WEBINAR

What's New with iManage?

April 10, 2019

CORNERSTONE.IT iManage

SPEAKERS

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Principal

Cornerstone.IT

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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

iManage

2019 Roadmap Focus

TODAY

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

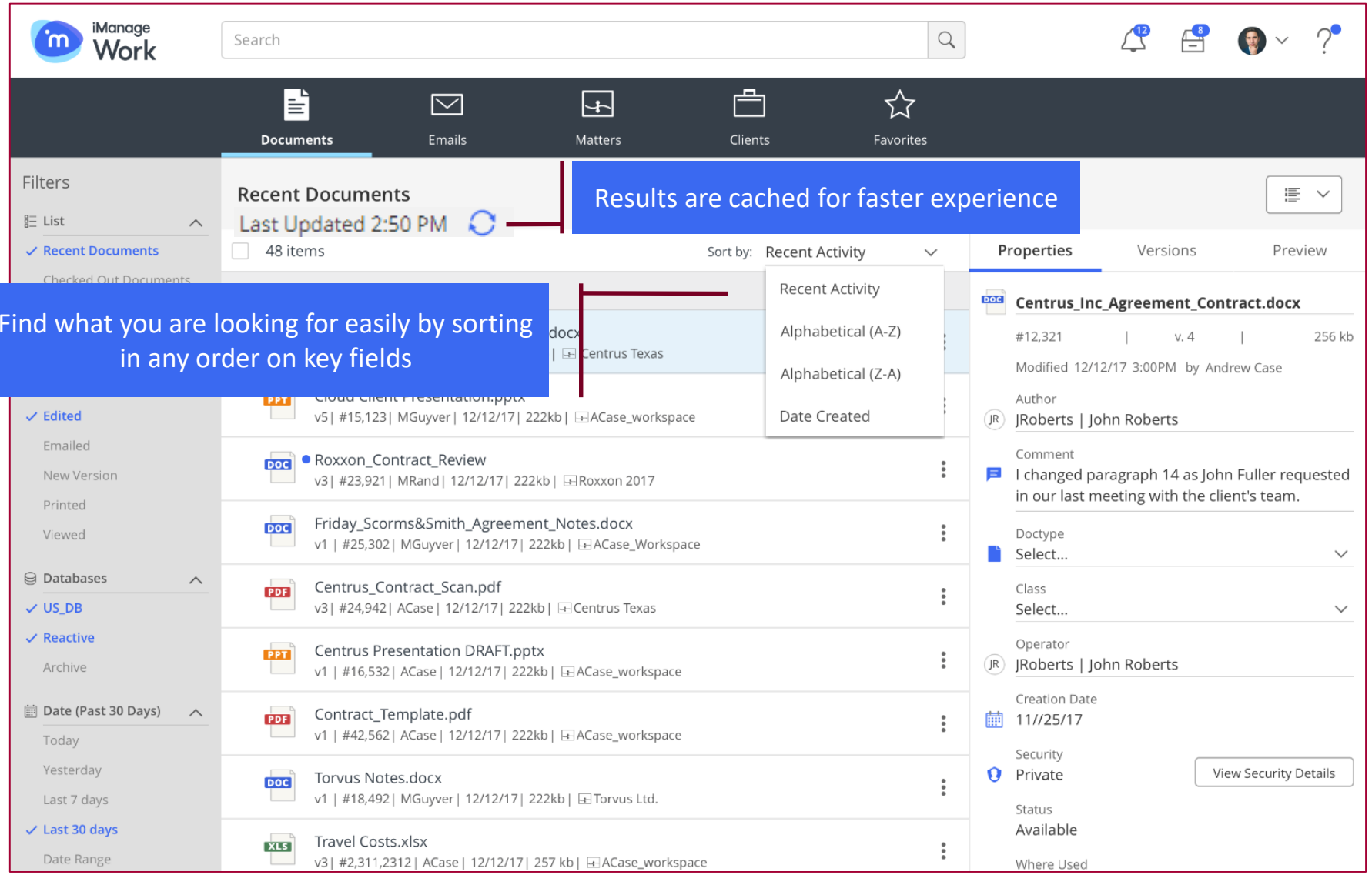
1H - **MANTIS**

- Feature Parity
  for Legacy Customers
- Desktop Sync & Offline

2H - Collaboration

- Office Online
- G-Suite
- Collaboration

iManage Work 10.2



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 uses 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

Flexibility

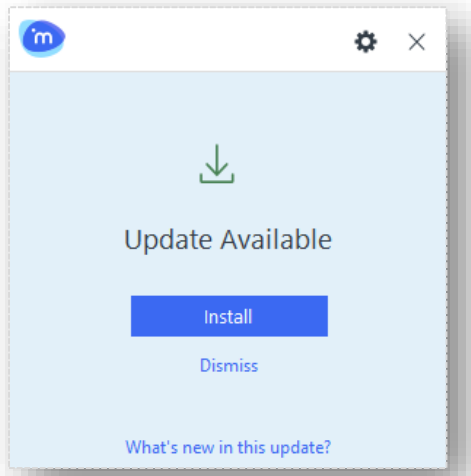
*Work from **anywhere**; Update at your **schedule***

Educate Users

*Learn **what's new** before updating*

Minimal Interruptions

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



Admin

Respond to Business

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

Full Control

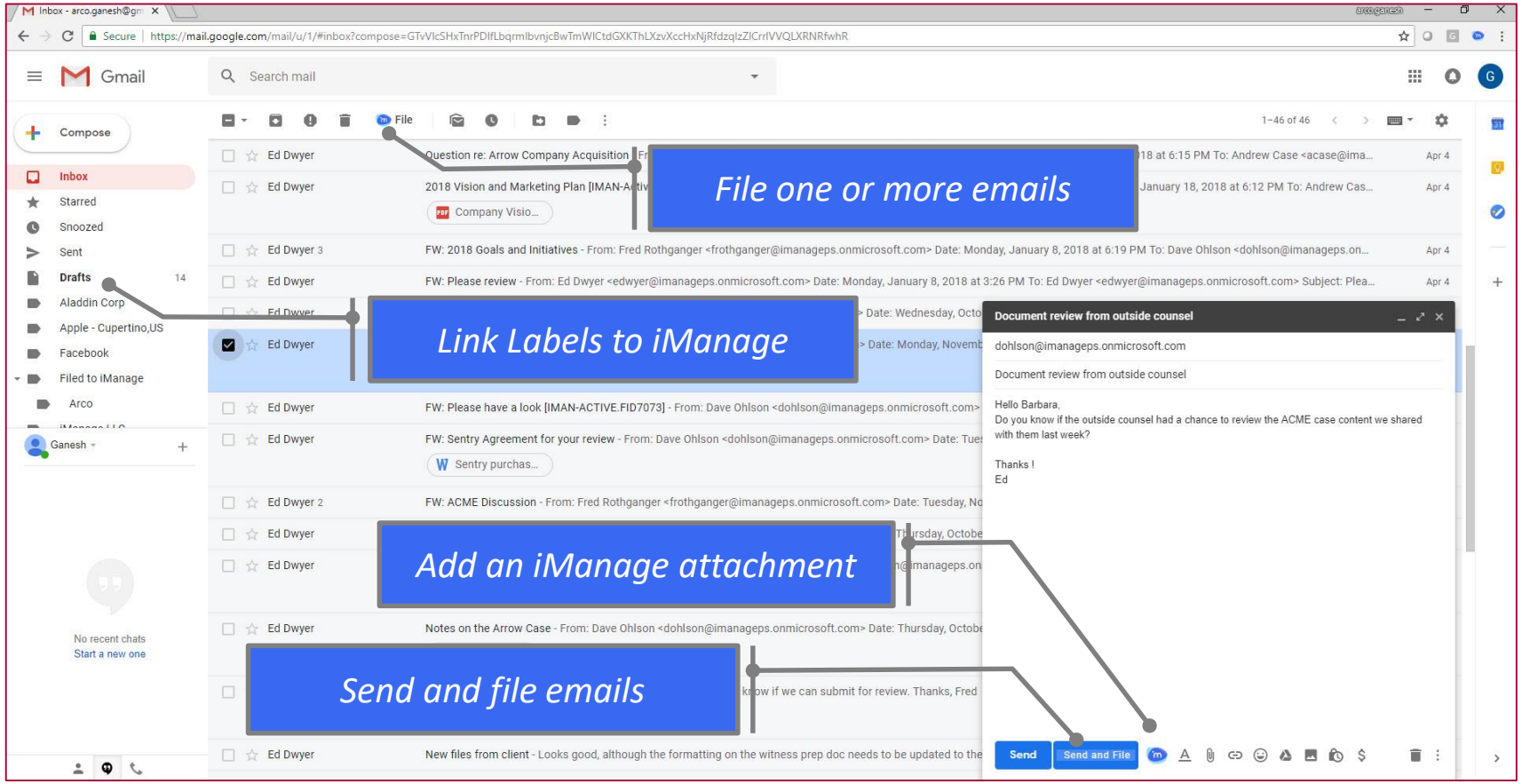
*You **decide** how to **manage** the setup and deployment or let iManage **take control***

