How DocsCorp and SeeUnity delivered a joint solution that cleans documents of metadata as they sync between systems

Meet the partner: SeeUnity

SeeUnity is a content integration expert, helping users to connect, sync, and migrate data between ECM solutions and external business applications. Its solutions are built to improve business processes by connecting people with content.

SeeUnity supports 20 connectors, though that list is growing. Its solutions are used by more than 500 customers and 30 partners worldwide. Many of its customers are Fortune 500 businesses, Am Law 100 and 200 firms, and government entities.
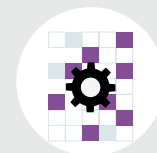
The start of something great

Commenting on how the relationship between the two companies started, Dan Anderson, SeeUnity CEO, said he met Dean Sappey, DocsCorp President and Co-Founder, at an International Legal Technology Association (ILTA) conference in the early 2000s and kept in contact. "It was clear to me then that we would work together on a combined integration solution at some point in the future."

Around 2010, SeeUnity started to build integrations for HighQ, a London-based enterprise collaboration and file-sharing platform popular in the legal industry. This included the Echo Content Synchronization product, which syncs content between various repositories and systems, including HighQ. cleanDocs, our metadata cleaning tool, also integrates with HighQ, and there was a lot of overlap between HighQ, SeeUnity, and DocsCorp users generally.

Recognizing an opportunity to work together

"It was obvious to me that Echo needed to integrate with cleanDocs," Dan commented, "when more and more clients started asking about control and governance over their documents. Metadata cleaning was becoming more than a nice-to-have value add. The market was increasingly aware of the dangers of metadata and the risk of data leaks."

Manage metadata

Tech Partner

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Delivering improved document control and governance

The behind-the-scenes work of building the integration

Partnering for the benefit of a mutual customer base

Identifying opportunities to create a joint solution based on market needs

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Dan explained it wasn't just growing market demands that led to the cleanDocs integration. "When we build an integration with a system like HighQ, it is easy for us to connect it to another application. This is what I like to call the 'build once and integrate with many' approach." So, SeeUnity decided to build the cleanDocs integration to meet the needs of their mutual HighQ clients.

Behind the scenes: building the integration

Dan described the beginning of the working relationship as uncomplicated. "DocsCorp provided us with the documentation we needed and set up an environment in which we could develop the integration. It was built with minimal development effort."

How it works: the integration with cleanDocs and Echo is entirely automated. It is set up as a rule, which dictates how the content is published to HighQ. When someone right-clicks on a document in their organization's file system and sends it to HighQ, metadata cleaning happens automatically as part of the upload process. The whole procedure is seamless, instant, and ultimately invisible to the end-user.

User spotlight: how an Irish law firm benefits from the partnership

SeeUnity was approached by HighQ on behalf of its client, McCann FitzGerald, an Irish law firm based in Dublin. It wanted a connector from its iManage document management system to the HighQ platform to facilitate the upload/download process of documents for its eDiscovery team.

The process at the time was time-consuming and manual. "There was just no easy way to do this in iManage," recalls Conor Clarkson, McCann FitzGerald IT Security Systems Engineer. "Also, we wanted to remove documents as soon as they were no longer needed to keep storage costs in HighQ to a minimum."

It was in a routine meeting with the firm and SeeUnity that the question "How is the metadata going to be removed from documents before uploading into HighQ?" was raised. During the ensuing discussions, Conor indicated that the firm was using cleanDocs to manage metadata cleaning for its outgoing email attachments. Using the SeeUnity connector with in-built cleanDocs integration, the firm was able to have documents automatically scrubbed of metadata as they moved from iManage to HighQ.

The user doesn't have to make cleaning choices since it is based on pre-set policies. This ensures maximum security without impacting productivity. This was the first SeeUnity deployment for this particular integration, but according to Conor, it all went smoothly and streamlined the process for the firm significantly.

Summary

SeeUnity and DocsCorp saw an opportunity to integrate their Echo and cleanDocs solutions to provide frictionless metadata cleaning as documents were synced between iManage and HighQ. The building of the integration was handled by SeeUnity but supported by the DocsCorp product teams. Today, many organizations benefit from this technology partnership, as it empowers them to manage metadata seamlessly when moving documents between different content repositories.