

CASE STUDY

Travers Smith blazes through tech challenges with Blue Car

Blue Car Technologies has helped Travers Smith upgrade and integrate a vital custom legacy product with its new DMS, supporting the firm's engineering manager Paymon Yau and his team to stay on track with essential day-to-day work

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When leading independent UK law firm Travers Smith decided to upgrade and integrate its bespoke email management software with a new document management system (DMS), only UK-based software development outfit Blue Car Technologies had the experience and expertise to deliver, says the firm's engineering manager Paymon Yau.

Yau leads project management, from conception to delivery and ongoing BAU, for the firm's digital products. With his team of developers focused on a number of pressing priorities, including the massive process of DMS migration to iManage Cloud (completed in May 2023), he found there was little time to focus on other projects. One of these was ensuring its internally built Folder Mapping product integrated with iManage.

Looking externally, he found that few software development agencies understood the intricacies of legal enterprise systems like the DMS. "The APIs for these platforms are well documented, but there's lots of 'gotchas' — bugs and limitations you hadn't thought of. It's not something you can outsource to any agency."

Enter Blue Car Technologies. With over 20 years of experience in the sector, the technology partner for iManage, NetDocuments, OpenText eDOCS and Microsoft SharePoint, has a UK-based development team skilled at delivering custom, secure and scalable solutions, to law firms and corporate legal departments. Since it began working with Travers Smith in March 2022, Yau believes the company has become an invaluable resource.

Every email in its right place

Folder Mapping organises emails in Microsoft Exchange, syncing to the DMS. Displaying a user's Outlook folders, they can select which folder to 'map' to a particular location in iManage, the contents of which are then automatically and continuously synced.

Its role in the firm's tech stack is crucial. "It is imperative that we have client/matter-centric emails in our DMS to ensure continuity of service delivery," explains Yau. Folder Mapping actively reduces the effort of ensuring these vital communications are filed away and accessible in the right place.

Using an Outlook add-in wasn't a viable alternative. "We'd lose too many features, functionalities and visibility of the data — with no idea of the state of someone's inbox, whether they're filing emails in the right place, or at all," he explains.

It was therefore clear that Folder Mapping needed to work with the new DMS, but making it happen was another story.

Expertise to make easy work of custom integrations

"Folder Mapping sounds simple, but with hundreds of inboxes handled every day, it involves lots of complex indexing and syncing processes in the background," he says. The complexities and interaction between the systems were the primary challenge, with lots of dependencies that weren't apparent or well documented. Built on .NET, the product's legacy codebase also meant that differences in metadata prevented one-to-one mapping with iManage.

Starting in March 2022, Blue Car's software development director Simon Black was able to refactor the code and write the integration to iManage over the course of five months. "Someone of his calibre is the equivalent of having five developers on your team, he's that good," says Yau. "He knows the system so well that I wouldn't trust anyone else to change the codebase now."

Before Blue Car created this latest version, Folder Mapping needed constant maintenance to keep running smoothly. "Now, after having to look at it daily — spending half my day debugging — I only need to check in every so often, look at the status or pull out a report. This has freed up my time massively," he finds.

Put the pedal to the metal on your product roadmap

Since initial work was completed in August 2022, Travers Smith has been able to introduce new functionalities, including a correction feature that enables users to fix and transfer incorrectly ‘mapped’ files to the right location. “To manually sort through thousands of emails would take weeks. Now the system handles this process automatically,” Yau adds.

The company has also supported his team with other technical challenges, such as replacing URL links to the previous DMS with iManage links in SharePoint. “It’s surprisingly difficult, and not something where you can look for the answer on Stack Overflow or by Googling it. In the end, Blue Car came up with a solution to help us find and replace all the old links,” he says. The company also developed a tool to mass- update incorrectly set metadata in iManage, which, given the volume of records, would have been impossible to do manually.

Yau has several more projects in mind — including upgrading legacy protocol Exchange Web Services (which Microsoft will be retiring in October 2026) to Graph, and integrating Folder Mapping with the firm’s matter-centric email filing tool MatMail.

“There are always challenges balancing what needs to be done and the internal resources to do it. Working with Blue Car has given us the flexibility to explore more features and changes. It’s made seemingly impossible tasks possible,” he says.

Discover how you can benefit from Blue Car’s bespoke software development, DMS Integration and support services, visit: bluecartechnologies.com

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