Extensible

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

Email Management for Gmail

Manage emails and attachments from Gmail



Now Available on a Mac

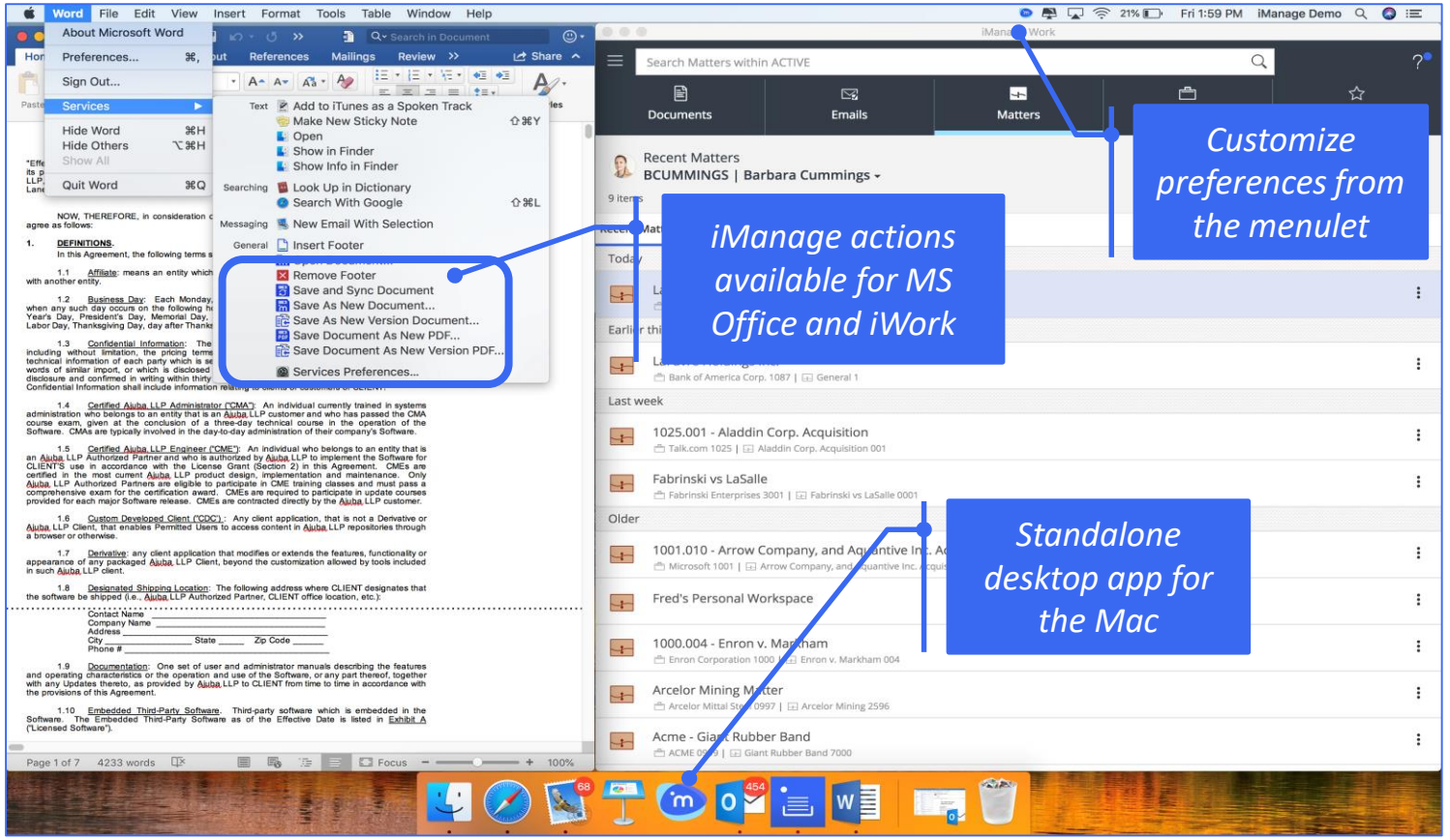
Complete email and document management capabilities

