



WEBINAR

# What's New with iManage?

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April 10, 2019

# SPEAKERS



**Jim Moreo**

Principal  
Cornerstone.IT



**Scott Dumore**

Director, Pre-Sales Engineering  
iManage

# iManage Work Product Management



## Document + Email Management

Work more productively

- iManage Work
- iManage Share



## RAVN Artificial Intelligence

Work smarter

- iManage Insight
- iManage Classify
- iManage Extract



## Security, Risk Mitigation & Governance

Work safer

- iManage Conflicts Manager
- iManage Business Intake Manager
- iManage Security Policy Manager
- iManage Threat Manager
- iManage Records Manager

iManage RAVN Engine — Content Intelligence and AI

iManage Platform — Administration · Common Services · Security



iManage Cloud

OR



On Premises

# iManage Work 10

Overview and Roadmap



# 2019 Roadmap Focus

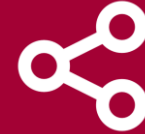
## TODAY

- Work 10.2 Win (Auto-Update)
- iManage Drive (Beta)
- Mac Client
- Gmail EMM



## 1H - MANTIS

- Feature Parity for Legacy Customers
- Desktop Sync & Offline



## 2H - Collaboration

- Office Online
- G-Suite
- Collaboration

# iManage Work 10.2

The screenshot displays the iManage Work 10.2 interface. At the top, there is a search bar and navigation icons for Documents, Emails, Matters, Clients, and Favorites. A blue banner at the top right states "Results are cached for faster experience".

On the left, a "Filters" sidebar is visible, with "Recent Documents" selected. Below it, a list of filters includes Edited, Emailed, New Version, Printed, Viewed, Databases, US\_DB, Reactive, Archive, Date (Past 30 Days), and Last 30 days.

The main content area shows a list of documents under the heading "Recent Documents" with a refresh icon and "48 items". The list is sorted by "Recent Activity". A dropdown menu is open over the "Sort by" field, showing options: "Recent Activity", "Alphabetical (A-Z)", "Alphabetical (Z-A)", and "Date Created".

A blue callout box on the left says: "Find what you are looking for easily by sorting in any order on key fields".

The right sidebar shows the "Properties" for the selected document, "Centrus\_Inc\_Agreement\_Contract.docx". It includes details such as version (v. 4), size (256 kb), modification date (12/12/17 3:00PM), author (John Roberts), and a comment: "I changed paragraph 14 as John Fuller requested in our last meeting with the client's team." It also shows the doctype, class, operator, creation date (11/25/17), and security status (Private).

Document Name	Version	Size	Modified	Author
Centrus_Inc_Agreement_Contract.docx	v. 4	256 kb	12/12/17 3:00PM	Andrew Case
Cloud Client Presentation.pptx	v5   #15,123	MGuyver   222kb	12/12/17	ACase_workspace
Roxxon_Contract_Review.docx	v3   #23,921	MRand   222kb	12/12/17	Roxxon 2017
Friday_Scorns&Smith_Agreement_Notes.docx	v1   #25,302	MGuyver   222kb	12/12/17	ACase_Workspace
Centrus_Contract_Scan.pdf	v3   #24,942	ACase   222kb	12/12/17	Centrus Texas
Centrus Presentation DRAFT.pptx	v1   #16,532	ACase   222kb	12/12/17	ACase_workspace
Contract_Template.pdf	v1   #42,562	ACase   222kb	12/12/17	ACase_workspace
Torvus Notes.docx	v1   #18,492	MGuyver   222kb	12/12/17	Torvus Ltd.
Travel Costs.xlsx	v3   #2,311,2312	ACase   257 kb	12/12/17	ACase_workspace

# Enhanced Support for More Applications

*Import and manage any type of file as part of your Work Product*

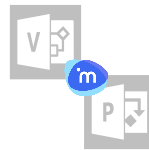
- **Extensive support for non-integrated applications**

Allows users to edit any file that is saved to iManage Work using the native application.



- **Full integration with MS Visio & Project**

Allows users to open and edit files directly from Microsoft Visio and Project. (2013 & later)



- **Enable Passive mode**

Native File save or open options are triggered for MS Office when passive mode is enabled.



- **Automatically apply configurations**

Changes to the Outlook application configurations are applied without requiring a restart.



- **Cost Recovery Integration\***

Time spent by the user editing a document is captured based on typing activity.



- **Combine files into PDF**

Users are able to insert PDF docs stored in iManage Work directly into a PDF document without having to save it locally first.



*\* Only available on-premise*

# Client-Side Email Management

*Don't lose any important emails with automatic filing*



## **Send & File**

*Users are prompted with a Send & File dialog to select a filing location when sending emails.*



## **Sent Items Filer**

*Monitor users' sent item folder for emails that have a luggage tag or containing an iManage Folder email address to automatically file the emails.*



## **Inbox Filer**

*Monitor users' inbox folder for replies to emails that have a luggage tag or contain an iManage Folder email address to automatically file the emails.*



## **Mapped Folders**

*Continue to use your existing Outlook folders to automatically file e-mail into iManage.*



# iManage Auto Updates Features

*Stay up-to-date with the latest features and continuous fixes*

## End User

## Admin

### Flexibility

Work from *anywhere*; Update at your schedule



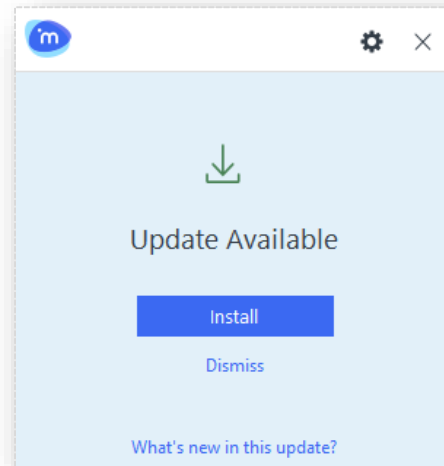
### Educate Users

Learn *what's new* before updating



### Minimal Interruptions

No need to 'stare at the screen' while the software downloads



### Respond to Business

Make users *more productive* by *painlessly* deploying New features and bug fixes



### Full Control

You *decide* how to *manage* the setup and deployment or let iManage *take control*



### Extensible

Easily *deploy* Classic *compatibility mode*; support *multiple vendors*



# Email Management for Gmail

*Manage emails and attachments from Gmail*

The image shows a screenshot of the Gmail web interface with several blue callout boxes and arrows pointing to specific features:

- File one or more emails:** Points to the 'File' button in the top toolbar.
- Link Labels to iManage:** Points to the 'Filed to iManage' label in the left sidebar.
- Add an iManage attachment:** Points to the 'Send and File' button in the bottom right of the compose window.
- Send and file emails:** Points to the 'Send' button in the bottom right of the compose window.

The background shows an email list with various subjects like 'Question re: Arrow Company Acquisition', '2018 Vision and Marketing Plan', and 'FW: 2018 Goals and Initiatives'. A preview of an email is visible on the right side.

