Preparing for a Successful Migration to RelativityOne

Preparing for a Successful Migration to RelativityOne

Introduction

As legal teams become increasingly open to migrating technology and data to the cloud, it is critical to understand how to correctly execute these transitions. Epiq has helped over 100 clients successfully migrate to Relativity and over 30 clients to RelativityOne. During these complex migrations, planning and strategy are key to avoiding pitfalls.

This guide explores best practices for migrating from Relativity Server to RelativityOne. It covers recommendations including:

• Stakeholder communication and change management

• Detailed migration planning, scoping, and execution

• RelativityOne workflow optimization

Although this guide focuses on a very specific scenario, moving to RelativityOne, many of its concepts can be applied in other scenarios where you are migrating data or onboarding and adopting new tools.

Recommendation #1: Gain Stakeholder Buy-In Early in Your Process

Migrating data will impact many groups within your organization. Depending on the maturity of your eDiscovery offering, there can be a range of people to involve. Before you start making any changes, and perhaps even before you decide to move to the cloud and RelativityOne, you should inform anyone who interacts with Relativity of the impending migration and what it will look like.

Common stakeholders to engage from the start include:

• Legal and compliance teams

• IT teams

• Case team

• Business unit leaders who may be asked for funding

• Key end users such as outside counsel

• Finance

Communication is critical when coordinating across groups. Schedule regular status meetings and create centralized documentation to get everyone on the same page. If you're choosing to migrate existing cases to RelativityOne, it will be critical to communicate downtimes. If only net-new cases are going into RelativityOne, it is important to communicate to users when to use each application.

Taking the time upfront to build consensus is well worth it. With stakeholders aligned early on, the path forward will be much smoother.

Recommendation #2: Create a Detailed Plan for Migrating Cases

This section only applies when migrating a portion or all existing matters from your current platform to RelativityOne. If you instead intend to maintain an older solution and only add net new matters to a new one, you should focus on workflow and process changes, as described in Recommendation #3.

Create a Migration Plan and Scope

After gaining stakeholder buy-in, the next step is creating a detailed plan for existing cases. This plan should identify the workspaces, their status, the date of the migration, and the actions pre and post migration. Using the plan as a source of truth that can be shared and updated will help keep all invested parties on the same page. Any plan should include clear action items that have assigned owners and due dates to help with accountability and keeping your timing on track.

Migration Plan

Your plan should use a variation of the following columns and any project specific items:

Case Name	Status	File Count	File Size	MDF Size	Client Name	Batch	Start	End

Column Explanations and Definitions

Case Name: Workspace or Matter name within your current platform.

Status: Epiq prefers 3 common statuses "Hot, Warm, Cold" to denote the activity level of a case. This corresponds with the amount of downtime a case can reasonably take during the migration. Hot is the most active, cold the least.

File Count: The raw number of files in a workspace, which tends to be the best measure of time to migrate.

File Size: GB size of files in workspace.

MDF Size: GB size of the SQL DB. File + MDF size is usually the second consideration for time a migration will take.

Client Name: This is the end client for tracking purposes, this may not apply to corporations, it can be a helpful field for grouping cases.

Batch: Epiq normally divides a migration into roughly equally sized batches. This allows for a consistent schedule without extremely large windows of downtime.

Start/End: Start and end of expected migration window (Jan 1 – Jan 3).

Scheduling Windows

Determining when exactly a case should be moved can be surprisingly challenging. In our experience, the best approach is to provide recommended dates and use those unless there are objections. As long as you build in the ability for stakeholders to provide feedback and change dates if truly needed, this will lead to a more efficient scheduling process compared to asking others for their preferred dates.

The simplest approach for migrations is to target nights and weekends for the moves. This will have the least impact on case teams. The exception to this is very large cases. These cases can take multiple days or longer to move, with extreme examples measuring in weeks rather than days. We recommend running several test jobs to determine your expected daily throughput when deciding whether a case can be handled within a weekend.

Reviewing Users and Permissions

Document the users for each workspace along with their roles and access levels. Making sure users have the expected level of access and case visibility will limit post-migration tickets or issues. A migration is also a great opportunity to review access levels and groups for cleanup.

For mass moves that are Relativity to Relativity, the tool "User and Group Synchronization" can be an effective option. Remember that users are not naturally transferred within the archive if moving from Relativity Server to RelativityOne.

Mitigating Risks

There is risk with any migration. It's important to have a plan and be flexible if it's required. Epiq typically uses the option of reverting the migration actions if something unforeseen arises. This means that if a case cannot be properly migrated by the expected time, we will cancel the migration and restore access to the case in the original environment. We would always recommend that a case remain in the source environment until the migration has been validated successfully and any post checks for that case have been completed.

Reporting Progress

The group of individuals interested in a migration is often broader than the core team that is planning and performing the migration. Detailed reporting that explains the migration status overall will help the core team communicate status with stakeholders and interested individuals.

