



Migration Checklist

How many databases does your WorkSite environment have?

Each WorkSite Database can have its own set of users, roles, security, meta-data etc. and for that reason it's important for us to understand if we're only migrating legal matters (production and/or archive) or that the WorkSite environment has been used to service for example staff departments such as IT or HR.

Are all databases on the same DB Server or do you use region specific databases?

For performance reasons, iManage typically used local servers (database and/or fileserver, etc.) when users are working multiple countries. Since our migration software has the optimal throughput when it's located closely to the source of the data, it's important for us to understand the location(s) of the databases.

Are all databases connected to the same Fileserver or do you use local file servers?

For performance reasons, iManage typically used local servers (database and/or fileserver, etc.) when users are working multiple countries. Since our migration software has the optimal throughput when it's located closely to the source of the data, it's important for us to understand the location(s) of the filestore(s).



Migration checklist

What version is your WorkSite environment?

Differences between WorkSite version will have impact on the database schema and the way how we can retrieve information.

Does your WorkSite environment use HIPAA Encryption?

When documents on the WorkSite filestore are encrypted, this should be considered when we access the information.

Has specific security been configured on Tab, Folder, Subfolder, or even document level, instead of workspace security?

The most likely scenario, security is managed on workspace level and could be retrieved from that workspace. Technically, WorkSite however allows you to break inheritance and set different security on tab, folder or documents level. It's important for us to understand if has been done and if so, if this is a regular or an exceptional situation, so we can transfer the security in a correct way.

Are all workspaces created according to a specific template or a certain set of templates and so are the root folders equal on all workspaces?

If workspaces are all based on a fixed template, the structure (tabs, folders) is typically easy to map from source to destination. In case workspaces are build and structured manually by users, this manual structure will have to be re-created during the migration.

Have workspaces been created driven from a primary system? (SAP, Dynamics, etc.)

When the WorkSite System is structured based on input from a leading system, it's important to re-establish that connection to Custodian for Legal to ensure information is structured and aligned properly across applications.



Migration checklist

Does your WorkSite environment have ARCHIVE database(s) and should this content be made read-only?

WorkSite environments often use ARCHIVE databases to store closed matters.

Optionally, this information could then be made read-only for all end-users and required to be re-opened and transferred to another database if modifications are needed. When this is set-up, we would like to understand the archive process and if archived information should be made read-only to end-users in the Custodian for Legal set-up.

Does your WorkSite environment have a TrashBin solution? And what should happen to these “deleted” documents?

WorkSite does not provide a recycle bin by itself and many partners created custom applications to facilitate a better safe delete mechanism. Some of these mechanisms moved the documents to another (secured) location while others left them in the original location and choose to hide the documents by setting custom security and meta-data. If such a custom recycle bin solution is in place, we would like to understand how this works and what should be done with documents in this recycle bin.

Does your WorkSite environment have orphan documents (documents that are not linked to a folder but return via search commands?)

Older WorkSite Environment (pre 8.5) did not support the “Prevent flat space filing” function. As a result, orphan documents could occur when folders were deleted that contained documents or when documents were deleted without checking the permanent delete checkbox.

Users will not see these documents in folders, but they can still be retrieved using Search functions or shortcuts.

SQL Query to retrieve amount of orphan documents:

```
select COUNT(*) from MHGROUP.DOCMASTER
WHERE DOCNUM NOT IN (SELECT ITEM_ID FROM MHGROUP.PROJECT_ITEMS AS PRJITEMS with (NOLOCK) WHERE
(ITEM_DB IS NULL OR ITEM_DB = DB_NAME()) AND ITEMTYPE = 'D')
AND DOCNUM NOT IN (SELECT PRJ.DOCNUM FROM MHGROUP.PROJECTS AS PRJ with (NOLOCK) INNER JOIN MH-
GROUP.DOCMASTER AS D ON PRJ.DOCNUM = D.DOCNUM)
```



Migration checklist

Do you have personal workspaces and if so, do these migrate to SharePoint Online or OneDrive for Business?

Some organisations used the WorkSite system with a personal workspace structure, allowing users to store personal content in their own workspace. Microsoft 365 typically offers this functionality via OneDrive for Business and if preferred, personal workspaces can be migrated to the users OneDrive for business location.

The numbers

We like to understand the volume of the data, so we can estimate the migration effort and duration.

Name of the Database(s) e.g. MATTERS	Geographic location of the Database(s) e.g. AMSTERDAM	Size of the database(s) (GB) e.g. 12 GB	Size of the File-store(s) (GB/TB) e.g. 4.5 TB	Number of documents per DB e.g. 6.8 Million	Number of work spaces per DB e.g. 250.000

SQL Query Count number of documents:

Select **COUNT(*)** AS Count_Documents from mhgroup.DOCMASTER with (NOLOCK) where TYPE='D'

SQL Query Count number of workspaces:

Select **COUNT(*)** AS Count_Workspaces from mhgroup.DOCMASTER with (NOLOCK) where TYPE='P'

Send the completed checklist to switch@transformdata.eu and we will contact you to discuss the possibilities.



A temporary server to run the migration software (close to legacy system)



A (temporary) SQL Database 2014 or later



SharePoint account with required permissions



Azure storage account