



# Managing your DMS in a Global Environment

ILTA 2007  
Ha Truong  
Senior Consultant



# Managing your DMS in a Global Environment

## Table of Contents

- Colocation
- Matter Centricity
- DMS and Emails
- Global Presence of Firms
- eSentio WorkSite Trash Utility
- eSentio iMigration Assistant Utility
- eSentio Bulk Importer Utility
- eSentio Database Sync Utility

# Colocation



# Colocation



# Colocation

## ❖❖ Data Center Consolidation

### ❖❖ Performance

- ❖❖ Customer performance is affected by WAN bandwidth and latency

### ❖❖ Latency is most important

- ❖❖ Must be measured properly

### ❖❖ Other network services can affect performance

### ❖❖ Performance testing is absolutely necessary

# Colocation

## ❖❖ Data Center Consolidation

### ❖❖ Response time:

- ❖❖ Below 50 ms is optimal

- ❖❖ Between 50 – 70 ms is acceptable

- ❖❖ Over 70 ms will need WAN accelerator or caching server

  - ❖❖ From 8.2 Design Guide

### ❖❖ WAN accelerator

- ❖❖ Compress data

- ❖❖ Compress IP headers

- ❖❖ Help lower latency and higher throughput

# Colocation

## ❖❖ Library Consolidation

- ❖❖ Create archive database

- ❖❖ How to handle Workspace

  - ❖❖ Use archive database

    - ❖❖ Workspace structure is kept intact

- ❖❖ Review retention rules

  - ❖❖ Move documents based on C/M once it is closed to nearline or offline storage

  - ❖❖ Use Interwoven Monitor tool to move files offline



# Colocation

- ❖ File Server Consolidation

- ❖ Adequate growth space

- ❖ SQL server Consolidation

- ❖ SQL Clustered server is correctly configured



# Matter Centricity

- ❖ Centralized vs. Distributed
- ❖ Where to create Workspaces?
  - ❖ Should be created in the office with the largest concentration of matter team members
- ❖ What do I do if a matter is being worked on in more than one office
  - ❖ One workspace vs. multiple workspaces for a matter
  - ❖ Short term performance traded off against consolidation efforts later

# Matter Centricity

- ❖ Regional approach makes most sense
  - ❖ WAN latency prevent a single data center deployment
  - ❖ Most international offices work on different matters and do not share content
  - ❖ Data privacy laws may prevent the storage or exchange of content from one country to another

# Integration of DMS with emails

- ❖ Facing growing amount of documents and emails
  - ❖ Look at retention policy
  - ❖ File emails in DMS instead of archive
- ❖ Review usage of custom field in docsmaster table
  - ❖ Make sure fields are mapped correctly
  - ❖ Use Message Fix tool from Interwoven to correct field mapping issue

# Global Presence

- ❖ Libraries across geographical locations
  - ❖ How to manage
- ❖ More servers to manage
  - ❖ File servers
    - ❖ Storage Management
  - ❖ SQL servers
    - ❖ Increased space usage

# Global Presence

## ❖❖ Worksite server

- ❖❖ DM admin should review worksite logs on a daily basis on DMS and Indexer server for errors

## ❖❖ SQL Server

- ❖❖ Admins should monitor SQL database maintenance plans
- ❖❖ Dump databases and transaction logs on a regular basis
- ❖❖ Check transaction logs size to ensure that it has not grown significantly
- ❖❖ Monitor jobs to ensure that they have not failed
- ❖❖ Set up email notification



## WorkSite Trash Utility

- ❖ Does your users want to permanently delete documents from the WorkSite database?
- ❖ Do not want to grant the “Delete” role function to everyone?



## WorkSite Trash Utility

- ❖ “Take Out The Trash” utility from eSentio Technologies will give users the ability to mark a document for deletion.
- ❖ The utility will move the documents to a recycle bin and delete the document from the database.

# WorkSite Trash Utility

- ❖ Key features of WorkSite Trash
  - ❖ Will delete marked document from database
  - ❖ Utility is not limited by search results limit of Interwoven API
  - ❖ Copy of document and metadata is saved in recycle bin
  - ❖ Recycle bin will automatically clear old documents for the folder based on the number of days criteria that the firm defines

# WorkSite Trash Utility

- ❖ Key features of WorkSite Trash
  - ❖ Log file containing all of the events that the utility perform including search for marked documents, deleting documents, and clearing the recycle bin
  - ❖ Job can be scheduled to be executed at any time frame

# WorkSite Trash Utility

**Configure**

Recycle Bin Options

Enable the Recycle Bin Feature

Recycle Bin Location:  ...

Number of Days to Retain Files:

Activity Log Options

Log File Name:  ...

Number of Days to Retain Entries:

OK Cancel

**Database Connections**

Database Connections Settings

Database Name	Datasource	Server
Trash Database	iManTrash	ESENTIO-SPRADLI
Trash Database Connection 2	iManTrash	ESENTIO-SPRADLI

Add...

OK Cancel

**Database Information**

Database Name

Name:

Document WHERE Statement:

Enable the Clear Online Versions Feature

Number of Versions to Retain:

SQL Database Connection Information

Datasource:

SQL User:

SQL User Password:

Confirm SQL User Password:

WorkSite Database Connection Information

DMS Server:

DMS User:

DMS User Password:

Confirm DMS User Password:

OK Cancel

**WorkSite DMS Trash Utility**

File View Options Help

Select the iManage Database:

Database:  Start

Log:

```

08/30/2006 11:07:10 *****
08/30/2006 11:07:10 Take Out The Trash for Trash Database
08/30/2006 11:07:10 Started at Wednesday, Aug 30, 2006 11:07:10 AM
08/30/2006 11:07:10 *****
08/30/2006 11:07:10 Recycle Bin Cutoff Date: Monday, Jul 31, 2006 12:00:00 AM
08/30/2006 11:07:10 Process completed normally at Wednesday, Aug 30, 2006 11:07:10 AM
08/30/2006 11:07:10 Elapsed time was 00:00:00
    
```



# iMigration Assistant

- ❖ Do you need a tool to migrate Docs Open profiles and documents into WorkSite?
- ❖ Do you need to manage the co-existence of two document management system during a migration?

# iMigration Assistant

- ❖ Interwoven provides a utility to import Docs Open profiles and documents but does not manage the co-existence of both systems for simultaneous operation during a migration
- ❖ It is possible for two identical documents to exist and be accessible in both systems causing document integrity issues

