

A Comprehensive Guide to iManage Legacy Solutions End-of-Life

iManage is ending life and support for popular legacy applications. Plan and prepare now for these changes - you will need time for upgrades.



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This eBook was created by Cornerstone.IT to help law firms understand the ins and outs of iManage legacy solutions end-of-life process and help prepare them for the transition to Work 10 or iManage Cloud.

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Introduction

iManage, a leader in advanced Artificial Intelligence and powerful document and email management, recently announced the end-of- life (EOL) for all legacy versions of its classic clients and add-ons.

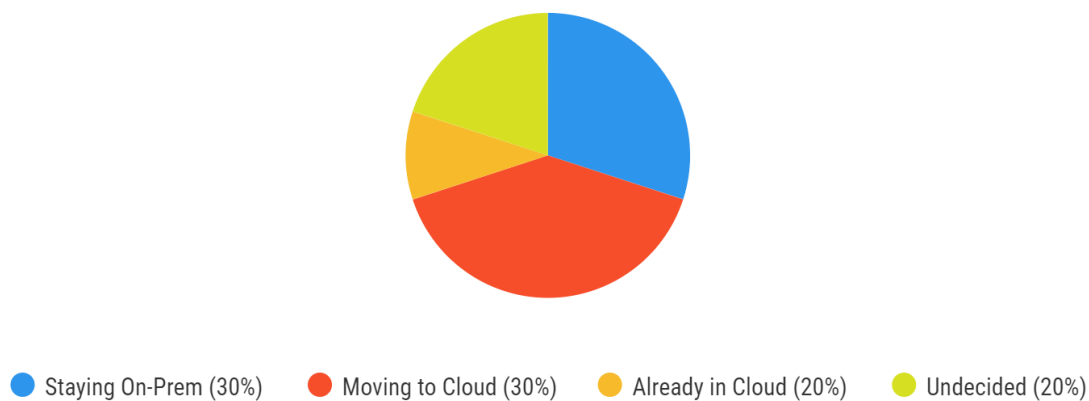
So, what does this mean for your organization? It means changes are on the horizon, and organizations will need to leverage technology to meet these changes head-on.

How Can We Help?

That's why we've written this instructional eBook to help your organization understand the ins and outs of the iManage EOL, what you will need to do to prepare, and how to execute a seamless transition into the **iManage Cloud** or **Work 10 On-Prem**.

During a recent ILTA Master Class webinar, we polled attendees and asked them to share their current plan for migration to Work 10 and the results were:

Percentage of Current Plan to Migrate to Work 10



How Will iManage's EOL Affect Your Firm?

What does end-of-life (EOL) mean?

EOL means that iManage will end all support for its core legacy products beginning **December 29, 2023**. iManage will no longer take support requests for the retired components and historical versions of the below-mentioned applications. Additionally, all support articles, documentation, and software downloads will be removed from the Help Center (help.imanage.com) as of ***December 29, 2023**.

This move will put many firms in a position to change the way they have been doing things for quite some time as they move away from the classic clients.

Why are iManage legacy solutions going EOL?

iManage's decision was motivated by upgrades to **Work 10** and their technology partners' integrations to support the **Work 10** interface with the Universal API. As a normal part of any technology's lifecycle, products eventually reach a natural end-of-life phase for various reasons, such as newer and better technologies, as well as changes in the market.

As a result, the following legacy versions of iManage clients and add-ons will cease:

iManage DeskSite
iManage FileSite
iManage OffSite
iManage Express Search
iManage Miner
iManage DealBinder Add-On

Also

***IDOL Indexer**

***As of May 2023, IDOL Indexer is in "Support Mode" with limited extended support through December 31, 2024. All other legacy solutions are still slotted for a combined EOS and EOL on December 29, 2023.**

How Will iManage's EOL Affect Your Firm? – Preparing for EOL

Start your planning

Your first order of business will be to assess your current technology environment and decide if you are going to stay on-premises or make the move up to the Cloud.

Once you have made that decision, your process will differ somewhat depending upon the path you choose. In the next few pages, we will break down the steps needed for both **Work 10 On-Prem** and **iManage Cloud** migration.

