its own Production Begin Bates.

When migrating a database, our team will confirm with you whether outgoing productions have been run in your database. If so, we will use the production version and the original version to create documents in the Everlaw space. Then, we will create a relationship between these documents so that you can view these versions as connected to each other.

To create this relationship, we need a field of unique identifiers that connects the produced version of a document to the original version – for example, a Control ID field in the production set's load file that indicates the original Control number of the pre-produced version. Internal platform-specific identifiers that are shared between production and original documents will also work.

Work Product

One of the biggest questions we are asked when consulting on a migration is whether we will be able to save review work that has already been done. We understand that, often, many hours have gone into that existing review work. Our Data Operations team will work with you to migrate this.

Codes, Notes, and Comments

If your work product consists of codes, tags, notes, or comments, we will ask your team to export these as fields in either a load file or a CSV. Our team will manipulate the format of the file into an Everlaw-ingestible format and re-create these codes and notes in Everlaw.

Highlights and Redactions

If your work product includes highlights or redactions, we will work with your team to determine the best approach. Often, clients find that redacted documents have been produced, and the production version contains the redaction. If this is not the case, we will help you determine other options to preserve this work product, including ingesting a redacted version of the document to view alongside the unredacted version.

How Can You Begin to Prepare?

Understanding Exports

Clients who have never performed an export may want to consider reaching out to their existing platform's support team or identifying training resources to help in the process. It may also be helpful to test a few exports to familiarize yourself with the process. However, we ask that you engage with Data Operations on a call before generating a complete export.

Project Scoping

Some of the first questions our Data Operations team asks in the Migration Intake Questionnaire involve the scope of the migration project. We recommend beginning conversations with your team early on to allow individuals time to determine which databases need to be migrated, which databases are active and need minimal downtime, and which databases are of the highest priority.

Information about the scope of your migration will help our team develop a project plan to ensure deadlines are met. This information will also be used to create a migration tracker if you are planning to migrate multiple databases.

Training

While our Data Operations team is working on manipulating and uploading your data, we strongly recommend that your team goes through Everlaw training. This proactivity will ensure that as soon as your data is ready to review, you will be equipped with the knowledge and confidence to navigate the Everlaw platform and evaluate the migrated data. We have found that clients who use the migration time to go through training are up and running far faster than those who wait until their data has been migrated. This will also allow you to QA the migrated data more efficiently and ensure everything that you intended to migrate has been transferred.