Standalone desktop App for the Mac

MS Office & iWork integration

Email Management: Apple Mail and Outlook

Edit PDF documents using Preview app



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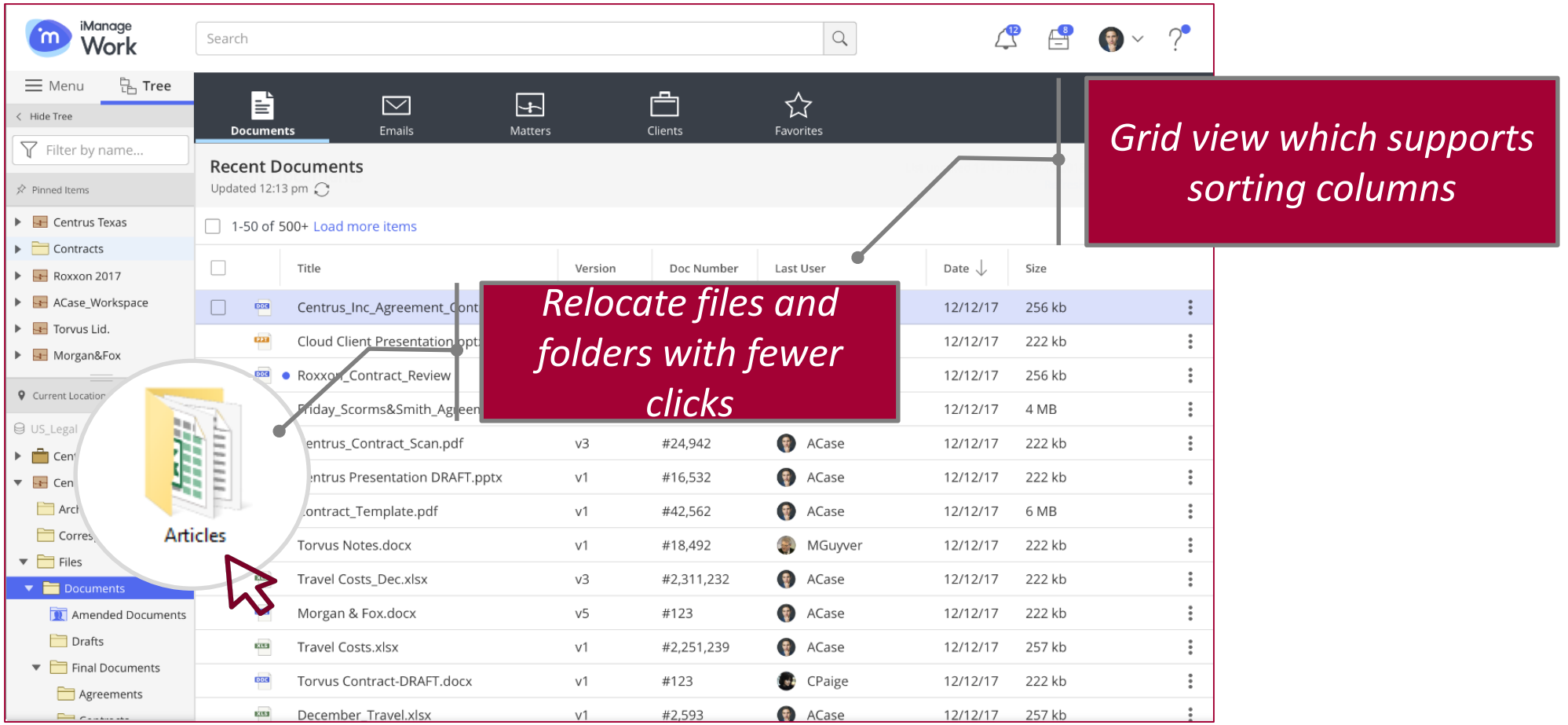
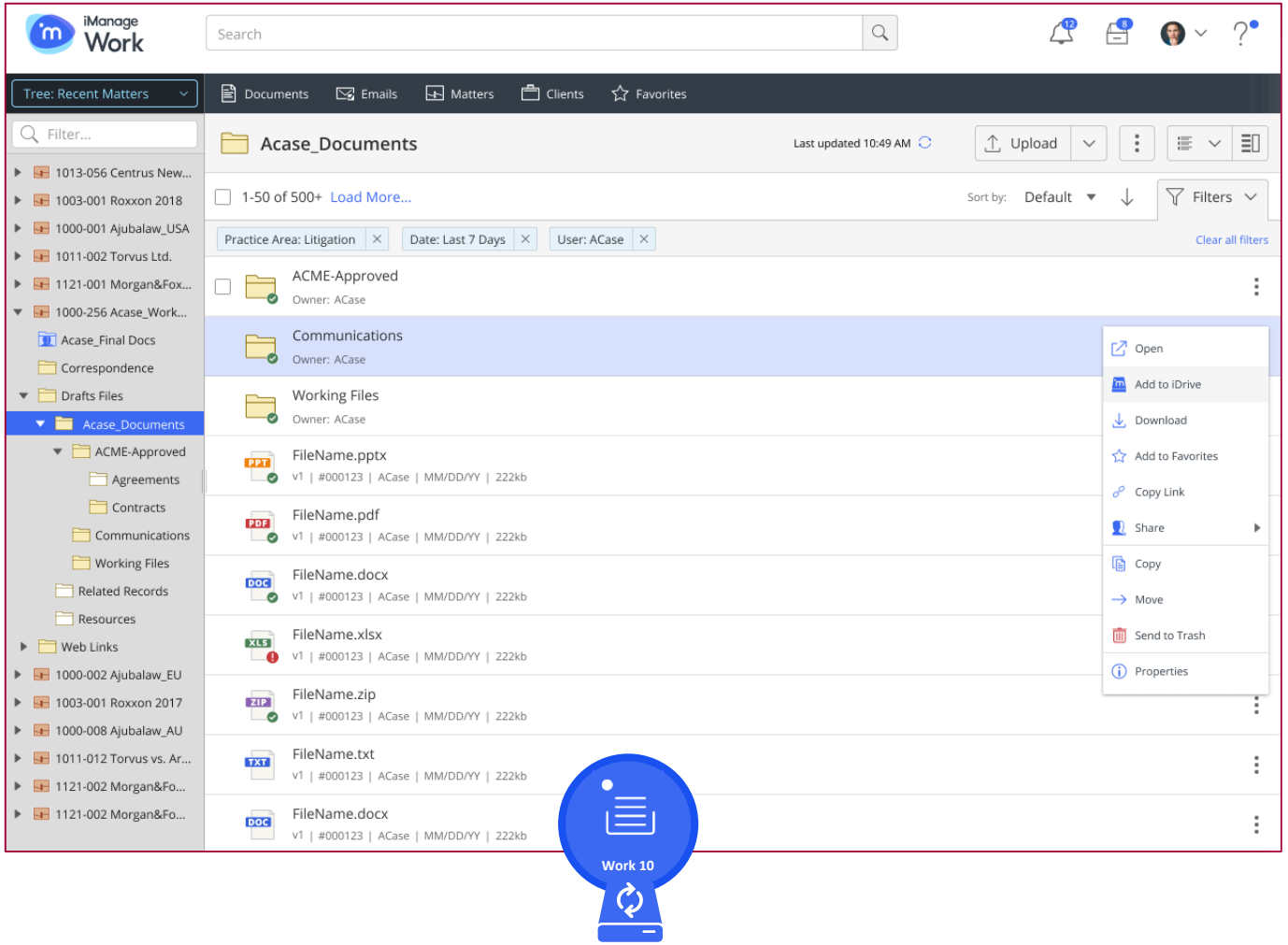
Work 10 – Tree Grid & Drag and Drop

Interface designed for power users who prefer a rich desktop experience



Smart Sync and Offline

Take content offline securely and sync automatically



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

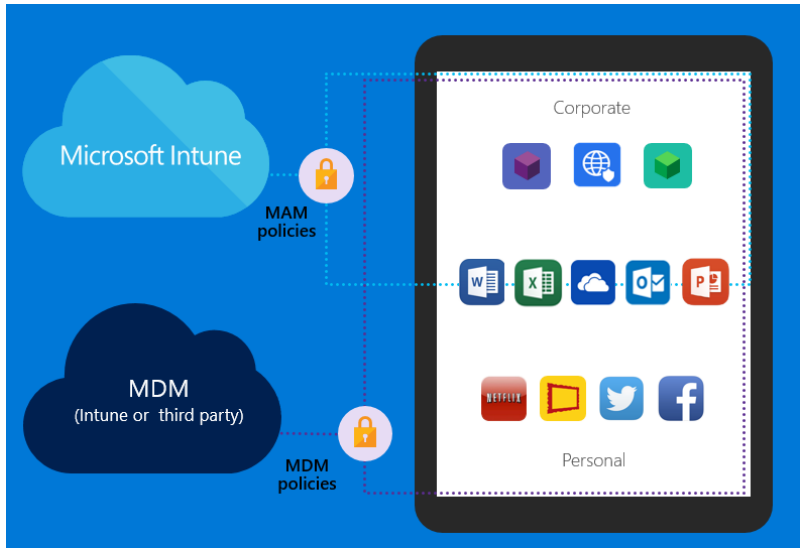
Security enhancements & client-side filing parity with server-site filing

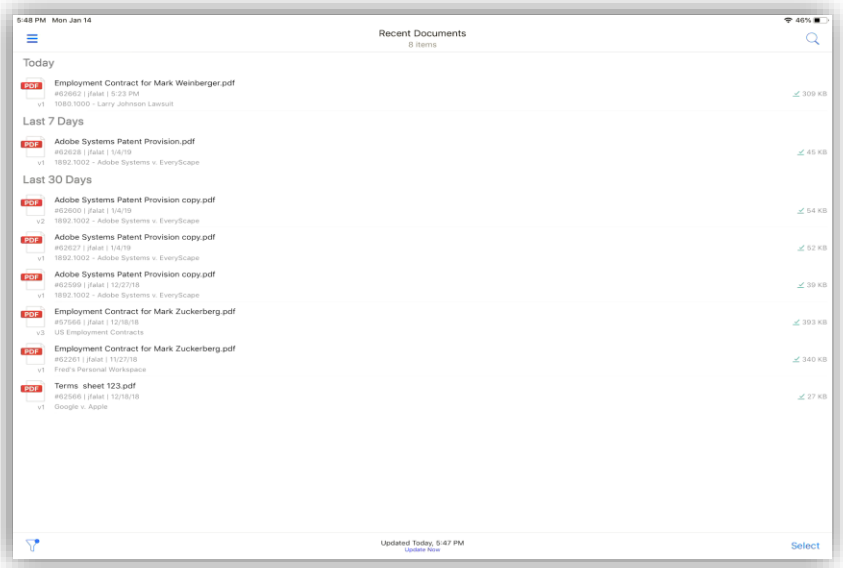
- OAuth Support for WCS Exchange
  - *Added security the pre-registration*
- Mailbox Agent
  - *With client-side filing*
- Offline Email Management
  - *Filing to the sync engine offline*

