

# Building a customized archival solution by taking advantage of SharePoint



## Introduction

Legal firms are every bit about people and knowledge. Vast amounts of information can be generated from a single case. Firm's clients are entitled to the benefits of collective, accumulated knowledge that is gathered from all around the business.

An Altman Weil survey found that

**94%** of firm leaders believe a sustained improvement in efficiency will increase their competitiveness. If employees are unable to efficiently and consistently locate and utilize the knowledge timely, there is a considerable problem. A robust document management system such as SharePoint is often compared to a Swiss army knife - it can be adapted for varied functionalities, but it isn't full-fledged to deliver end-to-end custom requirements unless skilfully customized.

## Client

Our client is one of the largest public accounting, consulting, and technology firms in the U.S. Their goal was to migrate from Sharepoint 2013 to 2016. During this migration process, they identified faulty functionalities of the current incompetent system and decided to fix them alongside the migration.

## Challenge:

The client was already using an archiving system that was deployed across multiple siloed systems. This inept archiving system required high manual intervention and maintenance. A gap analysis was done between the expectations of a desired archival system and the current system, in that process; several product backlog items (PBI) under each scrum was recorded.

## Reported inadequacies:

- **11000** sites in total, **600** audited data archived everyday manually which translates to **3** man days of manual work
- Manual conversion of spreadsheets and documents into PDFs for storage
- Relative links placed in documents that needed corroboration across archived locations
- An archival system that needed different access privileges across **3** environments - internal, private (to observe attorney-client privilege) and external
- Messy UI - The attorneys still preferred to carry hand copies to court rooms and printing was inconvenient

## **Solution**

The main goal was to reduce backup and recovery time to a minimum, to relieve employees of the continuous manual archiving process and fix function anomalies during migration. The new archiving architecture was designed to deliver a virtually instantaneous search, increased end-user functionality, and a streamlined search process. A light weight and competent provider hosted app on Sharepoint was deployed that could aid effortless site template based migration. Giving lawyers the tools they need to maximise their efficiency and reduce response time and to enable tangible savings in costs to the business.

## **Benefits**

The archiving solution provided accelerated and streamlined processes and encouraged a business climate that could cater to the demand of the legal staff.

- **Risk Mitigation** – higher reliability of smaller databases and faster recovery in the event of a malfunction
- **Explicit user permissions and access privileges** – three different environments warranting users right of entry only to permitted documents in each setting
- **High productivity environment** – employed lightweight shortcuts, allowing application to reduce total storage costs while maintaining user accessibility
- **Improved and faster search function** – Being able to refer to and re-use work done for previous clients
- **Potential Savings in millions of dollars** – a powerhouse platform for empowering teamwork and productivity eliminating manual work, seamless collaboration, intelligence, and insights.

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## **Conclusion**

In theory, SharePoint should help a lot of inefficiency problems legal firms' face. However, you aren't alone if you find that in practice your company's SharePoint environment has become unrewarding. The archiving

system developed by us is industry proven; an accelerator that empowers firms to maximize information resource investments, tightly map workflows, and integrate critical systems. We constructed a system that improved customer service, brought down costs, enhanced productivity, and at the same time protected case information.

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## **About Excelencia**

Excelencia is an ISO 9001 certified service provider for IT Services. We are headquartered in Austin, Texas.

With over 10 years of experience serving emerging enterprises in USA, UK, Europe, Australia & Middle East, we boast of working with over 150 clients across technologies. We provide value-added solutions with a clear focus on quality and endeavor to be a long-term partner addressing all aspects of our clients.

Through a single point of accountability, we offer end-to-end, enterprise-class IT solutions, including cloud and on-premise solutions, managed services, enterprise application management and other professional services.