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Portals: Where We Are and the Road Ahead

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Introduction

This article aims to give an overview of the current position of the legal portal market (primarily law firms) and to offer some predictions for the road ahead. The key areas covered will include:

- What are portals? Some basic definitions
- Why might you need a portal?
- What can you do with a portal?
- Where we are at present with portals: technologies and usage
- Key considerations for portal projects
- Future predictions for legal portals



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Intranet – a privately maintained computer network that can be accessed only by authorised persons, especially members or employees of the organisation that owns it.

Extranet – an extension of an institution's intranet, especially over the world wide web, enabling communication between the institution and people it deals with, often by providing limited access to its intranet"

Portals can comprise any or all of the above components. They can be a combined internet, intranet and extranet or they may just be an intranet.

Although a portal may in many cases start life as a purely internal tool, many law firms have subsequently extended the usage as an extranet to work with clients as phase two of a project. An obvious further step in such a scenario would be to extend usage externally via an internet site.

The following quote from Gartner sums up the essence of what makes up a generic portal, stating that portals offer

"Access to and interaction with relevant information, applications and business processes, by selected target audiences, and in a slightly personalised manner".

The first notable point is the potential for "interaction" rather than just access, and this is often a key distinguishing factor of a portal project.

The second point is that portals are not just dealing with information, unlike many intranet and internet projects, but are also providing access to and interaction

What are portals?

One of the most important factors is an understanding of what is meant by the word "portal". The term is frequently used in different contexts which can make it confusing. Often portals are seen as the next generation of intranets, which were previously so popular. Although technically not incorrect the full definition should go further. To consider what a portal is, one must step back and consider the constituent parts and also cover some other commonly used terminology in this field. The definitions below are taken from Dictionary.com and could equally be taken from many other reference points:

"*Internet* – an interconnected system of networks that connects computers around the world...."

with business applications. In this sense they go beyond just providing web content from intranet and internet sites and start to open up other business applications, such as Document Management Systems (DMS), Client Relationship Management Systems (CRMs), finance systems, E-mail, HR systems, Case Management Systems, workflow systems etc.

The third point is that portals potentially provide access to and interaction with business processes, such as matter inception, expense claims and appraisal systems. This now goes way beyond merely providing information and starts to see the user actually being able to “work” within the portal.

The fourth point is that of personalisation, the key being to provide not just information but “relevant” information to the user. Personalisation is often the area where taxonomies can assist, since by classifying both content and people you can match them up. Personalisation is usually achieved by having some sort of profile system within the portal where a user can add to existing information about himself in order to specify what he is interested in e.g. corporate acquisitions in Germany.

The final point to reiterate is that of “selected target audiences”, the point being that through security settings you decide who can see what content, thus allowing portals to operate as intranets for internal staff, as extranets for clients and as an internet site for the general public. This could be likened to a gateway, with access through the gateway being determined by the gatekeeper, who would determine not only who was allowed through the gateway, but what they could and could not see on the other side.

Why might you need a portal?

There may be many reasons why you might want to adopt a portal, such as an intranet or internet revamp, a client extranet project or perhaps a desire to integrate your business systems etc.

The amount of content on the world wide web is increasing every second. The number of additional pages added to the web between the time this article is written and the time you read it could be up to, or more, than 500,000,000. Added to this rapid internet growth is the fact that the average law firm will have around 10 core business applications that many users will access frequently. Therefore the amount of information available to the average user is far greater than his individual requirements. Couple with this the fact that this information is available in numerous different places and formats, and there is an obvious and serious problem of information overload.

When you combine this position with the fact that the ability for us to absorb information remains relatively constant (i.e. we can read at a certain speed), the only variables are that of the quality, context and flow of the information, and it is here where portals can potentially provide help.

What can you do with a portal?

Given that portals can in effect be both intranets/internets and extranets you would expect to be able to do everything that you can currently do in any of these areas, such as using them for basic content provision; news, guides, policies etc. You would also expect to be able to use them as a means of communication, as you can intranets/internets and extranets.

