

# Eckert Seamans Leverage Prosperoware CAM for Provisioning, Folder Management, and Bulk Updates

**Location:** Multiple offices in the United States

**Industry:** Full-Service Law Firm, Am Law 200

**Collaboration System:** iManage

## **Pain points:**

- Provisioning matters from source systems with templates
- Defining templates with various folder levels
- Bulk updates across workspaces

**Solution:** Prosperoware CAM  
C3 License for iManage DMS



## **Solution Highlights:**

- Seamless provisioning of matter-centric structures for iManage DMS
- Improved matter templates to meet practice group needs
- Efficient bulk updates for matter details across workspaces
- Matter-centricity and provisioning with CAM allowed implementation of need-to-know security

## **OVERVIEW**

In 2019, Eckert Seamans was moving from Worldox to iManage as their primary Document Management System (DMS). During the project, advised and implemented by Prosperoware partner, Adaptive Solutions (now part of Morae), the client realized they had requirements which the native iManage platform could not meet.

“We were migrating to iManage from Worldox. During our due diligence, we found out that we were going to need another solution to help us administer and manage our workspaces,” says Bob Trosky, Directory of Information Technology at Eckert Seamans.

Specific challenges that Eckert Seamans was experiencing revolved around consistent provisioning in a matter-centric model from their source Time & Billing System with set templates and folder structures.

“Our users wanted to have folders with different levels to save their documents in and categorize them. We worked with each practice group to figure out what structures they needed for their workspaces, such as which folders had to be created automatically and which ones were supposed to be optional.”

The client also had many changes occurring in their Time & Billing system across matters and they needed it to reflect in their DMS.

Jennifer Parker, Senior Director at Morae states: "Building on the iManage platform, CAM is able to provide a user-friendly way to do these changes in bulk across many matters. That was a very important requirement from their side."

## SOLUTION

Prosperoware's partner, Morae implemented CAM for Eckert Seamans. The software-as-a-service (SaaS) platform for adoption and governance of collaboration systems was able to solve the challenges they were experiencing after their migration to iManage.

"CAM is the most mature product in the market. Even though it hasn't been out long, it has been cloud-ready longer than any other solution. There aren't many other products that compete with CAM, and some of the complex operations that the client wanted to accomplish were available only in CAM," says Ms. Parker from Morae.

Sandy Mikita, IT Project Manager at Eckert Seamans states: "Some of the features that stood out to us were the ability to further change a large amount of workspaces, change client/matter names and numbers in bulk, add users in bulk, and other capabilities that weren't natively available for iManage. The ease of provisioning in general was a big plus for us."

The client was able to set up any template they needed with required and optional folders based on conversations with practice groups.

CAM provided us with the flexibility to become matter-centric and allowed us to create the right places for users to save documents in and classify them.

**Sandy Mikita**  
IT Project Manager,  
Eckert Seamans

Ms. Mikita also adds: "CAM allows us to create matter templates that go down multiple levels of folders. We have some groups that want unlimited access to folders and some that need them to be more limited."

When they migrated to iManage, the client realized that a lot of provisioning and managing of workspaces would have to be done manually. CAM helped automate many of the manual tasks.

"If CAM is working the way it should, you just have to set it up and forget it. The workspace generator, user sync, adding folders, and more, doesn't need manual intervention. CAM has really assisted the client with that automation."

"Ultimately, CAM provided us with the flexibility to become matter-centric," adds Sandy Mikita, the IT Project Manager at Eckert Seamans. "We needed a product like this and we are glad we purchased it."

## RESULTS

Switching a Document Management System (DMS) is a large undertaking for any firm, but with Morae's support, Eckert Seamans was able to successfully migrate to iManage.

With CAM, Eckert Seamans ensured that they structure their data in a matter-centric way and gain advanced provisioning, folder management, and bulk update capabilities.

Prior to their migration, Eckert Seamans had a public DMS, but with the increase in client audits, they decided to switch to a need-to-know model. They were able to do so because their data was matter-centric with CAM and they used iManage SPM to implement need-to-know.

According to Ms. Mikita: "Everything in our previous DMS was public. When we switched to a matter-centric structure, we worked on security and implemented a need-to-know model because of client security audits. We've had to lock down all of our workspaces on a need-to-know basis."

In the end, CAM allowed Eckert Seamans to improve their DMS structure and provision with standardized templates. Users can now save data in the right place, allowing the risk management team to implement a Zero-Trust or need-to-know security model.

"CAM provides the necessary usability and functionality that is important for law firms and large legal teams. It enhances native iManage functionality, giving firms what they need for provisioning, user sync, bulk updates, and more. For clients who are moving to the cloud and using Work 10, I think it's the best product out there to get the additional functionality."

**Jennifer Parker**  
Senior Director,  
Morae

### So what's next for Eckert Seamans and CAM?

"We're looking at what new features CAM provides for Microsoft 365", states Ms. Mikita.

### About Eckert Seamans

Eckert Seamans is a full-service national law firm with a strong reputation and history of success that spans more than 60 years. With more than 300 lawyers across a network of 15 offices, they provide clients with proactive, solution-oriented business and litigation counsel.

### About Litera

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