



iManage WorkSite



The leading legal information management solution with robust analytics, automated classification and unmatched scalability, connectivity, and security.

Information is the lifeblood of law firms so effective management of this information is essential. Legal professionals worldwide face an ever-growing information explosion that presents them with multiple content and risk management challenges. Legacy technology that relies on inefficient manual processes cannot scale to meet the needs of today's legal professionals. Furthermore, this technology fails to provide clients with the assurance that the information they have entrusted to the firm is securely governed in accordance with the client's retention policies.

Legacy technology cannot offer advanced search and analysis, but rather relies on techniques such as keyword and Boolean searches which have well documented ineffectiveness. Research shows that keyword searches will identify only 22% of relevant data, fail to find or identify documents with slang, abbreviations, or misspelled words, and return an inordinate amount of non-relevant data that must be reviewed. When combined with the demands of a globally distributed workforce, these challenges underscore the need for an advanced, robust legal information management solution. To meet these needs and mitigate risk, legal professionals must look for solutions that better govern information assets and drive the next quantum leap in productivity while mitigating risk and reducing costs. Used by more than 1,400 law firms, legal departments and professional services firms worldwide, Autonomy iManage WorkSite is the leading legal information management solution. Powered by Autonomy's Intelligent Data Operation Layer (IDOL), WorkSite elegantly streamlines the interactions between law firms and their clients as well as providing firms with the most advanced approach to legal information management. Autonomy iManage offers the only seamless and comprehensive set of Information Risk Management and eDiscovery solutions for all documents, including voice and video, built on a single platform.

- Powerful IDOL Automation & Search
- Unparalleled Information Access
- Robust Document Management
- Powerful Offline Capabilities
- Seamless Connectivity with End-to-End eDiscovery
- Unmatched Scalability and Security

"Phoenix recommended the Autonomy iManage product to meet our document management needs, and have provided excellent support throughout our implementation. The solution has allowed us to gain more control of our content and tightly integrate with our Practice Management system to provide a job-centric electronic filing system."

Simon Greenhalgh, Lubbock Fine, IT Director



ROBUST LEGAL DOCUMENT MANAGEMENT

Autonomy iManage WorkSite manages firm, matter, client and project content, and enables organisations to implement working practices consistent with their policies and vision while promoting collaboration across distributed teams. Through the IDOL platform, content in WorkSite is available from any device or access point, including desktops and laptops, the internet, mobile devices, and client facing extranets.

WorkSite provides essential document management features, tracks document versions from initial draft to final form, maintains audit trails and logs, and manages email and other electronically stored information (ESI). Electronic files managed by WorkSite are accessed through familiar solution interfaces, such as Microsoft® Office and Microsoft Outlook, or even from a Web browser or Blackberry®. The check-in and check-out functionality ensures version control and helps to maintain a complete audit trail.

WorkSite assures user adoption through an advanced, easy to use filing system, overcoming the largest barrier to effective information management. Electronic files are organized into matter files called workspaces, the electronic equivalent of an expandable file folder. Automated classification obviates the need for users to fill out tedious profile forms and classify each document. The workspace can be modeled closely to the physical document storage paradigm so that users can easily understand the organisational structure. By virtually eliminating the manual processes that have created user resistance and hindered organisation-wide adoption with legacy systems, WorkSite provides a quantum leap forward in usability, adoption, and automation.

WorkSite's workspaces maintain metadata, provide for user-configurable subfolders for correspondence, pleadings, depositions, and other matter-specific items, and include security controls to maintain ethical walls. WorkSite manages all electronic and paper documents, including email, voice, video, and scanned images, with the ability to analyze and view more than 1,000 file types through the advanced functionality of IDOL. WorkSite streamlines document filing, eliminating the need for manually created document profile forms. In addition, items stored in WorkSite automatically inherit security and metadata (client number, matter number, document class, etc.) from the folder where they are filed, resulting in more accurate categorisation and search results, and more productive attorneys and staff.

LEVERAGING ADVANCED SEARCH TECHNOLOGY OF IDOL

Autonomy is a leading provider of Meaning Based Computing (MBC) solutions, which go far beyond traditional keyword and date-range capabilities to provide a consistent, efficient, and legally defensible process for information management. IDOL harnesses the complete richness of human information by extracting meaning from the mass of unstructured information, which analysts estimate constitutes over 80% of all enterprise data, and includes email, blogs, IMs, audio and videos.