PDF Annotation & Microsoft Intune Integration

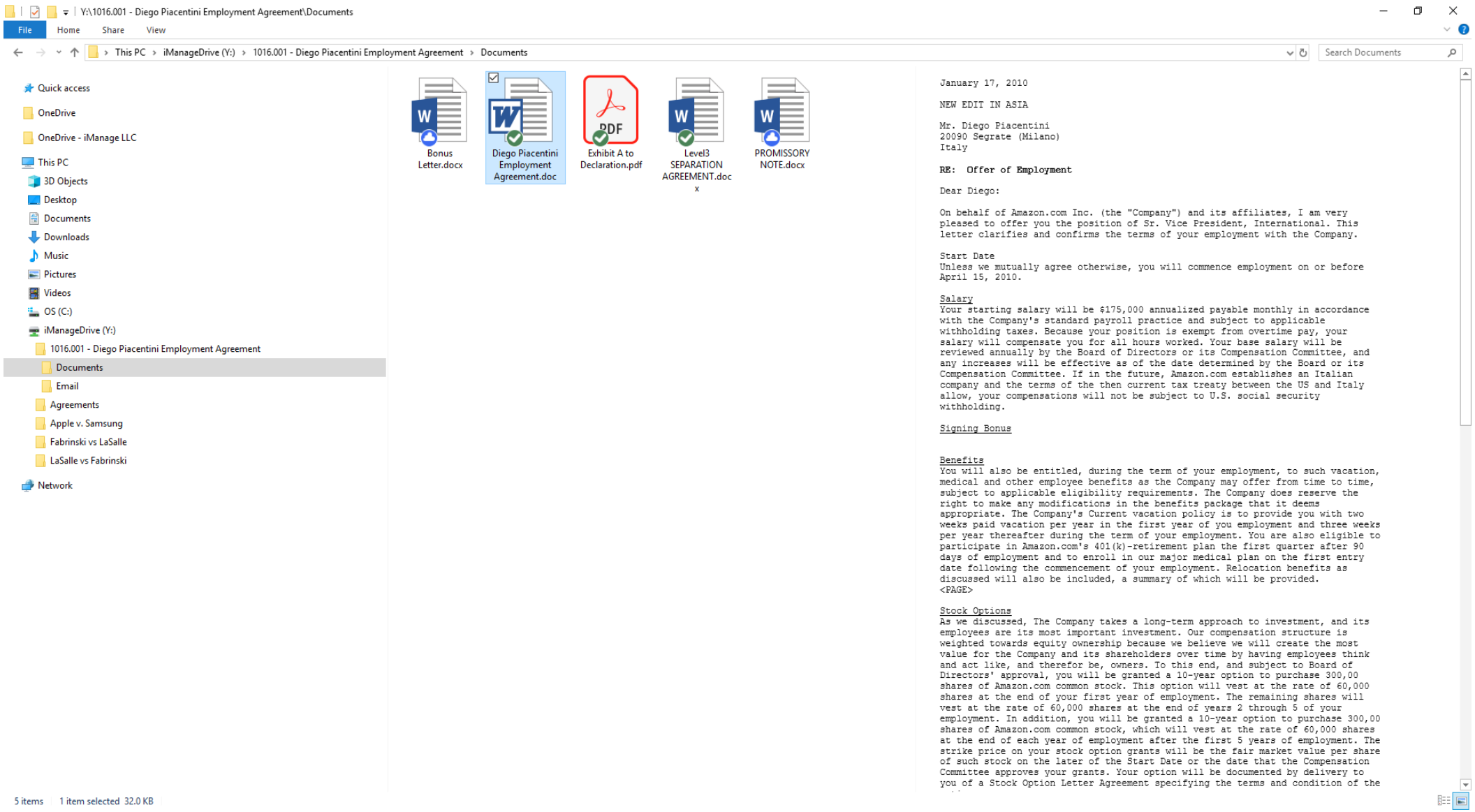
Annotate PDFs in Work & Secure MS Office Apps on iOS

- 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



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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

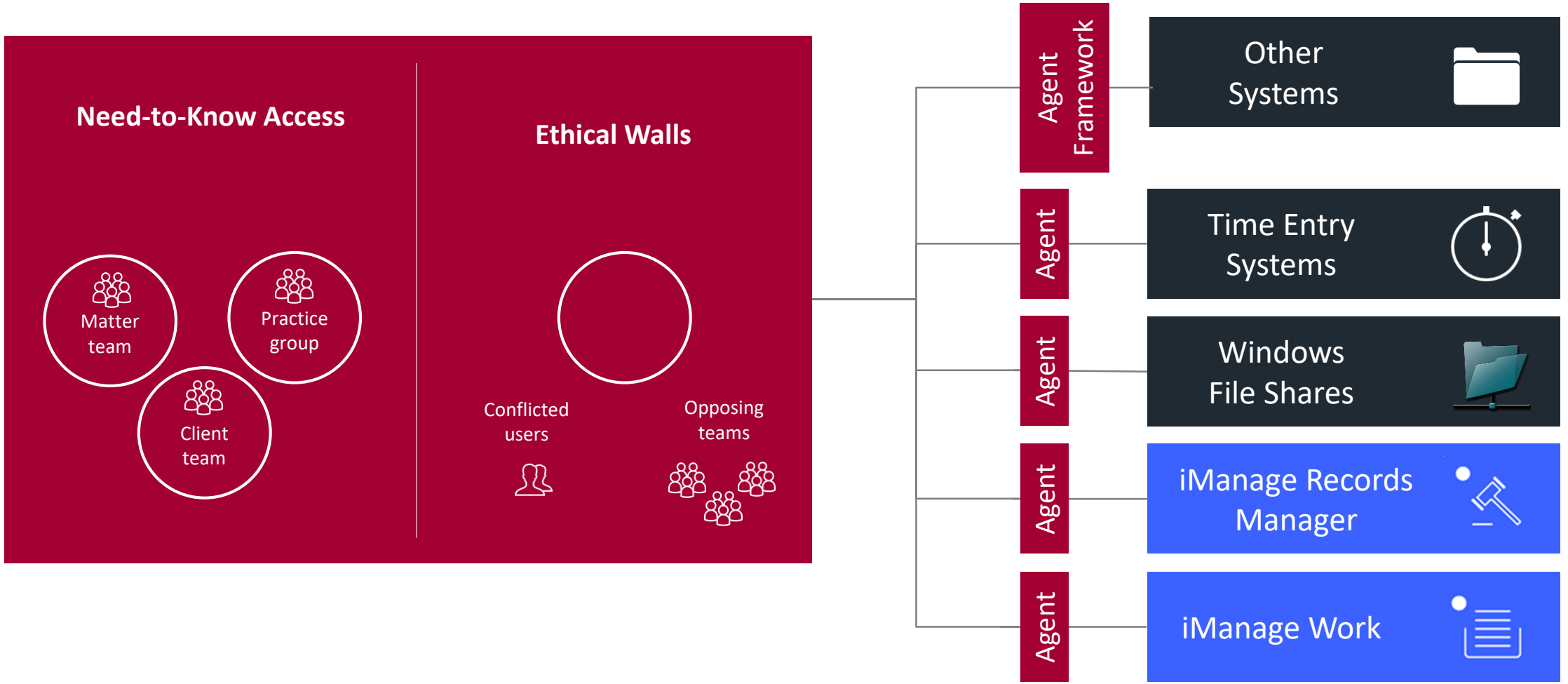
Security Policy Manager and Threat Manager

