DECISIV® Search   RECOMMIND®

SEARCH AND INTER-OFFICE COMMUNICATION

Decisiv Search Turns SharePoint into the Firm's "Go To" Portal for Automated Concept Search to Ensure Quick Access to Relevant Information for over 1400 SharePoint users

ABOUT FRASER MILNER CASGRAIN

Fraser Milner Casgrain LLP (FMC) is one of Canada's leading business and litigation law firms with more than 500 lawyers in six full-service offices located in the country's key business centers. FMC focuses on providing outstanding service and value to its clients, while striving to excel as a workplace of choice for its people. Regardless of where clients choose to do business in Canada, FMC's strong team of professionals possesses knowledge and expertise on regional, national and cross-border matters, counseling private and public clients of all sizes - from startups to industry icons - in every type of commercial transaction. The firm's expertise extends into diverse fields that range from energy, entertainment and financial services to international natural resources infrastructure, labor, litigation and dispute resolution, mergers and acquisitions, mining and public policy. FMC's well-earned reputation for consistently delivering the highest quality legal services and counsel to its clients is complemented by an ongoing commitment to diversity and inclusion to broaden firm members' insight and perspective on client needs.

THE CHALLENGE

FMC strives to continually improve and consolidate its information technology to both help lawyers find relevant information and provide clients with efficient services. While upgrading to the latest version of SharePoint, the firm determined that it needed a more robust enterprise search solution that streamlined the user experience. "With six offices and multiple data repositories, we needed a way to do a single search across the enterprise," says Ginevra Saylor, FMC National Director of Knowledge Management.

While all six offices shared a common document management system, each had independently designed its databases within that system; meaning profile screens, fields, and look-up protocol within fields were inconsistent. "Technically, I could search all of the databases with the native search in our document management system, but because the fields and naming conventions were so different, the search was usually unsuccessful and often timed out before I got results," says Saylor. To work around these problems, FMC's 1,400 SharePoint users typically conducted a series of separate database searches, a tedious process that lacked context and could not capture unstructured documents.

To solve its internal search engine challenges, FMC would have had to create consistent document profiles and look-up fields throughout the firm. Using Share-

DECISIV SEARCH DELIVERS POWERFUL ENTERPRISE SEARCH:

- Supports keyword, natural language, phrase and Boolean search input

- Allows advanced searches by author, date range, document type, source, or any other metadata field

- Automatically integrates results from multiple sources and displays them in context for greater comprehension

- Groups search results by category—such as author, document type, or source —for easy filtering and navigation

- Allows easy tuning of all system functions with web-based administration

- Highlights search terms in the results list and within the document

- Provides a "Quick View" for rapid review of remotely-stored documents

- Displays most relevant or most recent version of a document

- Supports over 30 foreign languages, including double-byte languages

- Provides compatibility with over 400 document formats

- Helps users zero in on relevant information with one-click search refinement

- Respects multiple security controls over integrated information

Point's FAST Search Server would have required customization and first-time technical development. Instead, FMC turned to Canadian company ii3, Inc. (ii3) to evaluate FMC's existing platforms and provide an efficient point-by-point comparison of viable solutions that would integrate well with those platforms.

A technology and automation provider that helps law firms achieve efficient communication and knowledge sharing, ii3 looked for a low-risk, high impact search solution to improve FMC's search experience and provide an enterprise search capability. It compared FAST with platforms from Recommind and another infrastructure software company, both offering solutions specifically designed for law firms.

THE SOLUTION

From its evaluation, ii3 concluded that FMC would be well-served by Decisiv™ Search, a concept search application that provides results in context to meet individual users' needs. ii3's comprehensive survey, its track record with Decisiv Search, and its confidence in the company helped FMC decide to implement Recommind's enterprise search solution. "Decisiv Search carried proven features and also satisfied the firm's time-to-market needs and budget constraints," says ii3 Chief Executive Officer Shy Alter. Decisiv Search crawls and indexes information from any source, including document management systems, intranets, contact management databases, and web sites. It automatically creates concept models that incorporate the vast information contained within an enterprise. These concept models identify related information across different information sources and rank search results by relevance.

Following FMC's decision to implement Decisiv Search, ii3 developed a list of detailed requirements and specifications, including content assessment, metadata evaluation, security, and access control. Next, it created a set of user interface screens with detailed presentations that allowed FMC to provide feedback and request changes. Finally, ii3 configured the solution and integrated it with Microsoft SharePoint, an operation that required close collaboration with FMC and Recommind. To resolve technical issues during implementation, the Recommind development team, ii3 and FMC's technical team convened by conference calls. "Recommind responded with a sense of urgency," says FMC Chief Technology Officer Scott Saundry. "We appreciated Recommind's hands-on involvement."