# iMigration Assistant

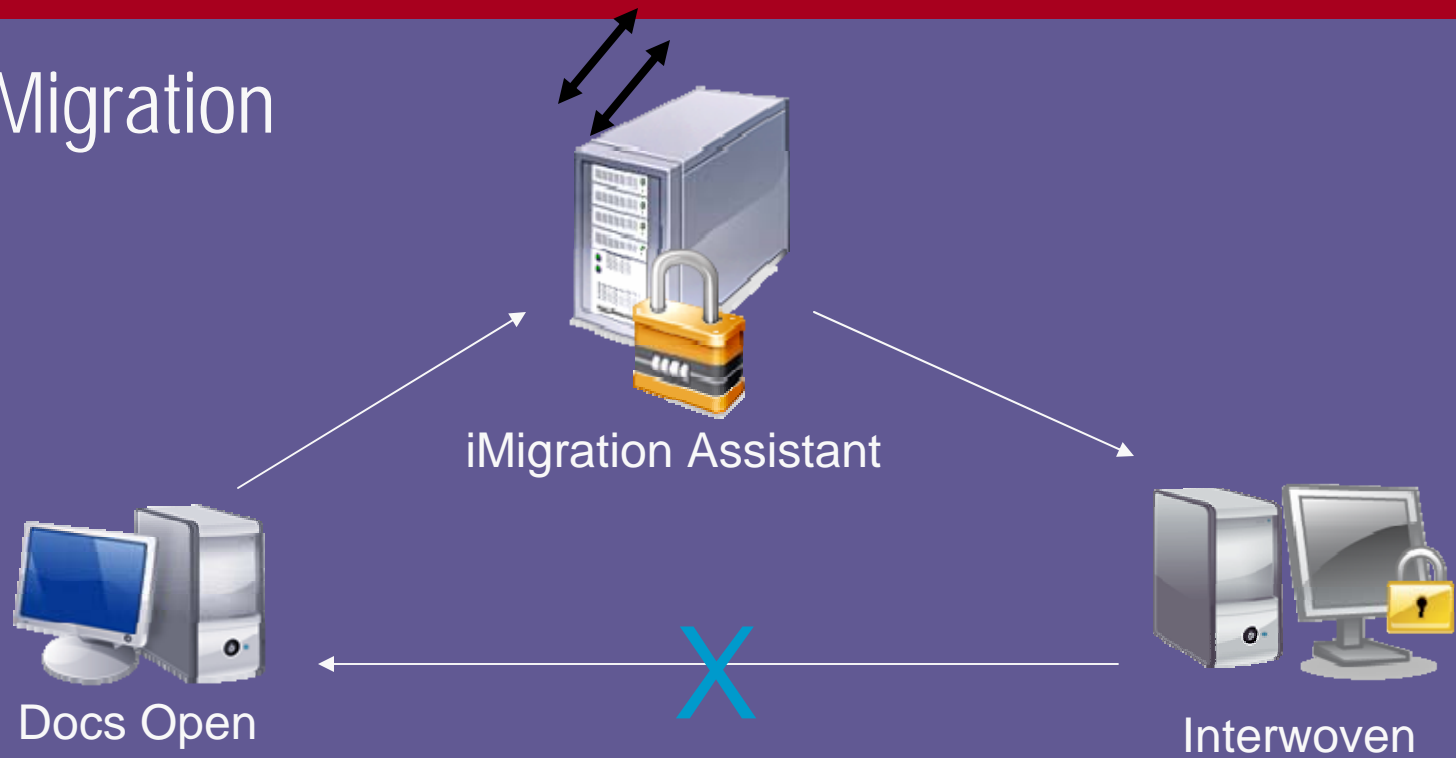
- ❖ iMigration Assistant works along with the Interwoven Migration Utility to enhance its existing functionality and solve this problem
- ❖ Key features of iMigration Assistant
  - ❖ Supports a “phased migration”
  - ❖ Manages DMS co-existence of both Docs Open and Interwoven libraries
  - ❖ Import user’s project list
  - ❖ Import user’s document history(activity log)

# iMigration Assistant

- ❖ Key features of iMigration Assistant
  - ❖ Identifies orphaned profiles
  - ❖ Scan and compares both DMS systems and identify missing documents
  - ❖ Import Docs Open users to Interwoven
  - ❖ Import Docs Open groups into Interwoven
  - ❖ Assign an Interwoven primary database based on Docs Open primary library

