MacRoberts LLP Bridges the Content Divide

With SeeUnity Echo Content Synchronization

Scottish Independent Commercial Law Firm

Effective information management: With 44 partners working in 3 offices across Scotland, MacRoberts serves many sectors and clients across the United Kingdom and Europe, including collaborating overseas law firms on multi-jurisdictional transactions. In the process of providing advice and legal counsel for over three decades, MacRoberts has amassed a substantial quantity of content. In fact, the electronic matter cases require over seven terabytes of storage to support all of the documents stored in the matter cases such as: emails, Word documents, PDF files, voicemails, technical drawing and meta data.

As with most firms, MacRoberts has extensive requirements for being able to structure, classify and organize content. The ability to effectively profile content with rich metadata is key to making sure information can be quickly located and applied when needed. To execute an effective enterprise content management (ECM) strategy, MacRoberts has long relied upon iManage Work (iManage). The ECM platform provides not merely the ability to profile and classify content but automates intake of email and other documents and records management capabilities. iManage is an effective tool for Partners and their legal teams to quickly identify and make use of all information relevant to a particular client or matter.

The Value of Making Information Available

Litigating cases often requires collaboration and sharing with clients and third-parties. Due to confidentiality and governance requirements these parties do not have direct access to the firms ECM library. Previously, MacRoberts transferred data using encrypted physical media (e.g. DVD-R), taking into account customer requirements for data handling. Each data request was time consuming on both ends to clearly define and find the necessary documents required for collaboration. Any additional requests for information would have to be reprocessed requiring additional time on both ends. In short, sharing information with clients and third-parties was often time consuming and difficult process in order to provide the information in a secure manner, making MacRoberts eager to improve the process.

Creating the Opportunity for Change

MacRoberts understood that a measured approach was important when undertaking a new strategy for client access to data that would ensure security. *"It's important that we didn't rush changes to our system,"* **said Robert Crichton, Director of IT Services.** *"We wanted to make sure we selected the right solution and that we adopt strategically, in phases."*

Mr. Crichton's team decided to work with a specific client - an independent financial advisor - to build out a proof case for a new information-sharing portal. In doing so, MacRoberts would be able to architect and test the solution, without putting any existing processes in jeopardy. In this manner MacRoberts could retain its existing processes until a replacement portal is fully tested and functional.

Industry

Legal

About the Project

- Systems Used: iManage Work and SharePoint 2013
- SeeUnity Products Used: Echo Content Synchronization

Challenges

- Inefficient process of providing content to clients and collaborators
- Fragmented delivery of content
- Inconsistency of content format and media

"The HighQ and SeeUnity partnership enables us to address this complicated task to efficiently and securely bridge the two firms' document management systems. In the future we'll be able to extend our collaboration efforts with these products in place."

-Robert Crichton, MacRoberts, Director of IT Services

iManage
Making knowledge work

iManage is the leading provider of work product management solutions for law firms, corporate legal departments, and other professional services such as accounting and financial services. iManage helps these firms their clients more effectively by improving productivity and governance through the creation, sharing, and security of work product. iManage is the comprehensive, integrated and reliable solution, trusted every day by over 3,000 organization and one million professionals worldwide.

After exploring the issue, Mr. Crichton's team determined that the optimal solution would be to create a publishing process that could push out select content from the iManage system to a customer-facing portal. From here, clients could search, browse, and access their own data. SharePoint 2013 was selected as the basis for a customer portal, with its ability to easily build out custom sites and pages. The missing piece was the software that could seamlessly publish content from iManage to SharePoint.

Three critical requirements guided the search for the right technology - configuration would have to relatively straightforward, publishing would have to be largely automated, and secure client access were paramount. The ability to meet these requirements is what made SeeUnity's Echo Content Synchronization the software of choice.

Echo Content Synchronization Automates Publishing

Echo Content Synchronization (Echo) is an enterprise-class engine for automating the transfer of content between systems. Using a rules-based system of templates, and leveraging security and metadata, content can be moved, copied, or bi-directionally synchronized. Echo meets a variety of uses cases, including archiving, bi-directional syncing, and publishing.

Working with SeeUnity, the IT team architected a plan to share data from iManage to a secure client portal site. SeeUnity Echo helped establish simple but powerful tools that defined what should be copied, how often whether the process should be bi-directional, allowing the client to save files to SharePoint and allow Echo to automatically copy these to iManage. Echo also helped transfer, set, and establish rules to maintain security permission and metadata properties.

Content is qualified against the rules and published to a corresponding secure customer SharePoint site. If content is updated in iManage, Echo detects those changes and updates the customer portal - with the option of versioning. If content is created or deleted, Echo will mirror those changes in the customer portal.

Working in the New Portal

With the initial proof case a success - the client now enjoys unfettered self-serve access to all qualifying content - MacRoberts is looking ahead, in addition to planning a larger phase rollout, additional Echo capabilities are being evaluates for suitability. Specifically, Echo's bi- directional synchronization offers the potential to automate data capture from clients - creating a two-way bridge of information while keeping data separate and secure.

Solution

Echo Content Synchronization

- Publish, sync bi-directionally, or archive content between systems
- Configure document sync rules to be initiated on triggers
- Advanced mappings for workspaces and metadata
- Schedule or automatically manage document sync

Benefits

- Automated delivery of content to clients and other third parties
- Improved productivity with time saving automation
- Timely delivery of content to clients and other third parties
- Improved decision making process

"Echo Content Synchronization has made the first phase a clear success. The customer is now able to search a tailored library of information. We no longer need to have a process for burning data to a disk and shipping it. In addition, we've created rules so that as our attorneys create new relevant information in iManage, Echo will capture that data and share it. The original content remains safely intact in our private iManage system, while the SharePoint site is only accessible to the specific customer."

-Robert Crichton, Director of IT