Case Study

Document Management for the New Normal Workplace

By combining MacroView DMF® with Microsoft SharePoint® international legal firm Webb Henderson has created a successful DM solution that enables their widely-distributed users to work collaboratively on documents.

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Introduction

Webb Henderson's mission is to provide its clients with specialist advice on strategic and complex projects in key business sectors. Webb Henderson provides specialist legal advice in the areas of competition law and regulation, corporate and special projects, disputes, and telecommunications and media.

Webb Henderson is a perfect example of the 'New Normal' for workplaces.

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Legal and Regulatory Advisors

Their partners and staff need to be able to work from anywhere at any time – from one of their offices in Sydney, Auckland or Singapore, a client office or hotel room in South-East Asia or the Middle East, in an airport lounge, the back of a taxi or from home. The team also need to collaborate easily and quickly on documents, including from widely distributed locations.

In 2014, Webb Henderson moved to a new document management (DM) solution based on Microsoft SharePoint® and MacroView DMF®. They report that their new solution has been well adopted by users and is delivering the functionality and performance demanded by their users, while also facilitating their distributed way of working.

Deciding to go with SharePoint

Prior to 2014 Webb Henderson was running a proprietary DM solution from a small software house specialising in legal solutions. As the firm grew in both size and geographic spread, it was necessary to find a solution that could deliver higher levels of functionality and performance for the firm's users, regardless of location. Webb Henderson investigated leading DM systems, including iManage Filesite and Documentum.

Webb Henderson was attracted to Microsoft SharePoint. It was web-based, offered robust document management capabilities and was relatively cost effective. However, Webb Henderson rapidly determined that an out-of-the-box SharePoint deployment did not provide the document management experience that their staff expected or required.

Webb Henderson identified a number of software tools that could provide a better 'front-end' to SharePoint, making it more attractive to their users for managing documents and emails. One of these tools was Document Management Framework (DMF), from Sydney-based MacroView Business Technology.

Webb Henderson selected SharePoint + MacroView DMF after an extensive evaluation. They found that by combining DMF with SharePoint they could create a DM solution that would provide the functionality and user experience that they wanted. Critically, MacroView DMF integrated directly into everyday applications, allowing users to work in familiar applications like Outlook, Word, Excel and PowerPoint. By extending and enhancing the integration of SharePoint and Office, MacroView DMF has become the enabler of Webb Henderson's distributed workplace.

Ara Margossian, who was the partner at Webb Henderson responsible for this project, has noted:

> *"Document management has changed so much from when I first started as a lawyer. With MacroView DMF and SharePoint, we have been able to deliver a first rate document management solution to our team. The functionality and flexibility of the solution, along with its ability to support collaborative working from virtually anywhere, are the big drawcards".*

Plugging the gaps

MacroView DMF addresses one of the biggest shortcomings of SharePoint / Outlook integration - the inability to drag and drop emails from Outlook into SharePoint. With MacroView DMF, you can drag and drop to save one or multiple emails or attachments and continue working in Outlook. MacroView DMF can also be configured to save the emails without any prompting of the user, while capturing the email attributes and other metadata automatically.

Drag and drop support in MacroView DMF extends to uploading documents from any Windows folder and to moving / copying documents between areas of the SharePoint store with metadata and versioning preserved, including across different site collections.

