

Marshall, Gerstein & Borun integrates Share-Point and eDOCS with SeeUnity

Integration extends a single view of related client records and matter-centric content, across multiple systems.

Marshall, Gerstein & Borun LLP is dedicated to intellectual property law and has had this exclusive focus since its founding in 1955. The Firm protects, enforces and transfers the intellectual property of its clients in more than 100 countries on six continents.



INCREASING CONTENT VOLUME AND COMPLEXITY

Marshall, Gerstein & Borun has experienced increased content volume and complexity. While they have long relied on eDOCS to protect legal matter content, the firm also expanded SharePoint to replace and replicate some physical record organization, including litigation records, general matter records and administrative records.

With eDOCS and SharePoint each containing related content, users were challenged to use and search two systems. Eliminating one system wasn't a viable option, as each system provides valuable features, such as workflow, user tools and rich metadata profiling. A better option would integrate access, presenting a single view of content from both systems. This solution would unify content for users – while allowing content to remain in (and be managed by) its current repository.

The firm determined that building the user experience around SharePoint, and enabling it to connect and communicate with their eDOCS system would best achieve this solution.

UNIFIED ACCESS AND CONTENT INTEGRATION

Marshall, Gerstein & Borun initially attempted to build their own integration, exposing eDOCS content through SharePoint web parts. The challenge was being able to integrate eDOCS control and functionality – including metadata accessibility. After deciding to find an existing product or services-based solution to integration, the firm held two key requirements – preserving where content is stored and managed, and embedding eDOCS user controls into SharePoint.

“SeeUnity met our needs in a way other products couldn't,” said Kimberly Giertz, CIO at Marshall, Gerstein & Borun. “We could expose eDOCS content and controls directly in SharePoint – giving users a

- Region served: Global
- Content Users: > 200
- eDOCS Document volume: > 1.6M
- SharePoint Document volume: > 200K
- SeeUnity products used:
- SharePoint Integration Modules

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The Firm represents Fortune 250 corporations, multinational businesses, start-ups, entrepreneurs, universities, research institutions, and non-profits. Nearly half of the Firm's professionals have been in-house as general counsel, patent counsel, technology transfer managers, scientists, engineers, or consultants - so we offer a depth of talent and seasoned experience in devising and executing intellectual property strategy and comprehensive IP solutions.

The Firm's professionals understand the hard science behind clients' innovations, and have the technical skills and business acumen to work with them hand-in-hand. Marshall, Gerstein & Borun LLP is ranked as a top intellectual property law firm by Chambers USA, U.S. News & World Report and Best Lawyers, and Corporate Counsel, Managing IP, Fortune, Intellectual Property Today, and Intellectual Asset Management magazines. For more information, visit: www.marshallip.com

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IMPLEMENTING SEEUNITY INTEGRATION SOLUTIONS

SeeUnity software enabled a matter-centric portal capable of accessing content from both SharePoint and eDOCS. With the help of SeeUnity’s professional services, Marshall, Gerstein & Borun was able to move from pilot programs to a production deployment in 3 months. With the integrated system, over 200 users can now access both systems using a single-sign on in SharePoint. Content from multiple repositories – including final form client records stored in eDOCS, and general matter records in SharePoint – are embedded and presented to users. Flexible custom web parts enable site templates to be easily built around relevant topics, such as specific customers or matters.

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*- Kimberly Giertz, CIO
Marshall, Gerstein & Borun LLP*

INTEGRATION BENEFITS – THE BOTTOM LINE

By replacing the unmanaged co-existence of content silos with a unified, integrated experience, Marshall, Gerstein & Borun has realized immediate benefits. Users can visit a client page and access result sets of all related content, including matter-documents stored in SharePoint, email and document histories stored in eDOCS, and any other relevant resources. SeeUnity’s web parts can automate deployment of matter-centric, site-based templates. The IT department can focus training, support and standards around a single user experience – conserving valuable resources. The new experience is flexible and capable of incremental usability tweaks.

“Direct access for our attorneys and staff is key,” said Ms. Giertz. “It reduces error and simplifies our support overhead. Most importantly, SeeUnity gives our users access to a single, cohesive experience, while we continue to store and manage content separately in SharePoint and eDOCS.”

ABOUT SEEUNITY

SeeUnity has over 40 combined years of experience with successful integration, migration, and synchronization of ECM systems. Our products and solutions help you make the most of your ECM systems. Our products have helped many industries, including legal, government, real estate, and entertainment, take control of their content by helping them implement publishing plans, extend security across repositories, integrate multiple repositories, or enact archiving policies across all of their repositories.