

SharePoint as a Display Portal

Rick McDannel, Senior Manager of IT
Thompson Coburn LLP



Agenda

- ◆ Displaying LOB information contextually
- ◆ TC Connect Demo
- ◆ Common web parts used by law firms
- ◆ SharePoint as a DMS/RMS

Information by Context

Individual

- Contacts
- Databases
- Docket
- Documents
- Ethical Walls
- Extranets
- Financial/Time
- Forms
- Marketing
- Matters
- Records

Practice Area

- Contacts
- Docket
- Financial/Time
- Forms
- Marketing
- Matters
- Members
- New Matters

Client

- Contacts
- Docket
- Ethical Walls
- Extranets
- Financial/Time
- Matters
- Overview
- Records

Matter

- Contacts
- Docket
- Ethical Walls
- Extranets
- Financial/Time
- Matters
- Overview
- Records

Dynamic Content Locations

Content	TC Sources	Individual	Practice Area	Client	Matter
Contacts	TC CRM	X	X	X	X
Databases	TC DB Manager	X			X
Docket Calendar	TC Docket	X	X	X	X
Documents	iManage	X			X
Ethical Walls	TC EWall Sys.	X		X	X
Extranets	TC Extranet Sys.	X		X	X
Financial/Time	Aderant	X	X	X	X
Forms	TC Forms Library	X	X		
Marketing	TC FRM/QPitch	X	X		
Matters	Aderant	X	X	X	
Matter Budget	Aderant				X
Records	SharePoint	X		X	X

■ = Thompson Coburn Product

Increasing Adoption

- ◆ Multiple access points
- ◆ Reduce clicks
- ◆ Matter list management
- ◆ Lync integration and other added value integrations

Demo

How We Did It

- ◆ Custom Visual Studio template
- ◆ OOB controls with custom wrappers for complex operations
- ◆ TC service layer (WCF) and warehouse to access data
- ◆ DMS integration using a custom web part and the iManage API
- ◆ Use property bag to store settings in a central location

Common Web Parts Used by Law Firms

DISCLAIMER: The following lists are not all-inclusive and this is not an endorsement for the products and vendors listed. The products and vendors listed were gathered from legal technology forum solicitations.



DMS Web Parts

SharePoint and Legal DMS Integration

Autonomy (Worksite)	www.autonomy.com
Handshake Software	www.handshakesoftware.com
OpenText	www.opentext.com
Prosperoware Ascera	www.prosperoware.com
SeeUnity	www.seeunity.com

Legal LOB Web Parts

SharePoint and Legal Data Integration

Handshake Software	www.handshakesoftware.com
Aderant	www.aderant.com
Elite	www.elite.com

Generic Web Parts

SharePoint Data and Content Integration	
Bamboo	www.bamboo.com
CodePlex (open source)	www.codeplex.com
ComponentOne (dev)	www.componentone.com
Infragistics (dev)	www.infragistics.com
Quest	www.quest.com
RedSun (tree view)	www.aredsun.com

SharePoint as a DMS

SharePoint DMS Vendors

SharePoint Document Management and Email Solutions	
Colligo (email)	www.calligo.com
Epona	www.eponausa.com
Go Legal	www.enableplc.com
Handshake Software	www.handshakesoftware.com
MacroView	www.macroviewusa.com
Sword Group	www.sword-ecm.com

Why Use SharePoint As A DMS?

- ◆ Big Picture: Minimize the silos, simplify ECM
- ◆ Minimize vendors and maintenance
- ◆ Leverage SharePoint ECM features
- ◆ Single platform to support
- ◆ Enterprise search simplification
- ◆ Consistent security model
- ◆ SharePoint is here to stay

SharePoint DMS/RMS Gaps

The Short List

- ◆ General usability issues
- ◆ Security method
- ◆ Ethical wall security
- ◆ Email management
- ◆ Audit log
- ◆ Office integration
- ◆ Document ID handling
- ◆ Filename vs. title
- ◆ Matter centrlicity
- ◆ Global updates
- ◆ Metadata integrity
- ◆ Check in/out and versioning
- ◆ Document linking
- ◆ Direct SQL access

Migration Challenges

- ◆ Quantity
- ◆ Quality
 - ◆ File Size
 - ◆ Invalid characters
 - ◆ Corrupted files
- ◆ Long file and folder names
- ◆ Logistics
- ◆ Server performance and availability

Other Challenges

- ◆ Performance
- ◆ Site Collection/content database boundaries and limitations
- ◆ Metadata integrity
- ◆ Accurate auditing
- ◆ File preview
- ◆ High availability
- ◆ Ethical wall security

Firm File Manager

What We Created

- ◆ Outlook Integration
- ◆ Windows Explorer Integration
- ◆ Multiple Scanning Options
- ◆ Minimal Profiling (none for email)
- ◆ Matter List Management
- ◆ Multiple Export Options
- ◆ Folder Plan Management
- ◆ Closing/Pleading Binder Support
- ◆ Personalization
- ◆ Fast Search Integration
- ◆ Managed Metadata Integration
- ◆ Simplified Security
- ◆ Unique Sequential Doc IDs
- ◆ Invalid Filename Handling
- ◆ Tagging/Enterprise Keywords
- ◆ Enhanced Auditing
- ◆ Microsoft Lync Integration
- ◆ Ethical Wall Security
- ◆ Automatic Matter Site Creation
- ◆ Use Document Title vs. Filename
- ◆ Replaced Legacy Records System
- ◆ Streamlined Deployment

SharePoint DMS/RMS Status

- ◆ Custom client implementation successful
- ◆ Records migration successful (over 4 million)
- ◆ SQL Server 2012 upgrade complete
- ◆ DMS migration delayed
 - ◆ Site Collection/Site reorganization
 - ◆ WestKM integration (work in progress)

Summary

- ◆ Be contextual
- ◆ Make content accessible from multiple locations
- ◆ Matter list management is important
- ◆ Many vendor/product choices
- ◆ It is possible to do this in-house
- ◆ Use SharePoint to access DMS information or use SharePoint as your DMS?

rmcdannel@thompsoncoburn.com