It is perhaps more interesting to consider the ways in which portals can offer more than is currently available. The first point is that a core benefit of a portal is that it can combine all of the above and thus provide one central place for all content publishing. Through the combined use of a content management system either within the portal or alongside it the “gatekeeper” can design generic workflows to apply to the publishing of all content. This ensures consistency and mitigates any risk of incorrect content being published either internally or externally. In turn, such centrally devised processes and workflows can allow for a greater decentralised model to be used, so that a law firm can have different people from different practice groups, industry sectors or support groups all contributing to their own parts of the portal.

The second big difference with portals is that of application integration as covered briefly earlier. The portal provides the opportunity for a law firm to capitalise on the often substantial investment it has made in various business systems, such as DMS and CRM. In addition to giving lawyers and support staff an “interactive desktop” by integrating these applications through the portal and consequently saving time, this approach also allows for the exposure of “passive” knowledge or “know-how” locked away within law firms outside any core know-how system. This passive knowledge sits within systems such as DMS, CRM and the finance system and can allow you to answer questions such as: have we done any matters like this before, how profitable were they, and who internally has the relevant experience?

The third key area where portals are different is that of taxonomies. As mentioned briefly above, the taxonomies (a multiple segment approach is preferable) such as legal subject, organisational unit, document type, jurisdiction and industry, can be the means by which it is possible to personalise content in the portal. Whilst the principle is simple, making it work can be difficult. The principle is that provided you adopt a standard set of taxonomies and apply these consistently to all content in all business applications, you can find any content you need as defined by the taxonomic terms. As an aside, and a point that really needs to be an article in its own right, this is the method that needs to be used to allow true “matter centricity”. This is the concept that a lawyer wants to be able to see everything pertaining to a particular matter irrespective of which business system the information actually sits in. This includes the matter details, documents relating to it, financials, client contact

details, other similar matters, people with experience, potential know-how etc. This is arguably the holy grail of the legal portal business justification.

A couple of other key areas which should be considered in portal projects but which will not be covered in detail here are the opportunities which portals can provide to redefine and streamline business processes and the use of portals as collaboration tools for internal and external use.

Where are we at present with portals?

The majority of law firms now have some form of internet and intranet sites of varying standards. The value of extranets in winning and retaining clients currently seems to be undervalued - perhaps as clients are not on the whole demanding these services from law firms.

True portal projects seem to be very much in their infancy in all but the big firms. This can be attributed to a number of reasons including the fact that technology is only now starting to catch up with user expectations, the cost of such projects is still relatively high, the potential benefits are often still not realised and the underlying business systems infrastructure often needs to be addressed first (new DMS or finance systems being common examples). When you couple with this the fact that the average project timescale is around two years plus, with the average managing partner's time in office at around three or four years (thus unlikely to reap the rewards of any such expenditure), perhaps the lack of uptake is understandable.

One other key area which has slowed the implementation of such projects is the product confusion that has been created by many of the vendors. If you believe what it says on the tin most of the products out there can do all but make the tea, and have been able to for some years! Sadly this is not the case and careful consideration needs to be given to product selection.

Some of the key portal products in the wider marketplace have failed to make a real impact in the legal field, such as Plumtree, SAP, Tibco, Oracle and IBM. The document management vendors like Interwoven and Hummingbird, with their portal add-ons to their DMS solutions, have had more success, although you do need to look in detail at what is possible with these solutions, particularly in the way business applications are or are not integrated, and content management and taxonomy management functionality. Users of Interwoven include Taylor Wessing and Dickson Minto, while Hummingbird has Allen & Overy and Denton Wilde Sapte as clients.

There are other niche legal market solutions such as SV Technologies Lawport, as used by CMS Cameron McKenna and Lovells. This is arguably the most widely adopted portal in the legal sector - certainly this is the

case in the US, if not in the UK as yet. Lawport works on a modular approach with modules for the intranet, extranet and internet. Key distinguishing features include the combined content management system, inbuilt taxonomies, data warehouse (their way of integrating the business applications) and specific legal sector bolt ons such as CV and proposal builders.