# iMigration Assistant

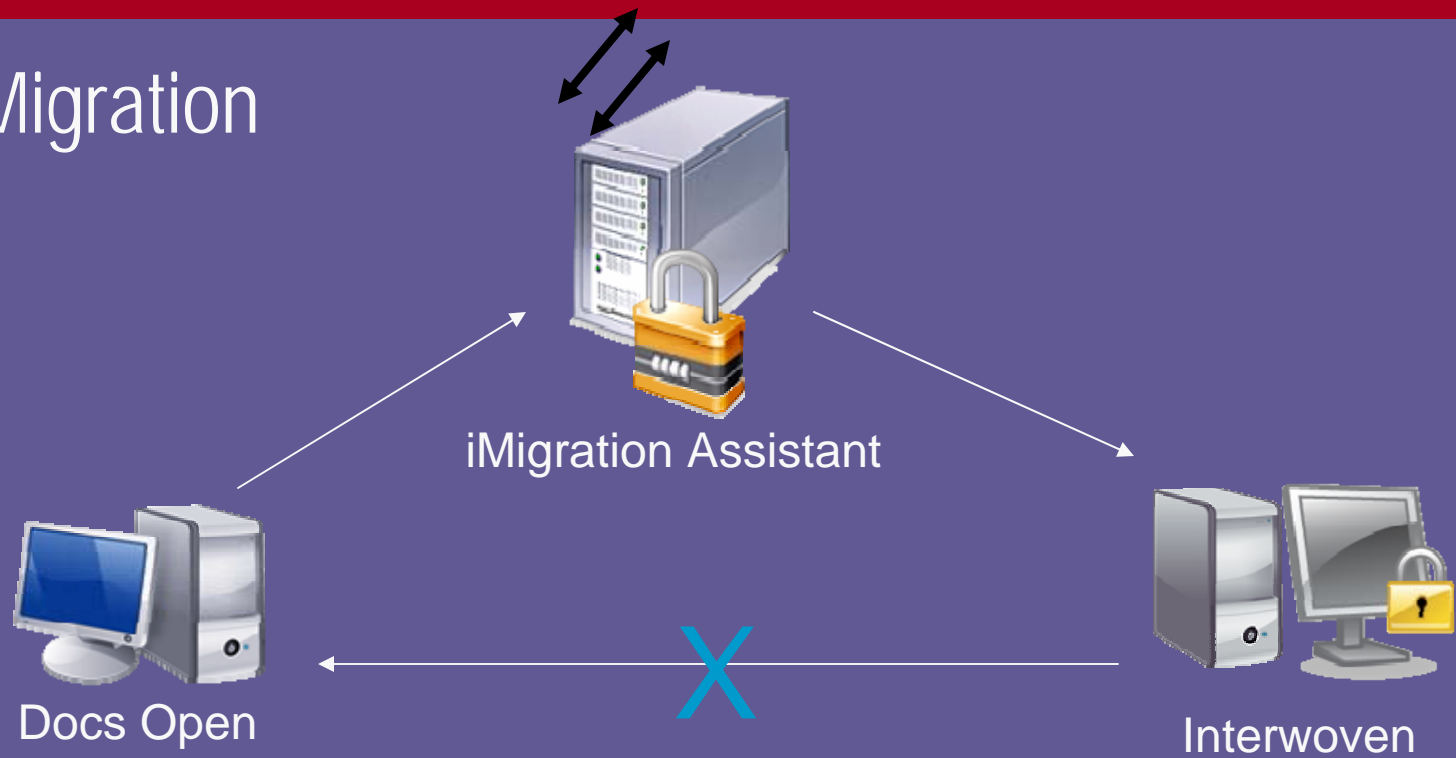
## Alpha Migration



All documents are imported at once into Interwoven

# iMigration Assistant

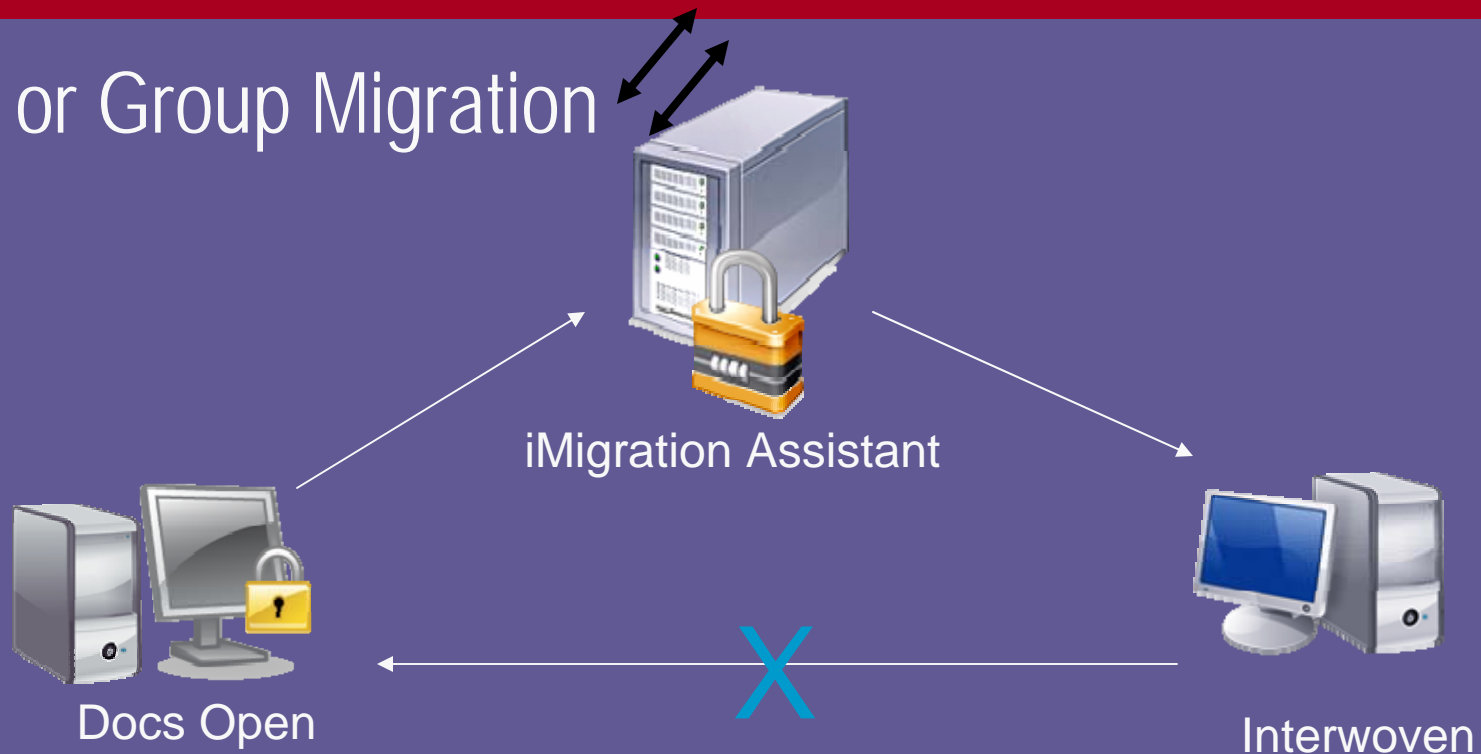
## Delta Migration



Changes to each documents are migrated to Interwoven

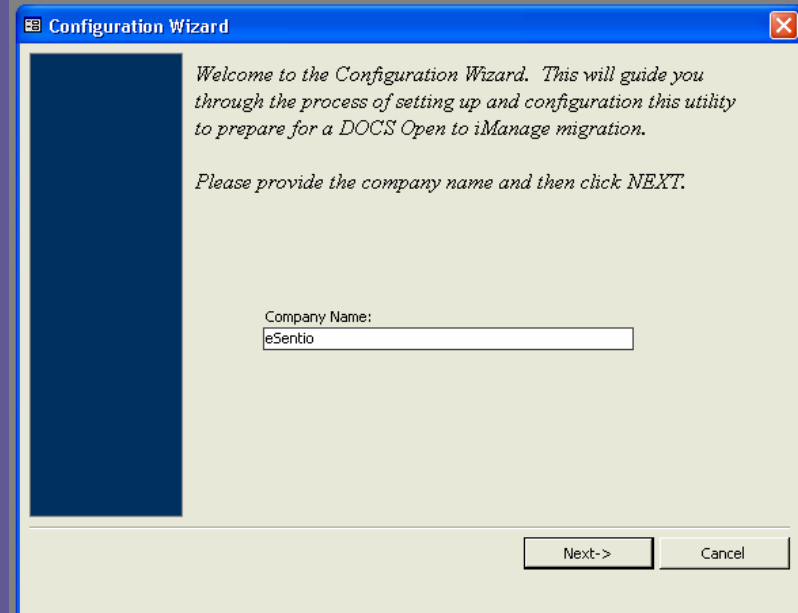
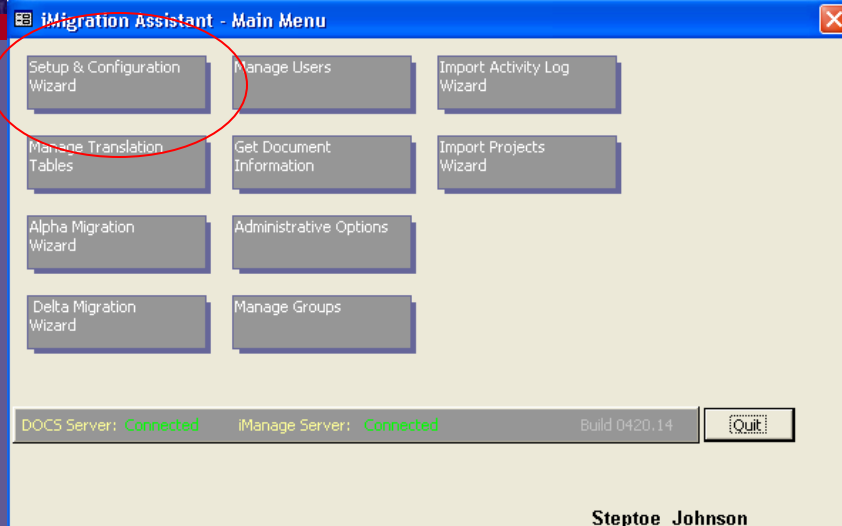
# iMigration Assistant

## User or Group Migration



Documents in Interwoven are unlocked  
and documents in Docs Open are locked

# iMigration Assistant



# iMigration Assistant

**iMigration Assistant - Main Menu**

Setup & Configuration Wizard    **Manage Users**    Import Activity Log Wizard

Manage Translation Tables    Get Document Information    Import Projects Wizard

Alpha Migration Wizard    Administrative Options

Delta Migration Wizard    Manage Groups

DOCS Server: **Connected**    iManage Server: **Connected**    Build 0420.14    **Quit**

**Stephoe Johnson**

**Manage Users**

Search in **User ID** that **Begins with** for  **Search**

User ID	Full Name	Location	Translated
chog	chog		No
chop	Peter Cho		No
nguyeng	Gerald Nguyen		No
TAIKMAN	Troy Aikman		No

[Show All Users](#)    Total: **4**

Messages

Other User Info

Translated User ID:

