Integrating SharePoint and OpenText: It’s Not Just the Technology

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SHB Integration Story

Shook, Hardy & Bacon L.L.P. is an international law firm with a legacy spanning more than a century.

500 plus Attorneys
1500 Employees
9 Offices

Background

- OpenText DM 5.2x
- SharePoint 2007 (migrating to 2010)
- 9 offices – 11 DM libraries
- Distributed DMS libraries
- Firm’s content management strategy
  - All documents in DM
  - All extranet-related documents to be stored in Most Appropriate Repository
Add Value to What we Have

• Is what we have broken?
• OpenText DMS is a rich source for integration
• Strong DMS governance rules
• Retention
• Data handling
• Opportunities with new versions
Integration Business Drivers & Goals

• The Business Drivers
  – Client and Legal Team demand for economic data transfer and synchronization capability between existing content management stores.

• The Business Goals
  – Synchronization of data between external repository (e.g., DMS, LOB) and SharePoint extranet
  – Data integration requiring little or no end-user interaction to access remote content
Integration Business Drivers & Goals

• Internal data stewards and knowledge workers are able to easily prepare data for publishing to extranet and multiple repositories.

• Bi-directional synchronization and/or mirroring of content from SharePoint ECM to other ECM and from external ECM to SharePoint.
Screen Shot of What We Found
eDocs-SharePoint Integration

- Client Portal Doc Library
- SSL RSA IPSEC
- eDOCS Integration SeeUnity Toolkit
- eDOCS SQL Server
- DM
- SP
- DCOM
- Files—Ports Int—2110
Configuration Keys

• SW Installation Options
• Core Product Client/API Install/Configuration
• Security Context Setup
• Firewall Considerations
  – File Transfer
  – DM Functionality
  – SharePoint Functionality
Configuration
Challenges

• These rich toolkits are not without challenges
• OpenText SharePoint Integration (w/SeeUnity)
• MS SharePoint (MOSS 2007, WSS 3.0, SP2)
• Platform configuration
  • Application Communication Discovery
  • Firewall implications of Communications
  • DCOM Discovery
• Licensing Configuration
Communications Detail

- Platform configuration
  - Application Communication Discovery
  - Firewall Implications of Communications
  - DCOM Discovery
    - How do you configure eDOCS DM to communicate through a firewall? What port numbers should you use for DCOM?
    - See Port Description
What Helped Us Get There

• References that may be helpful

  – How do you configure eDOCS DM to communicate through a firewall? What port numbers should you use for DCOM? 
    DM RM \ 5.1.0.5 \ 6.0.4 
  – Solution Number (Legacy): SD005999
  – OpenText integration White paper

  – SeeUnity Toolkit White paper detail - 
  – White papers regarding this subject at Microsoft KB article at 
Lessons Learned

- Governance suggests: place all record content in central repository – DMS
- Ease of use and quick searching suggests: place content where the user actually works
Lessons Learned

• Multiple tools to integrate: Microsoft, Handshake, OpenText SH integration with SeeUnity, others

• Challenges of the toolkits
  – Protocol handlers
  – Need to journal all content being migrated
  – Data steward needed to prepare integration content