# Now Available on a Mac

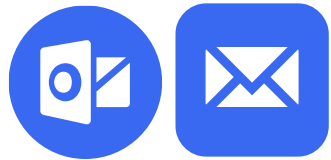
Complete email and document management capabilities



Standalone desktop App for the Mac



MS Office & iWork integration



Email Management: Apple Mail and Outlook



Edit PDF documents using Preview app

Word File Edit View Insert Format Tools Table Window Help

Services

- Hide Word
- Hide Others
- Show All
- Quit Word

Remove Footer

Save and Sync Document

Save As New Document...

Save As New Version Document...

Save Document As New PDF...

Save Document As New Version PDF...

Services Preferences...

Search Matters within ACTIVE

Documents Emails Matters

Recent Matters

BCUMMINGS | Barbara Cummings -

1025.001 - Aladdin Corp. Acquisition

Fabrinski vs LaSalle

1001.010 - Arrow Company, and Arguente Ins. Av

Fred's Personal Workspace

1000.004 - Enron v. Markham

Arcelor Mining Matter

Acme - Giant Rubber Band

Page 1 of 7 4233 words

# 2019 Roadmap Focus

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# Work 10 – Tree Grid & Drag and Drop

*Interface designed for power users who prefer a rich desktop experience*

The screenshot displays the iManage Work interface. On the left is a 'Tree' view showing a folder structure under 'Documents'. The main area shows a 'Grid' view of 'Recent Documents' with columns for Title, Version, Doc Number, Last User, Date, and Size. A red callout box points to the grid view with the text 'Grid view which supports sorting columns'. Another red callout box points to a file in the grid with the text 'Relocate files and folders with fewer clicks'. A third red callout box points to the 'Articles' folder in the tree view with a mouse cursor.

	Title	Version	Doc Number	Last User	Date ↓	Size	
<input type="checkbox"/>	Centrus_Inc_Agreement_Con...				12/12/17	256 kb	⋮
<input type="checkbox"/>	Cloud Client Presentation opt...				12/12/17	222 kb	⋮
<input checked="" type="checkbox"/>	Roxxon_Contract_Review				12/12/17	256 kb	⋮
<input type="checkbox"/>	Friday_Scorns&Smith_Agreem...				12/12/17	4 MB	⋮
<input type="checkbox"/>	Centrus_Contract_Scan.pdf	v3	#24,942	ACase	12/12/17	222 kb	⋮
<input type="checkbox"/>	Centrus Presentation DRAFT.pptx	v1	#16,532	ACase	12/12/17	222 kb	⋮
<input type="checkbox"/>	Contract_Template.pdf	v1	#42,562	ACase	12/12/17	6 MB	⋮
<input type="checkbox"/>	Torvus Notes.docx	v1	#18,492	MGuyver	12/12/17	222 kb	⋮
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<input type="checkbox"/>	Torvus Contract-DRAFT.docx	v1	#123	CPaige	12/12/17	222 kb	⋮
<input type="checkbox"/>	December Travel.xlsx	v1	#2,593	ACase	12/12/17	257 kb	⋮

*Grid view which supports sorting columns*

*Relocate files and folders with fewer clicks*

*Articles*

# Smart Sync and Offline

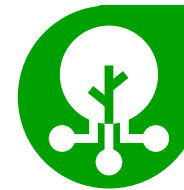
Take content offline securely and sync automatically

The screenshot displays the iManage Work interface. At the top, there is a search bar and navigation icons. Below that, a dark navigation bar contains tabs for Documents, Emails, Matters, Clients, and Favorites. The left sidebar shows a tree view of folders, with 'Acase\_Documents' selected. The main area shows a file list for 'Acase\_Documents' with columns for file name, version, metadata, and size. A context menu is open over the 'Working Files' folder, listing actions such as Open, Add to iDrive, Download, Add to Favorites, Copy Link, Share, Copy, Move, Send to Trash, and Properties. A 'Work 10' logo is overlaid at the bottom center of the screenshot.



## Complete Offline experience

Allow end users to select Workspaces and folders to take offline. Filed emails are available offline.



## Smart cache & File transfers

Optimized file transfers that prevents orphaned checked out documents.



## Secure

All content is encrypted including file store, metadata DB, & filename.



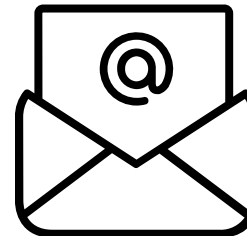
## Unified user experience

Consistent end user experience with iManage Drive and the sync engine with Work 10.

# EMM Enhancements

*Security enhancements & client-side filing parity with server-site filing*

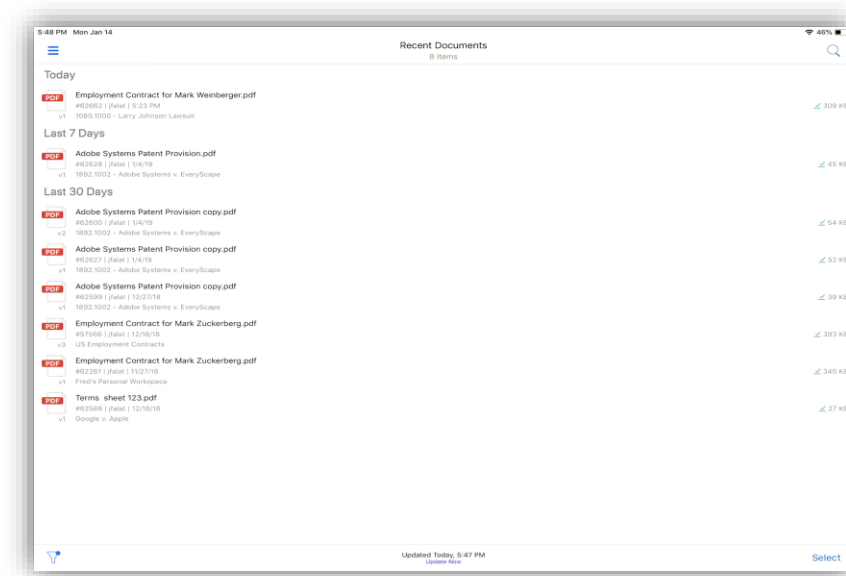
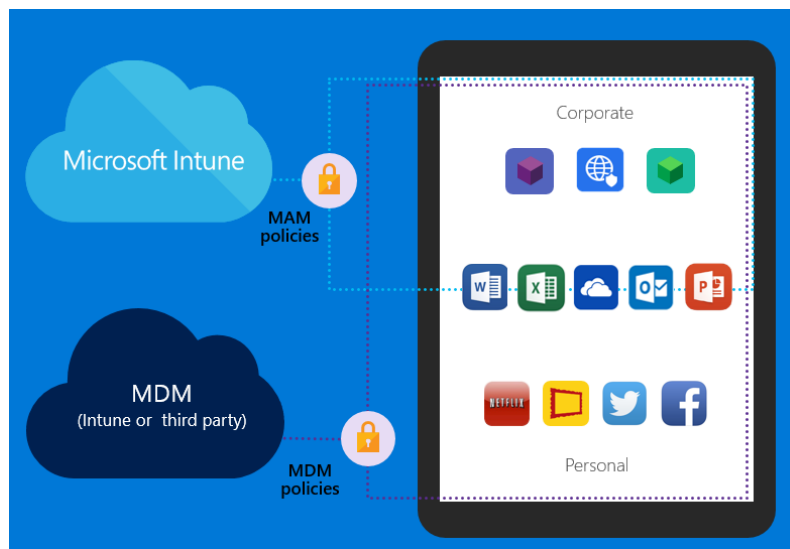
- OAuth Support for WCS Exchange
  - *Added security the pre-registration*
- Mailbox Agent
  - *With client-side filing*
- Offline Email Management
  - *Filing to the sync engine offline*



