

Case Study

Top US Bank Upgrades Its Document Management System

Maximizing Legal Department Technologies:
NetDocuments™ - TeamConnect™ Integration

A Guide for Corporate Legal Departments



Case Study: How A NetDocuments - TeamConnect Integration Maximized Both Technology Investments

Technological transformation has put the legal profession on the fast track for the past several decades. Even pre-pandemic, the maze of available technologies and their intricate frameworks have increasingly burdened legal operations professionals.

Tired Technology Trade-Offs

up to **5** hours
a week spent by legal
staff just making
systems work

With the plurality of legal technologies managing different legal department functions, from Document Management System (DMS) to Enterprise Legal Management (ELM), legal staff often spend a significant amount of time working around and coping with the inherent inefficiencies in outdated, ineffective systems, as well as working with documents between systems out of sync. The sad truth is that legal staff learn to accept inefficiencies and adopt a “make it work at whatever cost” attitude. In many instances this entails countless manual tasks and work-arounds, and even more alarmingly, several hours a week spent just trying to get the outdated systems to work with evolving modern processes.

“*Upgrading to the optimal platform for Document Management is a key step to maximizing legal department productivity.*”

The Hidden Need for Integration

77%
of legal officers
reported a surge in
workload

Modern legal technology has been designed to improve department workflow, effectively handle documentation, and reduce spend. To meet this goal, ELM and DMS systems are complimentary solutions, however, most of them lack the capability for seamless integration. Therefore, evaluating options for upgrading or replacing these systems can be a daunting task. For instance, if multiple systems are not able to talk to each other, suddenly one upgrade project can turn into two: both an upgrade *and* an integration upgrade.

But what if there could be a seamless integration included with your technology upgrade or updates?

Here’s a real example.

Case Study:

Their Pain

A Top 10 US bank's law department legacy document management system was approaching end-of-life. Upgrading the same system to a newer version was too complex and costly. The bank decided to replace their legal team's old system with NetDocuments™ services, however they had spent a lot of time and money over the past decade integrating their legacy DMS with their ELM, Mitrastech TeamConnect™. They were looking forward to using NetDocuments but were concerned that the lack of integration would feel like one step forward and two steps back. Unless their new DMS could be synced with their current ELM system, valuable time would be wasted switching between interfaces, transferring data, and merely keeping tabs on documents and workflows.

They asked InfiniGlobe to help. Here's what we did:

The legal operations team shared their process and pain points with our integration experts who had performed similar integrations between ELM and DMS applications in the past.

We understood and determined similarities between NetDocuments's "matter-centric" design and the TeamConnect interface. Users wanted to be able to access their matter workspace in NetDocuments immediately after creating a matter, without have to wait for an information sync to happen, something that was bothering them in the legacy system.

We Dug Into The Details

TeamConnect and NetDocuments are both complex, enterprise-level systems. Most corporations, including this bank, invest heavily in customizing, maintaining, and servicing their enterprise software. This can mean lots of custom rules, objects, fields, wizards, etc. that must be accounted for, inventoried, and understood. Our InfiniGlobe business analyst reviewed both systems and defined metadata mapping, as well as a full understanding of security requirements.

While our technical team was confident that user's original requirements will be met with the traditional matter flat-feed sync type integration, but they did not stop and dug more into the NetDocuments and TeamConnect Application Programming Interfaces (API) for other methods like real-time interfaces. The team suggested to users several other ideas on making the user experience better with less clicks.

We Delivered

The integration was a major quality-of-life achievement for TeamConnect and NetDocuments users.

“That NetDocs button is magic! It saves me hours of manual work and frustration.”
- Legal Staff

TeamConnect users no longer had to leave the application to create a workspace, copy-paste matter information, or work with documents in NetDocuments. Now, users could open individual NetDocuments workspaces on different tabs in TeamConnect for when they want to work on

multiple matters throughout the day. Security and access control for secret matters were also accounted for and integrated into the interface, ensuring only users with approval can access documents.

After only a month of working with the new system, users shared with us that they have seen additional improvements beyond the benefits the integration plan promised, including speed, reliability, accessibility, and interoperability with an increase in user adoption of both the NetDocuments and TeamConnect systems.

Our client provided glowing feedback on the positive results the InfiniGlobe team provided. Through each step, from suggesting NetDocuments to integrating their Document Management System with their Matter Management System, we helped this legal operations team cut waste and inefficiency from their process and strengthen the reliability of their systems.

“Very excited! This integration is a tremendous time-saver. Thank you for all your work!”

- Operations Manager, Legal & Compliance

What's To Come

As technology partner with both Mitrastech and NetDocuments, InfiniGlobe offers an out of the box integration connector for NetDocuments and TeamConnect. Whether you have one system, the other, or both – and are interested in upgrading your technology, you can consider the integration already taken care of. We will make the process painless and seamless.



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InfiniGlobe is a legal technology consulting and software company located in Newport Beach, California. InfiniGlobe designs, builds, integrates, and services modern software solutions for the legal industry. Full-service provider of client customized software for integrated and comprehensive software solutions professional services for corporate law departments, ranging from system implementation to upgrades, optimizations and more. For more info visit InfiniGlobe.com or contact (833) LGL-TECH.

Article Sources:

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