Features & Benefits

iManage

Security Policy Manager

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

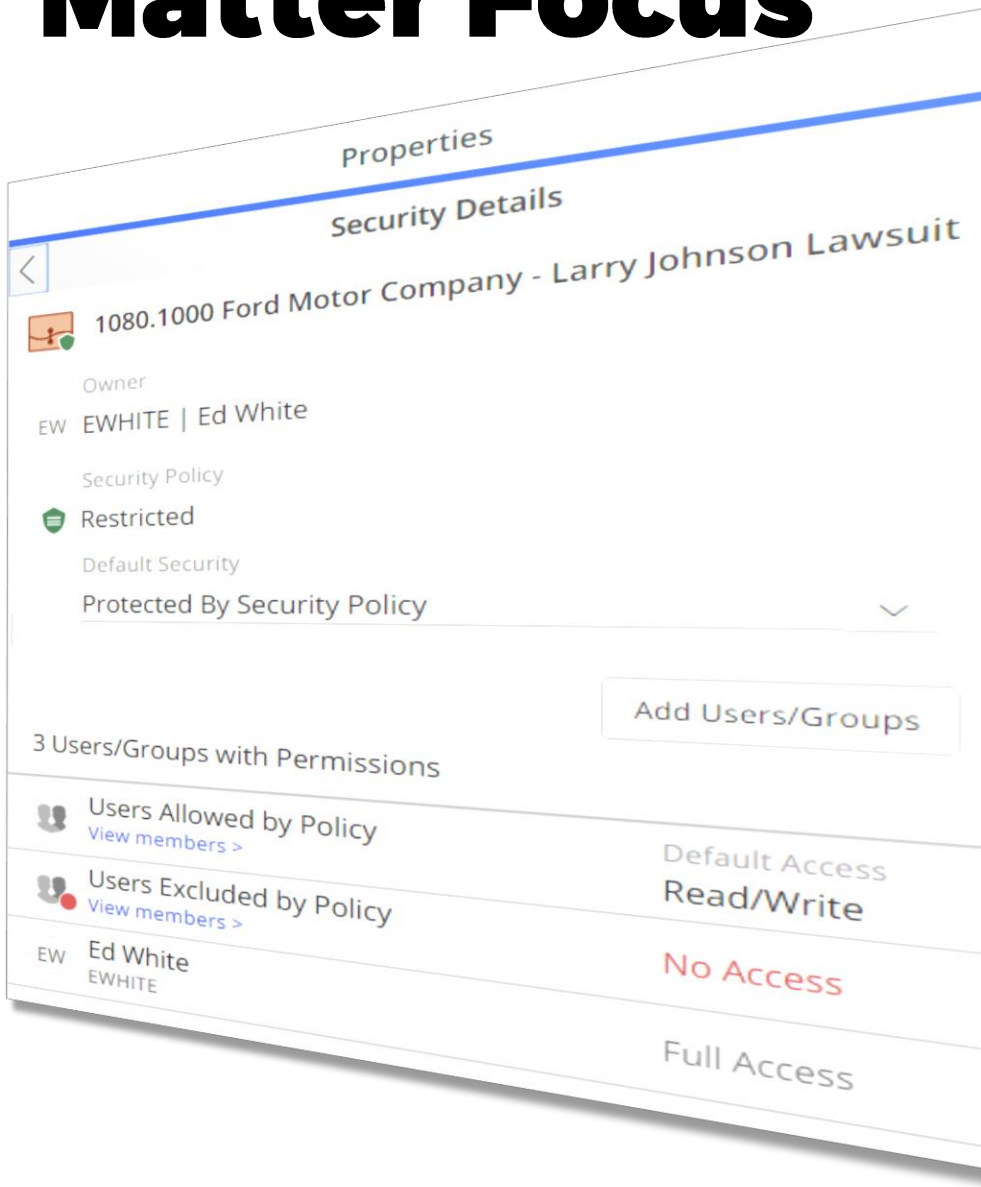


Security that Scales – Support Full Need-To-Know

- 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

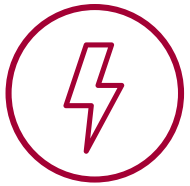
Security with a Client or Matter Focus

- 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

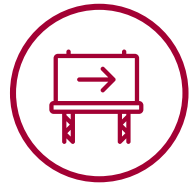
Threat Manager Mitigates Modern Day Threats

Insider

- Disgruntled employee
- Unintentional risk exposure
- Malicious insider
- Privileged accounts
- Non-filers

External

- Stolen credentials
- Phishing attacks
- Nation state actors
- Social engineering



