

# Mitigating Risk and Data Chaos with CAM's Provisioning Capabilities

Remote and hybrid modes of working have done wonders for the collaboration world. Many organizations had to find the most creative means to keep the business going and their teams motivated. With that, collaboration systems have become critical to this new era of engaging with your teams.

But since organizations do not solely rely on one system but several - including Microsoft Teams, DMS, CRM, HRIS, and more – data chaos can quickly emerge. And while these systems have the functionality to do wonders for collaboration, they can quickly become chaotic if not managed and governed properly. This makes organizations vulnerable to cybersecurity risks on top of adoption challenges.

Some of the many challenges that organizations face regarding collaboration systems are data chaos, users placing documents wherever they find convenient, inability to find data when needed, risk teams unable to apply proper disposition policies due to lack of context, and more.

Currently, administrators go into each collaboration system to create a project or relationship. They go into a particular system and create the project with its related workspaces/teams/channels and folders, then add users manually and try to assign permissions. From there, they go onto the next system.

A simple process? Maybe. But try repeating that manually for hundreds of projects across four or five collaboration systems.

This creates drags in productivity as administrators are pulled away from other tasks they could be addressing, and it can also create privacy issues. If an admin carries out hundreds of manual processes, there is an increased risk of making a manual human error, leading to gaps in privacy and security.

How to address these challenges? Proper provisioning, coupled with rich metadata for matters and projects, is the starting point.

## What is Provisioning?

Provisioning is the process of creating workspaces, teams, channels, and folders within and across multiple systems.

Provisioning leverages technology that integrates with your organization's source systems, allowing your admins to automatically generate the necessary projects or relationships across collaboration systems in a matter of seconds. This process also includes the ability to apply templates and standardized naming conventions across workspaces, folders, projects, etc.



## CAM Provisioning: Efficiency & Consistency

CAM is a Software-as-a-Service platform (SaaS) for adoption and governance of multiple collaboration systems. It allows organizations to provision, classify, protect, manage, and govern data, mitigating data chaos and reducing risks related to privacy & cybersecurity.

With CAM's provisioning capabilities, organizations can integrate source systems such as HRIS, CRM, Time & Billing, Portfolio Management Systems, and more, and consistently create Teams, Channels, tabs, workspaces, folders, users, and more, in any collaboration system, like Teams and the DMS.

Organizations can provision with standardized naming conventions, adding the project or matter ID in every provisioned item, and providing the same folder structures across collaboration systems. This helps users locate content, increases adoption, and decreases the likelihood of data chaos.

Once your workspaces/teams/channels have been provisioned, it's time to add the metadata!

This enables users to locate data faster, and risk teams understand context across collaboration systems. This means that not only will your users know where to store and access files, but your risk management team will also be able to act quickly in the event of a breach or outage and apply the appropriate security policies.

By applying metadata to projects, risk teams and users alike can simply enter keywords or phrases to quickly locate and identify matters – alleviating hours of manual searches across thousands of matters.

### Provisioning powers governance.

With provisioning across systems, organizations can integrate Teams with their DMS so that both the DMS workspaces and Microsoft Teams have the same structure. Users will know where to save data, while risk management teams can apply consistent security on a Zero-Trust basis. If users need to collaborate on a document in Teams with a client, supplier, or vendor, they can do so successfully without the risk of inappropriate access to sensitive, internal documents.

Provisioning in this way can also enable organizations to integrate with ethical wall systems and carry over their existing ethical walls or information barriers across systems, including the DMS and Microsoft Teams.

## Provision a new workspace, team, channel, OneDrive folder, or manage permissions

The screenshot shows the 'Directory' page in the Literra interface. At the top, there is a search bar and navigation tabs for 'Directory', 'Jobs', 'Users & Groups', 'Approvals', 'Administration', 'Analytics', 'Documents', 'Workspace', and 'Controls Center'. A dropdown menu is open, showing options: 'Create Workspace', 'Create Team', 'Create Channel', 'Grant Access', and 'Create OneDrive Folder'. Below the menu is a table with columns: 'Matter/project', 'Client/department', 'Practice', 'System', 'Status', and 'Last modified'. The table lists various projects and their associated metadata.

Matter/project	Client/department	Practice	System	Status	Last modified
Distribution Contracts (9019)	Lego Development Corp (45001)				3 hours ago
RJ Reynolds v. Samuelson, Inc. (201)	R.J. Reynolds (1002)	Litigation			3 hours ago
Team 3 (7004)	Stewart Information Services (1778)				a day ago
Project Team (7111)	Target (10006)				a day ago
Project Private Channels (7003)	Stewart Information Services (1778)				a day ago
Harkins Manufacturing vs Document Movers Ltd (190521)	Harkins Manufacturing (32003)				a day ago
Project Permissions (7002)	Stewart Information Services (1778)				2 days ago
Project Blue (7001)	Stewart Information Services (1778)				7 days ago
Project Dashboard (7000)	Stewart Information Services (1778)				8 days ago
AC Development (222)	Lego Development Corp (45001)				8 days ago
Harkins Manufacturing v. Sky Pink Inc (47956)	Harkins Manufacturing (32003)				8 days ago
Project Parket (22045)	Stargazer Investment Fund (75101)				10 days ago

Results: 713

## Search & Filter by Metadata in the Directory

The screenshot shows the 'Directory' page with search and filter options. The search bar contains 'Harkins v. Thompson'. Below the search bar, there are filter options for 'Client/department', 'Practice', 'System', and 'Status'. There are also dropdown menus for 'Last modified' and 'Office'. A 'Filter' button is visible. The table below shows the filtered results.

Matter/project	Client/department	Practice	System	Status	Last modified	Office
Distribution Contracts (9019)	Lego Development Corp (45001)				2 hours ago	
RJ Reynolds v. Samuelson, Inc. (201)	R.J. Reynolds (1002)	Litigation			2 hours ago	
Team 3 (7004)	Stewart Information Services (1778)				a day ago	
Project Team (7111)	Target (10006)				a day ago	
Project Private Channels (7003)	Stewart Information Services (1778)				a day ago	
Harkins Manufacturing vs Document Movers Ltd (190521)	Harkins Manufacturing (32003)				a day ago	
Project Permissions (7002)	Stewart Information Services (1778)				2 days ago	
Project Blue (7001)	Stewart Information Services (1778)				7 days ago	

Results: 713

If you want to learn more about CAM's provisioning capabilities, [book a demo](#) today and talk to one of our experts.