Location/Library Name:  **edit**

Full Name:

Disabled    **Save Changes**

Bulk Update

Location/Library Name:

Disabled    **Update**

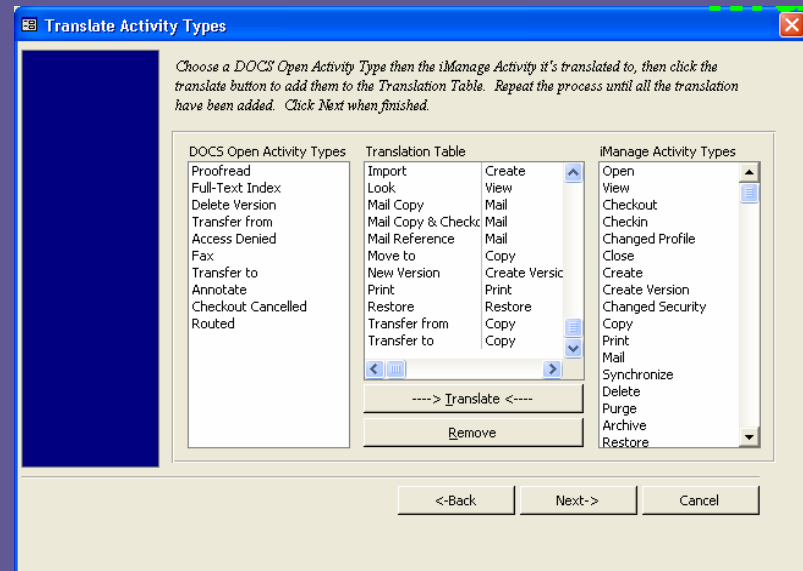
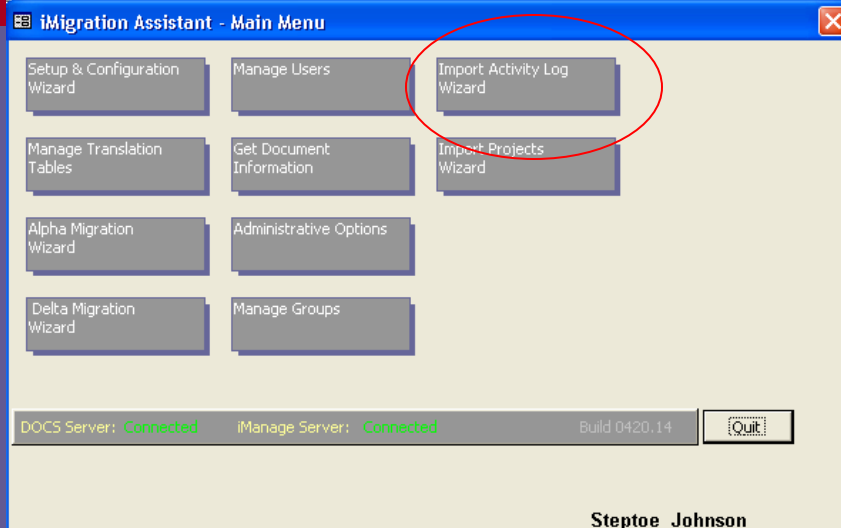
**Create new VALDATA.MAP File**

**Download Users from DOCS Open**

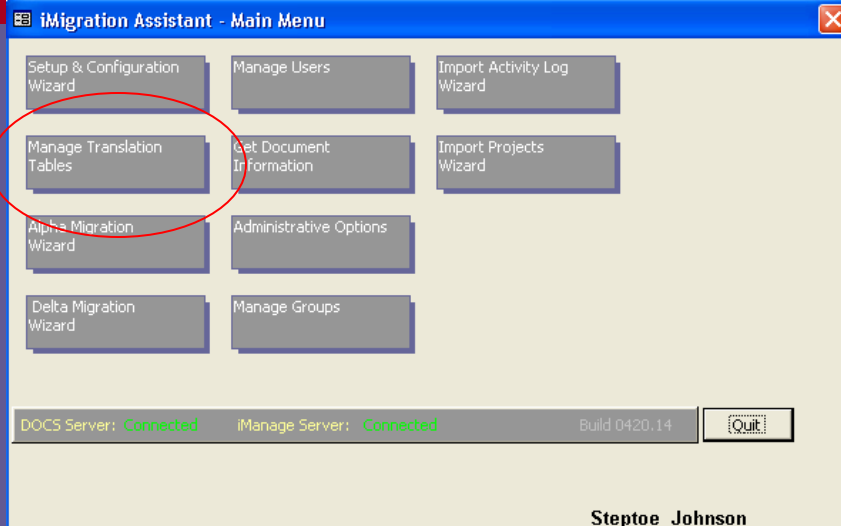
**Synchronize user(s) list with iManage**

DOCS Server: **Connected**    iManage Server: **Connected**    **More Options**    **Close**