FMC also chose to implement two optional Recommind modules that refine search capabilities. The Matters & Expertise™ module provides a comprehensive, firm-wide view of matters, deals, cases and experience. FMC members can identify colleagues with expertise in or knowledge of a specific matter within seconds. The second module, the QwikFind™ search bar, gives instant access to Decisiv Search from within Microsoft Office applications or from the desktop toolbar, eliminating the need to launch a separate browser window or application when performing a firm-wide search.

Seamless integration with the firm's SharePoint portal will help cement the role of Decisiv Search as FMC's knowledge hub. "Decisiv Search simply works: you get it, you install it, you run it," says Alter.

WHY RECOMMIND?

"This powerful and intelligent search platform takes our knowledge management program to a new level. I've gone from not being able to find something I know we have to being able to provide a lawyer with the top ten documents on point within seconds. That is pretty thrilling."

Ginevra Saylor

National Director of Knowledge Management
Fraser Milner Casgrain LLP

CASE STUDY

THE RESULTS

Following a pilot, FMC rolled out Decisiv Search to the entire firm. "This powerful and intelligent search platform takes our knowledge management program to a new level and provides all members of the firm with quick and easy access to needed information," says Saylor. "I've gone from not being able to find something I know we have to being able to provide a lawyer with the top ten documents on point within seconds. That is pretty thrilling."

FMC has embedded Decisiv Search in SharePoint so its members can use the SharePoint portal as their "go-to" for all information whether general to the firm, specific to a given office or practice group, or available from outside sources. The transparent coordination of these two platforms removes the guesswork for the users. "With our new enterprise search engine, end users can search all key systems from one easy-to-use interface," says Saylor. "Because it differs from a keyword search, people can find what they are looking for without knowing how to search for it," she adds.

Decisiv Search automatically creates concept models that greatly improve search results. Its intuitive Smart Filters™ provide quick navigation and easy browsing. "I am impressed with the sophistication of concept searches, the intelligent presentation of search results, the speed in returning results from a large search across multiple databases, and the relevance of the search results," says Saundry.

The ability to search across platforms has simplified and strengthened the search process at FMC. Relevant systems are all searched at once in a Google-like search, and the results are rapidly delivered in a complete package. "Decisiv Search is an elegant solution that offers a simple front end for the user while providing a very sophisticated back end for the search itself," says Saundry. "It is just the opposite of FMC's legacy system, which was complicated upfront and not that effective."

Decisiv Search honors existing document management security in its search results. "This completely role-based system allows a user to see only what he is allowed to see," says Saundry. "It respects the security that is in place and doesn't add a level of security that we have to manage."

The firm is still acquainting itself with the advanced functionality of its enterprise search engine, such as one-click search refinement. In the immediate future, FMC intends to deploy the newest version of Decisiv Search, which promises to expand IT control of search behavior with an administrative console and allow users to embed saved searches through the Internet. "By providing a complete matter view, the latest Decisiv Search upgrades will allow FMC's IT department to bypass some labor-intensive projects," says Saundry.

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DECISIV SEARCH ALLOWS FMC TO:

- Provide more efficient services to its clients by improving the firm's ability to search across multiple platforms

- Equip its lawyers with a powerful, intuitive search tool that brings quick and highly relevant results

- Produce, in a matter of seconds, enterprise search results that are complete, on point, and in context

- Significantly expand the scope of the search with consolidated inter-office database searches

- Improve communication among offices with Matters & Expertise, an optional module that allows FMC staff to identify colleagues with expertise in particular matters and quickly review to project work

- Avoid the time and expense involved in using internal staff to integrate FMC databases or customize a solution to fit their needs

- Honor ethical walls and private documents by respecting the law firm's role-based security rules

- Use its internal resources to focus on SharePoint development rather than building a customized search solution

CORE® TECHNOLOGY

Recommind's products are powered by patented CORE search technology. The advanced nature of CORE delivers search and automatic categorization that is significantly more accurate than traditional search engines, while requiring far less effort to implement and maintain. Developed specifically to meet today's information management requirements, CORE enables organizations to access information more quickly and easily.

ABOUT RECOMMIND

Recommind is the leader in predictive information management and analysis software, delivering search-powered business applications that transform the way enterprises, government entities and law firms conduct eDiscovery, enterprise search, and information governance.

CONTACT US:

Recommind, Inc. Headquarters
650 California Street
San Francisco, CA 94108
United States
Tel: +1 415 394 7899
www.recommind.com

For additional contact details visit:
recommind.com/company/contact