

# Data Migration

## Safe, secure, and efficient transfer of your legacy matter and invoice information

LexisNexis offers a range of data migration services. Focusing mainly on migrating matter and invoice data from legacy systems, our services enable customers to take immediate advantage of the reporting functionality of LexisNexis® CounselLink® enterprise legal management (ELM) software. That means you gain immediate insight into your legal spend and can quickly identify where spend is going and how you are tracking to budget, as well as matter status and litigation exposure.

LexisNexis consultants have loaded data from dozens of data sources, including other ELM applications as well as homegrown systems. For over twenty years, our highly experienced services team has guided customers through the data migration process as part of the CounselLink onboarding process, resulting in thousands of matters and billions of dollars of invoices being loaded into CounselLink.

We offer multiple levels of data migration. Our Professional Services team works with you to determine the type and level of data conversion that best meets your needs.

## Data Conversion

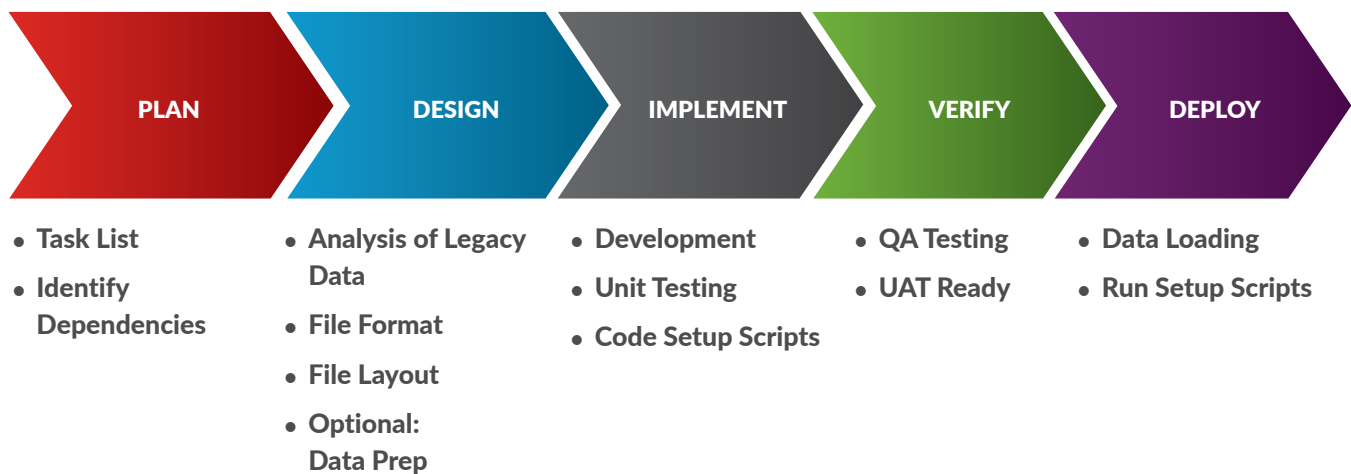
The **Bronze Matter Conversion** is perfect for migrating commonly requested matter and invoice data and is largely predefined. It also lets customers include up to ten custom data fields so you can tailor information to your reporting and data needs. Law firm assignment, participant association, and accounting configuration (allocation) are included in the scope of this integration. Additionally, total historic billed fees and expense, either at the matter-level or for each firm/vendor assigned to a matter, can be loaded in this conversion.

For customers with more comprehensive needs that desire additional data fields or matter feature entry, we offer the **Gold Matter Conversion**. The Gold Matter conversion process is broader in scope and can include different file formats and layout.

**Invoice data** migration has the significant benefit of allowing reviewers the context of previously billed work while reviewing newly submitted invoices. Depending on the goals of the data migration, CounselLink supports two levels of invoice migration.

- **Summary-level invoice migration** is the migration of invoices at the total fees and expenses level for each invoice. This allows for trending analysis as well as granularity at the invoice-level.
- **Charge-level invoice migration** is for customers with more sophisticated needs and provides heightened invoice details such as migrating individual charge lines. Access to this level of detail is advantageous when analyzing timekeeper level information, including staffing levels.

## The Process



### Plan

The LexisNexis Professional Services team approaches data migrations in a phased manner. In the **Planning Phase**, the project plan is established and dependencies identified. Where customers are handling the data preparation, those activities are accounted for and due dates set. When we are contracted to handle the data preparation, those tasks are set for CounselLink resources.

Migration of content required for go-live, including active and recently closed matters, is prioritized to ensure adequate time for loading and validation. Historic invoices are loaded in reverse chronological order to get more recent invoices migrated first.

Data preparation services include analysis of the data to be loaded, generally a database backup. We will review the data and request decisions based on the quality and utility of the data for the migration. We may recommend that very low-volume data (e.g. fields that weren't entered with consistency), and data that is highly variable, not migrate into CounselLink.

## Design

During the **Design Phase**, our consultants work with your implementation team to analyze the legacy data set and recommend transformation and normalization processes to streamline the data for loading. The file formats and layouts for the data files will be documented and assumptions regarding data preparation listed.

Dependencies that require setup scripting are identified and documented in this phase as well. Where customers are handling data preparation, we require sample data files prior to the commencement of the Implement Phase.

## Implement/Verify

**The Implement and Verify Phases** comprise the development and quality assurance testing of the data migration process for CounselLink. Our experienced development team will build the conversion processes and unit test the code. The migration is then UAT-ready to test with the customer.

## Deploy

Upon completion of customer testing, the migration is ready for the **Deploy Phase** in which the data will be loaded. Where customers are doing both matter and invoice conversions, matters are always loaded first. Then, any preparatory scripts to handle system dependencies are executed in anticipation of invoice migration. The loading of invoices may take multiple days depending on the volume of invoices and the level (summary- or charge-level) at which they are loaded.

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With hundreds of successful data migrations, the LexisNexis Professional Services team is happy to discuss which of our data migration options will best meet your needs.

### LEARN MORE

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