

**Maximise your Microsoft®
investment to provide
Legal Matter Management**

custodian 
for legal

intuitive MATTER MANAGEMENT with SharePoint

Maximise your Microsoft® investment to provide Legal Matter Management

custodian for legal extends the powerful document management and collaboration capabilities of Microsoft Office 365™ / SharePoint® to provide a matter-centric collaboration and document management solution for legal matter management.

custodian utilizes the powerful and familiar interface of Microsoft Outlook® and other Office® applications to ensure the highest level of user-adoption and minimize the need for migrating complex and costly legacy systems.

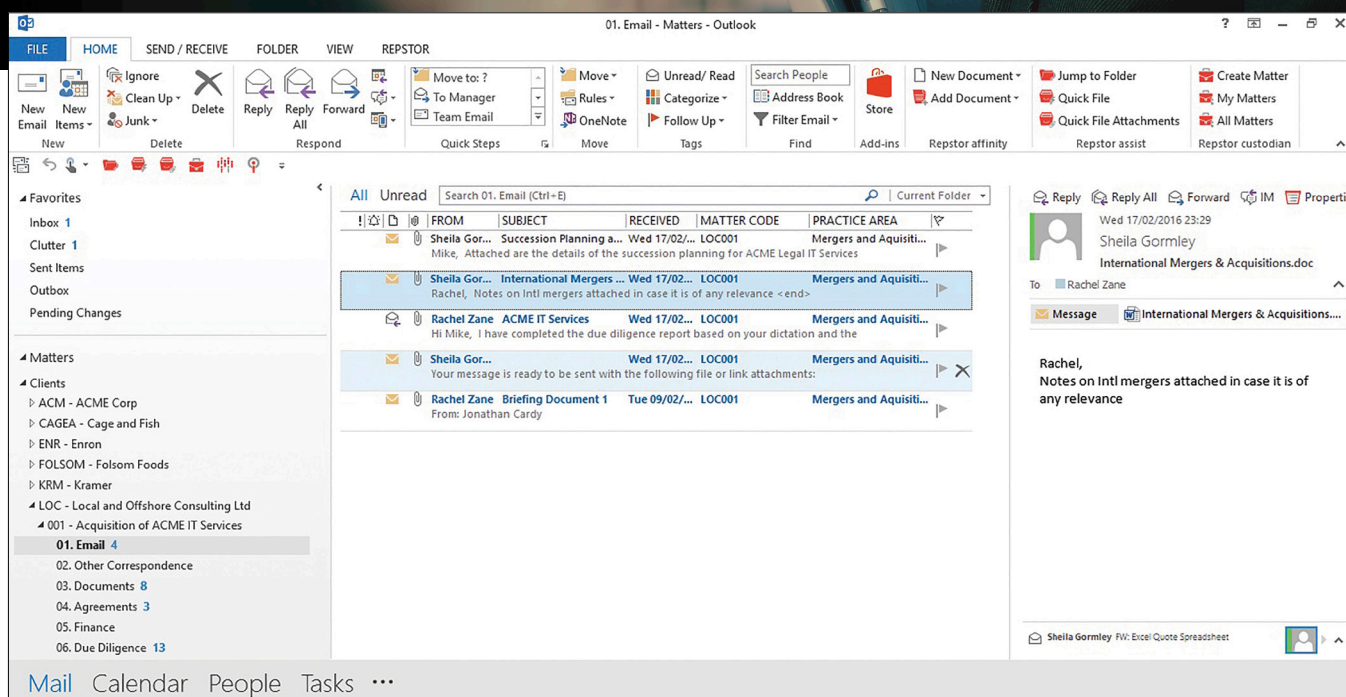
The legal market is more competitive and challenging than ever. It is increasingly more important that firms are seen to deliver a great service to clients. Legal professionals need to have the flexibility to work on matters at times that are convenient to them – on and offline, in the office or remotely. Often it is necessary to collaborate with geographically diverse colleagues or clients, while keeping content that is from multiple systems and sources secure and compliant. Email is still the primary communication tool and legal professionals demand an intuitive solution to manage emails as part of a matter. In a competitive landscape law firms also need to provide more value at a reduced cost. Using technology is one way to enable legal professionals to be more productive, helping firms to provide a more efficient service and be more competitive.