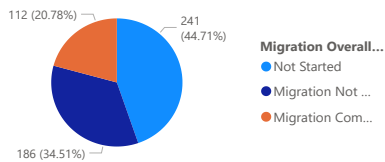Here is an example of a real time dashboard provided by Epiq during migrations:
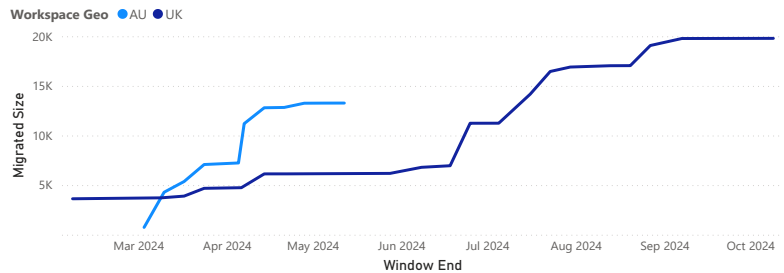
Count of Case Name by Workspace Geo
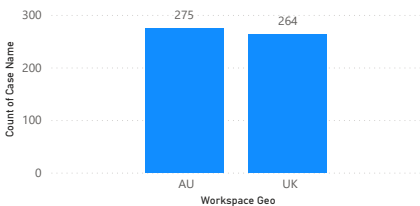
Workspace Size (GB) by Workspace Geo
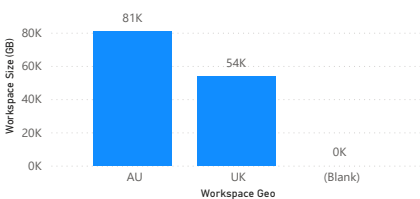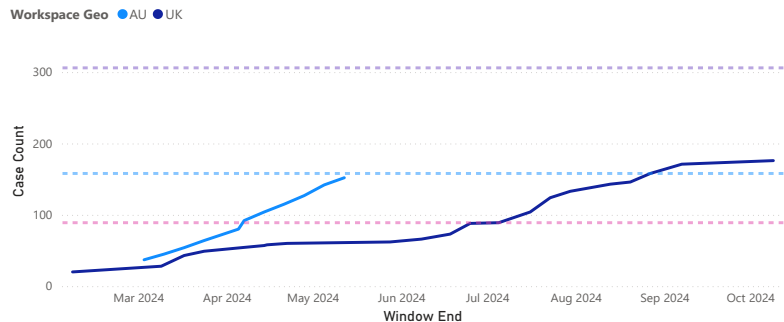

Count of Case Name by Migration Overall Status

Migrated Size by Window End and Workspace Geo

Case Count by Window End and Workspace Geo

Recommendation #3: Optimize Workflow During Your Migration

Migrating to a new platform provides the perfect opportunity to re-engineer and optimize workflows. RelativityOne introduces capabilities that may enable streamlining legacy workflows or reworking challenging processes. As individuals learn to use a new platform, it is a great time to wrap in other processing and workflow changes as part of training and onboarding. Common examples of workflow changes to consider include:

Switching Processing Tool

Consider the pros and cons of various processing options now available to your team. This can include Relativity Processing, Epiq Discovery processing, and more. Once you have aligned on the right tool for your organization, you will need to build a processing template and explain to users what this new tool means for legacy cases.

Workspace Types

Workspace types tend to be one of the most impactful new features in RelativityOne, but can also cause confusion. Repository, Cold, and Review workspaces each come with considerations to billing and actions that can be done in them. Make sure you and your users understand the differences. Additionally, how and if you use the staging hosting area and for what types of data is another factor to consider.

Relativity Integration Points

Relativity Integration Points (RIP) and other new features in RelativityOne should be considered, including this ever-expanding list:

• Utilizing Linked Files from RIP can reduce your overall spend

• Automation/Automated workflows

• Relativity Collect

• Relativity Redact

• Relativity's Extend Product (Contract, PII Detect, Breach Review, and aiR)

Conduct workshops and training sessions early in the planning to uncover workflow pain points, brainstorm process improvements, and familiarize users with RelativityOne. Some organizations develop a "road show" or other internal marketing efforts to socialize the platform change, the reasons for it, new benefits from the change, and other features that will help drive excitement and adoption.

Closing

Epiq has effectively partnered with clients of all sizes to help them migrate from Relativity Server and other tools to RelativityOne. We've helped organizations reduce infrastructure burdens and position themselves for the future during this transition. With deliberate planning, stakeholder engagement, workflow innovation, and careful execution, any challenges can be overcome. Following the strategies in this guide will help you set the stage for a cloud migration that upgrades productivity and performance.

About the Author

Josh Cornett, EMS Transformation Strategist, Epiq

With nearly a decade of experience leading complex software and hardware implementations, Josh has been at the forefront of Epiq's Managed Services largest migrations, including migrating organizations from a variety of source platforms and spearheading successful transitions to RelativityOne. In his various client-facing roles, Josh has focused on delivering implementation solutions that drive value for clients. He has partnered with numerous clients to optimize workflows and realize significant cost savings. He serves as a trusted advisor to clients, designing and implementing tailored solutions to meet their needs.