# PDF Annotation & Microsoft Intune Integration

*Annotate PDFs in Work & Secure MS Office Apps on iOS*

- Prevents personal O365 accounts from accessing iManage content
- Prevents saving to unsanctioned cloud storage, e.g., Box
- Works with other MDM applications to manage the device outside of Intune
  - Blackberry Bridge
  - MobileIron





# iManage Drive

Y:\1016.001 - Diego Piacentini Employment Agreement\Documents

File Home Share View

< > < > > This PC > iManageDrive (Y:) > 1016.001 - Diego Piacentini Employment Agreement > Documents

Search Documents

Quick access

- OneDrive
- OneDrive - iManage LLC
- This PC
  - 3D Objects
  - Desktop
  - Documents
  - Downloads
  - Music
  - Pictures
  - Videos
  - OS (C:)
  - iManageDrive (Y:)
    - 1016.001 - Diego Piacentini Employment Agreement
      - Documents (selected)
      - Email
      - Agreements
      - Apple v. Samsung
      - Fabrinski vs LaSalle
      - LaSalle vs Fabrinski
  - Network

5 items | 1 item selected 32.0 KB

- Bonus Letter.docx
- Diego Piacentini Employment Agreement.doc (checked)
- Exhibit A to Declaration.pdf
- Level3 SEPARATION AGREEMENT.doc
- PROMISSORY NOTE.docx

January 17, 2010

**NEW EDIT IN ASIA**

Mr. Diego Piacentini  
20090 Segrate (Milano)  
Italy

**RE: Offer of Employment**

Dear Diego:

On behalf of Amazon.com Inc. (the "Company") and its affiliates, I am very pleased to offer you the position of Sr. Vice President, International. This letter clarifies and confirms the terms of your employment with the Company.

**Start Date**  
Unless we mutually agree otherwise, you will commence employment on or before April 15, 2010.

**Salary**  
Your starting salary will be \$175,000 annualized payable monthly in accordance with the Company's standard payroll practice and subject to applicable withholding taxes. Because your position is exempt from overtime pay, your salary will compensate you for all hours worked. Your base salary will be reviewed annually by the Board of Directors or its Compensation Committee, and any increases will be effective as of the date determined by the Board or its Compensation Committee. If in the future, Amazon.com establishes an Italian company and the terms of the then current tax treaty between the US and Italy allow, your compensations will not be subject to U.S. social security withholding.

**Signing Bonus**

**Benefits**  
You will also be entitled, during the term of your employment, to such vacation, medical and other employee benefits as the Company may offer from time to time, subject to applicable eligibility requirements. The Company does reserve the right to make any modifications in the benefits package that it deems appropriate. The Company's Current vacation policy is to provide you with two weeks paid vacation per year in the first year of your employment and three weeks per year thereafter during the term of your employment. You are also eligible to participate in Amazon.com's 401(k)-retirement plan the first quarter after 90 days of employment and to enroll in our major medical plan on the first entry date following the commencement of your employment. Relocation benefits as discussed will also be included, a summary of which will be provided.  
<PAGE>

**Stock Options**  
As we discussed, The Company takes a long-term approach to investment, and its employees are its most important investment. Our compensation structure is weighted towards equity ownership because we believe we will create the most value for the Company and its shareholders over time by having employees think and act like, and therefore be, owners. To this end, and subject to Board of Directors' approval, you will be granted a 10-year option to purchase 300,000 shares of Amazon.com common stock. This option will vest at the rate of 60,000 shares at the end of your first year of employment. The remaining shares will vest at the rate of 60,000 shares at the end of years 2 through 5 of your employment. In addition, you will be granted a 10-year option to purchase 300,000 shares of Amazon.com common stock, which will vest at the rate of 60,000 shares at the end of each year of employment after the first 5 years of employment. The strike price on your stock option grants will be the fair market value per share of such stock on the later of the Start Date or the date that the Compensation Committee approves your grants. Your option will be documented by delivery to you of a Stock Option Letter Agreement specifying the terms and condition of the

# 2019 Roadmap Focus

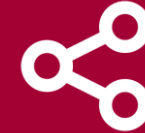
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# iManage Work 2019-2020

*Key themes driving roadmap futures*

## **MS Office Online & Collaboration**

*iManage Work  
OneNote*

*MS Office  
Editing Online  
Mobile Office  
G-Suite*

## **Tagging & Collections**

*Manual or  
integrate with  
RAVN advanced  
functions*

## **Document Protection**

*DRM and DLP  
integrations*



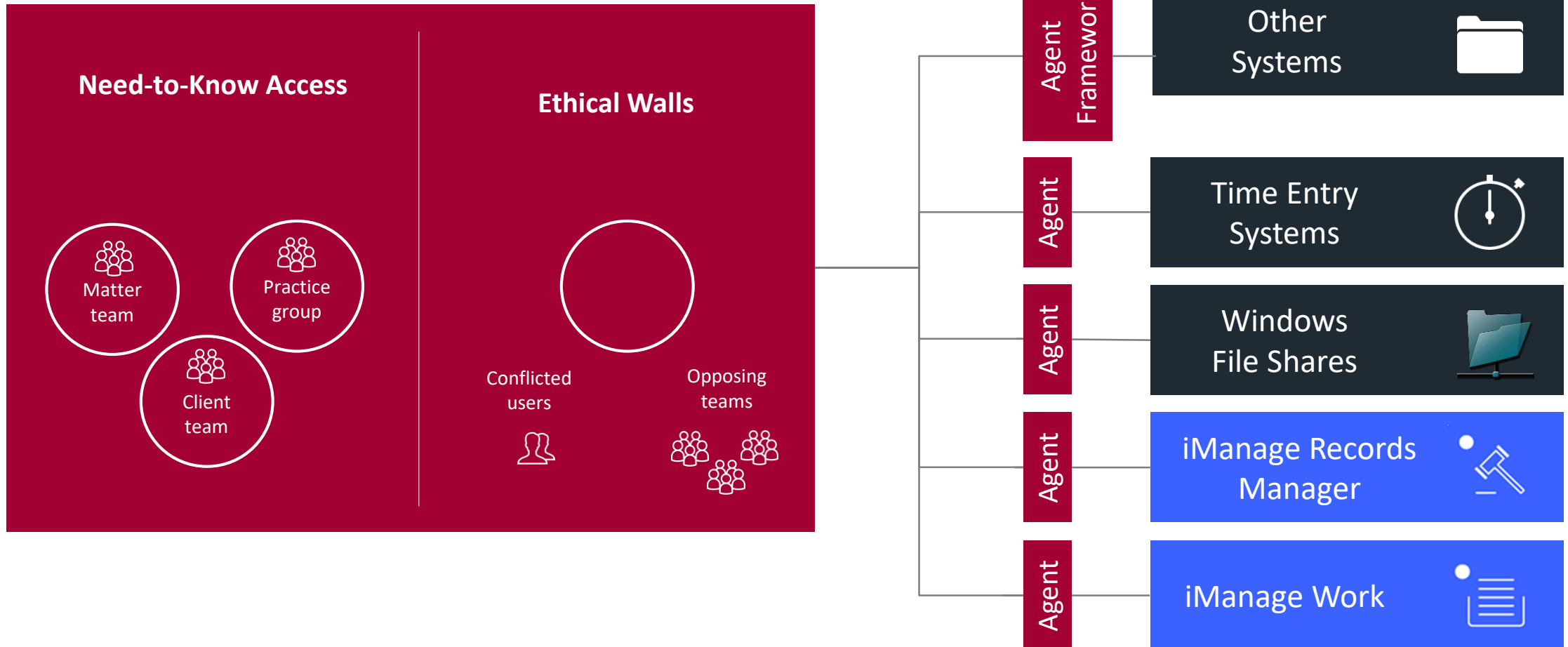
# Security Policy Manager and Threat Manager

