

CASE STUDY

HARNEYS

Helm360 Merges Aderant
Data to Elite Enterprise in
Record Time


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Introduction

Harneys is a global, offshore law firm with offices in the British Virgin Islands, Cayman Islands, Luxembourg, Cyprus, Bermuda and Anguilla. A full-service law firm, their offerings include all major transactional, contentious, and private client disciplines. Harneys is an extremely progressive and innovative firm that prides itself on its responsiveness. Their legal technology infrastructure must not only keep pace with a diverse workload but also support the company's future-focused initiatives.

The Challenge

Harneys recently acquired a firm using the Aderant PMS. Their challenge was to:

- Understand both business' financial structures.
- Align the data management strategies.
- Reconcile both PMS processes.
- Map and convert the Aderant data into Elite Enterprise within two months while ensuring Harneys' balancing standards were maintained

Converting data from one database into an already existing, live database presented several challenges, including eliminating duplicates, investigating anomalies, and ensuring the matter numbering scheme was aligned. As well as this, Harneys needed to ensure the conversion was validated and that the system was in balance post-merger.

WHAT THEY'RE SAYING

“We needed a consulting firm that had deep finance systems accounting skills with extensive knowledge of the two of the main PMS solutions and could easily adapt and work as part of the internal Harneys project team. We found that in Helm360. This was true collaboration”

Osa Osawe
Group Finance Projects Director

What We Did

Helm360 has extensive conversion, finance and legal IT experience. We tapped into our finance, accounting and database experience to trace the financial processes within the Aderant system and mapped both processes. We converted the sub-ledger data, merging the information seamlessly with Harneys' data to preserve the integrity of the historical data. This allowed the client to work with the converted historic data as they would their own data.

OUR APPROACH

Our approach was to convert the historical data from Aderant to Elite Enterprise in stages:

Stage 1: Convert WIP-only time and cost cards and create WIP batches accordingly.

Stage 2: Convert bills and collections and create the associated batch posting logic.

Stage 3: Code and Insert records using the new GL Posting Logic.

All three stages were accomplished with two runs on the Train environment and one Live conversion in two months

The Results

Helm360 is skilled at entering a new environment, learning it, understanding it and taking ownership of it; skills that are paramount when working with large complex law firms to achieve their goals.

This capability helped us complete this project within the budgeted time and price. Our Data Engineering Team completed the Master Data Conversion in a record nine days, including significant coding, running two test conversions, a final conversion, and producing a Master Data Conversion Validation Report.



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