

## Customer Case Study



### Overview

**Country:** United States

**Industry:** Legal Services | Business Law and Corporate Litigation

### Customer Profile

Founded in 1930 Delaware – Morris Nichols is a go-to law firm for the Fortune 500, with many among their approximately 100 attorneys consistently named among the leading lawyers in America.

### Business Situation

Faced with the inability to effectively access or distribute relevant information across the firm and a necessity to decrease administrative tasks and client costs, the firm required an enterprise search solution that is centralized, fast, flexible, and secure, with relevant results.

### Solution

Morris Nichols (MNAT) chose BA-Insight to successfully integrate the firm's enterprise systems with their intranet portal for enhanced knowledge management using Microsoft Office SharePoint Server 2007 and BA-Insight's Longitude Connectors and Longitude Search.

### Benefits

- **Full search integration of SharePoint, Interwoven FileSite, and West KM**
- **Index and securely search 4.5 million DMS system FileSite**
- **Relevant search results in less than 2 seconds**
- **West KM transaction cost savings**

## Law Firm Improves Speed, Security, Flexibility of System Integrations to SharePoint Search

**“The ease of use with BA-Insight Search Connectors to integrate into our other systems, SharePoint, Interwoven, and West KM; the quick turnaround to get a solution in place; the end result of a preview pane and the speed of search; better yet, the speed of indexing 4.5 million documents. These were all major factors why we chose BA-Insight.”**

### Wade Goldt

Director of Information Technology  
Morris, Nichols, Arsht & Tunnell LLP

Leading Delaware law firm Morris, Nichols, Arsht & Tunnell (MNAT) turned to BA-Insight to implement and deploy a world-class enterprise search solution built on Microsoft Office SharePoint Server 2007 and the BA-Insight Longitude Connector and Search solutions to centralize information firm-wide in SharePoint Search. The firm's aging intranet functioned more as a platform for corporate communications than as a collaboration platform for attorneys and support staff. MNAT wanted an integrated intranet portal and document management system with a unified, secure search. Today, MNAT attorneys are enjoying an increase in searchable intranet content and reuse of firm knowledge, as well as more efficient access to data across systems. An increase in productivity reduces the firm's non-billable hours and creates a competitive advantage in the marketplace.

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**Wade Goldt**  
Director of Information Technology  
MNAT

## Situation

MNAT is a go-to law firm for the Fortune 500 specializing in business law and corporate litigation. Established in Delaware in 1930 by Judge Hugh M. Morris, the firm has grown to 100 attorneys that make up a broad national practice of Corporate, Commercial, Intellectual Property and Bankruptcy Law. MNAT delivers exemplary client services in 5 different practice areas, and many among their 100 attorneys are consistently names among the leading lawyers in America.

The IT department at MNAT works to consistently provide the best technologies available to help the firm make the most of its extensive information assets. Their objective is to provide MNAT attorneys with easily searchable, logically organized information, and the necessary tools to find colleagues and collaborate efficiently within the firm.

The requirement for the intranet portal at MNAT was first and foremost to centralize the firm’s information assets; to create one central location where attorneys and firm professionals could turn to for collaborative legal teamwork and searchable access across several firm data stores. Whether looking for anything from who’s on vacation today to specific case reference materials, in an access database or document management system, one central location to point, click, and find the information needed.

The second requirement was to streamline the creation and distribution of the weekly internal firm newsletter. For years, the firm had published a highly anticipated weekly newsletter with everything that had taken place in firm over the past week and what was planned going into the next week. This newsletter would also include items such as a new phone list with updated extensions and birthdays. Attorneys would wait for the 4:00 Friday email to get all the information of what had transpired over the past week. All of the directors would spend several hours on Friday recalling the past week’s events, planning the next week’s events, and compiling the newsletter for email distribution. Finally, it would be edited and emailed out as a 2 MB PDF file, adding 300 MB from one email to the server. “Then people would take that email and save it to document management. Not just one person, but everybody. Or they’re leaving it in their email inbox. I can’t tell you how many times I’ve seen 300 or more newsletters in an individual’s inbox,” says Goldt. Updating the intranet with this information in real time versus weekly, without the requirement of having to compile, edit, publish and distribute the newsletter, would create a significant time and storage savings.

Finally, the automation of a number of administrative processes such as paid time off requests, visitor requests, and banquet services using forms with mandatory fields to eliminate excess time spent collecting the necessary information for requests.

## Solution

MNAT started analyzing and evaluating solutions in March 2010. Once BA-Insight was chosen to integrate Thompson West KM into SharePoint, the firm spent two months working with BA-Insight and Thompson West KM to create the search

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Developer  
MNAT

connector. “I’m a big fan of the tool. The flexibility of the connectors is fantastic; the ability to integrate with other systems. The West KM integration is a testament to the flexibility of the connector architecture,” explained Chris Hines, MNAT Developer.

MNAT started their two-phase pilot in May 2010 with a small group focused on search against their 4.5 million item Interwoven FileSite document management system (client matter records and stored emails), and practice-specific document libraries within SharePoint.

“Something really good about BA-Insight software was being able to partition out crawling of 4.5 million DMS opinion documents in FileSite, to which we attach our own specific metadata, versus our DMS stored emails,” Hines continues. MNAT has their own reference material called opinions which are attached to MNAT-specific metadata. Example: on Document A an attorney will write ruling details for that particular opinion, something very specific to MNAT, thereby attaching their own metadata.