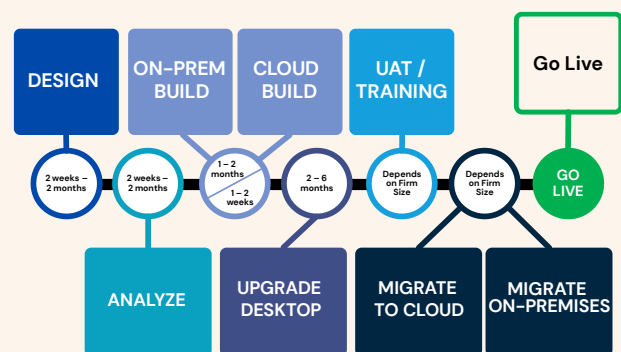
This is also the time that you need to begin your planning for your desktop environment, whether you are updating physical computers or creating a new Citrix image.

Seek out help from a skilled migration partner.

Connecting with a reliable Migration Partner at this time may be helpful with assessing your current environment and discussing your future needs in order to help you understand your options.

How long will it take?

There are so many variables that you may not be aware of that could determine your timeline in ensuring your move to **Work 10** before the product cut-off date. We are all aware that a process like this takes more time than originally planned and resources may become limited as the EOL date approaches.



How Will iManage's EOL Affect Your Firm? — The Advantages of iManage Work 10 Over the Classic Clients, Filesite and Desksite.

Better user experience - drive adoption and productivity across all devices

Deeper integration with Microsoft Office - including Outlook and Teams

Enhanced performance and capabilities, including client-side email filing

Flexible, adaptable, agile platform across multiple modern systems

Auto-updates - keep user up-to-date with the latest functionality, delivered via self-serve or firm-wide

During a recent ILTA Master Class, we polled attendees and asked them to share their current plan for migration to Work 10 and the results were:

How long ago did your team rebuild its Windows Desktop?



● In Progress (22%) ● Within last 12 months (32%) ● Within last two years (30%) ● Three years or more (16%)

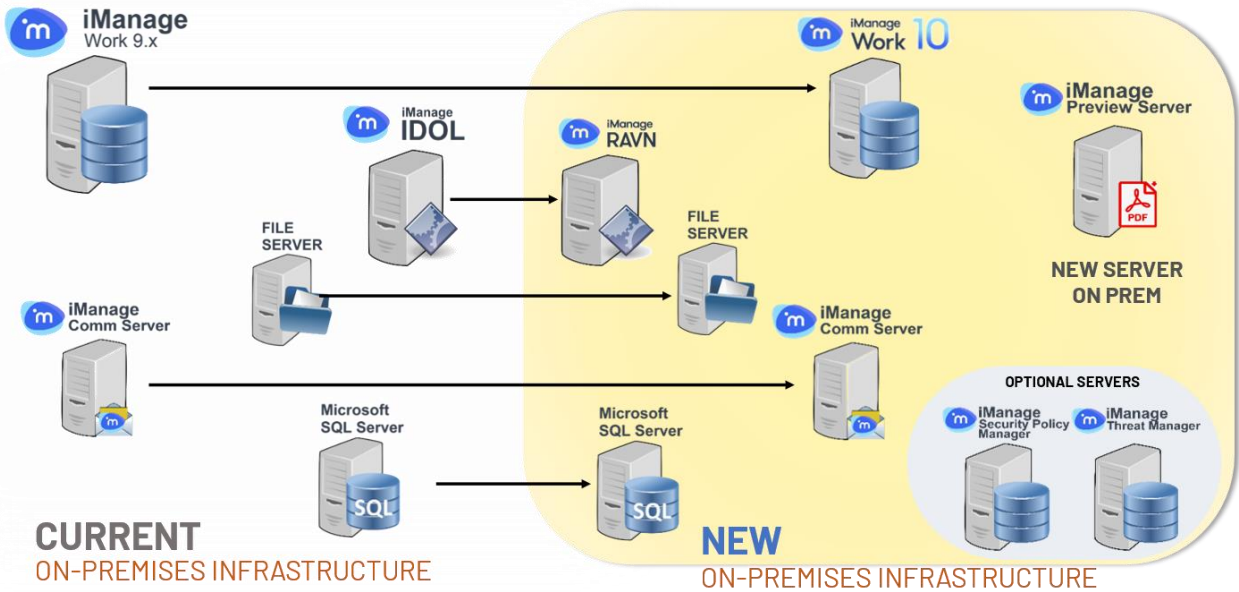
How Will iManage's EOL Affect Your Firm? – iManage Cloud vs On-Premises

Things to consider when deciding whether to move to iManage Cloud or stay On-Prem:

- ✓ Do you have the IT staff to support an on-premises system going forward? Or would being on the cloud be a better use of your resources?
- ✓ Cost of servers and licensing, upgrades and maintenance down time could be substantial. Since iManage maintains all of the servers, you will not be responsible for these costs.
- ✓ Remote accessibility On-Prem can be limited. Whereas using iManage Cloud opens options for remote access, along with iOS apps allowing for access via iPads or iPhones.

