

## Case Study:

# Impact Systems and INEOS Phenol Complete Multifaceted Migration Project to Documentum 6



### Business Overview

INEOS Phenol is the world's largest producer of Phenol and Acetone. The company is headquartered in Gladbeck, Germany with manufacturing sites in Germany, Belgium and Alabama. INEOS' production network spans 71 manufacturing facilities in 14 countries throughout the world. Operating in the chemical manufacturing business means that INEOS Phenol must always ensure compliance with chemical process operational safety standards. For example, INEOS operational staff must use the most recent approved procedures while operating a plant in order to minimize possible chemical dangers to employees and surrounding communities.

### Project Overview

Over the past four years INEOS has implemented several business critical applications such as LAB Quality, Capital Authorization Process, Operating Procedures and managing design changes for routine maintenance and plant upgrades (MOC) using the Documentum Platform. Some of these applications now have expanded to multiple INEOS sites. The MOC application established the common infrastructure and direction for document management applications at INEOS Phenol. It provided the functions necessary to standardize and systematize their document change and distribution processes.

In 2007, INEOS Phenol determined that the company needed to upgrade the current systems at multiple sites to the latest version of EMC® Documentum, D6, based on the following:

- The hardware the current systems were running on was inadequate to meet the current and future demands for increased system performance and client response. The Production and Test Systems' hardware and software was outdated and reaching the end of its reliable life. In addition, one of the systems was failing and needed immediate replacement. Lastly, the Operating System on all the servers was out of support.
- INEOS wanted to expand the functionality of current business critical applications that was available as out-of-the-box configurations in D6. This made it more attractive to upgrade and migrate, rather than spend the money enhancing the existing system.
- DCTM 5.2.5 was no longer being supported by Documentum.

### Advantages and Challenges

Since Impact Systems had configured and customized the clients' existing environment, Impact was able to quickly and accurately estimate what the scope of work would be to migrate INEOS to D6. This helped eliminate challenges at the project onset. Our upfront Migration Analysis Assessment for the project revealed that the majority of the existing customizations could not be ported to the new system and had to be recreated.

As this was Impact Systems' first complex D6 deployment and our first migration to D6, there were quite a few unknowns regarding how all of the existing configuration objects (especially the Lifecycles and Workflows) would behave once migrated to the new system and if these would then need to be recreated for INEOS to work properly.



### Solution

Impact Systems followed their proven methodology – A-C-E™ Migration Methodology – to deliver a successful content migration project:

- During the Analysis phase, Impact defined a project road map based on experience for migration of configuration and content. We also defined the migration path based on previous INEOS custom application acquaintance, previous migration experience, and the recommended Documentum approach for migration of the customizations.

- During the Construction phase, the INEOS production repository was copied and created in Impact Systems' Lab using EMC VMWare Technology. This allowed us to go through a preliminary upgrade process in our Lab and document the steps and issues discovered during pre- migration and post- migration. We also verified that the migration process fixed the issues discovered during the initial migration process execution, and ran through the upgrade process multiple times to confirm the repeatable process. We were able to eliminate approximately 40% of the customizations out of four previous custom applications, as they were readily available as part of Documentum D6 out-of-the-box features (e.g., Presets). This step ensured that for any future Documentum upgrades INEOS will have fewer customizations to upgrade, which will require less time and money over the long term.

Analyze	Construct	Execute
Build Project Roadmap	Develop Repeatable Process	Execute Migration Process
Discover Organizational Memory	Develop Metrics (Dashboard)	Verify Results Using Standards And Metrics

- During the Execution phase, using the expertise from the previously constructed and documented repeatable process, Impact upgraded the Documentum Test Environment from 5.2.5 SP5 to D6 SP1 at one client site in just three days. INEOS' Production Documentum Environment was then cloned using EMC VMWare Technology. Based on expertise Impact had gathered during the Construction phase, the clone was successfully upgraded in two days from Documentum 5.2.5 SP5 to D6 SP1. Finally, we successfully upgraded the two manufacturing sites using the same repeatable process in one week. Impact and INEOS resources worked side-by-side during the on-site testing and the production migration.

Additionally, as part of the migration project Impact Systems designed and developed a sophisticated Documentum and Adobe LiveCycle PDF Assembler connector. The Adobe PDF Assembler allows INEOS to centralize the assembly and processing of rendered PDF documents. Impact Systems' generic connector allows INEOS to configure each Documentum Lifecycle State, and dynamically generate richly formatted overlays and watermarks based on document metadata. Additionally, the connector allows creation of dynamic page headers and footers, and allows for creation of secure PDF documents required as part of the client's Quality Process. The connector's flexible configuration enables the client to implement it into various other INEOS facilities or other custom INEOS applications. This also allows them to easily make changes to current connector configurations without affecting the entire application.

### Summary: Outcomes/Benefits Realized

The project resulted in a successful rollout of the business critical applications and migration of the configuration and content at multiple sites. The migrated repositories contained 35 doctypes; 160,000 documents of various formats including Word, Excel, Visio, AutoCad drawings, scanned images, and PDFs; five Lifecycles; and 35 Workflows. And, the company has engaged Impact Systems for additional work to support the company's usage of Documentum across the enterprise.

*“The Impact Systems team worked side-by-side with the INEOS Phenol team throughout the entire migration process, resulting in a successful project. Impact Systems’ repeatable process and methodology absolutely streamlined the project, gave us great confidence that the project would have a seamless outcome, and helped us complete the project in significantly less time,” said Bill James, Senior Developer and Database Administrator of INEOS Phenol.*

### About Impact Systems

Founded in 1996, Impact Systems, Inc. focuses on the deployment and migration of Enterprise Content Management (ECM) systems. Impact Systems has developed a proven, comprehensive migration process, including an upfront Migration Analysis Assessment and a proprietary suite of migration software tools (Q-Config™, Q-Transfer™) and the multi-step A-C-E™ Implementation Methodology for end-to-end solutions. This software and methodology allows for the migration of configuration, content, metadata and related templates, policies and rules across ECM (EMC Documentum, FileNet, Open Text, Lotus Notes and SharePoint) platforms, based on a proven, best practice process. Impact Systems has delivered complex migration solutions to satisfied clients in the life sciences, manufacturing, technology and financial services markets, while meeting strict regulatory requirements. Additionally, Impact Systems has Solution Centers in the U.S, India and Switzerland to provide cost effective migration implementation project support around the clock. Impact Systems is a member of the EMC<sup>2</sup> Consulting/Select Services Team, and is an Adobe® and Kofax partner.