Repstor custodian extends Office 365/SharePoint, to deliver a complete matter management solution by providing matter-centric collaboration, document and email management capabilities directly within Office 365/SharePoint. Most importantly, this capability is provided completely seamlessly within Outlook. This deep integration means users can work on matters directly from Outlook, increasing productivity while maintaining compliance and security. Users can also work on or offline and can access content from the many different sources required in addition to the matter management system.

Repstor custodian also allows firms to ensure that they maximize investments in Microsoft technologies, and can take advantage of the broader Microsoft platform including analytics, compliance, Data Loss Prevention (DLP) and so on. Additionally, custodian has been developed to integrate seamlessly with other professional applications such as Practice Management Systems (PMS), on-boarding applications, time and billing applications, workflow management applications etc.



intuitive MATTER MANAGEMENT with SharePoint



► Figure 1 - Matter Workspace and Content in Outlook

Key Benefits

Maximising your Microsoft Investment

Firms can quickly and economically deploy matter management solutions without the need for custom development.

- Works with SharePoint on-premise, Office 365 Cloud or Hybrid – there is no customization of the Office 365/SharePoint systems.
- Seamlessly integrates with Microsoft Office Applications, Windows® Explorer and Outlook.
- Extends the powerful document management capabilities of Microsoft Office 365 and SharePoint to provide matter-centric collaboration, document and email management.
- Matters can be created through custodian utilizing SharePoint to provision matter workspace structures, metadata, permissions and precedent documents automatically.
- Other Microsoft platform capabilities can be exploited, for example analytics to generate management reporting to show key metrics and develop an in-depth understanding of performance, costs and other facets, as well as compliance features, DLP and other key capabilities that are required to meet the needs of the modern law firm.
- Minimizes the need for change management as matters are surfaced through the familiar Outlook user experience and other Office applications.

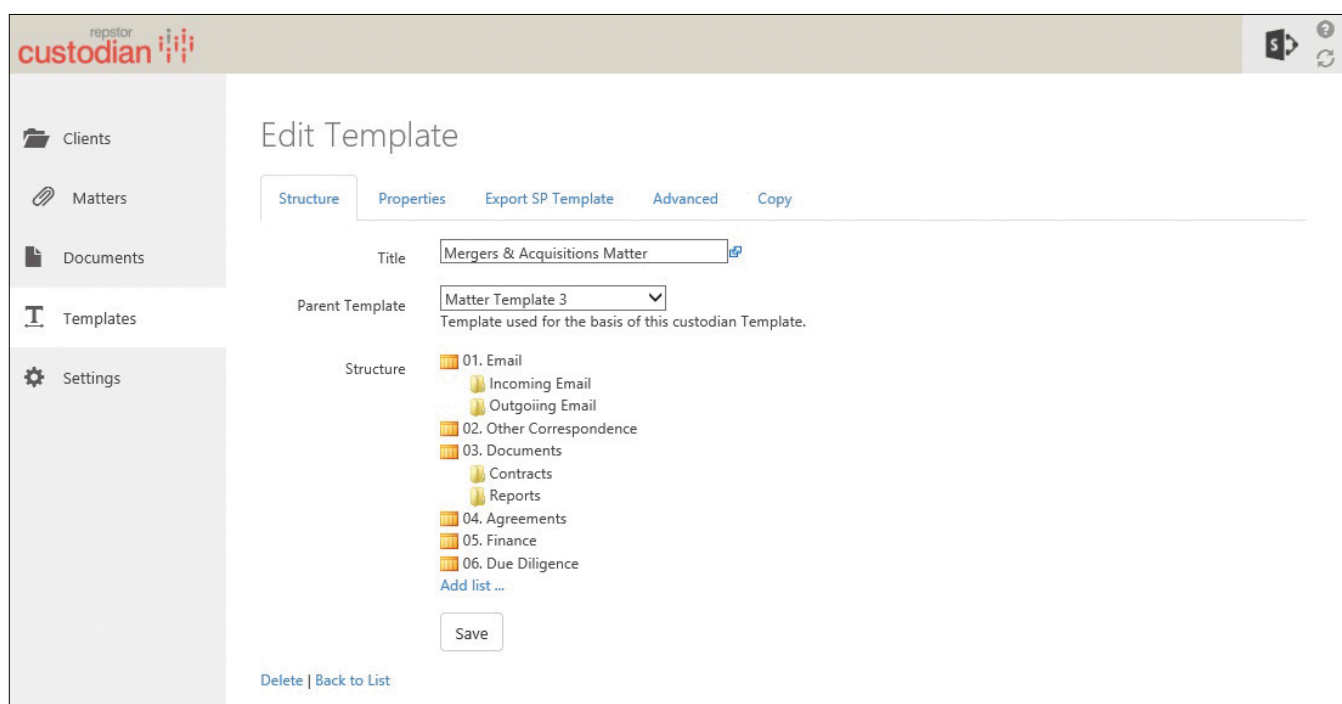
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Key Benefits