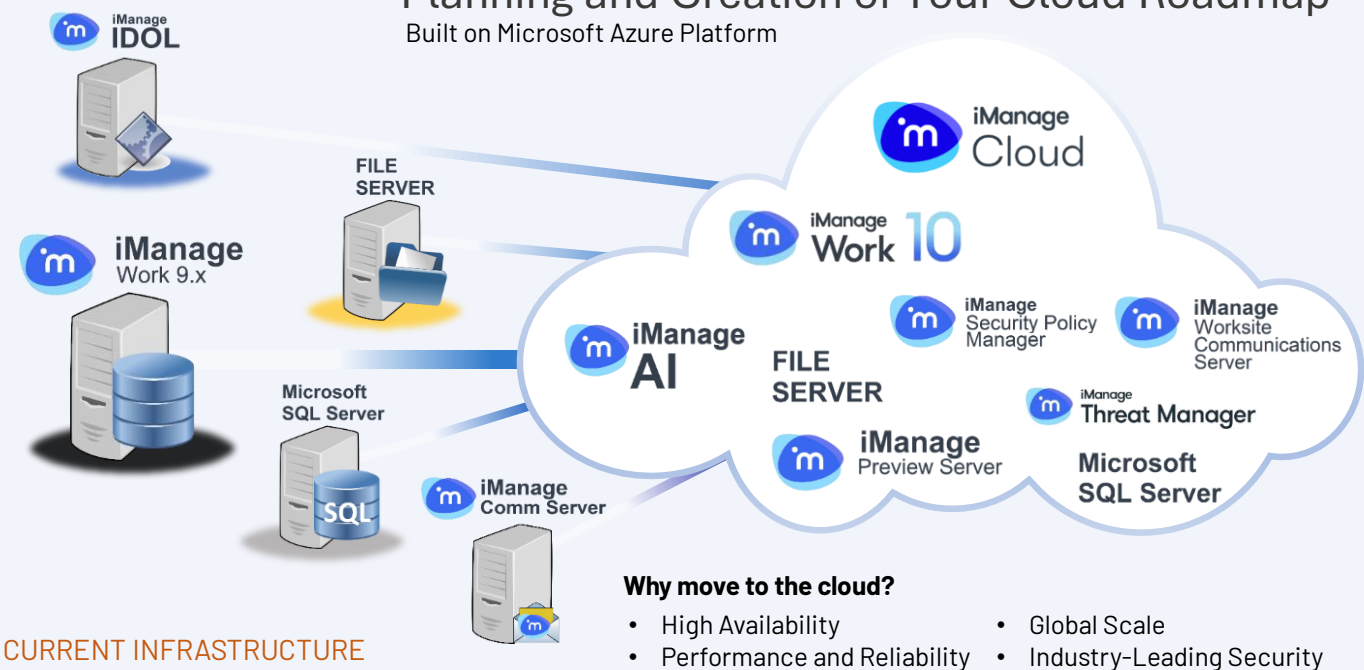
How Will iManage's EOL Affect Your Firm? – iManage Cloud vs On-Premises

Planning and Creation of Your On-Prem Roadmap



Planning and Creation of Your Cloud Roadmap

Built on Microsoft Azure Platform



What to Do if You Are Staying On-Premises?

While the iManage EOL doesn't mean the end of on-prem operations, it does complicate things a bit.

Infrastructure Upgrade

If your firm plans to stay on-prem you will need to plan your upgrade to the **Work 10 Server** to fully leverage the **Work 10 Client**. This will include your DMS, Communication platform, and a newly added Preview Server.

Depending on the age of your current servers, you will need to decide if you will be doing an in-place upgrade or building out new servers. You will need to consider the age of hardware, Windows versions, and whether you are staying with physical servers or moving to virtual servers. This decision will determine your timeline.