Features & Benefits



# Security Policy Manager

*Delivering Need to Know Security and Ethical Walls at Scale Across the Firm*



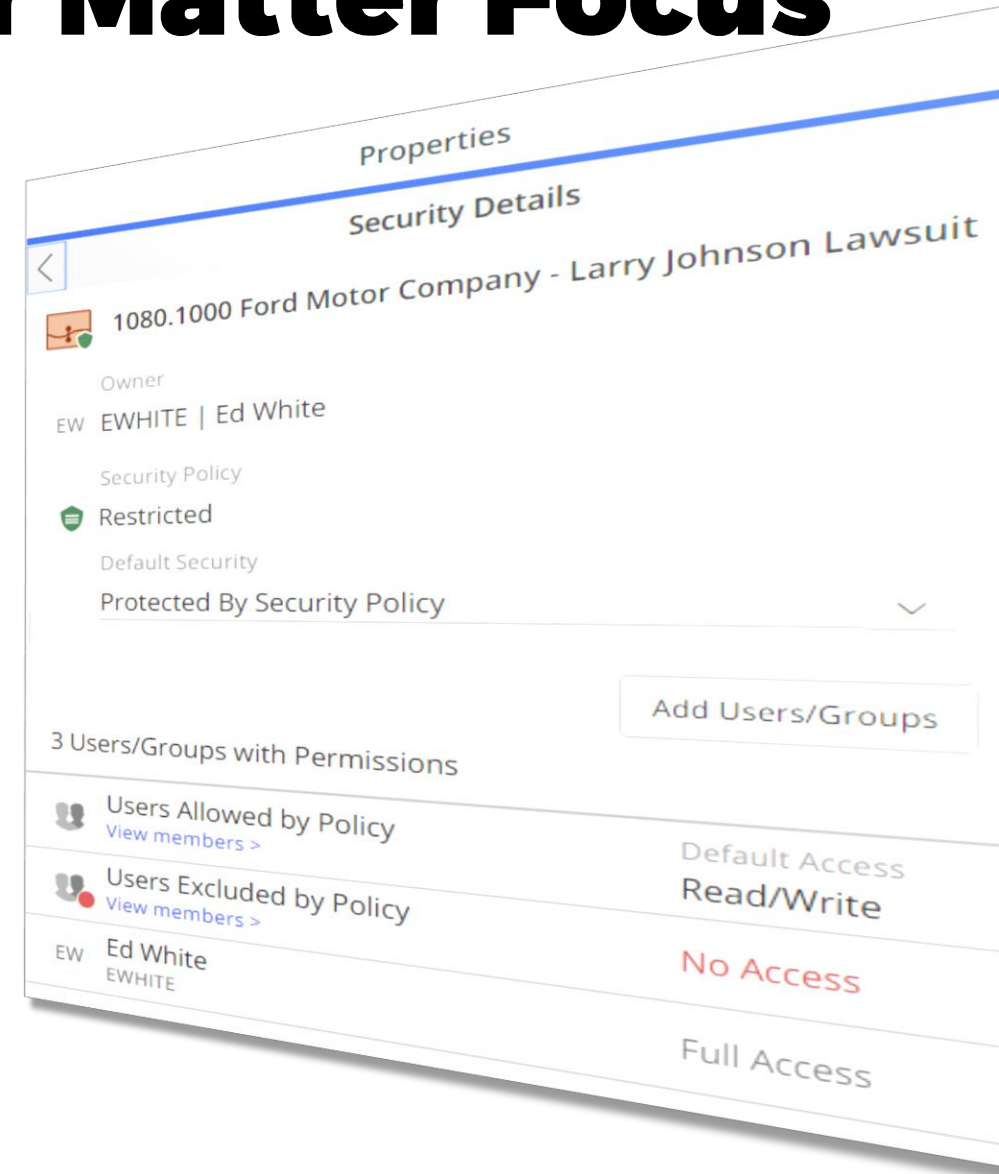
# Security that Scales – Support Full Need-To-Know

- Security applied instantly to DMS
  - No cascade of ACL, content re-indexing or re-filling
- Ability to delegate security responsibility
  - Intuitive user experience
  - Central administration
- Allow attorneys to add themselves
  - Access instantly or after approval



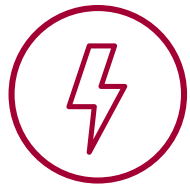
# Security with a Client or Matter Focus

- Security that is easy to understand
  - Security defined – client, client matter, group or matter case
  - Reduce complexity of multiple overlapping walls
- Visibility in iManage user interfaces
  - Restricted access materials clearly identified
  - iManage Work and iManage Records Manager
- Designed for help desk operators
  - Easily respond to “why don’t I have access” questions



# iManage Threat Manager

*Advance protection against modern day security threats*



## **Detect sophisticated threats**

Insider, external, departing laterals



## **Reduce false positives**

Deep feature set analyzes and identifies risks that are likely fraudulent



## **Ensure Compliance**

Built-in reports credibly demonstrate how sensitive data is protected



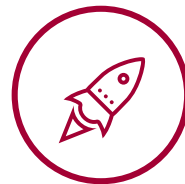
## **Streamline Investigations**

Interactive graphs, visualizations  
Re-construct attack timeline



## **Integrate with the enterprise IT security stack, REST API's**

iManage databases, Email Logs, Time & billing systems, Matter Management Systems, SIEM Tools