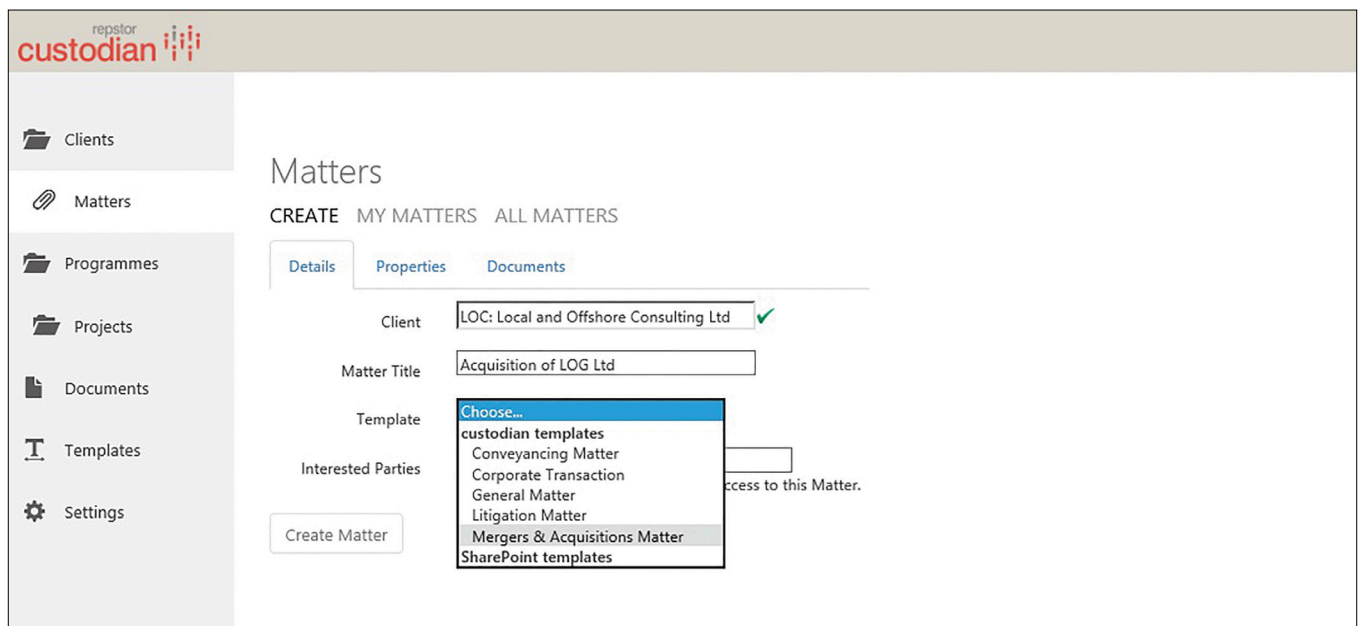
Powerful and Rich Matter Management Functionality

Extending the document management and collaboration capabilities of Microsoft Office 365 and SharePoint to provide a user friendly matter management solution.

- Provides a highly performant, intuitive user experience for your legal professionals.
- Rich Matter Templating functionality to support different matter types.
- Apply structure, property sets, security, document types and associated processes to matters.
- Automatically ‘push out’ matters to relevant parties and make them accessible immediately through Outlook.
- Secure offline access to matter content.
- Create different types of matters based on region, department, practice areas, project type, sensitivity etc.
- Apply security consistently across matters.
- Inherited metadata, security and retention policies means sensitive data is protected.
- Integrate with Practice Management Systems and other back end systems to provide PMS and other specific matter related information within Outlook.