RAVN Indexer

IDOL is also EOL as of **December 29, 2023**. To that end, you will need to make the move from IDOL Indexer to the newer **RAVN** Indexer. RAVN is 25-35 percent faster than IDOL and is fully compatible with **Security Policy Manager** and **Threat Manager**.

Other Server Considerations

Are your Exchange and SQL Servers compatible with the new Work 10 environment? Are you considering moving your Exchange to Azure Cloud or adding encryption to your file store? You will want to include these items in your timeline.

Third-Party Products

If you are currently using a third-party application to add new workspaces or populate your iManage database, you will want to confirm they are **Work 10** compatible.

Additional iManage Products

Additionally, firms are choosing to add two security and governance products to their iManage Work 10 on-prem environment: **Security Policy Manager** and **Threat Manager**. Preparation time for these servers will also need to be factored into the timeline.

What to Do if You Are Migrating to the Cloud?

Moving to the Cloud is the simplest way to handle this transition. When migrating to the iManage Cloud, the Work 10 Server components and the Cloud Search Service will be part of the process as well.

If you begin your Cloud migration now, your firm will not be rushing when the EOL date nears. Instead, you will be ready for Go-Live, while others are lagging.

As soon as you have committed to iManage Cloud you will want to begin doing the following:

- ✓ Secure an Implementation Partner, like **Cornerstone.IT**, to closely work with you during your move to the cloud. This partner will evaluate your current business practice and workflows and will work with your IT team to create your custom migration plan.

- ✓ Next, you will want to engage a third-party application, like **Litera Prospereware's Cloud Migrator**, for the document and data lift. Since each firm's architecture is different, you will need to prepare the migration tool with custom settings and direction. This takes time and should be started early in the process.
- ✓ Though you will not have new servers or software to install yourself, iManage provisions your cloud environment based upon the solutions you have purchased. Once the required information has been gathered and presented to iManage, your new environment will be created and be ready for you.
- ✓ Determine your security and authentication products. iManage Cloud offers the ability to remotely access your Cloud environment, so security needs to be put into place in order to confirm users' identity and access. Products like SAML, Cisco DUO, Microsoft Authentication, and RSA SecurID use two-factor authentication and are used by many firms today.
- ✓ Confirm that your billing system connectors and workspace generation tools are up to date.

What to Do if You Are Migrating to the Cloud? – The Benefits of Moving to the Cloud Now

iManage Cloud offers boosted security and improved scalability to your DMS and other collaboration platforms. Plus, your data is much safer in the Cloud as it is secured by iManage and their perpetual updates. iManage Cloud is proven to be more cost-effective than on-premise solutions in the long run.

This transition also carries with it various benefits for both your teams and the organization at large, as a Cloud-based environment is more conducive to a modern hybrid workforce. For instance, your IT teams will not be bogged down with as many administrative tasks, allowing them to work on more high-value tasks.









Smaller firms reap the benefits of firms up to 100 times their size

Cloud reliability — 99.992% uptime - less than 43 min. downtime per year

Lower risk for data loss due to power failures or server crashes

Decreased potential for viruses, ransomware, hackers, and other cybersecurity problems

No downtime due to server upgrades

 HIGH AVAILABILITY	 ENHANCED TEAMS INTEGRATION
 PERFORMANCE AND RELIABILITY	 SEAMLESS CO-AUTHORING
 GLOBAL SCALE	 360 - MATTER FILE
 INDUSTRY - LEADING SECURITY	 iMANAGE TRACKER

Doing the Work

Choosing between the iManage Cloud or On-Prem Work 10 is only the first step in this journey. There are many other key considerations and steps your firm needs to take before it can fully transition from iManage 9.x systems. This is what we call, **"Doing the Work."**

Prior to migrating, your firm will need to:



Evaluate the Current Desktop

Make sure that your Windows client is fully up to date and that you have the latest version of your Microsoft 365 applications installed. It is also important to move from a 32-bit environment to 64-bit.



Verify Impact on Third-Party Apps

It's unlikely that all of your firm's third-party software is Work 10/Cloud-ready at this moment. Check in with these applications to make sure they are fully updated and compliant with iManage Work 10 and the Cloud.



Cleanse "Bad" Data

Due to the large number of matters, projects, and documents that firms deal with on a daily basis, cleaning up any data integrity issues prior to moving to iManage Cloud or Work 10 is a must.

