

transformdata



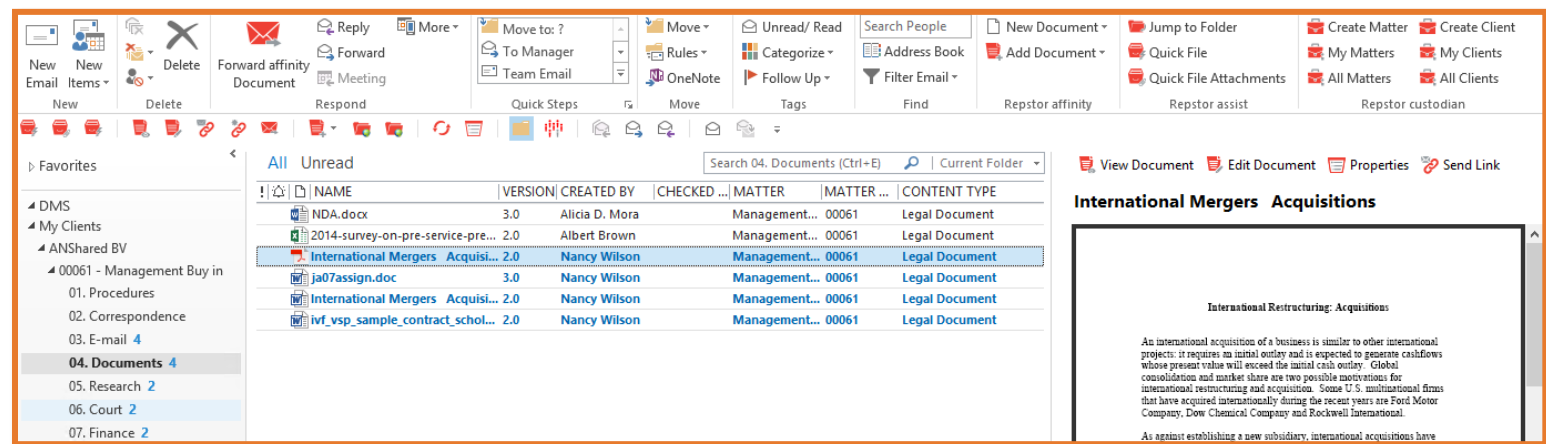
Maximise your Microsoft®  
Investment to provide full  
legal project & matter management

**custodian**   
for legal



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.



► Figure 1 – Matters and content within Outlook

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. E-mail is still the primary communication tool and legal professionals demand an intuitive solution to manage e-mails 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 e-mail 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 maximise 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.



## Maximise your Microsoft investment

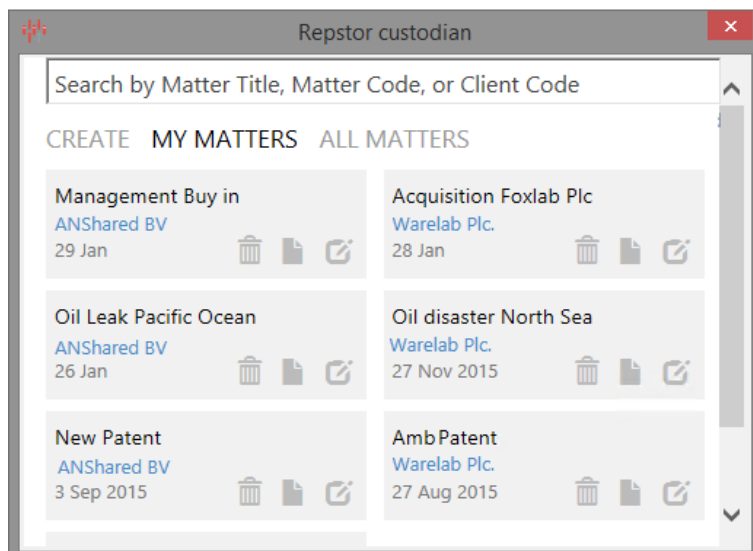
Firms can quickly and economically deploy matter management solutions without the need for custom development.