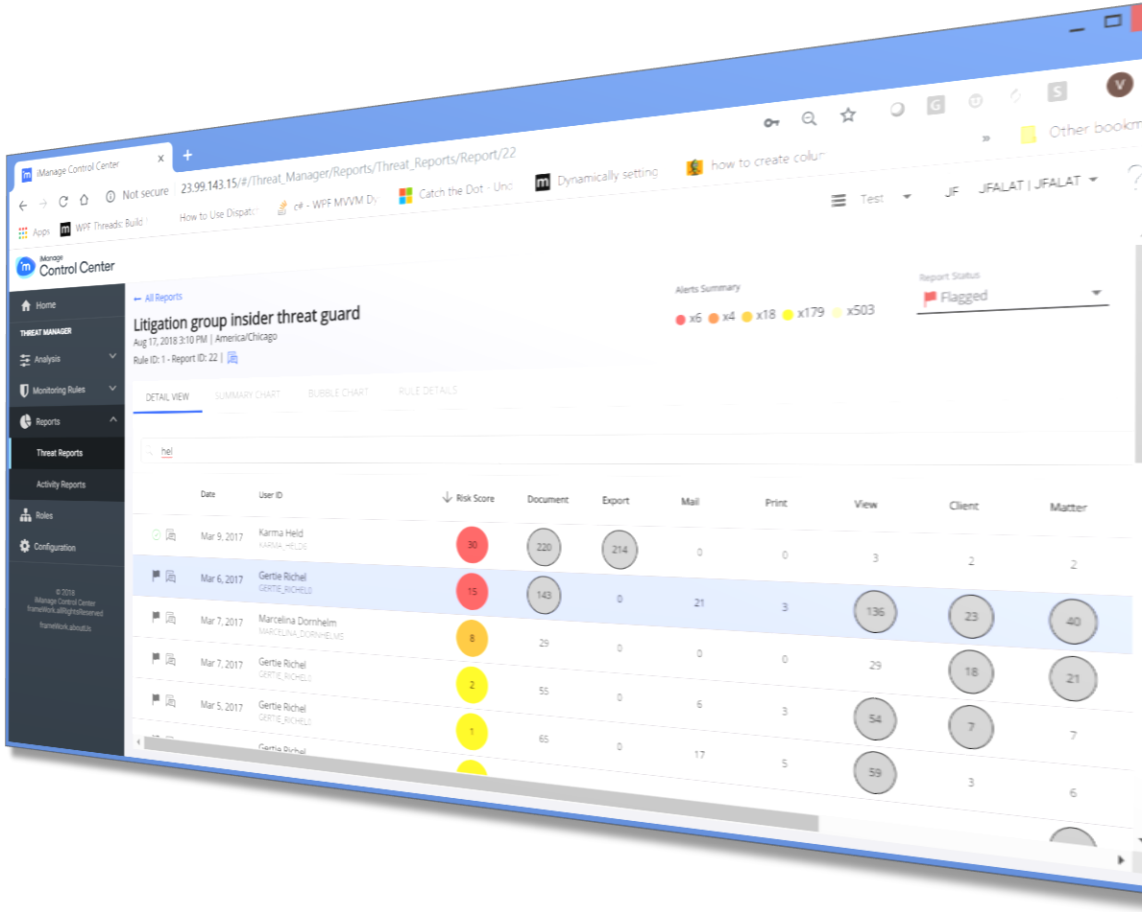
Departing Laterals

- 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

iManage

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

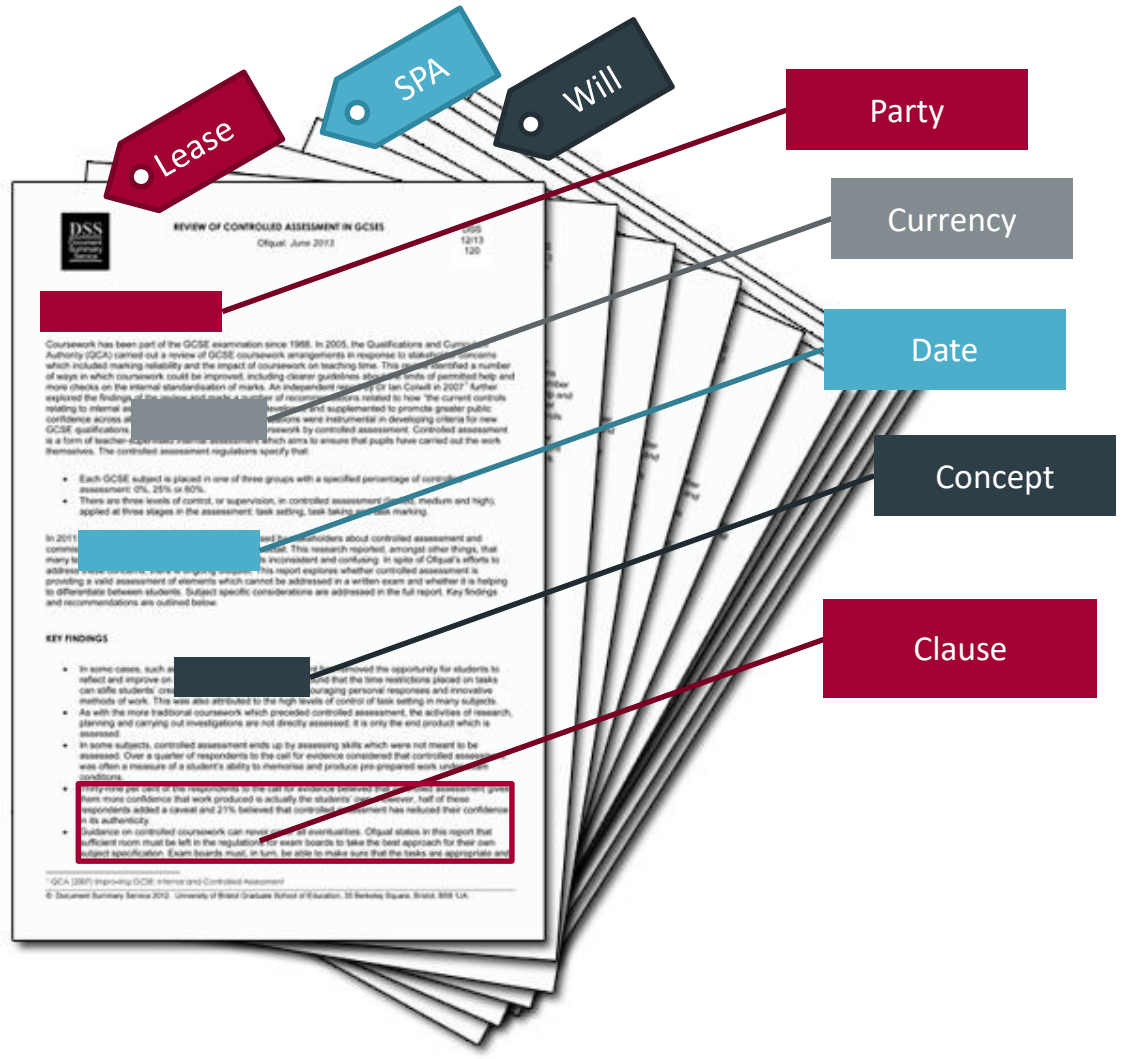
- Document reviews
  - M&A
  - Real Estate
  - Contracts
  - Finance
- Extract information
  - Clauses, parties, dates
  - Obligations

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

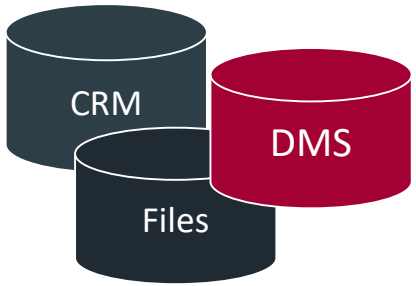
- Faster drafting of documents
- More compliant drafting
- Stay on top of “what is market”
- Encourages collaboration
- Better re-use of existing knowledge

Document Classifier

Identify potential precedent and knowledge base content

Business Driver

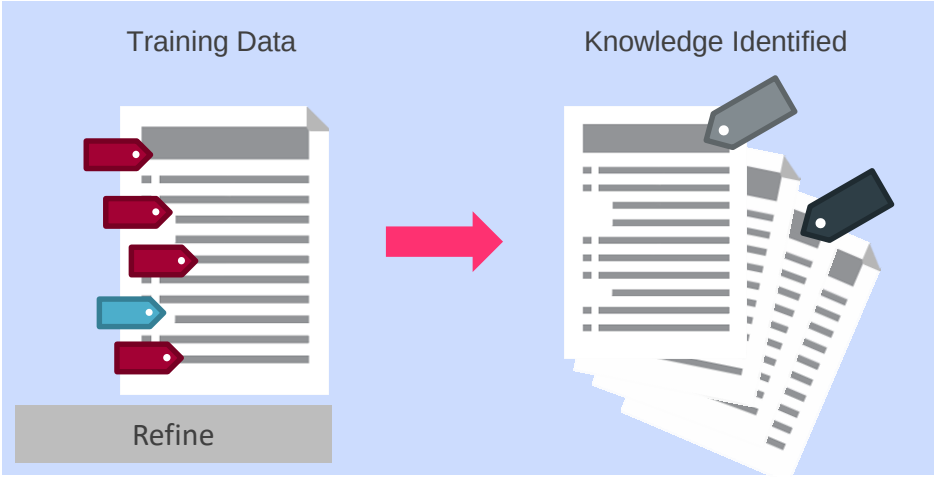
Reuse tacit knowledge within the firm



LOB Solutions

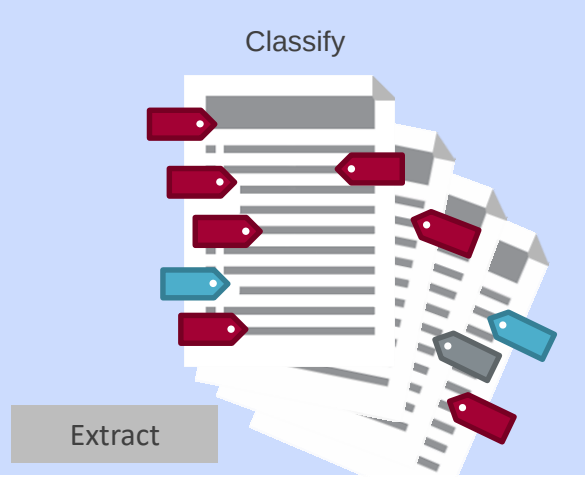
Selection

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

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

Role specific dashboards

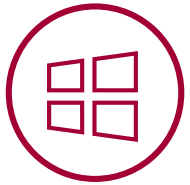
End users, secretaries, records clerks and managers can easily access and perform key tasks

Optimized for the iManage Cloud

Available ion-premises or n the iManage cloud

Single policy engine

Manage electronic and physical content consistently using a central policy engine



Manage content in place

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

Powered by the RAVN engine

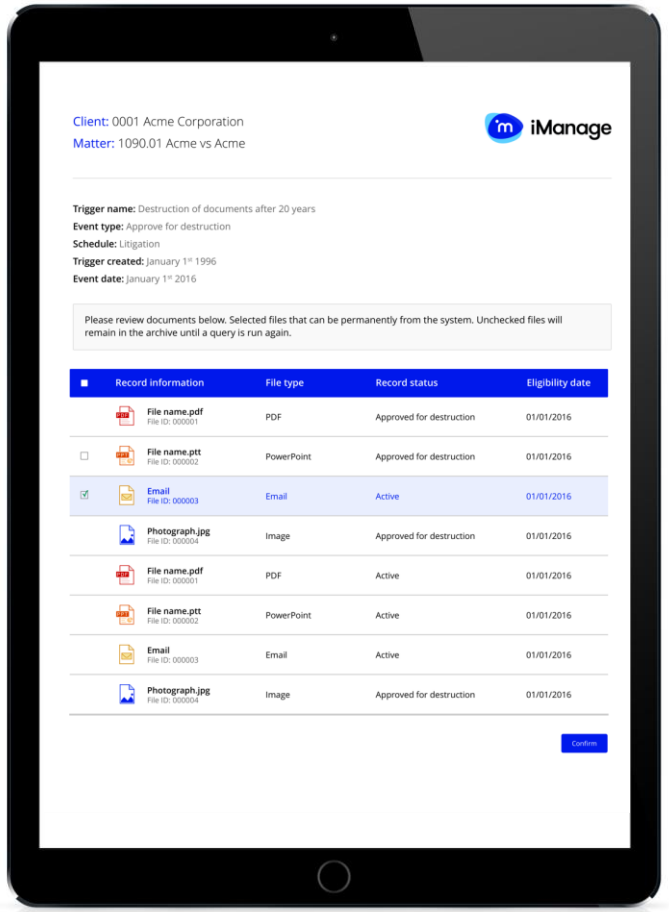
Single search index across iManage repositories