Another product is Microsoft's Sharepoint. Although there has not been a significant uptake in this to date, Microsoft can already count Wragge and Co and Herbert Smith as users. This is without doubt a big area of growth for Microsoft and given that they have an annual R&D budget of around £6 billion, it seems more a question of when they will dominate the area rather than if. In considering Sharepoint you need to understand the differences between Sharepoint Services and Sharepoint Portal Server, but get someone in IT to do that! An interesting point is that both SV Technology and Interwoven are currently working on enabling their solutions through Sharepoint, clearly indicating the way they feel the wind is blowing!

One final product worth a brief mention is Handshake, from the US company of the same name. While not a portal product in the same way as the others it goes a long way in enabling something like Sharepoint to be deployed a lot faster (as Wragge and Co have found with their portal).

The above products really just give a flavour of what some of the law firms are using. In the end it all comes down to product selection and the key advice is understanding what you want it to do before you start shopping!

Key considerations for portal projects

The primary consideration is to identify clearly the business objectives and deliverables from the portal project. Although it sounds obvious, one of the key reasons many portal projects take far longer than expected is due to shifting goalposts during the project.

When it comes to product selection, this is not just a technology project: information staff must be involved. There are numerous areas to review, including content management capabilities, data warehouse vs no data warehouse (how you integrate the different business systems is by far the hardest and longest part of a portal project), security options, search, collaboration and workflow functionality. Also, make sure you future proof by understanding the mid and long term direction of the supplier and the product (including Microsoft compatibility).

It is also important to manage the expectations of those involved in the project so that you don't end up with unobtainable goals. The portal will not revolutionise a whole way of life, it might just make it a bit easier! It's an

old saying but under promise and over deliver. Go with the basics and gradually add new functionality once you establish your user base.

Finally, information professionals as “gatekeepers” have a fundamental role to play in portal projects. Ultimately we are talking about information here, provided in many different forms from different systems. Nobody understands the supply and consumption of information better than the information professionals so get involved from the outset. The worst position to be in is to have to pick up the maintenance of a system into which you had no input in terms of functionality and process design. Also, this type of project usually has good visibility within the firm and is therefore a great way to raise the profile of the information professionals.

Future predictions for legal portals

Within the next five years portals will become commonplace as intranets/internets and extranets evolve. They will also become easier to implement and, as with all new technologies, over time the cost should come down.

Over this time period we should also see an increase in the provision of extranet services from law firms via portals. This will probably be driven by client demand, and once enough law firms start doing it there will be a serious game of catch up for the rest. This increased extranet focus is also likely to centre on an increased need for collaboration with both clients and other parties. This collaboration should in the longer term steer more to the use of other media such as personal video conferencing, in order to share information via the portal.

One of the key immediate challenges faced by many portal projects is how to make people use them once you

have built them. Although the standard answer is to fill them with essential and useful content there is perhaps another way to approach this eternal dilemma. Instead of people visiting the portal, get the portal content to visit them. There are technologies that are emerging now which do just this, such as the Information Bridge Framework (IBF) from Microsoft. These technologies allow you to push relevant content to a user in the context of whatever he is doing, such as writing a document or an e-mail. A lawyer can therefore be in the position that while writing to a client he can be given links in a separate frame to previous correspondence, financial details for the client, legislation links, news and events etc. It sounds incredible but in fact it's already available. To achieve this however you must sort out your underlying business systems and the data integrity through a portal project.

As for longer term predictions, portals will not exist in their current form. Instead we will have fully integrated desktops with seamless applications (providing some real challenges for vendors on branding). This should in turn lead to the obvious next step of greater portability, offering the integrated desktop while on the move.

An interesting area in the longer term will be the adoption and use of data exchange standards between law firms and their clients through their portals. If we all use portals and we all apply basic taxonomies to our content then it will be possible to have seamless multi directional provision of information directly into our various systems.

In conclusion, the portal area is on the brink of major growth over the next five years and beyond, and could well transform much of the way people work within law firms. Information professionals should be at the centre of this change given the skills they possess. These projects must be recognised not as IT projects but as information, people and process projects, transforming the way people work with and contribute information.

Biography

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