

Portal Provisioning

Managing User Accounts and Matter Workspaces

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Provisioning — the process of creating and managing user accounts and matter workspaces — is an important consideration in developing a portal or extranet strategy for your firm. Reliable and consistent provisioning is necessary if the portal is to become a valued part of your firm's service offerings.

IT managers need to have a solid understanding of the provisioning strategy, and equally important, so do attorneys and legal assistants. In the surreal world of the extranet, attorneys and paralegals are the *de facto* helpdesk for the firm's clients. Instilling in them the necessary knowledge and proper expectations will go a long way toward making the portal a success.

Many portals include mechanisms to automatically create new matter workspaces. Scheduled exports from your accounting system, typically performed nightly, can provide the necessary data. Workspace templates, if available, help ensure that new matter workspaces are properly configured with respect to a given type of matter. Without this capability, additional configuration may be necessary before a workspace can be made available. In either case, you may benefit from augmenting the bundled capabilities with your own automation, especially if you wish to customize the workspace based on matter type or client preferences.

User account information may be maintained by the portal application itself or derived from another source. In the latter case, user accounts are typically held in Active Directory or in a companion application such as a document or case management system.

Portals that rely on Active Directory or DMS/CMS for user administration will typically service internal users right out-of-the-box. External user accounts, however, must still be created and managed. Whether in Active Directory or DMS/CMS, these user accounts will have significance beyond the portal application and must be managed accordingly. Add to this the specter of teaching an end-user to set up accounts in the Microsoft Management Console, and you will not be

surprised that the responsibility for managing client accounts likely will fall to the IT department.

On the other hand, portals with a self-contained user administration system can usually be managed by a legal assistant, alleviating the need for daily IT involvement. In the self-contained system both internal and external user accounts must be managed. IT can add value in this situation by including the portal in the standard new-user and departing-user processes (hopefully, automated ones).

In either case, external user accounts must be managed; automating the provisioning process will ease this burden significantly. Typical sources for external account data include CRM systems and case management systems, as well as basic contact management applications such as Outlook. With automated provisioning, attorneys can conceivably grant or revoke portal access by simply checking a box in a contact record. Policies expressed through the automatic provisioning script ensure that the resulting account is set up and managed according to your firm's standards.

Above all else, the automation process must be well-defined and documented, and a number of tools are helpful to achieve this goal. Simple data transfer can be done with Microsoft DTS (Data Transformation Services). More complex tasks can be handled by VB Script, PERL or other scripting languages. Real-time provisioning can be accomplished with the help of user-driven workflow systems such as Metastorm, or by integrating existing applications using systems such as the Tsunami integration and data sharing appliance.

Regardless of the kind of portal you ultimately choose to implement, proper automation of the provisioning process will help lower the portal's operating costs and keep your attorneys and the firm's clients happy.

Resources

Microsoft DTS:

www.microsoft.com/sql/evaluation/features/datatran.asp

PERL scripting language: www.perl.org/

Metastorm: www.metastorm.com/products/pla.asp

Tsunami Software: www.tsusoft.com/