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

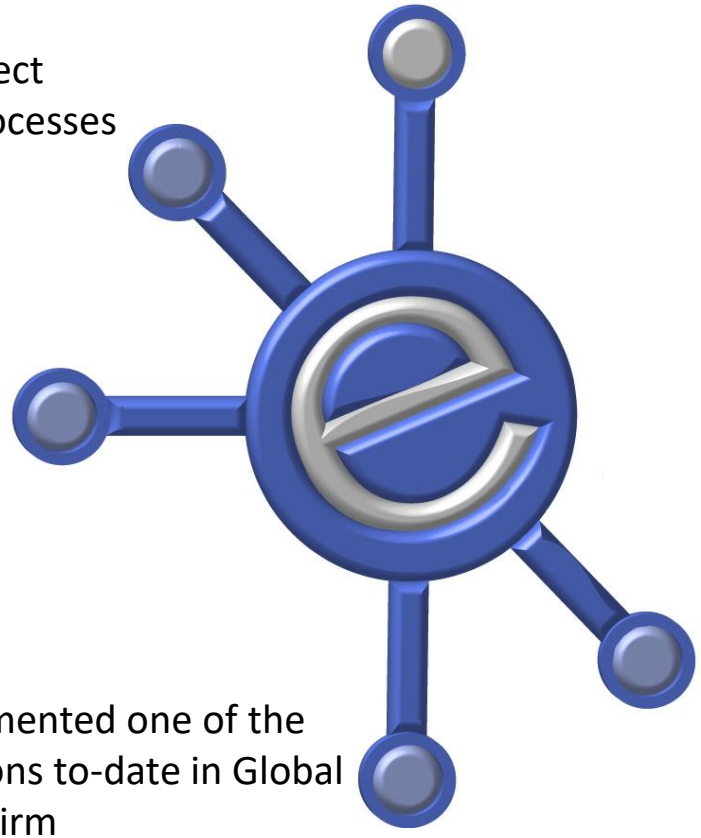
iManage

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

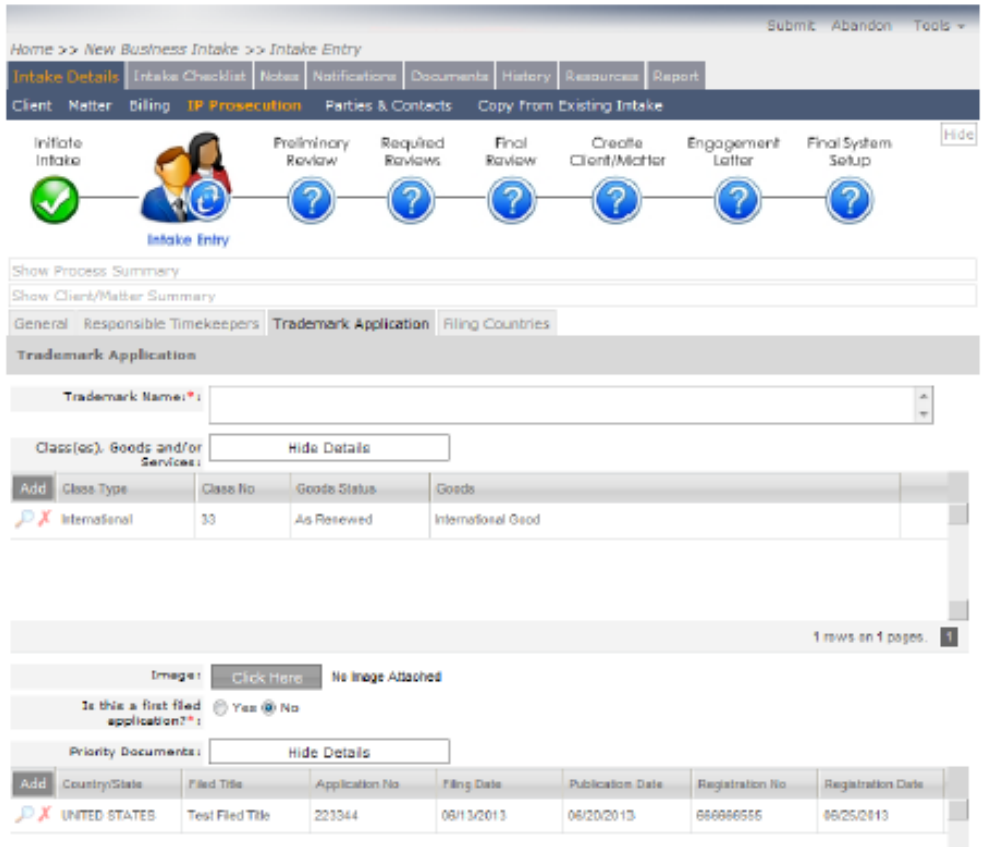
Elegrity is the most experienced law firm BPM & Conflicts of Interest vendor in the market.