Like the other products in the Autonomy Proactive Information Risk Management (IRM) platform, iManage WorkSite utilises the intelligence of IDOL and its full array of information processing capabilities, including metadata searching, file type analysis, date ranges, keyword searching, and concept analysis. Users can find any matter or document across the firm in seconds using convenient and powerful search capabilities. IDOL search allows users to easily find and leverage firm expertise and matter knowledge as well as quickly respond to client needs.

IDOL enables WorkSite to leverage managed content and locate relevant information instantly, providing fast and intuitive access to content through either Express Search or WorkSite Miner. Express Search provides easy access to all WorkSite content with a fast, natural-language, stand-alone, secure search tool. WorkSite Miner enables users to explore groups of content returned from a query to better understand email threads, historical decision processes, or other key categorizations. These can be dynamically shifted to quickly cull through large numbers of documents.

The IDOL platform is massively scalable and highly secure, with the largest on-site installation exceeding 10 billion documents. Additionally, IDOL is language independent and can search virtually all of the data across the enterprise, supporting over a thousand ESI formats, giving WorkSite an unprecedented ability to find, classify, and manage virtually any type of information found in the enterprise.



EMAIL MANAGEMENT

In addition to robust document management, WorkSite's email management tools give the firm the ability to implement policies that capture all relevant email as part of the electronic matter file. With the ability to manage both Microsoft Exchange and Lotus Notes, users can file and access matter-related correspondence directly from the inbox. The automated tagging function enables related email to be filed to the same WorkSite location without manual effort, and IDOL's robust analytics learns from users' past filing actions to suggest filing locations and decrease errors.

EXTRANETS

WorkSite extranets enable information about the matter to be securely communicated with the client, co-counsel, expert witnesses, and other parties through a web browser. This helps to improve client service and increase repetitive engagements, while providing the client with 24/7 access to content. WorkSite segregates external users from internal users to reduce the chance of accidentally giving access to a sensitive or privileged document. Internal WorkSite users simply publish a document to an extranet from a Worksite desktop application.

INTUITIVE INTERFACES

iManage WorkSite is available with two full-featured clients – **DeskSite** and **FileSite** – which provide tight, out-of-the-box integration with popular Windows applications. The combination of a familiar user interface and powerful document, email, and knowledge management functionality assures rapid adoption and immediate productivity gains with minimal training.

WorkSite OffSite is designed for mobile users that are often not connected to a network, and provides the same familiar environment as FileSite and DeskSite. OffSite automatically synchronizes new and updated documents with WorkSite when users reconnect to the network.

WorkSite Mobility allows users to browse and search files from either a Blackberry device, using an integrated WorkSite client, or other platforms, such as Windows® Mobile, iPhone™, or Palm™, using a mobile browser.

WorkSite Web overcomes the challenges of securely sharing business content with staff, clients, and partner organizations. The scalable solution removes the need to replicate content for publishing and significantly enhances access to critical business information. This is accomplished through secure and configurable web access to internal and shared business content from a unified web component architecture.

WorkSite for SharePoint adds the security, scalability, and lifecycle management of WorkSite to SharePoint. Using a single user interface, this solution enables proper storage and retention management through seamless integration to an existing SharePoint deployment.

POWERFUL ORGANISATION TOOLS

WorkSite provides powerful tools to keep an attorney's ever-increasing matter workload organised, making it easy to move, copy, or create shortcuts to documents, email, and folders. Current matters appear in a single "My Matters" list which can be updated automatically to include an attorney's new work during the matter opening process. The easy access to workspaces avoids drilling through deep hierarchical folder structures that legacy solutions require.

ROBUST RELIABLE PLATFORM THAT ADAPTS TO YOUR BUSINESS

Performance and reliability are critical for document management, and IDOL provides WorkSite with the most scalable and resilient platform. Servers can be clustered and load balanced to ensure optimal performance, fault tolerance, high availability and business continuity. Information is easily and seamlessly shared across geographically distributed sites, and the easy-to-manage and flexible architecture allows WorkSite to be deployed in organisations ranging from fewer than ten people to those with thousands of people and tens of millions of documents distributed worldwide.



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Phoenix provides best of breed software and services to organisations across the legal, accounting, property and corporate markets. Our solutions are respected in these industries for their unmatched ability to meet critical business objectives.

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