

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

Key Practice Areas – Product Liability, Tort, Business Litigation, Intellectual Property, Environmental and Toxic Tort, Labor and Employment.

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

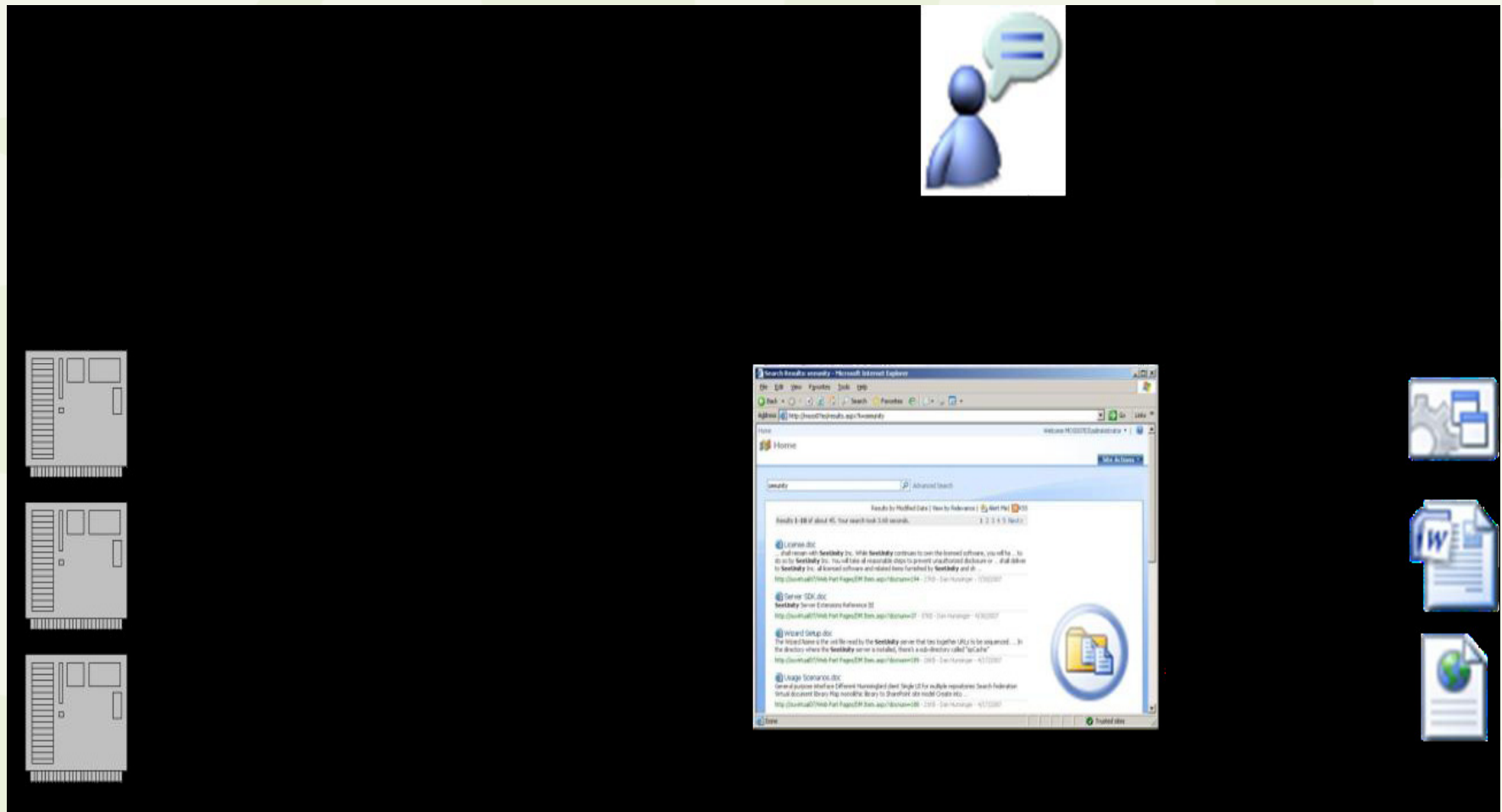
Integration Business Drivers & Goals

- 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