► Figure 2 - Configure Matter Workspaces



► Figure 3 - Create Matter from Template

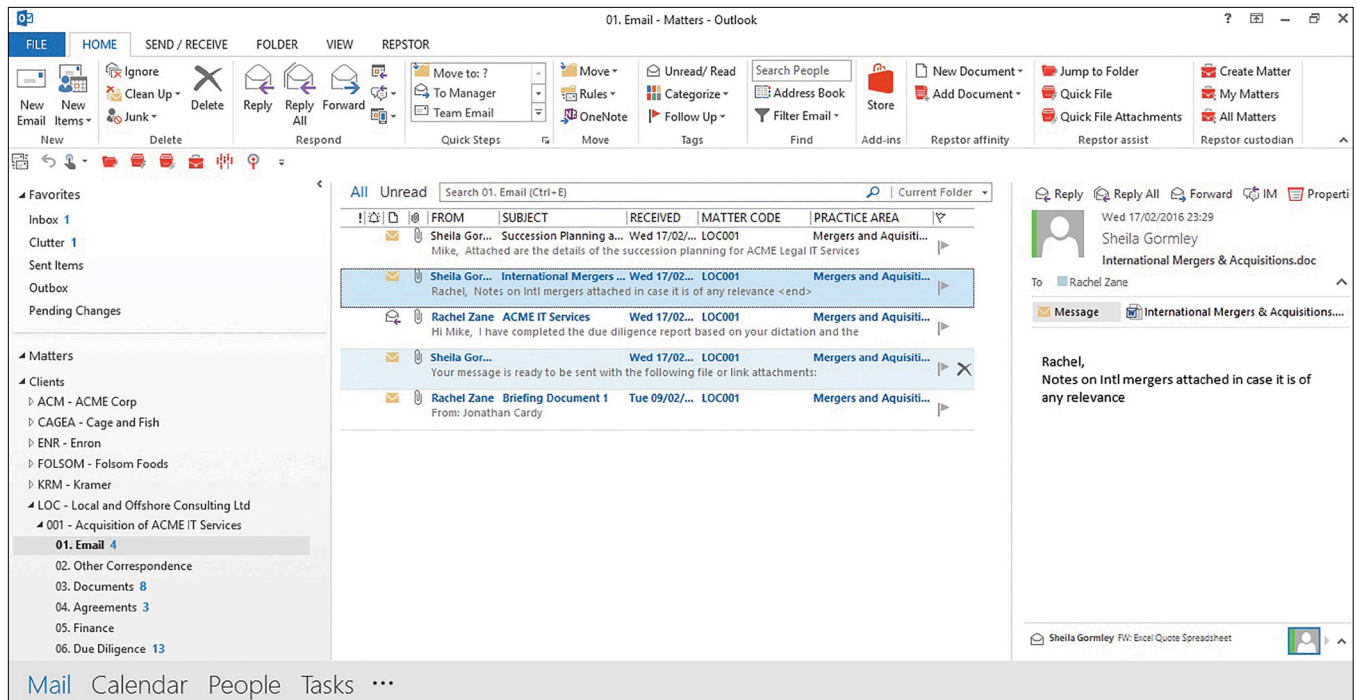
Secure Email and Document Management

Email is the most utilized collaboration tool for legal professionals. custodian enables users to manage matter related emails and documents together, avoiding the issue of isolated email content and applying consistent structures for managing matter based content.