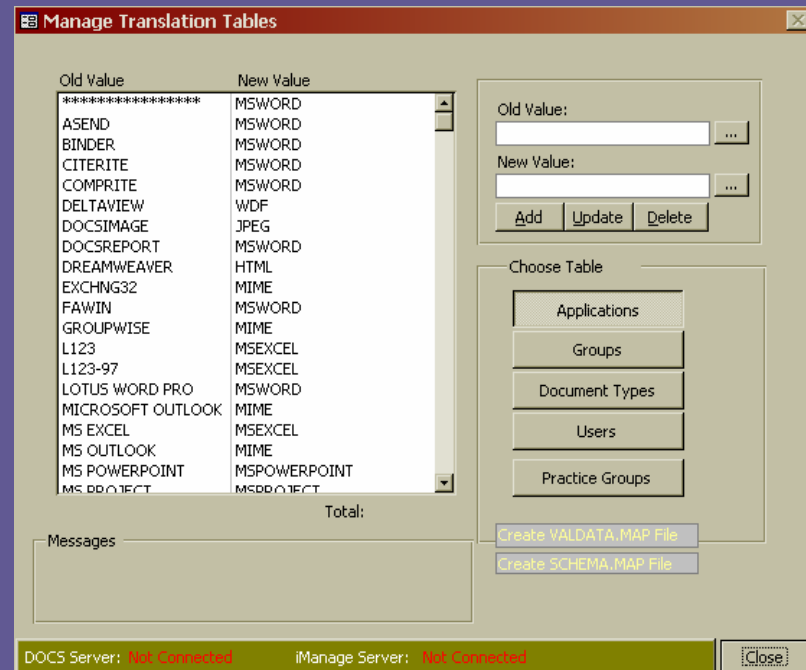
# iMigration Assistant



# iMigration Assistant



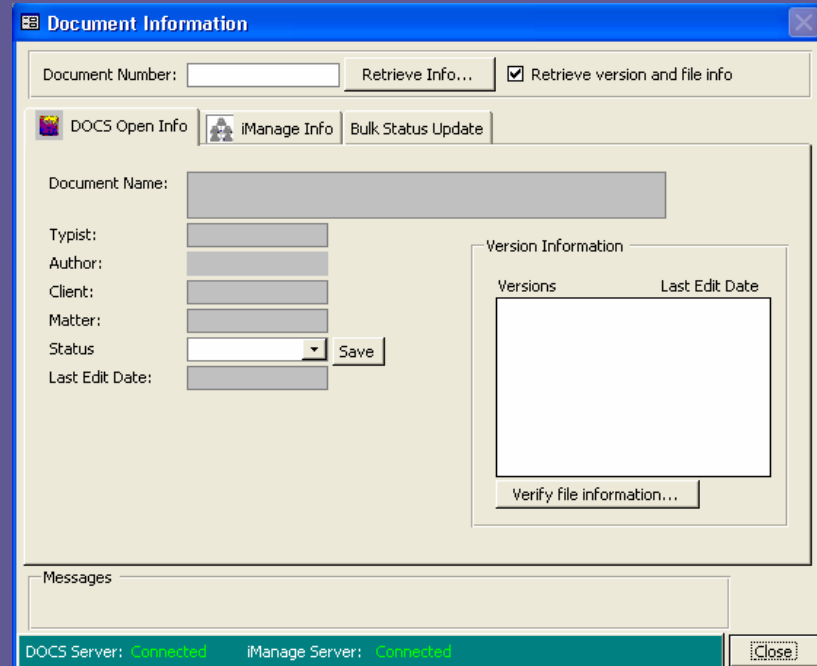
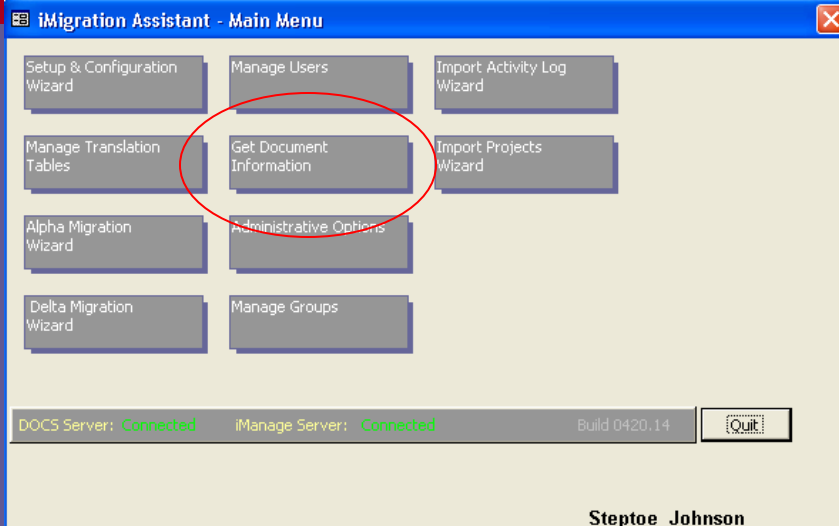
The screenshot shows the 'iMigration Assistant - Main Menu' window. It features a grid of buttons for various functions: 'Setup & Configuration Wizard', 'Manage Users', 'Import Activity Log Wizard', 'Manage Translation Tables' (circled in red), 'Get Document Information', 'Import Projects Wizard', 'Alpha Migration Wizard', 'Administrative Options', 'Delta Migration Wizard', and 'Manage Groups'. At the bottom, it displays 'DOCS Server: Connected', 'iManage Server: Connected', 'Build 0420.14', and a 'Quit' button. The name 'Stephoe Johnson' is visible at the bottom right.



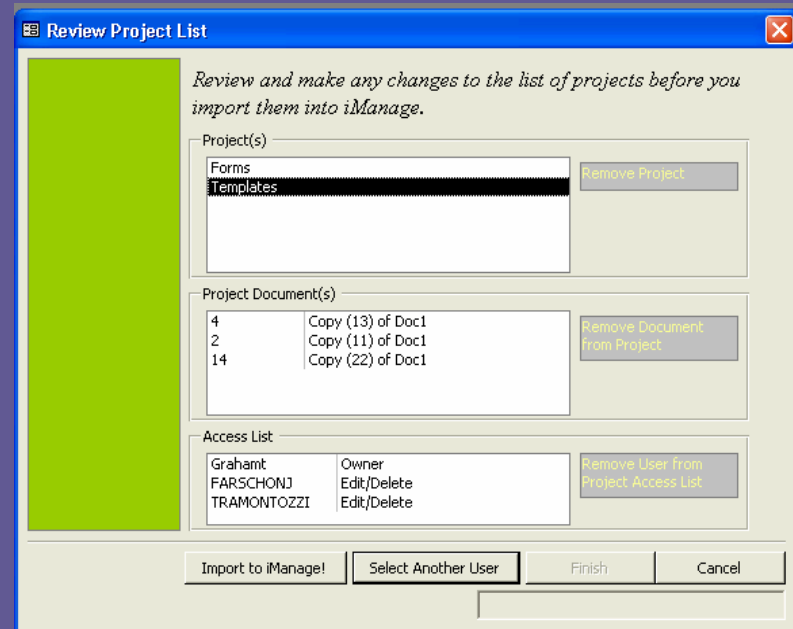
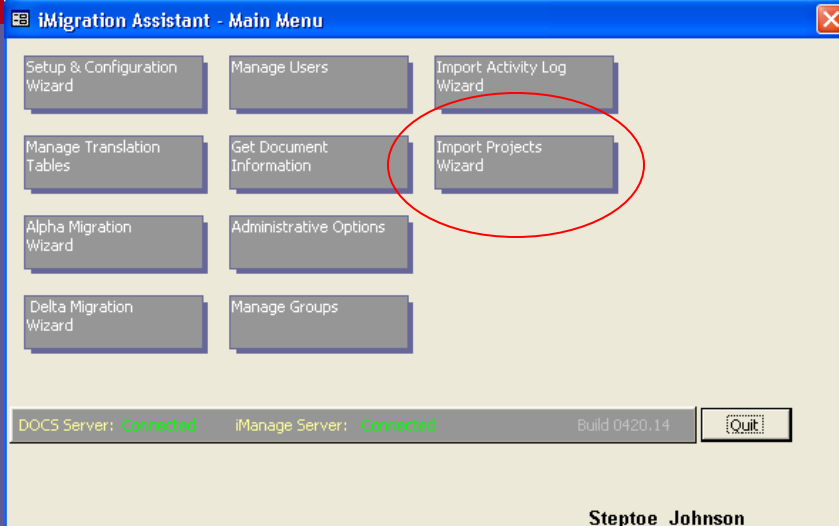
The screenshot shows the 'Manage Translation Tables' window. It contains a table with 'Old Value' and 'New Value' columns. The table lists various file types and their corresponding migration values. To the right of the table are input fields for 'Old Value' and 'New Value', and buttons for 'Add', 'Update', and 'Delete'. Below these are buttons for 'Choose Table' (Applications, Groups, Document Types, Users, Practice Groups) and buttons for 'Create VALDATA.MAP File' and 'Create SCHEMA.MAP File'. At the bottom, it shows 'DOCS Server: Not Connected', 'iManage Server: Not Connected', and a 'Close' button.