## **Easy to Deploy**

On premise appliance, iManage Cloud



# Threat Manager Mitigates Modern Day Threats



## Insider

Disgruntled employee

Unintentional risk exposure

Malicious insider

Privileged accounts

Non-filers



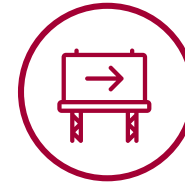
## External

Stolen credentials

Phishing attacks

Nation state actors

Social engineering



## Departing Laterals

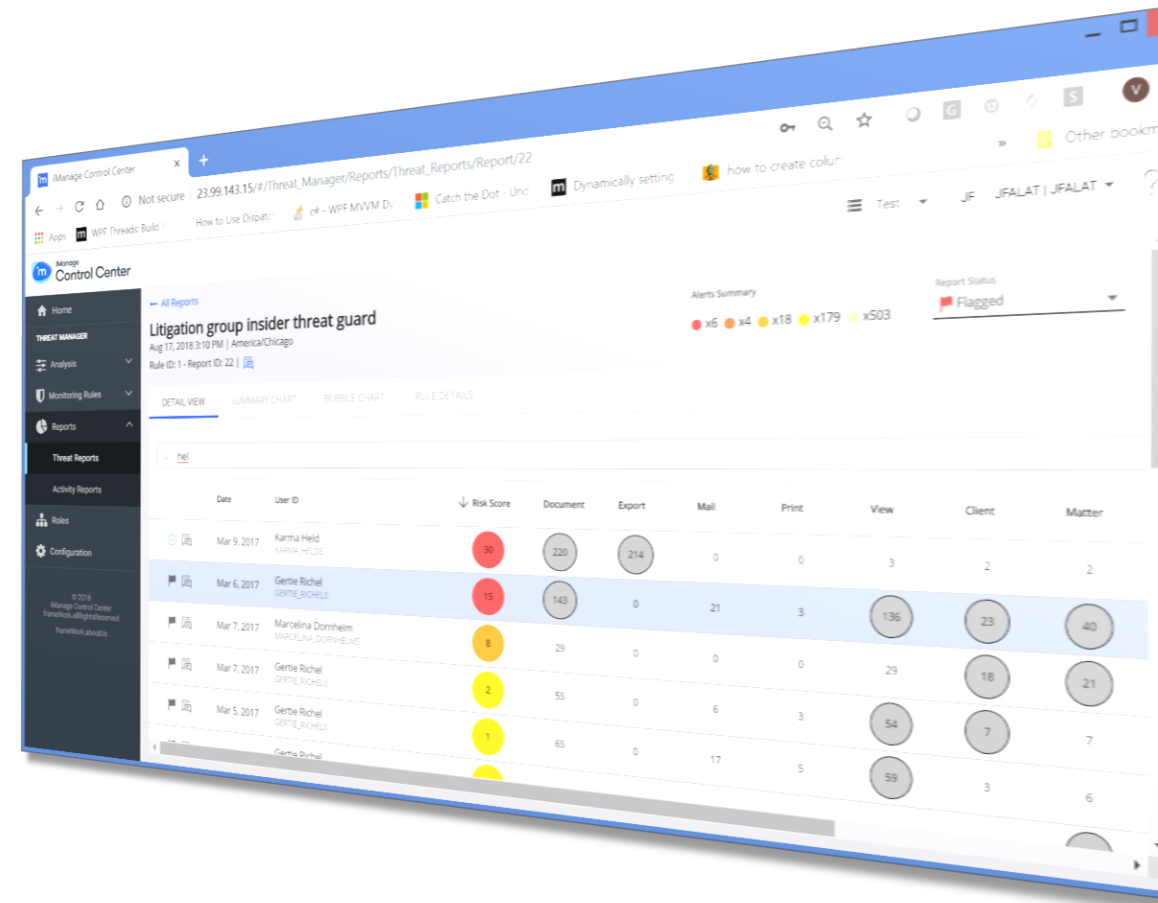
Users who have given notice

Predict lateral departures

# Detect Threats With the Highest Level of Accuracy

*Innovative ways to protect and secure sensitive data*

- Reduce time to neutralize threats
  - Machine Learning technology analyzes deviation in contextual information- client, matters, practice areas
- Proprietary scoring algorithm and simulation
- Go beyond threshold-based monitoring
  - Understands malicious behavior patterns



# iManage RAVN AI

Features & Benefits



# What Does iManage RAVN AI Do?



## Classify

*Create order from chaos*

- Document and email classification
- Classify time card narratives for better Pricing, LPM
- PII identification



## Extract

*Turn documents into data*

- Document reviews
  - M&A
  - Real Estate
  - Contracts
  - Finance
- Extract information
  - Clauses, parties, dates
  - Obligations

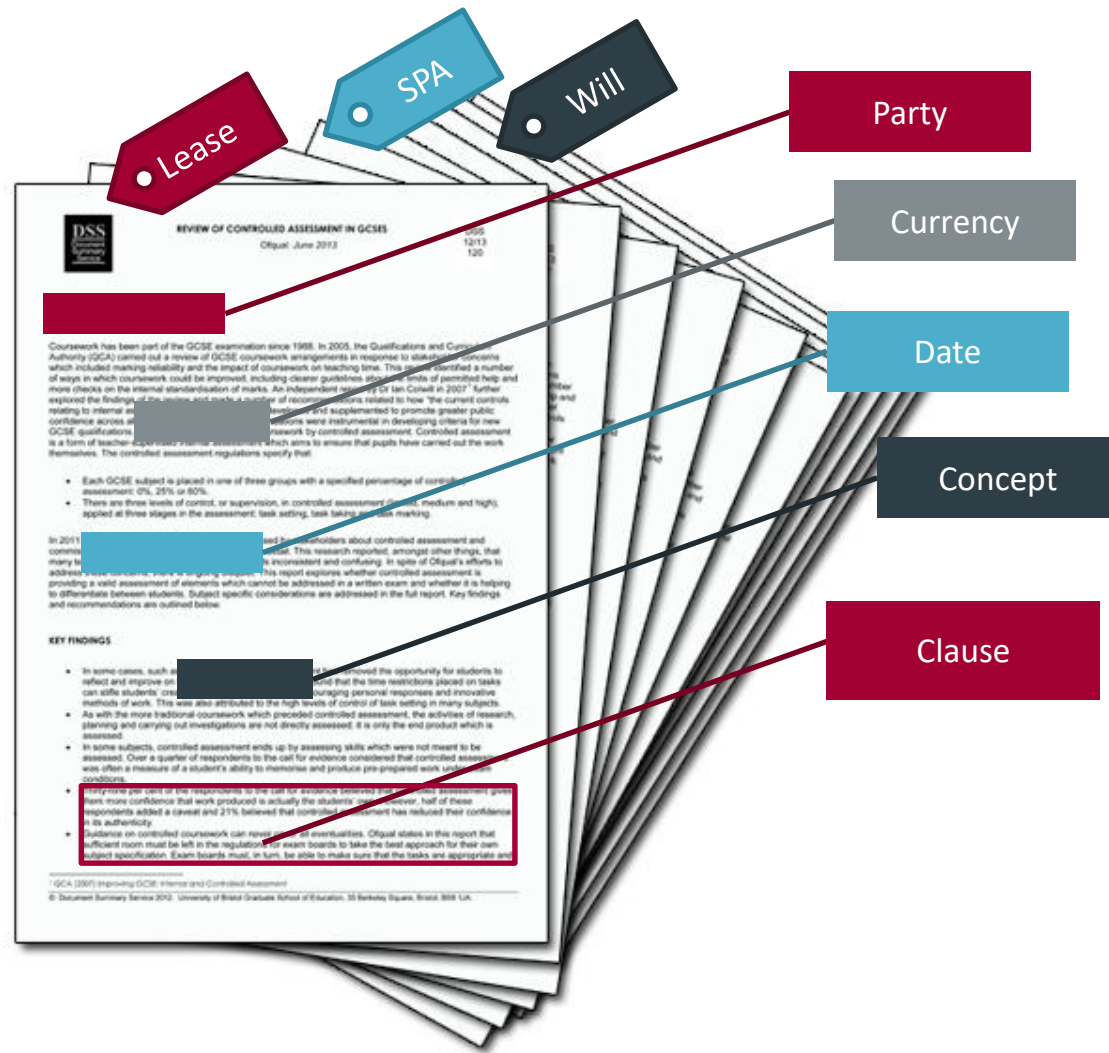


## Insight

*Powerful search and KM*

- Full text, taxonomy and conceptual search
- Federated search
- Across repositories
- Identify experts with Knowledge Graph™