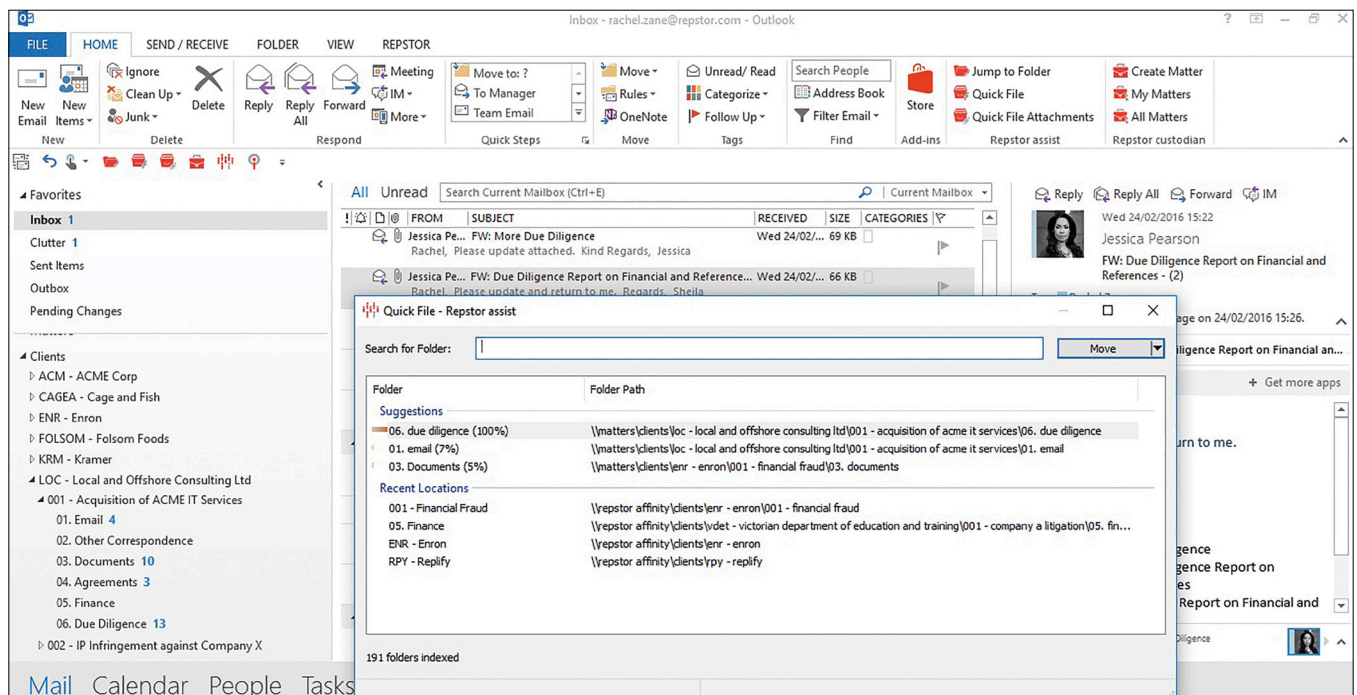
- Seamless and high performance Outlook integration to your matter management solution.
- Rich matter-centric document management functionality accessible through Outlook or SharePoint.
- One familiar search interface across all content from within Outlook (online and offline).
- Ensures that the correct metadata, security and other attributes are applied consistently.
- Provisioning of content to Outlook in a consistent structure to make it easy for users to find and file content.
- Full version management with comparison between versions.
- Assisted filing to suggest most appropriate filing location based on the content and context of the email/document being filed.
- Improves accuracy of filing for compliance and leverages Microsoft SharePoint compliance features (Records Management/Legal Discovery/Digital Rights Management and others).

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Key Benefits



► Figure 4 - Matter Workspace and Content in Outlook



► Figure 5 - Intelligent Filing



Multi-Repository Support

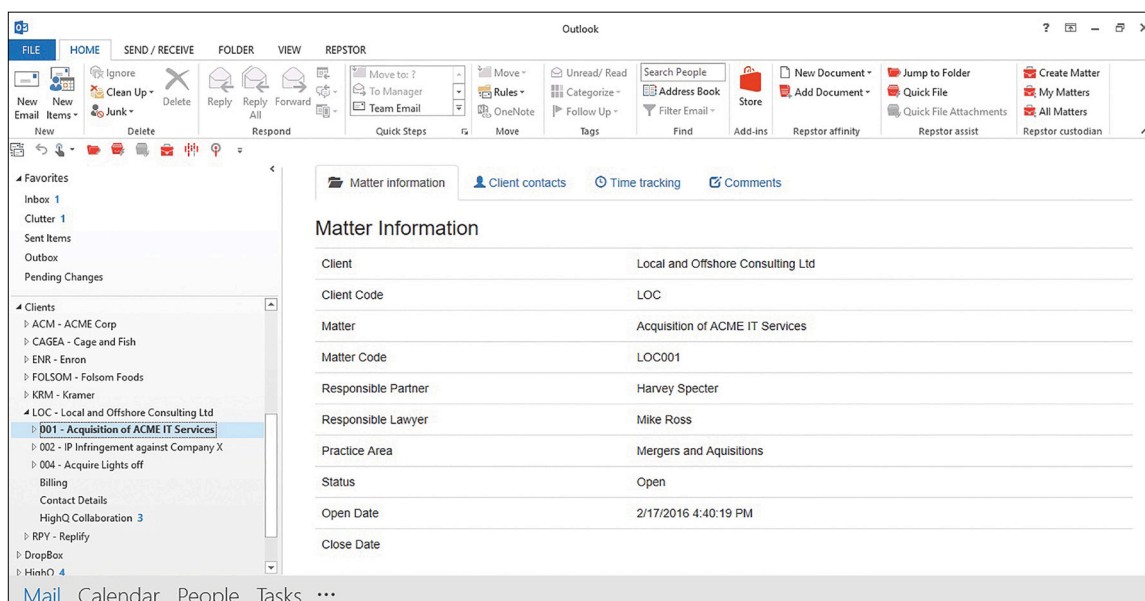
custodian for legal offers seamless integration to other commonly used repositories within the industry, known as multi-repository support.