Old Value	New Value
*****	MSWORD
ASEND	MSWORD
BINDER	MSWORD
CITERITE	MSWORD
COMPRIE	MSWORD
DELTAVIEW	WDF
DOCSIMAGE	JPEG
DOCSREPORT	MSWORD
DREAMWEAVER	HTML
EXCHNG32	MIME
FAWIN	MSWORD
GROUPWISE	MIME
L123	MSEXCEL
L123-97	MSEXCEL
LOTUS WORD PRO	MSWORD
MICROSOFT OUTLOOK	MIME
MS EXCEL	MSEXCEL
MS OUTLOOK	MIME
MS POWERPOINT	MSPOWERPOINT
MS PROJECT	MSPROJECT

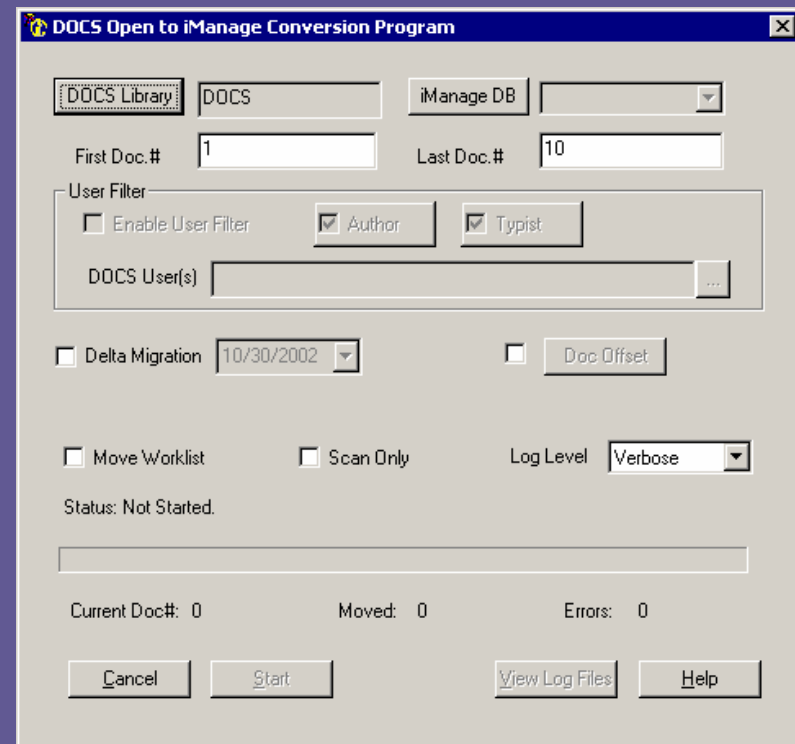
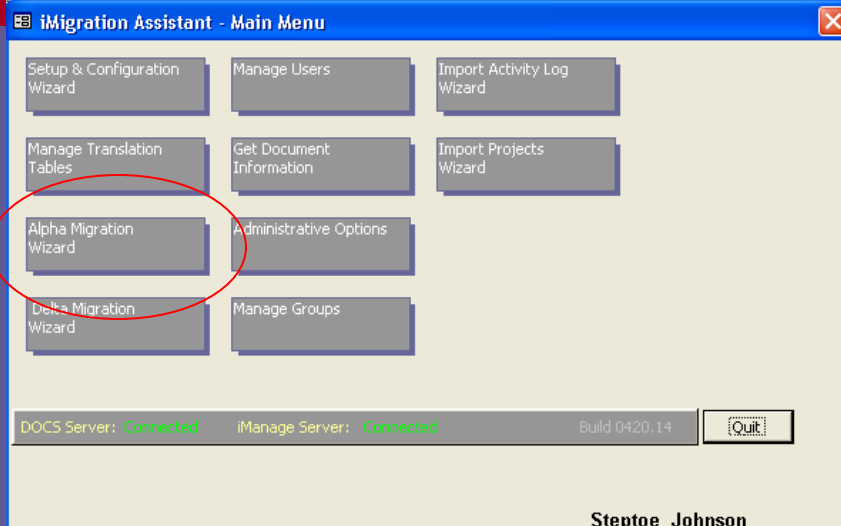
# iMigration Assistant



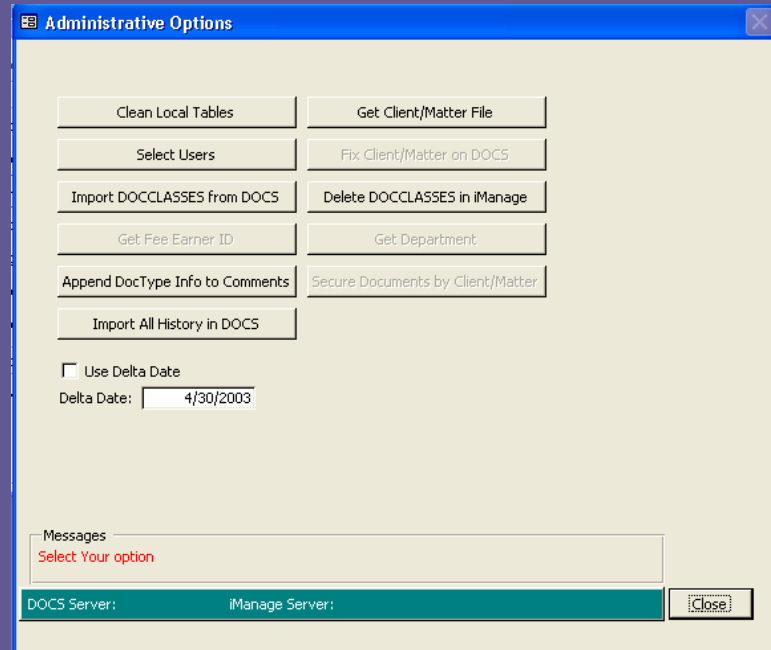
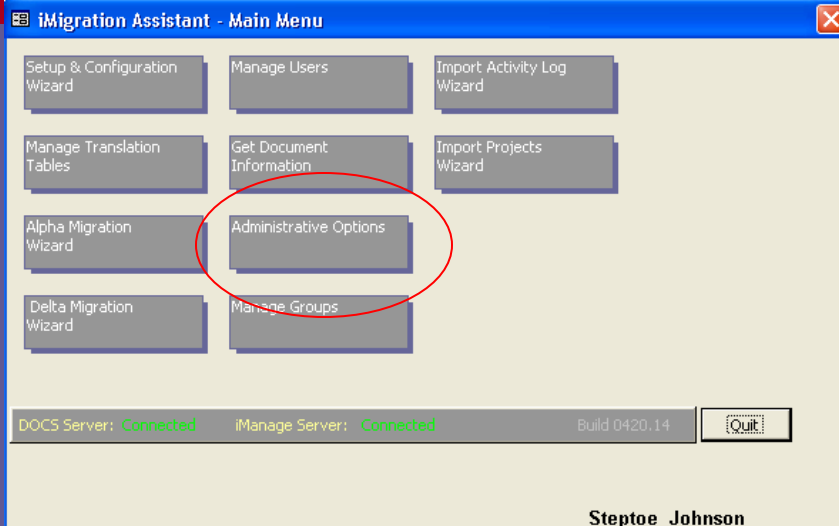
# iMigration Assistant