A major source of user frustration with SharePoint as a DM solution is that to perform a search for a document you need to jump out to the web browser, including when you want to insert an attachment in a new email that you are drafting. MacroView DMF lets users search and attach SharePoint documents directly from familiar applications such as Outlook, Word, Excel and PowerPoint. With MacroView DMF, searching for and inserting a document as an attachment takes less than half the keystrokes that are required if you are using the out of the box integration of Outlook and SharePoint.
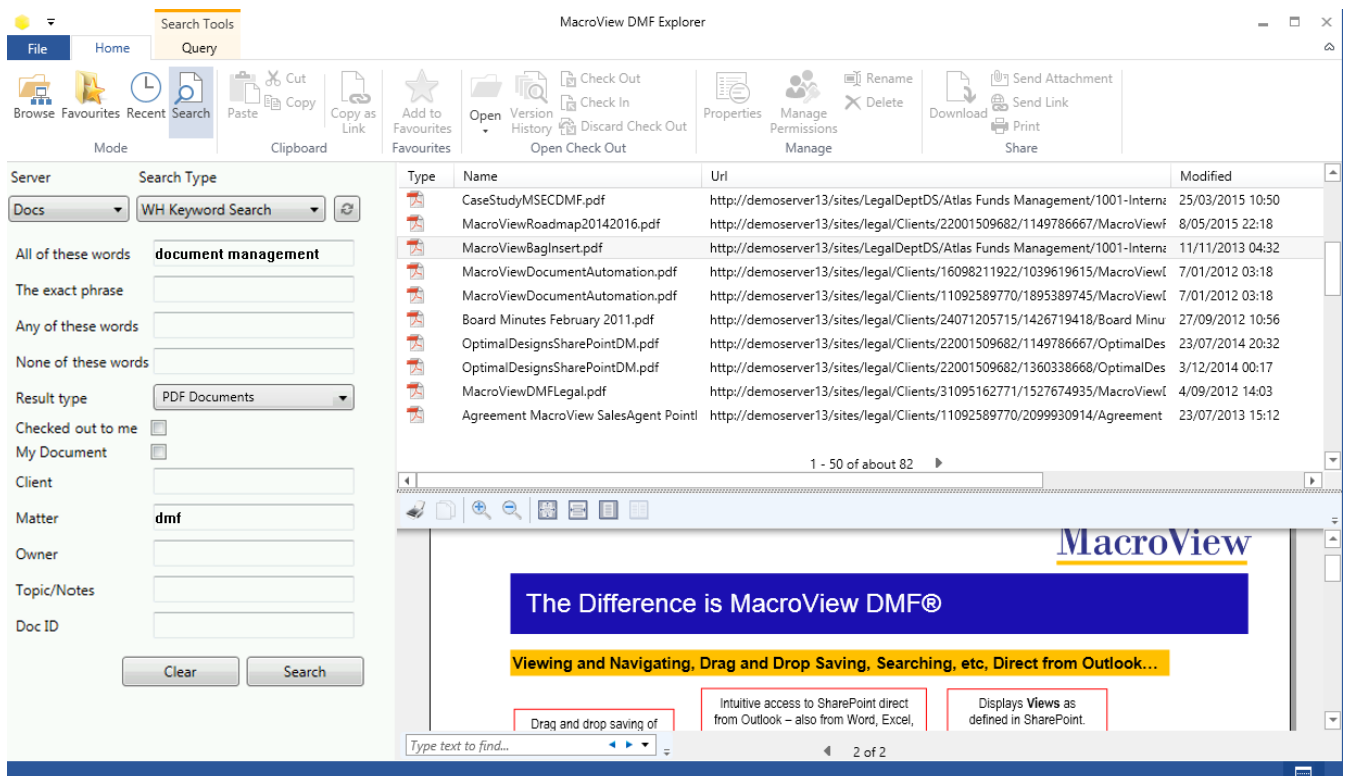

Figure 1: Webb Henderson took advantage of MacroView's support for customizable search panels. The *Keyword Search* has been customized to allow users to find documents using metadata such as Client, Matter, Owner and Document ID, in addition to content.

Webb Henderson preferred their document numbers to look and work like they would in a traditional DM system – i.e. assigned sequentially across the whole document store, rather than the 'coordinates within a site collection' style that ships with SharePoint. They also wanted Document IDs and Version numbers to be automatically displayed in the footers of documents opened from and saved to SharePoint. These unique document numbering requirements were implemented through an optional MacroView DMF module.