- Users can access internal content stored in current and legacy systems while also accessing external collaborative environments such as HighQ®, Box® and Dropbox®.
- Secure collaboration with external parties.
- Users have a single view of their matters.
- A single user experience with access to all relevant content through Outlook.
- From Outlook users can manage, file and access their email, matters and documents in SharePoint, HighQ collaborate, File Shares, Box, Dropbox, HP Records Manager® and other content repositories.

Easy Integration to Professional Applications

custodian for legal has been developed to integrate seamlessly with various other professional applications, avoiding the need for users to switch between applications. These applications include:

- Practice Management Systems (PMS)
- On-boarding applications
- Time and billing applications
- Document and Records Management Repositories
- Project Management applications
- Workflow Management
- Mobile Content Management



► Figure 6 - Integrate with PMS to see additional Matter related information

Product Features

Exploits Office 365 or SharePoint On-Premise

- ✓ Developed with the SharePoint Add-In model to deliver functionality without customization
- ✓ Utilizes Office 365 or SharePoint on-premise to provide the content repository and the Microsoft Office clients to make matter management a familiar experience for users
- ✓ Uses Microsoft SharePoint version management and other document management features including content types, metadata, managed metadata and many others
- ✓ Integration with back end systems through a modern API
- ✓ Outlook Client Extensibility available to provide for additional configuration/customization

Maintains the Outlook way of working

- ✓ Users access their content directly in Outlook
- ✓ Content is automatically made available in Outlook for users with appropriate permissions
- ✓ Full offline working is provided as default
- ✓ High System Performance

Matter IDs, Naming and Filing Structures

- ✓ Matters are deployed in a consistent manner with automatically generated structures based on configuration
- ✓ Automated Matter ID generation
- ✓ Flexible configuration and naming of matter structures in Outlook hierarchy

Client Sites

- ✓ The system can be configured to add Client (or other aggregation name) sites so that matters are stored in logical structures

Matter Templates

- ✓ Flexible use of lists (e.g. doc libraries) or sites to meet different matter provisioning needs
- ✓ Administrators can configure specific templates for specific matter, engagement or other types of matter based working
- ✓ Matter structures can be applied to SharePoint Sites or Lists to support specific scenarios
- ✓ Pre-defined content can be added so that as matters are created the relevant pre-requisite documents are included in new matters
- ✓ Full support of rich metadata at a matter or document level
- ✓ Support of SharePoint Templates

- ✓ Provisioning of document templates so that users can create new documents based on the document templates included in the matter template or other general templates, and population with matter properties (e.g. a Matter Reference)
- ✓ New matters can be opened quickly and easily from Outlook or from the Repstor custodian APP

Matter Provisioning

- ✓ Matters can be provisioned:
 - by authorized users or provisioning may be driven by external systems such as PMS or other on-boarding systems
 - based on any number of template matter types defined by the administrator using the custodian APP
 - directly from the Repstor menus within Outlook
- ✓ Includes 'push' of matters to the relevant users' Outlook folders

Matter Selection

- ✓ Users can easily choose which matters they want to be available in Outlook - this is available from the Outlook Menu or SharePoint UI

Security

- ✓ Various security models are available to support different modes of working
- ✓ Individual Matter security can be set/adjusted by authorized users
- ✓ Supports the rich role security provided by SharePoint

Filing for Matter Management

- ✓ Users can quickly and easily file email and other content (including attachments, Office files, email and other content)
 - drag and drop from Outlook (email/attachments/from desktop/other content)
 - Quick File with Repstor assist (fast identification of matter filing locations)
 - add documents of specific content types using Windows Explorer
- ✓ Suggested filing locations are provided to users when filing
- ✓ Rules can be generated against any existing Outlook hierarchy, including existing categorized email and Repstor custodian synchronized content (SharePoint/other ECM systems, File Shares/Microsoft OneDrive®)