Doing the Work – Why is Data Integrity Important?

What is Data Integrity and why is it so important?

Over the course of matter lifecycles, it can be common for users to forget to save and file their data properly or update old user permissions. This can create data chaos that inhibits a clean and efficient transition.

Common pain points concerning data include:

- Invalid or mismatched metadata
- Duplicate user IDs, group IDs, or e-mail addresses
- Deleted user IDs
- Non-printable characters and rogue spaces in document, folder, or workspace names or other fields
- Folders or documents in flat space

If you are planning to move to iManage Cloud, be aware that fixing data issues on-premises is much faster and easier. Once you move to the Cloud you will no longer have access to your SQL database, so resolving certain issues will need to be done through the Universal API or by hand using the client.

It is vital to cleanse and order data prior to moving. Bad data can create major problems during this transition and after the fact as well.

Note: You need to do this cleansing whether you stay on-prem or move to the Cloud.

This might also be a great time to visit your current Matter-Centric design and make changes that are more reflective of your current workflow.

Using IMCC, you will also want to recreate your workspace templates in iManage Cloud and customize based upon workflow and needs by using [Flexible Folders](#). You may want to eliminate lesser or rarely used document types or remove empty folders.

Doing the Work – Infrastructure Preparation

This is the point where you need to build out your new On-prem servers, or secure your third-party migration tool to lift your documents and data to the Cloud.

Cloud

Prepare your current infrastructure move to the Cloud:

- Engage your third-party application for document and data lift to iManage Cloud and begin your migration plan
- Ensure your data integrity remediation is complete
- Determine Security and Authentication - SAML, OAuth, or other security measures needed for secure access
- Archive workspaces that will not be lifted to iManage Cloud
- If you have secured a Sandbox in the new iManage Cloud environment, begin learning and testing the new iManage Control Center (IMCC) - this will replace DBAdmin
- Create new workspace templates in Cloud environment

On-Prem

Prepare your current infrastructure for On-Prem:

- Build and configure new Work 10 servers as needed
- Test your new Work 10 servers and prepare to update the SQL database schema
- Determine Security and Authentication - SAML, OAuth, or other security measures needed for secure access
- Ensure your data integrity remediation is complete
- Familiarize yourself with the new iManage Control Center (IMCC) - this will replace DBAdmin.
- Create new workspace templates in IMCC for your new Work 10 environment

Doing the Work – Upgrade Desktops/ Citrix Images

Whether you are moving to the Cloud or staying On-Prem you will need to evaluate your current desktop/image and update as needed for the new iManage Work 10 environment.

Items to consider when building your new desktop:

- Updating your Windows version
- Office and Adobe compatibility, may need to upgrade to newer versions
- Move from 32-bit to 64-bit
- Assess third-party add-ins to ensure Work 10 compatibility
- Contact vendors and obtain new installation packages
- Do you have custom or home-grown applications that integrate with Filesite or Desksite? If so, you may need to recreate them using the Universal API or research alternative products that are Work 10 compatible

A few third-party applications you may need to update to iManage Work 10 compatibility:



Doing the Work – Testing and Training

User Acceptance Testing (UAT)

Why is User Acceptance Testing so important? User adoption is paramount for any major move to a new or upgraded system. If you do not include User Acceptance Testing (UAT) as a key component in your move to iManage Work 10, you could put your entire investment at risk.

UAT is typically a small focus group of power users that can test all aspects of your new environment and give you feedback on issues or concerns that need to be addressed before you move to the next phase. This allows you to work out any kinks before you move to the Pilot Group phase.

Pilot Group

After you have worked out any issues with UAT, it is always recommended that you run a Pilot Group. Most firms will identify a representative from each department that can test the new environment to ensure that Work 10 will satisfy all their departments' needs.

Training

Testing and training are often neglected, and many times completely ignored. Unfortunately, users are often change-averse and struggle to adapt to new systems. User Acceptance Testing, Pilot Group, and End-User Training are tools that have helped firms succeed with the full adoption of this new environment. Working with a reputable training company can be a great asset for your users by providing education and training tailored to their working environment. You may want to secure your training partner early in the process to ensure their availability.

Doing the Work – Training Your Users to Succeed

If you have “Done the Work” up to this point, but still do not have user buy-in, you could risk major hiccups and snags in the migration process, as well as issues with user adoption after Go-Live.

