

The Power of Portal-Driven Content Management

SeeUnity
CASE STUDY

How Briggs and Morgan is Driving Efficiency By Integrating Microsoft SharePoint and Open Text eDOCS DM with SeeUnity

Briggs and Morgan, a prominent Midwest law firm serving clients from across the United States, has a long and proud history of representing organizations and individuals in civil law matters. Today the firm has more than 180 attorneys who serve a range of clients including multinational corporations, business start-ups, commercial enterprises, nonprofit educational and charitable institutions, utilities, governmental agencies, public bodies and individuals. The firm has offices in Minneapolis and St. Paul.

Briggs has relied upon Open Text eDOCS DM and its predecessors to manage important content for over two decades. It has become a key part of how the firm minimizes risk and meets internal compliance standards.

The Challenge: Associating Related Content

As most legal knowledge workers will attest, one of the biggest challenges of information management is the fact that data related to a specific case or matter is generally spread across multiple data sources. Matters can include thousands of documents and information in different formats and applications. Word processing documents, spreadsheets, email, financial data, etc. can all be related, and relevant to a search.

Ms. Mary Houle, Software Support Manager at Briggs, explains the role of legal practice management applications in meeting these challenges. "Practice management applications collate information from multiple systems, based on its relevance to a subject, and provides the end user with a consolidated, portal view. As powerful as eDOCS DM is as a document management system, it is only one component of a portal view. Fortunately, eDOCS DM

Challenges and Opportunities

- Firm data spread across multiple disparate, yet effective systems
- No common user interface for accessing all data related to a matter/team project
- Case management solutions tended to be prohibitively expensive
- Limited internal administrative resources available to develop a "home-grown" solution
- Push to continue managing documents within eDOCS DM, while adding portal and collaboration capabilities



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provides such rich profiling capabilities, the metadata is well-suited to be used by portal applications.” Ms. Houle’s team examined other practice management applications that would connect to eDOCS DM as well as other data sources. Ultimately, these applications did not provide the desired return on investment; the firm wanted to find a way to provide end users with a consolidated view of the firm’s documents and data, but at a reasonable cost.

Providing web-based access to all content related to a matter in an agile, effective user interface was clearly an opportunity to increase efficiency, both now and in the future. Ms. Houle noted that in a recent study, it was projected that over 60% of the work force in the U.S. will be working remotely on a regular basis by 2013. The software team determined that it was a priority to incorporate web-based access to business information.

Creating the Solution: Proving the Value

Ms. Houle and her team were convinced that creating a web-based, portal-based view into legal information would improve efficiency in many areas. The challenge was that they would have to deliver the system, and hope that a demonstration of value on a small scale would encourage firm-wide adoption. The search for a product that would meet project needs, without exorbitant costs or a complex deployment path led the team to SharePoint, and eventually to SeeUnity.

The Benefits of SharePoint

The team recognized very quickly the potential for SharePoint to be the ideal solution. It had a flexible web-based architecture that could be expanded through modular additions. These modules were discrete and low impact; experimenting and building the right applications would be relatively easy. SharePoint server licenses cost a fraction of the other practice management applications being looked at. The UI was simple and intuitive, leveraging many of the recognizable features shared with other Microsoft offerings. Only one feature was missing – the ability for SharePoint to easily access eDOCS DM as an information source for the firm.

Solutions and Benefits

- Cost to implement a SharePoint portal solution was relatively low
- Portal provides a single user interface for accessing data from multiple sources
- Matter and department teams will have “one-stop-shop” collaborative workspaces
- User-friendly SeeUnity web parts provide out-of-the box access to eDOCS DM functionality
- Document-level security still benefits from eDOCS DM



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Integrating SharePoint and eDOCS DM with SeeUnity

A fluid integration between SharePoint and eDOCS DM was the ideal combination of portal tools and document management – but it was also the outstanding technical hurdle. To address this, the team purchased SeeUnity, and retained a services provider who specialized in SharePoint-based solutions.

“SeeUnity was a logical choice,” says Ms. Houle. “It passes security from eDOCS DM to SharePoint, so we didn’t have to worry about jeopardizing security. It’s also out-of-the-box; all my team had to do is configure SeeUnity’s Core Integration Services to recognize information sources. Adding new functionality is as simple as configuring and combining SeeUnity web parts.”

To present a working proof case, the team built a portal with access to HR content, their legal library resources, and IT and Training information. The response was immediately positive. “Once we rolled out the SharePoint portal, we began getting requests for team sites to be built around cases and functional groups. The attorneys and paralegals really liked what they were seeing, and could envision how it could change the way in which they accessed and managed important information.”

As a result, Ms. Houle’s team will be increasing the role of SharePoint across the organization. “Our IT resources are spread across a wide range of projects,” says Software Support Specialist Mike Mittelstaedt. “One of the benefits of the SeeUnity and SharePoint solution is that we can add new sites and functionality fairly easily and gradually. The SeeUnity product is flexible enough that we can pretty easily add in new points of integration like building blocks.”

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Preparing for Future Content Management with Integration

The SeeUnity integration of SharePoint and eDOCS DM has created options for Briggs and Morgan. The integrated products provide the firm with more effective tools for viewing and leveraging information. In a search-intensive environment, content access improvements make a measurable impact, saving work hours for both IT employees and knowledge workers. Looking forward, the integrated role between SharePoint and eDOCS DM will become even more important.

"We are implementing a plan to store additional data within eDOCS DM for long-term file management and archiving," says Ms. Houle. "The volume of our eDOCS DM libraries is going to increase significantly. The ability for SharePoint-driven access, provided by SeeUnity, will quickly go from being a powerful tool to a necessity."

The team hopes to someday expand the role of SeeUnity. In addition to increasing the usage of their existing product, Enterprise Integration for SharePoint, the team is also looking at Synchronize Express and Enterprise Archiving & Distribution for SharePoint. This solution would allow the firm to move content automatically back and forth between SharePoint and eDOCS DM for additional content control. With SeeUnity, adding this new functionality is as easy as installing additional out of the box modules.

About SeeUnity

SeeUnity software connects users and content – anywhere, all of the time. Our software includes modules for delivering data, interface applications that enable user access, and content connectors for communicating between data sources. For more information about SeeUnity, visit www.seeunity.com

SeeUnity created this case study. Briggs and Morgan consented to be identified in the case study, in exchange for consulting services.



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