The check-out and versioning approach of SharePoint is not just different but often awkward for experienced DM users. MacroView DMF streamlines the experience by providing significantly improved and highly intuitive version control options:
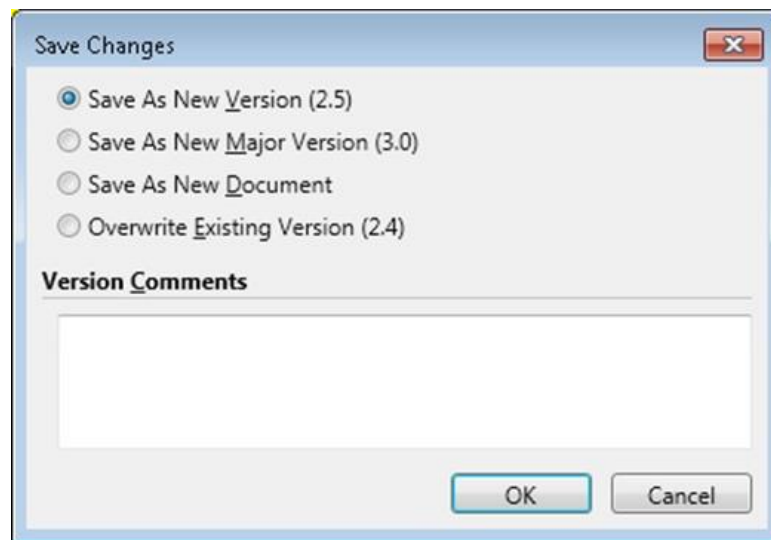
Figure 2: Version control options displayed by MacroView DMF on closing a document that has been opened from a document library with Major and Minor versions.

Facilitating Collaboration on Documents

In the Webb Henderson workplace, there is frequently the need to have multiple lawyers participate in the drafting and review of Word documents. Tight client deadlines and working across international time zones often mean that multiple users need to edit a document simultaneously, particularly on large scale transactions.

MacroView DMF lets users find documents in SharePoint using the full power of the SharePoint search engine, without needing to leave Microsoft Word. They can open the documents and edit them collaboratively using the native co-authoring capability of Microsoft Word. The integration of Skype for Business within Word 2016 also allows users to send instant messages to each other within Word to work through drafting issues and further speed up the collaborative editing of the document.

Delivering performance and flexibility in a Distributed Environment

Historically, many organizations with distributed operations had to deploy a separate DM server in each office to secure the end-user experience. This approach does not work in the new normal workplace, where users need to be able to work from anywhere and collaborate with colleagues in real-time.

Just as cloud computing has changed the way law firms consume IT, the demands for effective co-authoring and collaboration have also required firms to implement centralised document stores. This introduces the challenge of ensuring that all users have good performance as they access that centralised document store, in SharePoint or otherwise.

Webb Henderson have successfully overcome this challenge. They have a central SharePoint server hosted in their own private cloud (i.e. an external data centre, not in any Webb Henderson office) and their users enjoy good performance as they save and open documents, including when users are working from remote locations.

They have achieved this through combination of investment in high quality links for each of their offices, Riverbed WAN optimization and performance-oriented configurations of their SQL and SharePoint servers. To ensure that performance is appropriately balanced with cost, Webb Henderson has used different approaches for each of its offices. The Sydney office uses a private connection to its data centre whereas the Auckland office uses a high quality internet based connection with Riverbed WAN optimization. Staff who travel frequently use the Riverbed mobile client to significantly improve document retrieval times and the broader user experience.

Webb Henderson users are able to access documents through a range of options, including mobile devices, web based access and virtual desktops that incorporate MacroView DMF. Users can also access MacroView DMF Explorer in a Mac environment.

Webb Henderson also seeks to deliver flexibility to its users through Office 365, which allows each Webb Henderson user to have Microsoft Office deployed on up to 5 devices and allows easy access to recently edited files on multiple devices, regardless of what device was originally used to perform the editing.

Migration from the Legacy DM Solution

MacroView Professional Services consultants assisted Webb Henderson with the migration of existing documents from its legacy DM solution to SharePoint. They utilised the SharePoint Migration tool from Clockwork Software to handle the bulk retrieval and upload, so that existing metadata and versioning was preserved. Metadata and naming for the migrated emails was brought into line with MacroView DMF by using the MacroView Standardiser utility.