# iManage RAVN AI Understands Your Data



- Filter and understand
  - Type and language of document
  - Structure of document
  - Search and tagging
- Extract and automate
  - Clauses and key data
  - Self Serve: AI trained by end users
  - Pre-built by experts; reusable
- Analyze and act
  - Export to line of business systems
  - Expose results in Insight
  - Embed into legal processes

# iManage RAVN AI Advantage

- Extensible, Self-training
  - Out-of-the box and custom extractors
  - Fully functional API
- Multi-use
  - Supports multiple use cases
  - Recipes
- Deeply integrated with iManage applications
  - Single user interface, model re-use
  - Use extracted metadata for advanced search
- Single vendor across content, analytics, governance and compliance



# iManage RAVN AI Solutions



## Document Reviews

M&A Due Diligence  
Real estate leases  
Financial documents



## Time Card Narrative Classification

- Classify activity for billing, pricing, project management, budgeting
- Time records are uploaded & available for additional analysis by the firm



## Clause Library / Knowledge Management

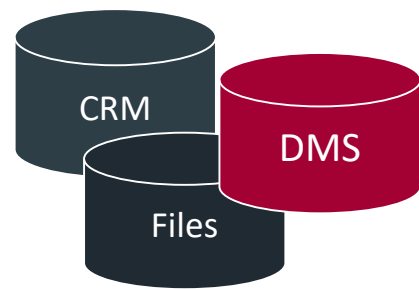
- Faster drafting of documents
- More compliant drafting
- Stay on top of “what is market”
- Encourages collaboration
- Better re-use of existing knowledge

# Document Classifier

*Identify potential precedent and knowledge base content*

## Business Driver

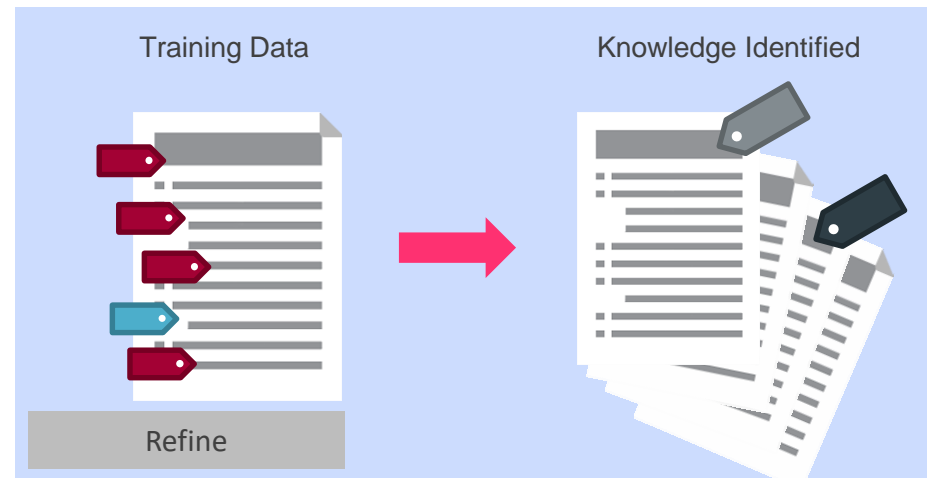
Reuse tacit knowledge within the firm



LOB Solutions

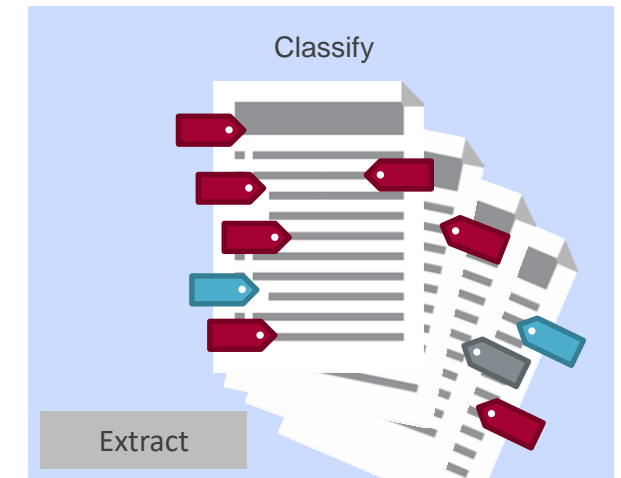
## Selection

Items considered and selected based on training data set



## Auto Classification

Machine learning based auto classification of content



## Outcome

Content is automatically selected, classified and made available through search for rapid re-use, improving legal service delivery



# iManage Records Manager

Features & Benefits



# iManage Records Manager

*Governance for physical and electronic records*



## Seamless integration with iManage Work

Consolidated end user interface-all electronic and physical content in one place



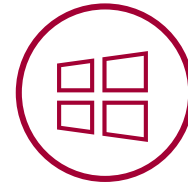
## Single policy engine

Manage electronic and physical content consistently using a central policy engine



## Role specific dashboards

End users, secretaries, records clerks and managers can easily access and perform key tasks



## Manage content in place

Manage content in Windows file shares and other locations without having to move it to the DMS



## Optimized for the iManage Cloud

Available on-premises or in the iManage cloud



## Powered by the RAVN engine

Single search index across iManage repositories

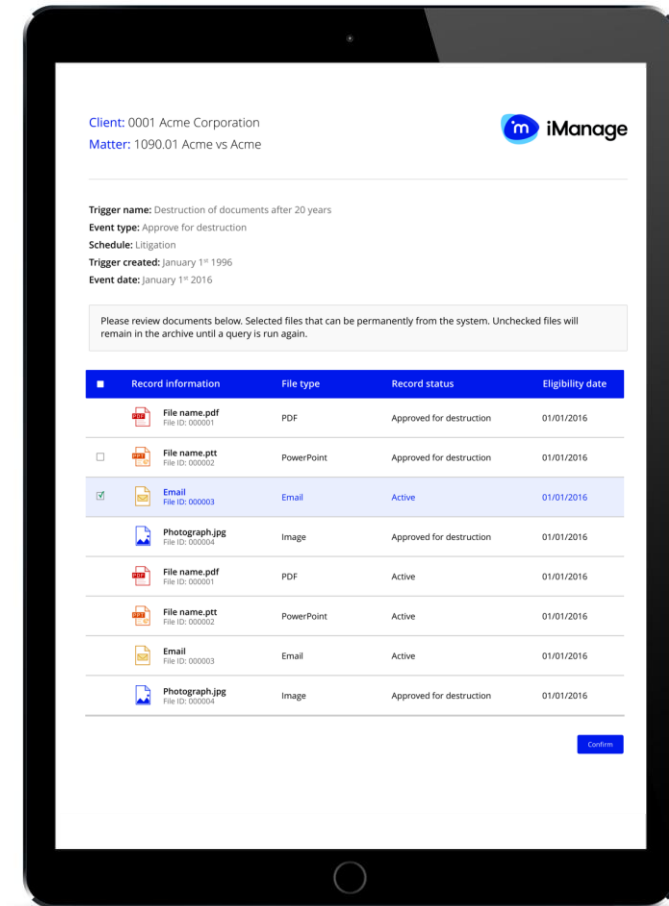
# Market Leading Physical Records Capabilities