End-user training is critical for a firm’s success in adopting the new Work 10 environment. Training will help users understand the design of the new client, and also give tips and shortcuts on how to use the Work 10 product to its fullest.

Interestingly, research has found that many users were never formally trained on any of the iManage products in the past, so this might very well be their first official training.

iManage has designed the Work 10 client to cater not only to the legal industry, but to attorneys directly, asking for their input on what they need to be successful and productive in their daily work. To that end, the new Work 10 client is very user friendly and intuitive. Though current iManage users may feel comfortable working with it without training, any further education you provide to your staff will benefit your firm.

It is impossible to get our users into training, should we even try?

Absolutely! Users need to feel confident and comfortable using these new systems. There are many ways to deliver training today that caters to all user types: in-class training, web-based training, training videos, Quick Reference Guides, and training documentation.

Tip: Secure your training partner early to ensure they will be ready when you are ready.

Doing the Work – Migrate On-Premises

You have decided to stay on-premises, design and analysis are done, new servers are built, you have upgraded your desktops or Citrix image, added the Work 10 client, your testing is complete, and training has begun.

Here are your next steps before Go-Live.

If your current legacy client (Filesite/Desksite) is 9.0 or newer, you can upgrade your Work server to the newest version of Work 10 and continue to use the legacy client until you are ready to migrate users. **Please Note:** You will not have any of the new benefits that are part of the Work 10 environment until you upgrade to the Work 10 client.

DMS Server Cut-Over

If you decided to do an in-place server update, you will need to set aside downtime to run the migration tools to update your SQL DB Schema and upgrade to the newest Work 10.x server version. This could take several hours, so you will want to set aside a large maintenance window for this update.

If you decided to build a new DMS server, you could point users to the new DMS server (if your legacy client is supported) and disable the current server.

Preview Server

This is when you can start your communication to the Preview server in preparation for the Work 10 client.

Indexer Server

Once you have built your new RAVN server, you can start the indexing process right away in preparation for your move from the IDOL indexer to RAVN.

Communications Server

If you are performing an in-place update to your Communications server your Work 10 DMS server should already be pointing to the correct Comm server and no changes would need to be made.

If you built a new Communication server, you would need to do the necessary steps to reference the new server and ensure the users are also pointing to the correct server.

Security Policy & Threat Manager

If you have licensed Security Policy Manager and Threat Manager, this is when you will want to make the connection to your new DMS environment and begin creating your Agents as needed.

Doing the Work – Migrate to the Cloud

You have decided to move to the cloud. Design and analysis are done. You have upgraded your desktops or Citrix image, added the Work 10 client, completed testing is complete and begun training.

Here are your next steps before Go-Live.

Server Updates

Since you are moving to iManage Cloud, you will not be responsible for upgrading or building any new servers. However, you will be maintaining your new Work 10 environment using iManage Control Center (IMCC).

It is recommended that your DMS Administrator or IT Manager be trained on IMCC at this point. Though very similar to iManage's DBAdmin console, it has many additional items and features that will need to be reviewed and understood.

Back-Office Integration Tools

Once the iManage Cloud environment has been created, you will need to look at which back-office tools you are currently using and address those in order to continue the flow of data to your new environment. Items to consider are client/matter data load (maybe from your time and billing system), user and/or group data load (typically from AD), and how your firm creates new workspaces.

Begin Lifting Your Documents to the Cloud

You should have already decided on which third-party migration tool you will use to lift your documents up to iManage Cloud and this is when you need to be working closely with your Implementation Partner to develop any tools and tables you will need to map your data and documents to the right location.

Some firms begin their initial import at this time and tend to focus on closed or archived workspaces first. Final delta migrations should be planned for the Go-Live date to include outstanding and revised documents.

Doing the Work – Go-Live!

Whether you are on-prem or made the move to the Cloud your Go-Live can be both stressful and exciting.

Helpful Steps to Follow for a Successful Go-Live:

Announce your Go-Live dates to your users and keep them informed and up-to-date with any statuses or changes in the schedule.

Work with your training partner to ensure floor support and continuing education availability for users unable to attend training or who need additional training or assistance.

Schedule time to replace new desktops or laptops if planned.