MNAT used feedback from phase 1 to enhance the search connector created for West KM transaction and litigation documents, including the creation of custom search results pages, and then launched phase 2 in June 2010. Phase 2 doubled the size of the pilot. With the set of MNAT users already familiar with the BA-Insight search interface, the transition into adding West KM was seamless. Users could now take full advantage of the 200 thousand converted documents in the firm’s DMS that have searchable West KM metadata. Users are able to search off of multiple fields within a single piece of metadata using BA-Insight’s parametric search, which creates a cube of metadata that the user can slice and dice.

### Architecture

The MOSS 2007 environment was architected using two low balance 2 CPU web front ends, one 4 CPU SQL database server, and one index server which also runs the Longitude import tool. The environment is all 64-bit and all virtualized using VMware VSX.

### Page Previews

“This type of integration is really about the speed. To be able to give our attorneys the speed of searching an entire document management system as well as any documents that are in West KM within less than 2 seconds; get that data and be able to filter based on metadata; they can find what they’re looking for in less than 30 seconds total. And that includes previewing and scanning through the information, all because of the preview window,” describes Goldt.

SharePoint alone returns a basic list of results from a user search that is limiting to the user. Finding the desired document or item can take several minutes, which can result in the user giving up and duplicating efforts by instead recreating the document themselves. BA-Insight’s preview presents users with the most relevant pages in the document instantly. The pages are fully hit highlighted enabling the user to instantly assess relevance for content both in and outside of SharePoint.

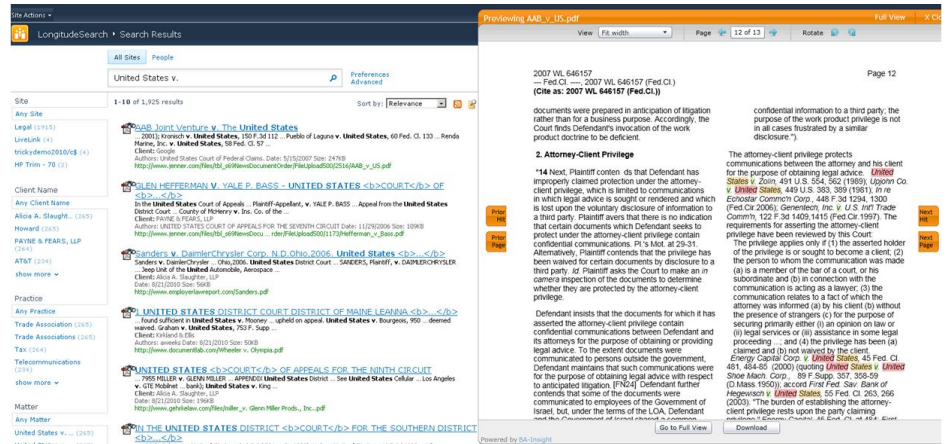
## Case Study Title

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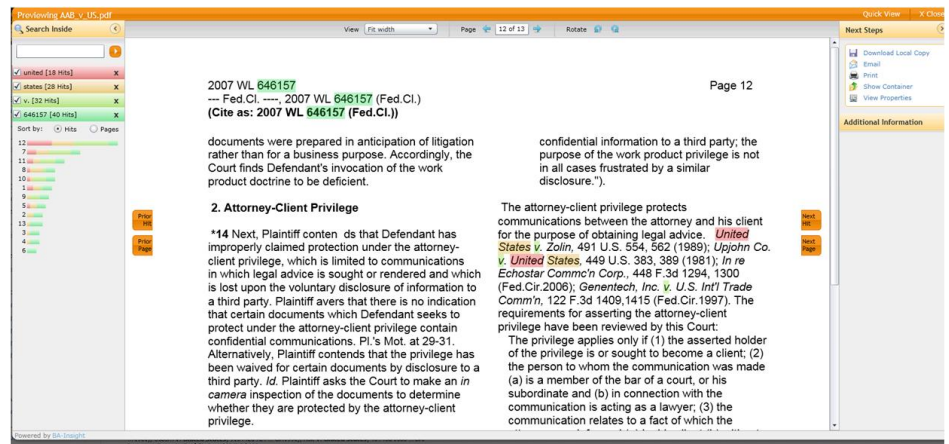
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Director of Information Technology  
MNAT



"95% of our documents are previewed and look really, really good. We'll get the remaining 5% with BA-Insight's Longitude V4.1 release in October 2010 which will include hit highlighting for scanned PDFs and the ability to preview emails," Goldt goes on to say. "It's amazing. The attorneys love it to the point where they're begging me to add their secretaries."



## Speed and Security of Integrating, Indexing and Searching

"The ease of use with BA-Insight Connectors to integrate into other systems; SharePoint, Interwoven, West KM. The quick turnaround time to get a solution in place with the end result of a preview pane and the speed of search. Better yet, the speed of indexing. All major factors why we chose BA-Insight," says Goldt.

BA-Insight's connector solution is flexible and robust. The real time security trimming combined with early binding security done at the index level, provides the dual ability to have real time security in place but also scalable performance where incremental updates are done efficiently.

"One of the technical benefits of the BA-Insight tool is the use of AD for making our incremental crawls fast by creating the AD groups and allowing us to

implement FileSite security; but also performant incremental crawls when we've updated permissions , for example," Hines adds. "One of our requirements was that our crawl and search were performing well. Nothing short of excellent. And the latitude of security as well. I didn't find anyone else who offers this level of security and scalable performance."

### **Additional Benefits**

The West KM integration allowed MNAT to cut down on transaction costs. Their attorneys incur fewer charges because they are able to use the new search tool to search West KM and therefore spend less time on the West KM website.

### **Microsoft Office System**

The Microsoft Office system is the business world's chosen environment for information work, providing the programs, servers, and services that help you succeed by transforming information into impact.

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For more information about BA-Insight products and services, call (914) 220-8395 or visit the Web site at: [www.ba-insight.com](http://www.ba-insight.com).



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