SHEPHERD+WEDDERBURN   LITERA

Shepherd & Wedderburn Deploy Prosperoware CAM for Provisioning and Governance of iManage Cloud and Microsoft Teams

Location: Multiple offices across Europe

Industry: Corporate & Commercial Law

Collaboration System:
iManage & Microsoft Teams

Pain points:

- Granular provisioning for iManage Cloud & Teams
- Lack of Workspace Template customization
- Integration with the iManage Universal API
- Governance with audit trails
- Data location and access

Solution: CAM + Teams Provisioning & Manual Move

☁ **CAM**

Solution Highlights:

- Enhanced provisioning capabilities across iManage Cloud
- Ability to provision with templates for specific use cases
- Quickly detect suspicious activity with detailed audit trails
- Ability to integrate with the iManage Universal API

OVERVIEW

Ahead of a planned migration to the iManage Cloud, Shepherd & Wedderburn found themselves in need of a solution that provides granular provisioning capabilities.

"We plan up to move our iManage on-premises environment to the iManage Cloud so we were keen to have a product that was integrated into that and would serve us well for several years," says Steve Dalgleish, Head of Technology at Shepherd & Wedderburn.

The firm had been experiencing challenges with adapting to the evolving needs for customized and specialized workspace templates. They needed a solution that would allow provisioning with readily available templates with prefix, suffix, or customized naming conventions to meet different departmental & practice group needs.

When it comes to proper governance, Shepherd & Wedderburn also needed to have detailed audit trails, allowing the firm to monitor user activity and detect any inappropriate or suspicious behavior. "The audit trail is crucial for us to understand where our data is, where it's gone, and what's been attempted with it."

With recommendations from iManage partner, Ascertus, and leaders around the industry, the firm realized that Prosperoware CAM would meet their core business needs for iManage provisioning, management, & audit trails.

But as soon as they selected CAM, the pandemic happened. The shifting business needs enticed Shepherd & Wedderburn to expand the scope of the project from using CAM for iManage only, to deploying it for Microsoft Teams too.

SOLUTION

Prosperoware CAM provided Shepherd & Wedderburn with the granularity they needed for provisioning and workspace management for iManage and Microsoft Teams.

CAM is a software-as-a-service (SaaS) platform for adoption and governance of collaboration systems. It enables organizations to provision, manage, move, analyze, comply, and protect data across systems, mitigating data chaos and reducing risks related to privacy & cybersecurity.

The firm uses CAM's capabilities to provision and customize their workspaces depending on business needs. It allows them to meet core business needs around provisioning, metadata, and templates.

"The previous solution was quite rigid in how templates were created so CAM gives us the flexibility of adding additional templates and logic based on the characteristics of the matter," says the Head of Technology from Shepherd and Wedderburn.

"CAM allows more specific templates to be developed when needed. We have 50 million items in the DMS and with CAM, people are placing documents in the right place and gaining the ability to understand which ones are documents, emails, financial elements, etc."

When it comes to Microsoft Teams, the firm is still testing whether adoption will occur, but says that CAM provides the ability to better collaborate within the system.

"Teams is a big change in how people could work so we don't know if they will start chatting or commenting on documents on Teams or go back to Outlook. But CAM gives us the ability to offer that to users."

> CAM is a very powerful product that let's you pull business information from one system and use it to provision other systems. It's a centralized application to manage the data flow within organizations regardless if it's on premises or in the cloud.
>
> **Steve Dalgleish**
> Head of Technology,
> Shepherd & Wedderburn

RESULTS

Shifting from an old provisioning solution to a new one can be quite challenging, especially when paired with an organization's transition from on-premises to the cloud. For Shepherd & Wedderburn, as challenging as this was, they have managed to reap the benefits that came with this switch.

CAM offers Shepherd and Wedderburn the granularity they were seeking across departments. It enables flexible workspace customization, saving documents in the right place, and monitoring activity through the audit trails.

"CAM just sits in the background and does what it's supposed to do. It takes data from other systems, processes it, and puts it in iManage, so it's exactly what we asked for. If there is an issue, we can get to where that issue is coming from quickly."

And not just that. CAM has helped Shepherd & Wedderburn also strengthen its risk management because it makes it easy to understand where data is located.

"We have increasing confidence that CAM is delivering what we expected it to. When an issue occurs and the risk team tries to find out what happened, now we are confident we can get that information out."

What's next for Shepherd & Wedderburn and CAM?

As the firm moves towards more modern ways of collaborating in the cloud, with Teams, and external stakeholders, it sees CAM as an important platform to help them focus on these elements and more.

"As departments become more client-facing, having a platform like CAM in our toolkit is a great place to start on modernizing our firm processes."

Ultimately, CAM has enabled Shepherd & Wedderburn to gain granularity in provisioning for the iManage Cloud & Microsoft Teams, improved content location, and allowed flexibility in templating.

About Shepherd & Wedderburn

Shepherd & Wedderburn is a renowned corporate and commercial law firm with offices across Europe. The firm has operated for over 2 centuries, with hundreds of employees and worldwide success to their name. With their focus centered around understanding clients' business concerns, the firm has an established reputation for providing both pragmatic and commercial advice across sectors.

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