The final step in the migration was the replacement of the document automation component of the legacy system with a custom template solution, also developed by MacroView. This new solution is purpose-designed for a multi-location, distributed workplace. A single set of Microsoft Office templates is dynamically configured by .NET logic to reflect the local address and other details of each Webb Henderson office.
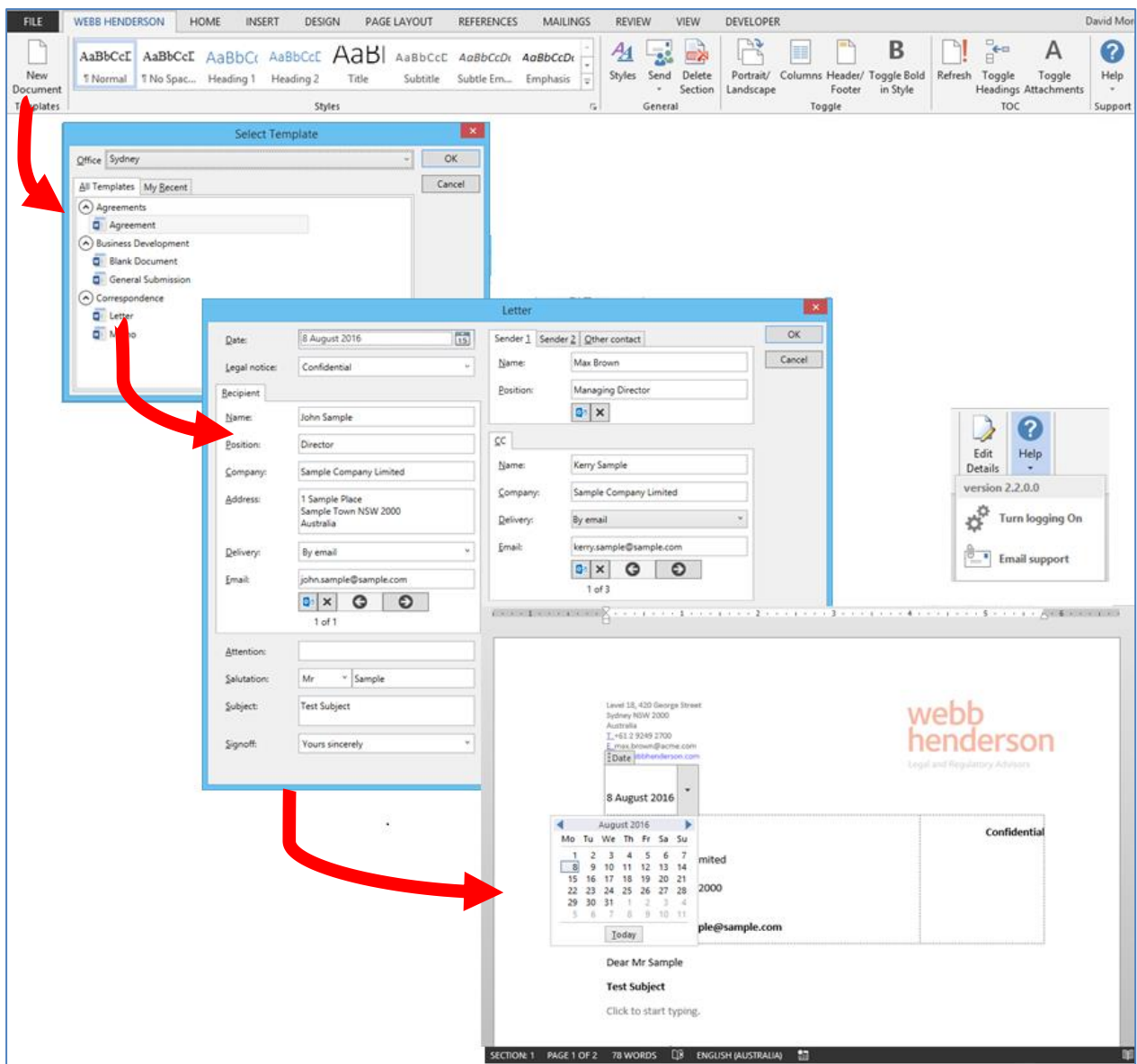

Figure 3: images from the Webb Henderson custom Office templates solution