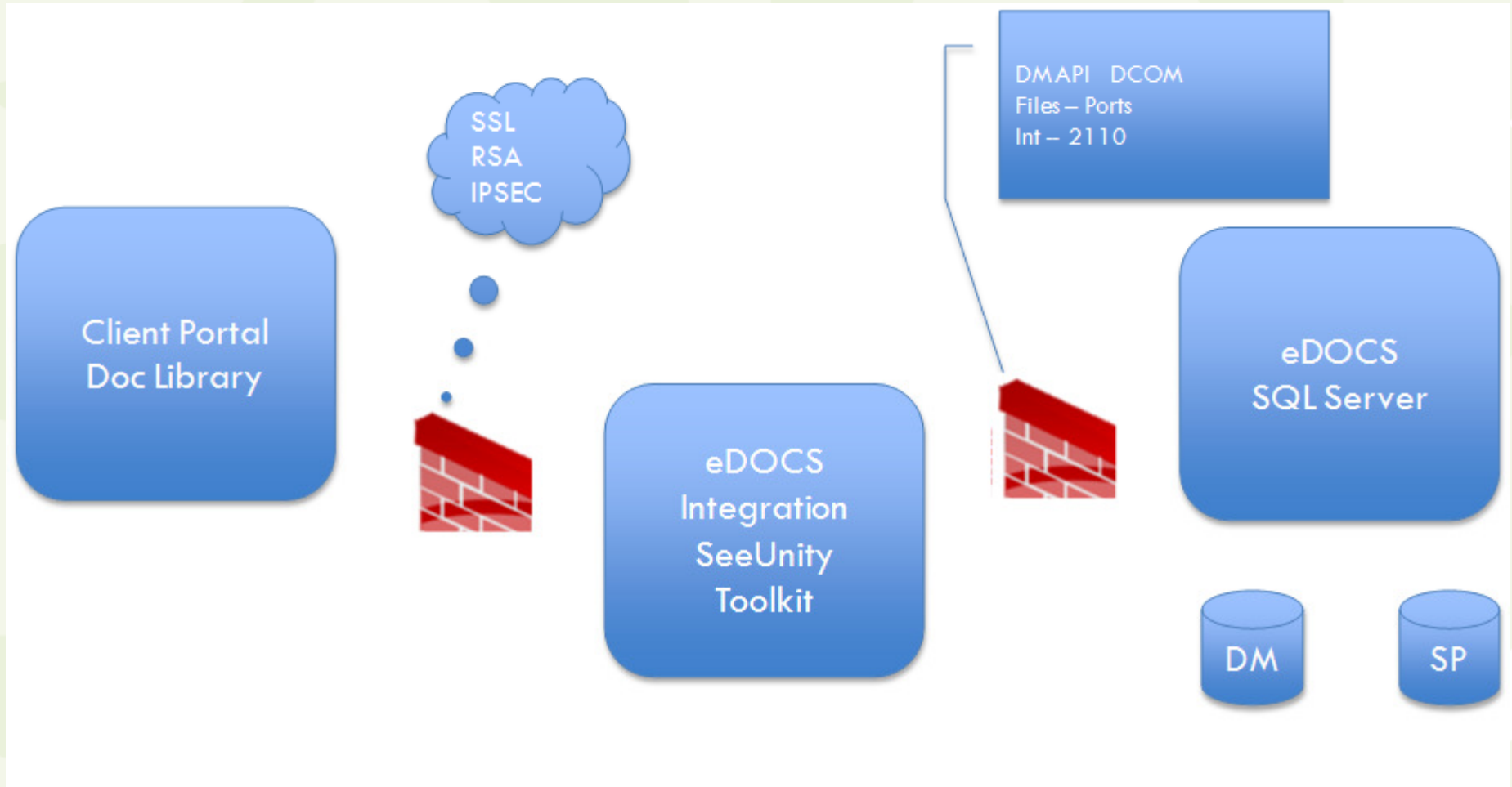
Integration Business Drivers & Goals

- 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



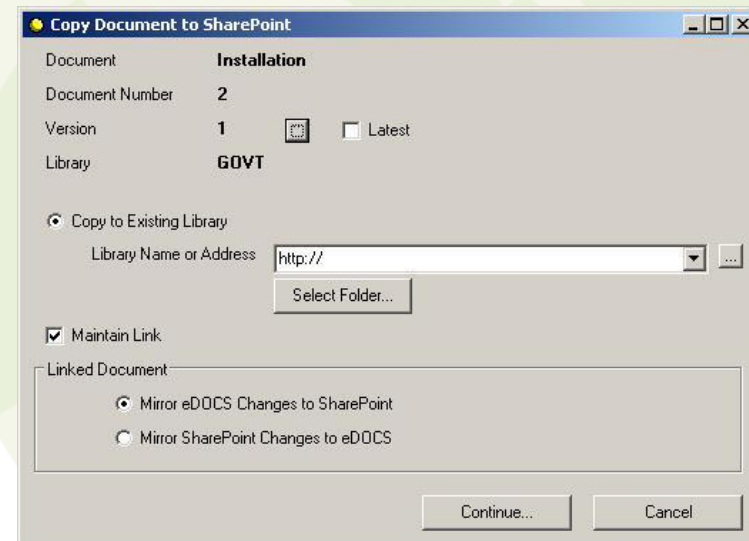
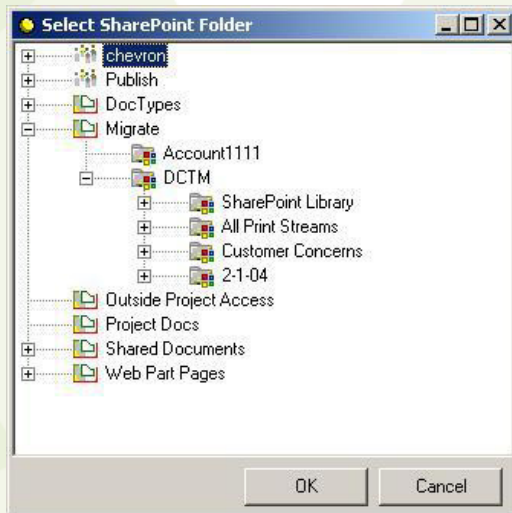
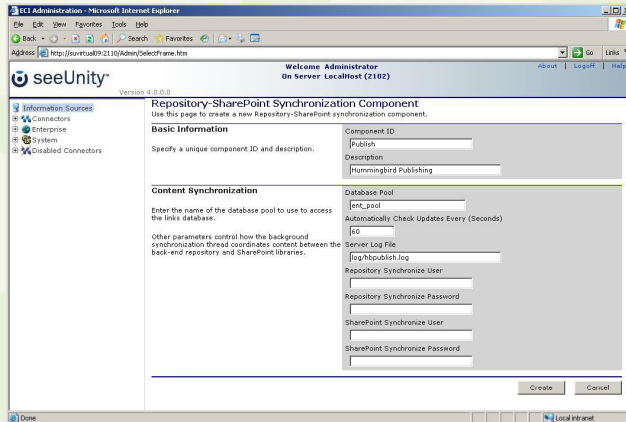
eDocs-SharePoint Integration



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
- <http://www.opentext.com/2/global/sol-products/sol-pro-extensions-microsoft>
- SeeUnity Toolkit White paper detail - <http://www.seeunity.com/products/enterprise.integration.sharepoint.asp>
- White papers regarding this subject at Microsoft KB article at <http://msdn2.microsoft.com/en-us/library/ms809327.aspx>

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