

Interwoven® Solution for Law Firms

Manage the Complete Electronic Matter File for Improved Productivity, Knowledge Management and Client Satisfaction

The Changing Practice of Law

Consolidations, mergers and the need to manage matters and share knowledge across geographically distributed offices have put significant pressures on law firms to efficiently manage critical content. Ever increasing volumes of e-mail, many of which carry critical attachments, make it essential to manage e-mail messages and attachments as part of the matter file. At the same time, law firms are under pressure to provide clients with a unified online user experience and higher levels of service around the globe.

The key business challenge for law firms today is to find an easy, cost-effective way for attorneys to access and share critical information and best practices, and provide partners full visibility into their clients' matters — directly from their familiar desktop environment. They also need tools that enable them to increase revenues by cross selling services and by building high-value practice areas and more profitable client relationships.

Interwoven Solution for the Legal Industry

Interwoven addresses this challenge by providing attorneys with software that works the way they do, not the other way around. At the heart of the solution is Interwoven (formerly iManage) WorkSite. Considered the Gold Standard for document management in the legal industry, WorkSite delivers document management functionality, such as check-in/check-out, version control,

search, and categorization, but the solution doesn't stop there. WorkSite also provides tightly integrated team collaboration, e-mail management, portal access, business process automation and knowledge management applications that enable firms to work more productively, build closer relationships with clients, and share information and best practices globally.

Works the Way that Lawyers do to Foster Productivity and Adoption

WorkSite enables lawyers to create virtual matter files, called WorkSpaces, which are the electronic equivalent of the expandable paper file folder. Workspaces are created as part of the firm's matter opening process. In addition to automatically creating the necessary folders based on the specific matter type, the process can set security for the WorkSpace and folders, assign metadata such as client, matter, jurisdiction, and type of matter to the WorkSpace and each folder, and generate an e-mail address for automatic filing of e-mails into the matter file, ensuring that best practices are followed.

Each matter WorkSpace can contain subfolders for correspondence, pleadings, depositions, and other matter-specific items, enabling attorneys and support staff to file electronic documents the same way that they file paper documents. Files can be stored in, and retrieved from the relevant matter folder from within popular productivity tools, such as Microsoft Office and Outlook, or from a Web browser, eliminating the need for

"Gray, Harris & Robinson attorneys will now have an immediate view of the status of their critical matter anytime, anywhere simply by using a Web browser. This gives our firm an edge in a fiercely competitive legal marketplace."

—Bryd F. Marshall, Jr., managing partner, Gray, Harris & Robinson

users to leave their familiar working environment. Providing consistent access from e-mail, desktop applications and a Web browser ensures that critical content is captured and made available to whoever needs it anywhere and any time, and, unlike some other document management solutions, each WorkSpace can be accessed from both the desktop and browser-based user interfaces, without the need to maintain and synchronize multiple databases.

WorkSite 8, the newest release, streamlines document filing by virtually eliminating the need to manually complete the document profile form. Any item being stored in WorkSite, whether a document, e-mail, scanned image, or audio file, will inherit the security and metadata, such as client and matter number, matter name, and more, from the folder in which it is being filed. The result is more accurate categorization and search results, and happier users.

Because attorneys typically work on several matters at the same time, WorkSite provides powerful tools to help organize matters. Matter-centric navigation enables users to easily move, copy, or create shortcuts to documents, folders and WorkSpaces. WorkSpaces can be accessed directly from the desktop, eliminating the need to drill down through database structures. Documents that are misfiled can be re-filed, quickly and easily, by dragging and dropping them from one folder to another. When a document is re-filed, the profile information is automatically updated to ensure accurate search results.

Each user's current matters are organized in a single "My Matters" list. New matters can be added to this list automatically during matter opening, or can be manually added at a later time. An associate or a secretary supporting an attorney may subscribe to a specific attorney's My Matters list, providing the ability to share the matter file among a team, regardless of physical location.

Robust search capability allows attorneys to find critical content regardless of whether it is in an e-mail, e-mail attachment, scanned document, PDF, spreadsheet or presentation. Items filed in WorkSite are automatically indexed for full-text searching. Searches can also be performed on the metadata in the document profile, and within a specific matter or folder.

In short, WorkSite delivers the industry's first and only effective approach to managing the complete matter file in an electronic form that can be shared across offices and with clients. We call it Matter Centric Collaboration. You'll call it — amazing.