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



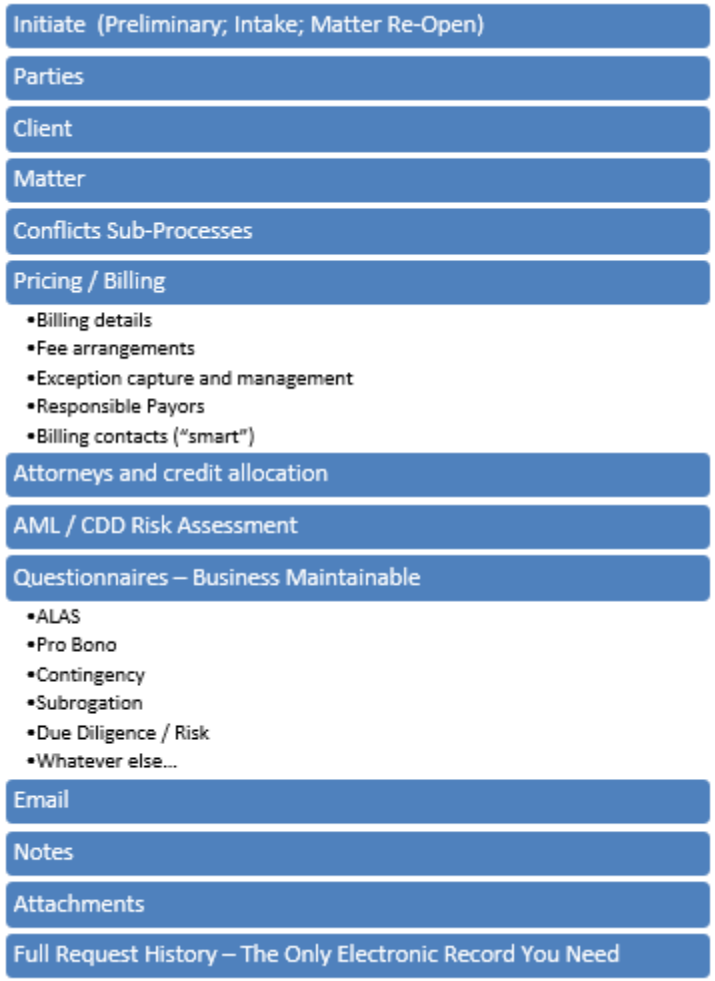
iManage New Business Manager

Benefits

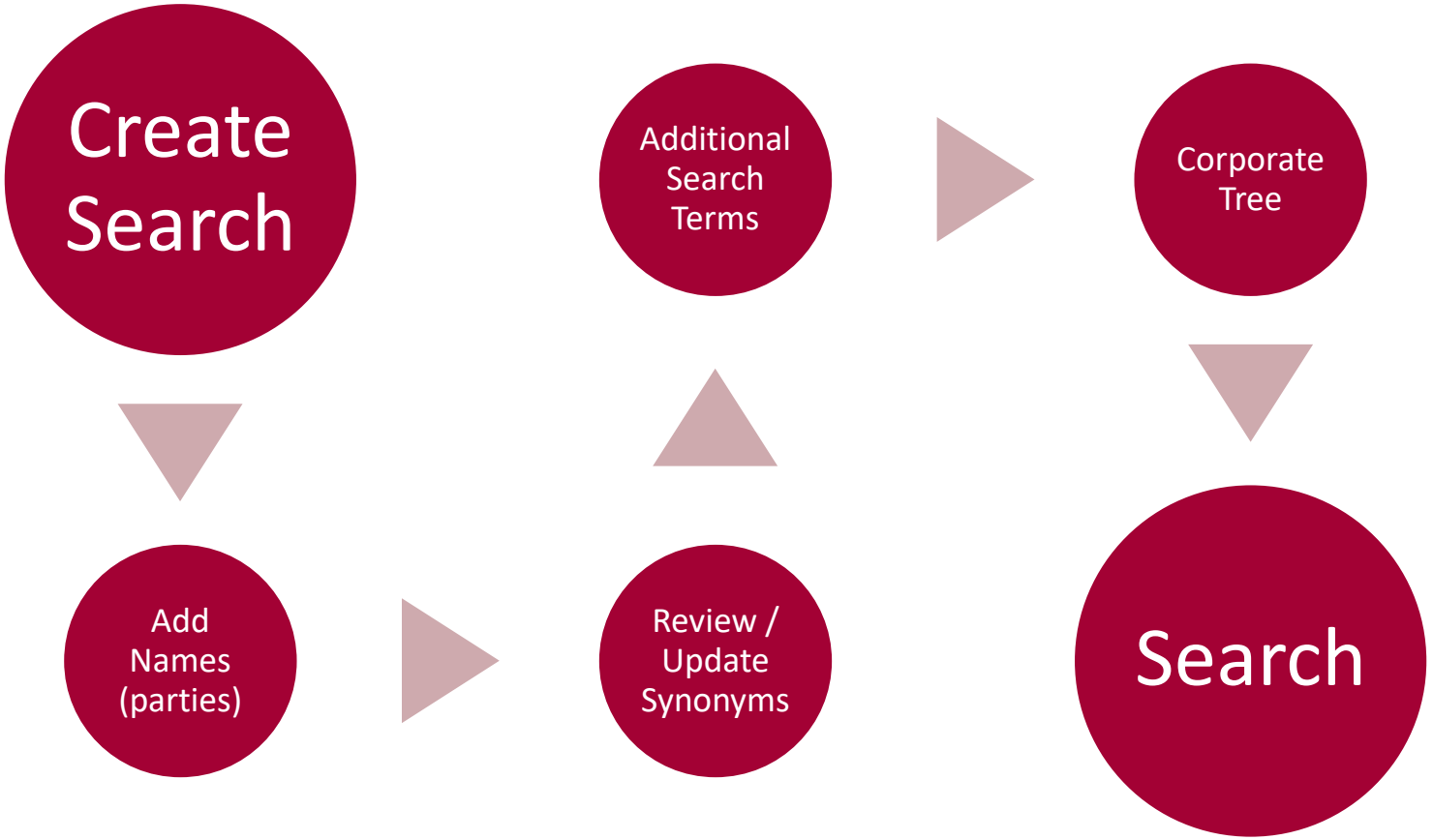
- Electronic record for all intake activities
- Easy to use user interface enhances adoption
- Tailored to your needs: Integrated notifications, business rules
- Automation
- Enhanced visibility into status of all requests

Differentiators

- Hight configurable: re-usable components increases business impact
- Attorneys participate via e mail, with which they are comfortable
- Support real-world sophisticated professes 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



The Conflicts Process



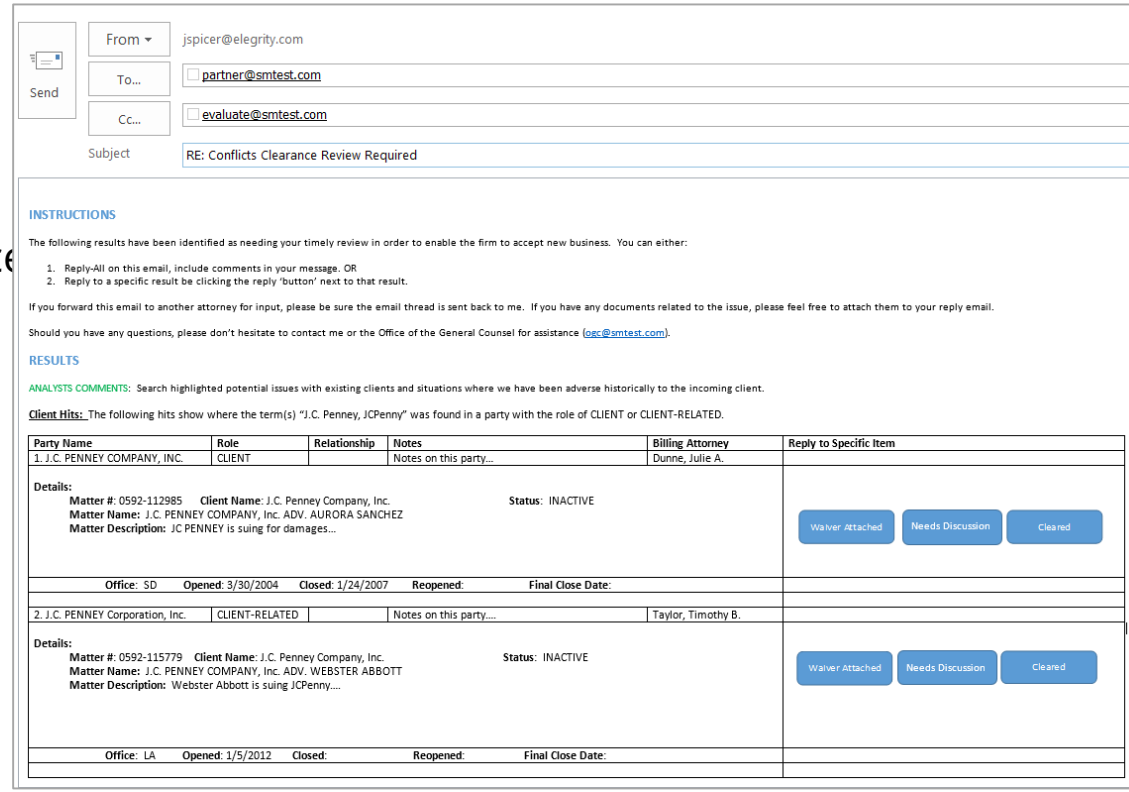
iManage Conflicts Manager

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



Send

From ▾ jspicer@elegrity.com

To... partner@smtest.com

Cc... evaluate@smtest.com

Subject RE: Conflicts Clearance Review Required

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 be 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).

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.	
Details: **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...					Waiver Attached / Needs Discussion / Cleared
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.	
Details: **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....					Waiver Attached / Needs Discussion / Cleared
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 mater lifecycle
- Better analytics, legal project management
- Reduced operating costs (labor)

Areas being evaluated include:

- Create **Elegrity 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 **Elegrity new business** audit trail
- Analyze a matter marked sensitive on intake with **Threat Manager** activity supervision

Have questions?

Jim.Moreo@Cornerstone.IT

646-530-8920