- Fully configurable hierarchical location types
  - Cities, buildings, offices, file rooms, zones, racks, shelves and shelf locations
- Track circulating items
  - Barcodes and RFID tags
- Offsite storage vendor support
- Seamless integration with electronic records management



# Record Retention and Disposition

- Apply retention schedules at the matter, folder, record type or record level
- Option to dispose non-records in workspace
- Configurable disposition workflow
  - Automate the review and disposition process with out of the box workflows
  - Electronic and physical records



# iManage + Elegrity

Features & Benefits



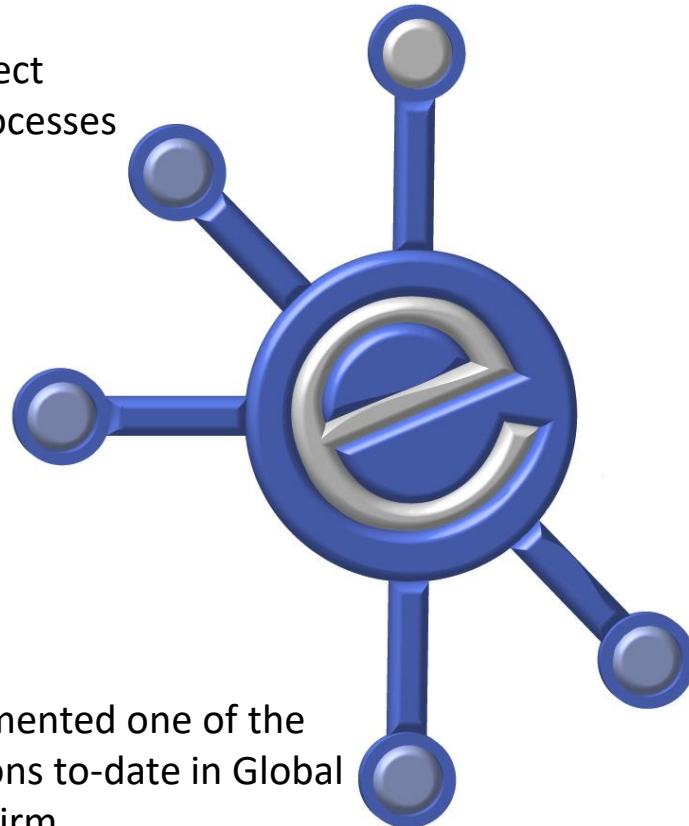
# Elegrity History

**2014-2018:** E-Valuate successfully supplants Elite, LegalKey, Analyze & Aderant conflicts

**2008-2018:** Elegrity Connect used for 40+ Business processes in law firms

**2006-2007:** Elegrity Connect used for New Business Intake @ growing AMLAW 200 and AMLAW 100

**2003-2005:** Implemented one of the largest BPM Solutions to-date in Global Financial Services Firm



**1998:** Founded

Elegrity is the most experienced law firm BPM & Conflicts of Interest vendor in the market.

We bring an unparalleled combination of law firm operational expertise and technical expertise – along with our focus on Client Service.

# Business Processes Automated

- Business Intake
- Preliminary Conflicts / RFP / Pitch
- Add/Change Parties
- Matter Check-Up
- Billing Rate Exceptions Management
- Client/Matter Name Changes
- Attorney Role Changes
- Many more...

## Trademark Application: Classes, Goods & Services

The screenshot displays a software interface for managing trademark applications. At the top, there is a navigation bar with tabs for 'Intake Details', 'Intake Checklist', 'Notes', 'Notifications', 'Documents', 'History', 'Resources', and 'Report'. Below this is a secondary navigation bar with tabs for 'Client', 'Matter', 'Billing', 'IP Prosecution', 'Parties & Contacts', and 'Copy From Existing Intake'. A process flow diagram shows steps: 'Initiate Intake' (with a green checkmark), 'Intake Entry' (with a person icon), 'Preliminary Review' (with a question mark), 'Required Reviews' (with a question mark), 'Final Review' (with a question mark), 'Create Client/Matter' (with a question mark), 'Engagement Letter' (with a question mark), and 'Final System Setup' (with a question mark). Below the flow, there are sections for 'Show Process Summary', 'Show Client/Matter Summary', and 'General' (with sub-tabs for 'Responsible Timekeepers', 'Trademark Application', and 'Filing Countries'). The 'Trademark Application' section includes a 'Trademark Name' field, a 'Class(es), Goods and/or Services' field with a 'Hide Details' button, and a table of goods and services. The table has columns for 'Add', 'Class Type', 'Class No.', 'Goods Status', and 'Goods'. One row is visible: 'International', '33', 'As Reviewed', 'International Good'. Below the table, there is an 'Image' field with a 'Click Here' button and 'No Image Attached' text, and a 'Is this a first filed application?' field with radio buttons for 'Yes' and 'No'. The 'Priority Documents' section has a 'Hide Details' button. At the bottom, there is another table with columns for 'Add', 'Country/State', 'Filed Title', 'Application No.', 'Filing Date', 'Publication Date', 'Registration No.', and 'Registration Date'. One row is visible: 'UNITED STATES', 'Test Filed Title', '223344', '08/13/2013', '08/20/2013', '680966555', '08/25/2013'.

Add	Class Type	Class No.	Goods Status	Goods
	International	33	As Reviewed	International Good

Add	Country/State	Filed Title	Application No.	Filing Date	Publication Date	Registration No.	Registration Date
	UNITED STATES	Test Filed Title	223344	08/13/2013	08/20/2013	680966555	08/25/2013

# iManage New Business Manager

## Benefits

- Electronic record for all intake activities
- Easy to use user interface enhances adoption
- Tailored to your needs: Integrated notifications, business rules
- Automation
- Enhanced visibility into status of all requests

## Differentiators

- Highly configurable: re-usable components increases business impact
- Attorneys participate via e mail, with which they are comfortable
- Support real-world sophisticated processes at top Law firms
  - Add/Change Parties; Client Name / Matter Name Changes;
  - Attorney Role Changes; Matter closure, etc.
- Re-usable components enables new processes to be built faster
- Best practices from a team with nearly 200 years combine experience
- Flexibility: evolves with your needs; many implementations 10+ years

Initiate (Preliminary; Intake; Matter Re-Open)

Parties

Client

Matter

Conflicts Sub-Processes

Pricing / Billing

- Billing details
- Fee arrangements
- Exception capture and management
- Responsible Payors
- Billing contacts ("smart")

Attorneys and credit allocation

AML / CDD Risk Assessment

Questionnaires – Business Maintainable

- ALAS
- Pro Bono
- Contingency
- Subrogation
- Due Diligence / Risk
- Whatever else...