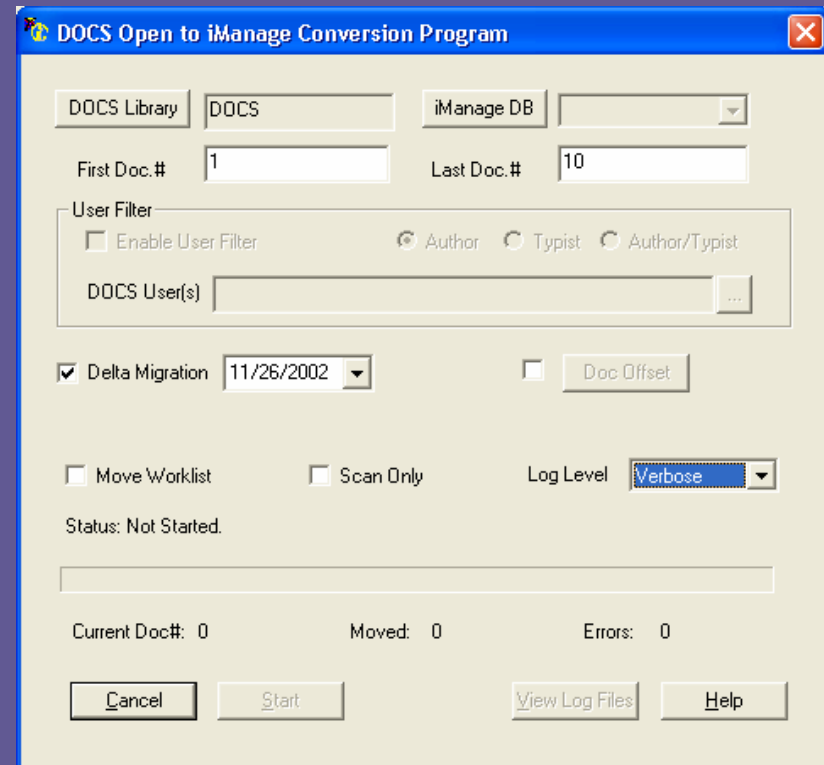
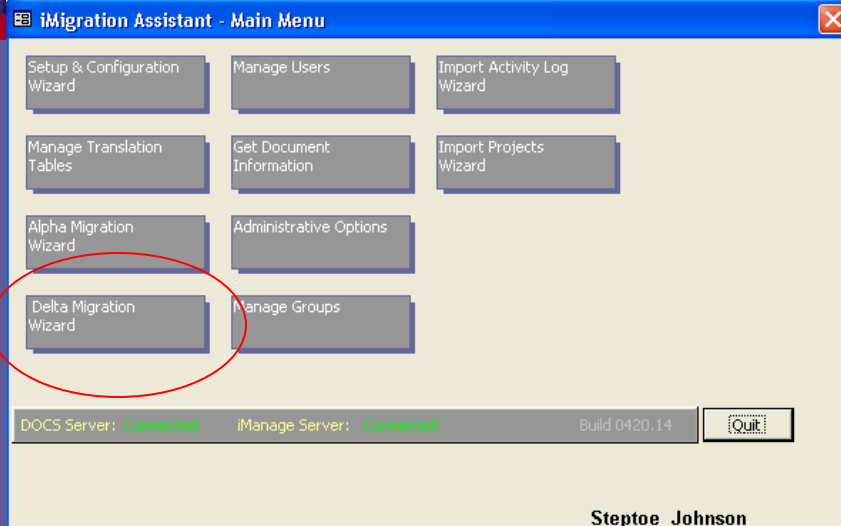
# iMigration Assistant



# iMigration Assistant



# iMigration Assistant



# iMigration Assistant

iMigration Assistant - Main Menu

Setup & Configuration Wizard	Manage Users	Import Activity Log Wizard
Manage Translation Tables	Get Document Information	Import Projects Wizard
Alpha Migration Wizard	Administrative Options	
Delta Migration Wizard	Manage Groups	

DOCS Server: **Connected**    iManage Server: **Connected**    Build 0420.14    [Quit]

Stephoe Johnson

Group Membership Import

You're almost finished! Choose the Group from the Available Group list box by double clicking there names. Run the Import by clicking Import

Search in [Group ID] for  [Search]

Available Groups

11400-0007-A	11400-0007-APO
12470-0020-A	12470-0020-APO
13931-0001-A	13931-0001-APO
14031	14031
30199	30199
30990_1	30990_1
21675-0005-A	21675-0005-APO

Total:

Selected Groups

--

Total:

[Import Group Members]    <-Back    Next->    Cancel



# WorkSite Bulk Importer

- ❖ Do you have folders and documents on your local hard drive that needs to be imported into WorkSite?
- ❖ Do you have a network drive of documents that your team is sharing?

# WorkSite Bulk Importer

- ❖ The WorkSite Bulk Importer from eSentio Technologies will import both the documents and the folder structure into a WorkSite database.
- ❖ The utility will create the same folder structure of the local or network drive and profile the existing files into the folders.
- ❖ A single profile screen will be displayed to define metadata of the new documents

# WorkSite Bulk Importer

- ❖ Key features of WorkSite Bulk Importer
  - ❖ Import both documents and folders(including sub-folders)
  - ❖ New documents will be placed in the same folder structure as the local or network drive
  - ❖ Only define metadata and security once for all documents
  - ❖ Utility will optionally delete or mark read-only the documents on local or network drive

# WorkSite Bulk Importer

eSentio WorkSite Bulk Importer Utility

Select the folder to import into iManage.

Selected Folder:

Do you want to include subfolders in the import process?

Yes  
 No

Press [Next >>] to continue.

Cancel << Back Next >> Finish

eSentio WorkSite Bulk Importer Utility

Select the folder to import into iManage.

Selected Folder:

Do you want to include subfolders in the import process?

Yes  
 No

Press [Next >>] to continue.

Cancel << Back Next >> Finish

# WorkSite Bulk Importer

eSentio WorkSite Bulk Importer Utility

Selected Folder: C:\eSentio

**Items found in the import folder.**

- 154 Subfolders
- 1,910 Files

Press [Next >>] to continue.

Cancel << Back Next >> Finish

eSentio WorkSite Bulk Importer Utility

Selected Folder: C:\eSentio

**Document profile for all documents being imported.**

Description:  + Current Filename  
(Optional File Name Prefix)

Author:  ... Jim Spradlin

Client:  ... eSentio.Admin

Matter:  ... eSentio.Development

Doctype:  ... Document

Sub Doctype:  ...

Jurisdiction:  ... Jurisdiction 1

Area of Int:  ...

Perspective:  ...

Department:  ...

Insert original file location into the Comments field.

Press [Next >>] to continue.

Cancel << Back Next >> Finish

# WorkSite Bulk Importer

eSentio WorkSite Bulk Importer Utility

Selected Folder: C:\eSentio

**Set Security and Access Rights:**

**Folder Access:**

**Document Security:**

Apply Template:

Press [Next >>] to continue.

eSentio WorkSite Bulk Importer Utility

Selected Folder: C:\eSentio

Press the following button to import the documents and folder into iManage.

Press [<< Back] to change your selections.

# WorkSite Database Sync

- ❖ Do you need to maintain the code list and user list across multiple WorkSite databases?
- ❖ Database Sync from eSentio populates the Firm's WorkSite code information from a single master database to all production databases

# WorkSite Database Sync

## ❖❖ Key features of Database Sync

- ❖❖ Provides a single source of input and maintenance of WorkSite users, group and code lists.
- ❖❖ Can be scheduled to update the production database many times a day.
- ❖❖ Reduces the need to have a SQL DBA to create replication jobs for code information updates.

# WorkSite Database Sync

eSentio iManage Replication Tool - Enter Sets Data...

*The application's control sets database information has not been defined.  
Please enter required information below.*

Control Sets Database Settings

Database Server:

Database Name:

Database User:

Database Password:

Save Cancel

eSentio iManage Replication Tool - Enter Sets Data...

