

Marshall, Gerstein & Borun Integrates SharePoint & eDOCS

With SeeUnity's Fusion Content Integration



International Firm Dedicated
to Intellectual Property Law

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

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.

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

Industry

Legal

Region Served

Global

About the Project

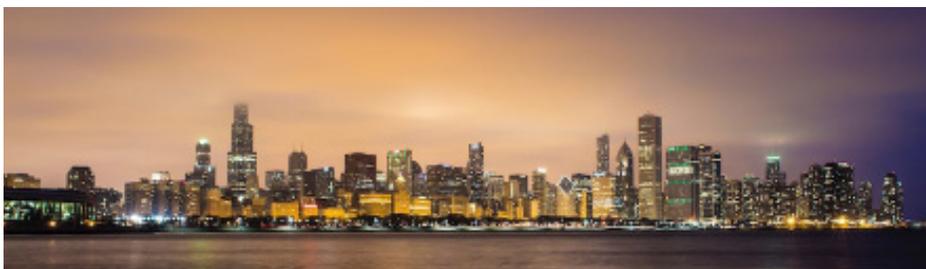
- Content Users: More than 200
- eDOCS Document Volume: Over 1.6 million
- SharePoint Document Volume: Over 200,000
- SeeUnity Products Used: Fusion Content Integration

Challenges

- The use and search between two systems became cumbersome
- Eliminating one system was not a viable option
- Needed ability to integrate and surface content from one system to another

"SeeUnity met our needs in a way other products couldn't. We could expose eDOCS content and controls directly in SharePoint – giving users a cohesive experience, while keeping content in their original repositories. SeeUnity also enabled us to embed the native eDOCS search experience into SharePoint – allowing people to continue leveraging eDOCS powerful profiles and search forms."

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



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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 cohesive experience, while keeping content in their original repositories. SeeUnity also enabled us to embed the native eDOCS search experience into SharePoint - allowing people to continue leveraging eDOCS powerful profiles and search forms."

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.

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."

Solution Benefits

Fusion Content Integration

- Seamlessly connects eDOCS and SharePoint
- Embeds eDOCS user controls into SharePoint
- Allows for direct access to content

"Direct, intuitive access for our attorneys and staff is key; it reduces error and simplifies our support overhead. SeeUnity gives our users access to a single, cohesive experience, while we continue to store and manage content separately in SharePoint and eDOCS."

- Kimberly Giertz, CIO



We are content integration experts providing in-depth solutions to connect, sync, or migrate data across on-premise or cloud-based ECM solutions with external business applications. We're dedicated to improving workflow and business processes by extending applications and connecting people with content. SeeUnity supports a growing list of 30 connectors and provides comprehensive migration and synchronization tools to 500+ customers and 30+ partners worldwide. We proudly serve customers of all sizes, including Fortune 500 businesses, Am Law 100 and 200 firms, and government entities.

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