Email

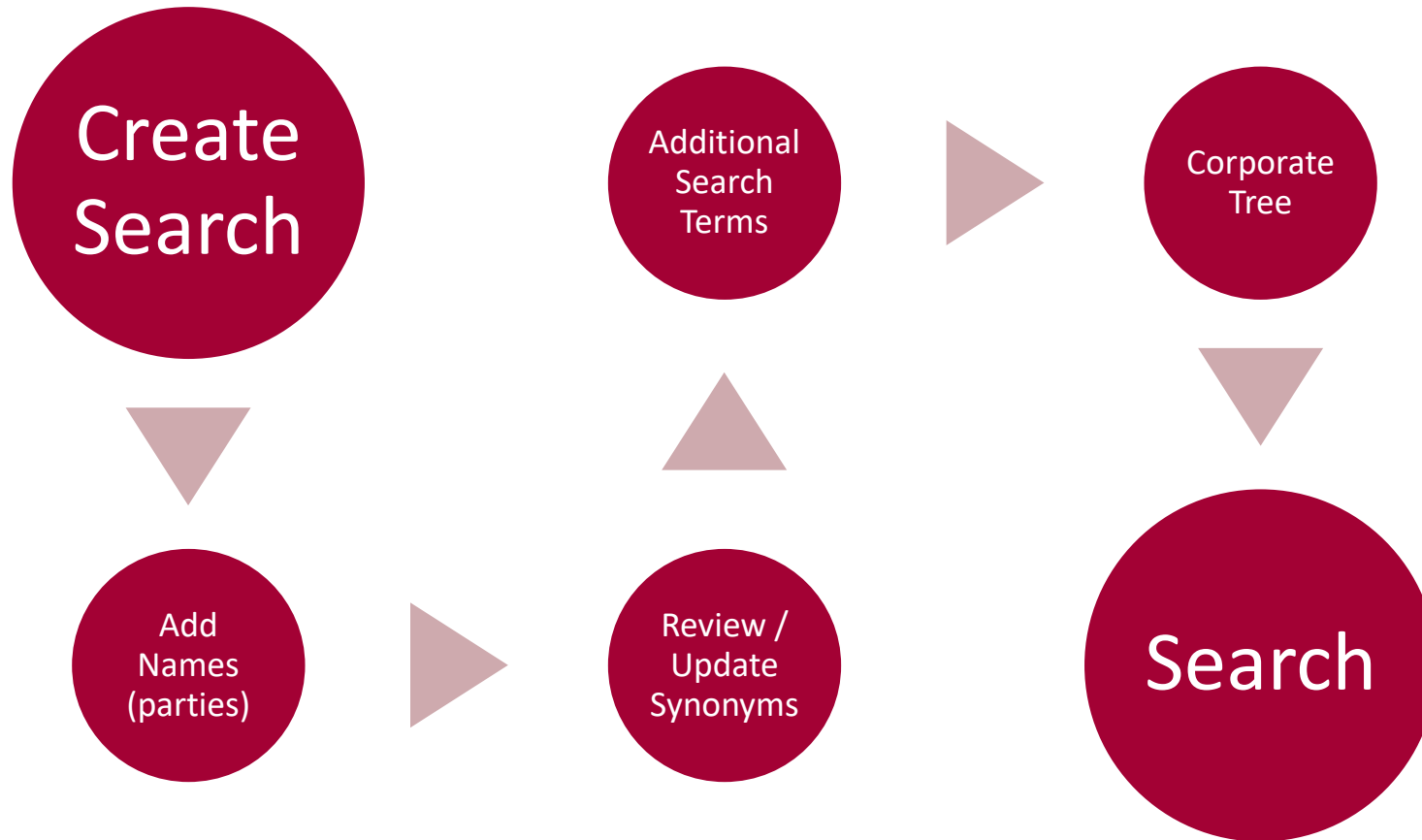
Notes

Attachments

Full Request History – The Only Electronic Record You Need



# The Conflicts Process



# iManage Conflicts Manager

## Benefits

- Built for the analyst – faster to results
  - Speed up search construction
  - Review by party – name centric
  - Organize the data in most relevant way
- Consistent results - not as dependent on analyst experience
  - Better reporting and aggregations
  - “In one place I can quickly find what I was looking for”
- Faster time to train new analysts
  - 2 days vs 6 mos.

## Differentiators

- Email based interactive clearance
- Automatically expose corporate family relationships

The screenshot displays an email interface for the iManage Conflicts Manager. The email header shows the sender as jspicer@elegtrity.com, recipients as partner@smtest.com and evaluate@smtest.com, and the subject as "RE: Conflicts Clearance Review Required".

The main body of the email contains the following text:

**INSTRUCTIONS**  
The following results have been identified as needing your timely review in order to enable the firm to accept new business. You can either:  
1. Reply-All on this email, include comments in your message. OR  
2. Reply to a specific result by clicking the reply 'button' next to that result.

If you forward this email to another attorney for input, please be sure the email thread is sent back to me. If you have any documents related to the issue, please feel free to attach them to your reply email.

Should you have any questions, please don't hesitate to contact me or the Office of the General Counsel for assistance ([ogc@smtest.com](mailto:ogc@smtest.com)).

**RESULTS**  
**ANALYSTS COMMENTS:** Search highlighted potential issues with existing clients and situations where we have been adverse historically to the incoming client.

**Client Hits:** The following hits show where the term(s) "J.C. Penney, JCPenny" was found in a party with the role of CLIENT or CLIENT-RELATED.

Party Name	Role	Relationship	Notes	Billing Attorney	Reply to Specific Item
1. J.C. PENNEY COMPANY, INC.	CLIENT		Notes on this party...	Dunne, Julie A.	
<b>Details:</b> Matter #: 0592-112985 Client Name: J.C. Penney Company, Inc. Status: INACTIVE Matter Name: J.C. PENNEY COMPANY, Inc. ADV. AURORA SANCHEZ Matter Description: JC PENNEY is suing for damages...					
Office: SD Opened: 3/30/2004 Closed: 1/24/2007 Reopened: Final Close Date:					
2. J.C. PENNEY Corporation, Inc.	CLIENT-RELATED		Notes on this party...	Taylor, Timothy B.	
<b>Details:</b> Matter #: 0592-115779 Client Name: J.C. Penney Company, Inc. Status: INACTIVE Matter Name: J.C. PENNEY COMPANY, Inc. ADV. WEBSTER ABBOTT Matter Description: Webster Abbott is suing JCPenny...					
Office: LA Opened: 1/5/2012 Closed: Reopened: Final Close Date:					

# Product Integrations – Plans

One of the biggest benefits is data integration between processes

- More accurate data for use throughout the matter lifecycle
- Better analytics, legal project management
- Reduced operating costs (labor)

Areas being evaluated include:

- Create **Elegriety conflicts** report from **SPM** data
- Add a lateral hire – based on conflicts results generate the security policies for a new lawyer (lateral hire)
- Set up records policy and pass to **IRM** at new client creation or closure (medium)
- Create new **iManage Work** workspace from NBI
- Attach the version of a doc to a **Elegriety new business** audit trail
- Analyze a matter marked sensitive on intake with **Threat Manager** activity supervision

# Have questions?



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