Achieve Geographic Transparency

In a distributed environment, WorkSite Server with Caching enables firms to manage content in a centralized location for business continuity and knowledge sharing, yet still provide rapid access to content from remote locations, even in regions with poor or intermittent network connections. The result? LAN-like performance from anywhere, at any time.

Tame the E-mail Tiger

The WorkSite Communication Server brings a new level of e-mail management to law firms, enabling them for the first time to implement policies that capture all relevant e-mails and make them a part of the electronic matter file. A unique e-mail address can be created for each matter WorkSpace, enabling users to forward e-mail directly to the folder, or to cc the folder on outbound e-mail messages. Replies that are sent using the "reply all" option will automatically be filed into the appropriate matter workspace. Messages can also be dragged directly from the e-mail inbox and dropped into a matter folder. Sophisticated duplicate detection eliminates redundancy.

Effective Matter Centric Collaboration

WorkSite's collaborative features help manage critical dates and resolve issues in a centralized location, enabling distributed project teams of lawyers, secretaries and paralegals to securely share client case files, memorandums, attorneys' notes, correspondence, tasks and events. They can also discuss ongoing issues related to each matter — via the firm's Intranet, Extranet or the Internet, using a standard Web browser, eliminating the need to navigate long, confusing e-mail threads.

A web-based portal enables time and billing, contact information and other external data — even real time news feeds — to be integrated into a single view by matter, client or any other relevant data, bringing new insight and effectiveness to how the firm operates.

Build Virtual Practice Areas and Communities to Leverage Organization Knowledge

Law firms need solutions that scale beyond document management and enable them to reach new levels of productivity and customer service. In addition to matter WorkSpaces, the Interwoven solution for law firms enables lawyers to create practice WorkSpaces where they can securely review, share and discuss issues affecting their practice with attorneys in different offices. Communities identify interesting events, such as seminars, relating to specific practice areas. Organizations become more "intelligent" by delivering knowledge and expertise to the entire enterprise on demand.

Improved Customer Service Means Increased Revenue Opportunities

Addition of the WorkPortal application enables law firms to extend each matter centric WorkSpace to display real time information from external sources, including news feeds, time and billing information and contacts. Integrations exist with most standard systems used in law firms including Elite™, CMS Open™ and Interaction™ and new integrations can be developed quickly and easily via the WorkSite SDK. Both clients and the law firm benefit from directly accessing a unified view of each client's matters, facilitating better, faster and more accurate client service — while building client loyalty. And, unlike stand-alone portals, WorkPortal enables authorized users to directly check documents in and out and perform all WorkSite document management functions from this portal view.

By giving both lawyers and clients a single point of access and a secure, personalized and integrated view across the full context of their matters, the Interwoven solution enables law firms to cross sell their services and increase revenues while building stronger, more profitable client relationships. By tapping into the collective expertise of their legal resources, law firms provide a broader range of innovative services to their customers, increasing revenue opportunities and gaining competitive advantage.

"We've had an Intranet for four years and, since its inception, have used it to leverage knowledge throughout the firm. The firm has also had document management since the early 80's. The WorkSite is a logical extension and marriage of both of those functions."

— Donald Sternfeld, CIO, Ropes & Gray

A Complete Solution that Scales to Meet Your Growing Needs

WorkSite's modular product design allows law firms to flexibly configure and deploy a solution that is tailored to their unique needs. They implement only what they need today, but can easily expand to support future growth. Exceptionally easy to use, WorkSite can be rapidly deployed across organizations within weeks. The result? Users become immediately productive with minimal training, resulting in a lower total cost of ownership and rapid return on investment.

A True Industry Leader

WorkSite is used today by more AmLaw 100 firms and more top 200 UK firms than any other system of its kind, and, to date, more than 290 law firms have switched to WorkSite from other document management systems. Switching to Interwoven WorkSite from competing systems is easier, more cost effective and less risky than you may think. To find out why, and how, visit our "Switch" site at switch.interwoven.com

About Interwoven

Interwoven, Inc. is the world's next-generation enterprise content management (ECM) company. Interwoven's patented, award-winning ECM platform integrates the six pillars of content management: collaboration, e-mail management, document management, Web content management, digital asset management, and records management. Allied with the leading enterprise application providers, the Interwoven ECM platform provides complete, end-to-end, content management for more than 2,800 organizations worldwide including Air France, Citibank, Ford, General Electric, Jones Day, Pfizer, Procter & Gamble, and Yamaha.

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