*The application's control sets database information has not been defined.  
Please enter required information below.*

Control Sets Database Settings

Database Server:

Database Name:

Database User:

Database Password:

Save Cancel

# WorkSite Database Sync

eSentio iManage Replication Tool

File Sets Tools

Main Tables

Children Databases

Description	Database Name	Last Replication Date
<input checked="" type="checkbox"/> Child Database	iManTrash	Never

Children Tables

Description	Table Name
<input checked="" type="checkbox"/> Libraries	LIBRARIES
<input checked="" type="checkbox"/> Users	DOCUSERS
<input checked="" type="checkbox"/> Groups	GROUPS
<input checked="" type="checkbox"/> Group Membership	GROUPMEMS
<input checked="" type="checkbox"/> Roles	ROLES
<input checked="" type="checkbox"/> Role Profiles	ROLE_PROFILES
<input checked="" type="checkbox"/> Roles Membership	USERROLES
<input checked="" type="checkbox"/> Types	DOCTYPES
<input checked="" type="checkbox"/> TypeMap	TYPEMAP
<input checked="" type="checkbox"/> Custom1	CUSTOM1
<input checked="" type="checkbox"/> Custom2	CUSTOM2
<input type="checkbox"/> Custom3	CUSTOM3
<input type="checkbox"/> Custom4	CUSTOM4
<input type="checkbox"/> Custom5	CUSTOM5
<input checked="" type="checkbox"/> Custom6	CUSTOM6
<input checked="" type="checkbox"/> Custom7	CUSTOM7
<input checked="" type="checkbox"/> Custom8	CUSTOM8
<input checked="" type="checkbox"/> Custom9	CUSTOM9
<input checked="" type="checkbox"/> Custom10	CUSTOM10
<input checked="" type="checkbox"/> Custom11	CUSTOM11

Close

# WorkSite Database Sync

The screenshot shows the eSentio iManage Replication Tool interface. The window title is "eSentio iManage Replication Tool". The menu bar includes "File", "Sets", and "Tools". There are two tabs: "Main" (selected) and "Tables".

**Replication Set Information**

Set Key: **32**

Description:

Database Server:

Database Name:

Database User:

Database Password:

*Start the Replication Process*

**Children Database**

Description	Database Name	Last Replication Date
<input checked="" type="checkbox"/> Child Database	iManTrash	Never

**Application Events**

```
08/17/2007 10:13:20 *****
08/17/2007 10:13:20 eSentio iManage Replication Tool has been started in interactive mode.
08/17/2007 10:13:20 *****
08/17/2007 10:13:52 Opening a replication set...
08/17/2007 10:14:36 Created set named 'Main Replication Set'. Set Key: 32
08/17/2007 10:14:55 Opening a replication set...
08/17/2007 10:15:58 Created set named 'Child Database'. Set Key: 33
08/17/2007 10:16:23 Opening a replication set...
08/17/2007 10:16:28 Opened set named 'Main Replication Set'. Set Key: 32
```

No Onscreen Logging

Close

# WorkSite Database Sync

eSentio iManage Replication Tool

File Sets Tools

Main Tables

Replication Set Information

Set Key: 32

Description: Main Replication Set

Database Server: ESENTIO-SPRAD

Database Name: Imanage

Database User: sa

Database Password: mhdocs

Start the Replication Process

Children Database

Description	Database Name	Last Replication Date
<input checked="" type="checkbox"/> Child Database	iManTrash	8/17/2007 10:18:38 AM

Application Events

```
08/17/2007 10:18:37 Table: MHGROUP.APPS
08/17/2007 10:18:37 23 Found in the Applications table.
08/17/2007 10:18:38 INSERT INTO MHGROUP.APPS VALUES ('Internet Explorer', 'MHT', 'Y', 'C:\Program Files\Microsoft Office\OFFICE11\WINWORD.EXE', 'Y', 'N', 'WINWORD', 'SYSTEM', '
08/17/2007 10:18:38 INSERT INTO MHGROUP.APPS VALUES ('MS Excel 2003', 'EXCEL', 'Y', 'C:\Program Files\Microsoft Office\OFFICE11\EXCEL.EXE', 'N', 'N', 'EXCEL', 'SYSTEM', '
08/17/2007 10:18:38 UPDATE MHGROUP.APPS SET APPNAME = 'MS Excel 97', T_ALIAS = 'EXCEL97', PRIMARYAPP = 'Y', PATH = 'C:\Program Files\Microsoft Office\OFFICE11\EXCEL
08/17/2007 10:18:38 INSERT INTO MHGROUP.APPS VALUES ('MS Project', 'MPP', 'Y', 'C:\Program Files\Microsoft Office\Office10\WINPROJ.EXE', 'N', 'N', 'PROJECT', 'SYSTEM', '
08/17/2007 10:18:38 UPDATE MHGROUP.APPS SET APPNAME = 'MS Word 2003', 'WORD', 'Y', 'C:\Program Files\Microsoft Office\OFFICE11\WINWORD.EXE', 'Y', 'N', 'WINWORD', 'SYSTEM
08/17/2007 10:18:38 UPDATE MHGROUP.APPS SET APPNAME = 'MS Word 97', T_ALIAS = 'WORD97', PRIMARYAPP = 'Y', PATH = 'C:\Program Files\Microsoft Office\Office11\WINWOF
08/17/2007 10:18:38 UPDATE MHGROUP.APPS SET APPNAME = 'NOTEPAD', T_ALIAS = 'HTML', PRIMARYAPP = 'Y', PATH = 'C:\WINDOWS\NOTEPAD.EXE', DDE = 'N', ODMA = 'T', D
08/17/2007 10:18:38 ----- End of Process Child Table -----
08/17/2007 10:18:38 ----- Starting to Process Child Table -----
08/17/2007 10:18:38 Description: Captions Set Key: 31
08/17/2007 10:18:38 Table: MHGROUP.CAPTIONS
08/17/2007 10:18:38 45 Found in the Captions table.
08/17/2007 10:18:38 UPDATE MHGROUP.CAPTIONS SET SS_NUM = 1, CAPTION_NUM = 1, CAPTION = '%Description', PROFILE_FIELD = 'DESCRIPTION' WHERE CAPTION_NUM = 1
08/17/2007 10:18:38 UPDATE MHGROUP.CAPTIONS SET SS_NUM = 1, CAPTION_NUM = 7, CAPTION = 'Client', PROFILE_FIELD = 'CUSTOM1' WHERE CAPTION_NUM = 7
08/17/2007 10:18:38 UPDATE MHGROUP.CAPTIONS SET SS_NUM = 1, CAPTION_NUM = 8, CAPTION = 'Matter', PROFILE_FIELD = 'CUSTOM2' WHERE CAPTION_NUM = 8
08/17/2007 10:18:38 UPDATE MHGROUP.CAPTIONS SET SS_NUM = 1, CAPTION_NUM = 27, CAPTION = 'Custom21', PROFILE_FIELD = 'CUSTOM21' WHERE CAPTION_NUM = 27
08/17/2007 10:18:38 UPDATE MHGROUP.CAPTIONS SET SS_NUM = 1, CAPTION_NUM = 30, CAPTION = 'Custom24', PROFILE_FIELD = 'CUSTOM24' WHERE CAPTION_NUM = 30
08/17/2007 10:18:38 ----- End of Process Child Table -----
08/17/2007 10:18:38 ===== End of Process Child Database =====
08/17/2007 10:18:38 ***** Replication Process Completed Normally *****
```

No Onscreen Logging

Close