

MacRoberts LLP uses Sync Studio™ to bridge the content divide

SeeUnity
CASE STUDY

SeeUnity's Sync Studio is helping Scottish law firm MacRoberts LLP securely connect clients with information.

Effective information management

With 45 partners working in 3 offices across Scotland, MacRoberts serves many sectors and clients across the United Kingdom and Europe, including collaborating with overseas law firms on multi-jurisdictional transactions. In the process of providing advice and legal counsel, 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 drawings and metadata.

As with most law firms, MacRoberts have 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 HP WorkSite™. The ECM platform provides not merely the ability to profile and classify content, but automates intake of email and other documents. WorkSite 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

Legal cases often require collaboration and sharing with clients and third-parties. Due to confidentiality and governance requirements these parties do not have direct access to the firm's WorkSite system. Previously, MacRoberts transferred data using encrypted physical media (e.g. DVD-R), taking into account

About MacRoberts LLP

MacRoberts is one of Scotland's pre-eminent law firms. Our clients include leading UK and international businesses, financial institutions, public sector organizations and private individuals.

Industry: Legal

WorkSite Data Volume: over 7 terabytes

Products Used: SeeUnity Sync Studio™, HP WorkSite™, and Microsoft SharePoint 2013™

Customer Challenges

- Inefficient process of providing content
- Fragmented delivery of content
- Inconsistency of content format and media
- Difficult to search content

Sync Studio Benefits

- Automated delivery of content
- Improved productivity with time saving automation
- Timely delivery of content
- Improved decision making process

Project Goal

- Provide easy access to content for third-parties and clients
- Maintain security and permissions of documents
- Save time by managing publishing from ECM interface



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client 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. In short, sharing information with clients and third-parties was often time consuming and a complex 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 also ensure security. "It's important that we didn't rush changes to our system," said Robert Crichton, Director of IT Services at MacRoberts. "We wanted to make sure we selected the right solution, and that we adopt it strategically, in phases."

Mr. Crichton's team decided to work with a specific client – an independent financial advisor – to build 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 was fully tested and functional.

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 WorkSite system to a client-facing portal. From here, clients could search, browse, and access their own data. SharePoint 2013 was selected as the basis for a client portal, with its ability to easily build out custom sites and pages. The missing piece was the software that could seamlessly publish content from WorkSite to SharePoint.

Three critical requirements guided the search for the right technology – configuration would have to be 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 Sync Studio the software of choice.

Sync Studio automates publishing

Sync Studio 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. Sync Studio meets a variety of use cases, including archiving, bidirectional syncing, and publishing.

Working with SeeUnity, the IT team architected a plan to share data from WorkSite to a secure client portal site. The SeeUnity Sync Studio helped to establish simple but powerful rules that defined what should be copied, how often, and whether the process should be bi-directional, allowing the client to save files to SharePoint and Sync Studio to automatically copy these to WorkSite. Sync Studio also helped transfer security permissions and metadata properties between repositories.

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– Robert Crichton
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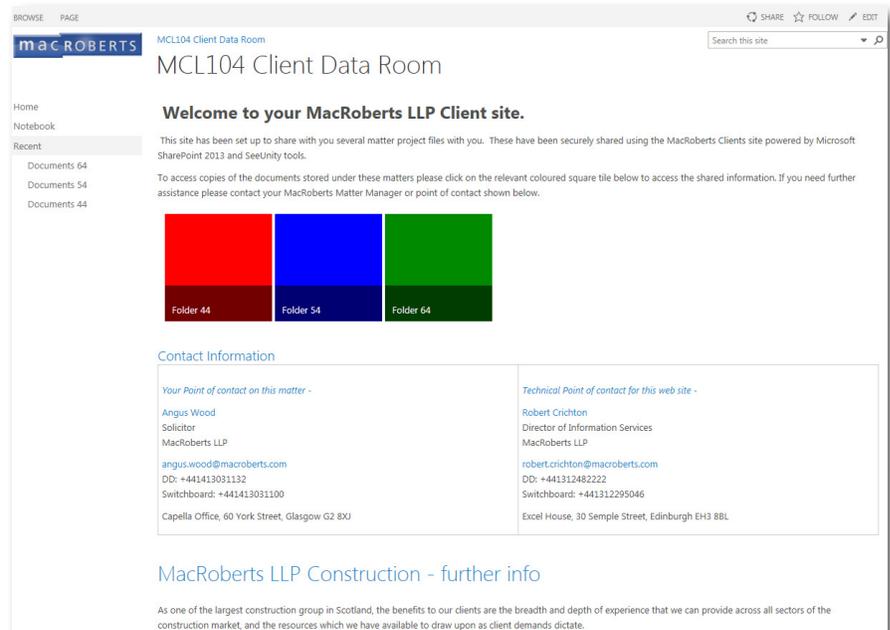
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Content is qualified against the rules and published to a corresponding secure client SharePoint site. If content is updated in WorkSite, Sync Studio detects those changes and updates the client portal – with the option of versioning. If content is created or deleted, Sync Studio will mirror those changes in the client portal.

Working with the new portal

“Sync Studio has made the first phase a clear success,” said Mr. Crichton. “The client is now able to search a tailored library of information. We no longer need to have a process for burning data to disk and shipping it. In addition, we’ve created rules so that as our attorneys create new relevant information in WorkSite, Sync Studio will capture that data and share it. The original content remains safely intact in our private WorkSite system, while the SharePoint site is only accessible to the specific client.”

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 phased rollout, additional Sync Studio capabilities are being evaluated for suitability. Specifically, Sync Studio’s bidirectional synchronization offers the potential to automate data capture from clients – creating a two-way bridge of information while keeping data separate and secure.



About SeeUnity

SeeUnity has over 40 combined years of experience with successful integration, migration, synchronization, and mobility of ECM systems. Our products and solutions have helped over 300 organizations globally take control of their ECM systems. For more information about SeeUnity, visit www.seeunity.com

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