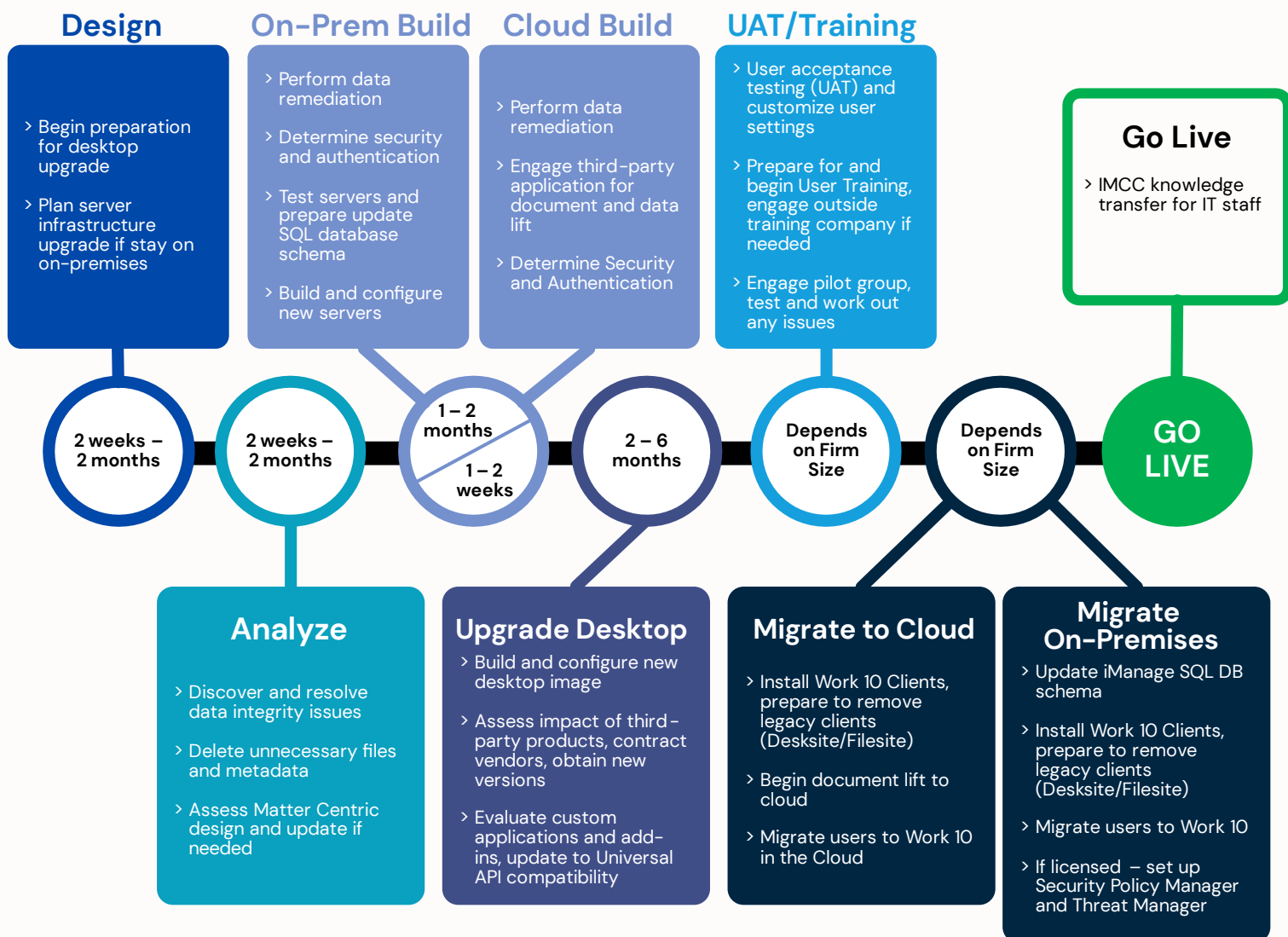
Ensure users can connect to the new environment and have access to all of their data.

Provide users with tools and resources if they have any issues or questions. IT department should be prepared and trained.

Communicate with staff if there are any issues or hiccups during the Go-Live process. environment using iManage Control Center (IMCC).

Migration Timeline

Considering the iManage EOL and Support is set for **December 29, 2023**, firms and organizations have a fairly clear timeline ahead of them.



Depending on size, this migration could take **between 6-18 months**. While the actual timing varies depending on scale, the overall timeline and roadmap remain quite similar.

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