- ✓ Works with SharePoint on-premise, Office365 Cloud & Hybrid
- ✓ Seamlessly integrates with Outlook, Windows Explorer and other Office applications
- ✓ Extends the capabilities of Office365 and SharePoint to provide full legal project & matter management
- ✓ Automatic creation of matters, meta-data, structures and permissions by custodian provisioning engine.
- ✓ Easy integration with other Microsoft SharePoint and Office365 functions, to include task management and advanced management reports



► Figure 2 – Management Reporting on mobile device

- ✓ Minimize the need for change management as matters are surfaced through the familiar Outlook user interface

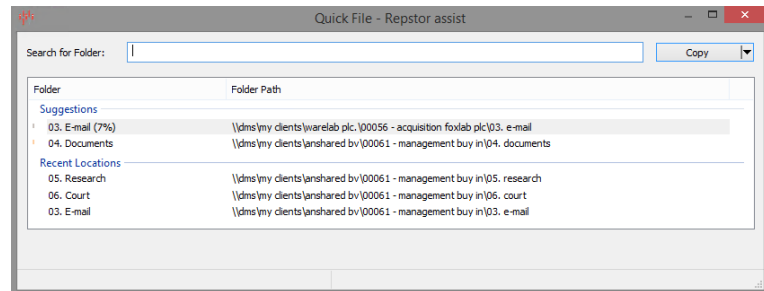


► Figure 3 – Manage My Matters

## Secure document & e-mail management

E-mail is the most utilized collaboration tool for legal professionals. custodian enables users to manage matter related e-mails and documents together, avoiding the issue of isolated e-mail content and applying consistent structures for managing matter based content.

- ✓ High performance Outlook integration
- ✓ Matter-centric document management capabilities
- ✓ One familiar search interface across all content (online and offline)
- ✓ Full version management and version comparison functions
- ✓ Duplicate detection for documents and e-mails
- ✓ Save time, by seeing which e-mails are already filed by your colleagues
- ✓ Suggested filing locations for documents and e-mails, based on content and context of the items being filed.



► Figure 4 – Intelligent e-mail management & suggestive Filing

## Multi repository support

Because no-one has just one e-mail address and because documents are not always stored in one single location, custodian supports multiple repositories and integrates seamlessly with the most common used legal applications:

- ✓ Integrations with deal rooms and collaboration software, all accessible from within the familiar Outlook interface. All available online and offline
- ✓ Supporting virtual matters where content resides in multiple location while it is presented as one matter to the professional
- ✓ Easily drag & drop to copy or move content between repositories without leaving Outlook
- ✓ New item notifications in Outlook to see recent changes across all repositories



## Create context by integrating additional applications

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

- ✓ Practice Management Systems (PMS) integrations to display more detailed matter information
- ✓ CRM Integration to display relevant contact details for the specific matter
- ✓ Time and billing applications
- ✓ Project Management applications
- ✓ Workflow Management
- ✓ Mobile Content Management
- ✓ Newsfeeds (SharePoint)
- ✓ Knowhow Solutions

## Legal Project Management

custodian goes beyond the traditional matter management by leveraging native SharePoint functionalities such as tasks, status reports and notebooks. This allows professionals to keep track of their work and managers to report on matter progress and risks.

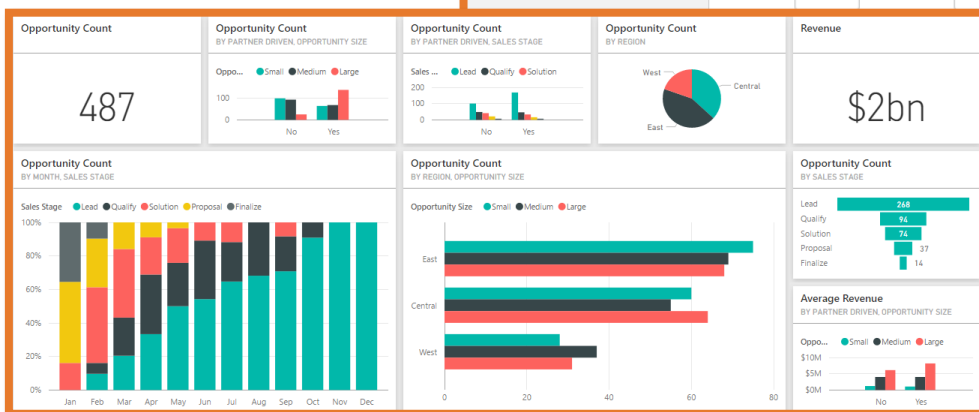
- ✓ Provision repeating tasks such as conflict and money laundering checks as part of the matter
- ✓ Increase compliance
- ✓ Reporting on tasks and on matter statuses
- ✓ Easily hand-over complete matters or individual tasks
- ✓ Optimize collaboration with shared notebooks
- ✓ Save time by sharing notebooks instead of distributing meeting notes

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► Figure 5 – Outlook CRM Data Integration

Amount (h)	Description	Name	Date
2	Conflict Check	Alicia D. Mora	2016-01-29 22:49:47
5	Intake meeting	Nancy Wilson	2016-01-29 22:55:12
1	weekly status meeting	Nancy Wilson	2016-01-29 22:55:59

► Figure 6 – Outlook - Time & Billing Integration



► Figure 7 – Management Report – Matter information