

# Autonomy iManage Solutions for Professional Services Firms

Manage client files effectively for better service and staff productivity

Well-managed information drives professional services excellence

Your organization is growing, and so is the amount of information your professionals work with. To deliver the best possible service to clients while enabling your fee earners to do their best work, you need to solve key information management issues before they put your organization and its productivity at risk.

Professionals in organizations such as law firms, accounting firms, and HR and management consultancies need to be able to find and retrieve client information of all kinds quickly and intuitively, from e-mails to presentations to contracts, and share it easily across and beyond the firm. As mergers and acquisitions leave companies more distributed than before, professionals in offices around the globe need to collaborate effectively around content as if they were in the same room. Mobile workers traveling to other offices and customer sites need secure, easy access to complete firm and client information from any location, at any time. Meanwhile, new regulatory mandates may be impacting your firm and making it essential to adopt and consistently apply records management policies firm-wide, across multiple content systems, without distracting workers from the business at hand.

These challenges become exponentially more difficult to overcome as the firm becomes larger—and can even stand in the way of the personnel recruitment and retention needed to support a growing business. Today's best professional services talent will settle for nothing less than the most modern systems, understanding the critical role these technologies can play in bringing them up to speed quickly and supporting their best work.

iManage Solutions for Professional Services Firms provide a complete platform for growth, efficiency, and risk management

Interwoven helps professional services firms grow financially, reduce risk, and improve efficiency by providing the tools to organize and manage all client-related documents. Professionals can intuitively store and retrieve any number of documents, e-mails, and papers through a single virtual folder that can be accessed securely from anywhere, at anytime. Geographically distributed groups can easily collaborate around complete engagement content, including e-mails sent and received by any team member, and mobile workers enjoy uninterrupted access to the information they need—even without opening their laptop. And firms gain an easy, cost-effective way to track, audit, secure, share, and properly dispose of data through the consistent, automated application of its retention policies—without the risk of human error posed by manual methods.

## Highlights

Solutions for Professional Services Firms

- Share information securely throughout the business and with clients
- Boost worker efficiency and mobile productivity
- Manage all client-related information, including e-mails, in one place
- Minimize risk and support

*“I can see that we will generate a significant payback. Missing files were a major problem in getting things done. WorkSite has made that problem go away entirely.”*

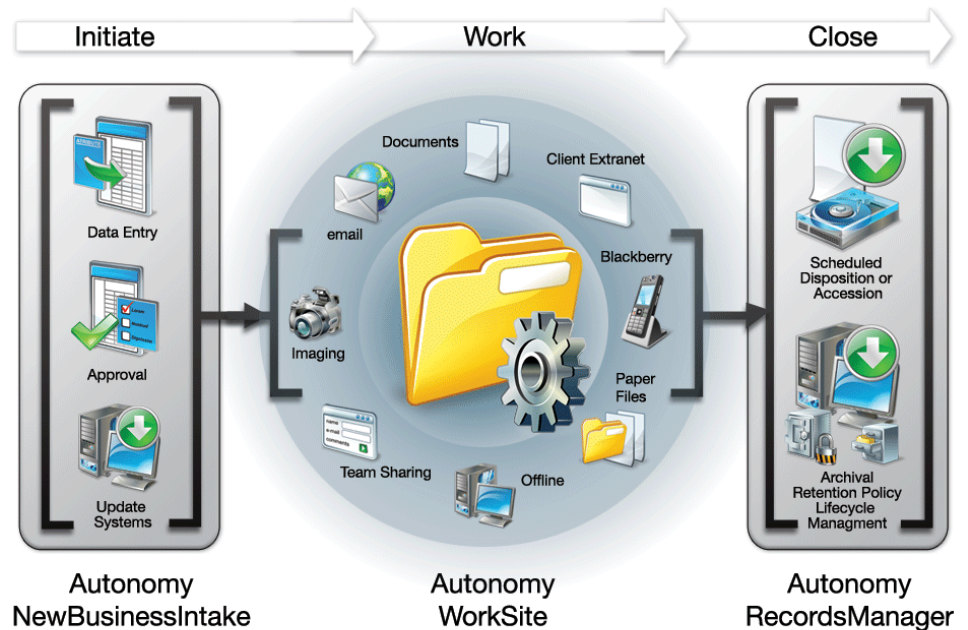
— Peter McLean, managing partner, Robert J Hart & Company, Chartered Accountant



## Manage and access client files in a familiar way

With Interwoven, professionals manage client files just as if they were paper, with engagement-related information of all forms—including PDFs, e-mails, scanned images, audio files, and other items—stored and managed together in an easily accessible and shareable electronic file.

- *Users can access, retrieve, and save content directly from within Microsoft Office and Outlook, a Web browser, and many other applications as easily as saving to a drive.*
- *Electronic client file navigation makes it easy to move, copy, or create shortcuts to documents, folders, and workspaces.*
- *Personalized lists of client files and robust search capabilities provide quick access to current and past engagement content.*
- *Content saved or dragged and dropped to a client file automatically inherits security, metadata, and policies for records classification and retention with no manual profiling necessary.*



## Email management eliminates overload and unlocks valuable information

Interwoven e-mail management enables firms to make e-mail part of a unified client file, reduces the burden on e-mail servers, and transforms e-mail into a knowledge asset that can be shared across all offices easily and securely.

- *Users simply drag e-mail messages from the Notes or Outlook inbox into the appropriate client folder; security and metadata settings are inherited automatically.*
- *E-mail addressable folders let users cc or forward messages directly to the relevant client file.*
- *Professionals can view everything in their current client files from within Outlook or Notes, in the same way they view e-mails in their inbox.*
- *E-mail attachments can be filed as part of the original message or as separate files with their own profiles and associated metadata.*
- *Intelligent duplicate detection eliminates redundancies and reduces storage requirements.*

Anywhere, anytime access to information enables uninterrupted productivity for mobile workers. Even while in transit or working remotely, professionals can enjoy uninterrupted access to client content and Interwoven functionality.

- *Unique offline capabilities let mobile workers save and work with entire client files on their laptops and continue to browse the file hierarchy, view and modify documents, create new ones, and search repository content just as they would in the office. New and updated files are automatically synchronized on reconnection to the network.*
- *Access to client information through mobile devices such as the BlackBerry ensures that professionals can immediately respond to client inquiries, even while traveling. Professionals can view client files, send and fax information in client files from mobile devices, and even file e-mail—all without turning on a PC. Leave your laptop at work!*

## Secure client access enhances service and efficiency

Interwoven takes customer satisfaction to a higher level with a secure extranet that gives customers around-the-clock access to their files.

- *Firms can easily provide self-service, 24 x 7 access to complete engagement information and updates.*
- *By enabling clients to retrieve and submit content on their own, firms can free their professionals' time for higher value tasks, improving overall productivity.*
- *Automatic encryption for content transmitted across the Internet supports compliance with privacy laws requiring the protection of client information.*

## Autonomy iManage Solutions for Professional Services Firms are built on:

- *WorkSite, Interwoven's industry-leading content management software, provides complete, simple-to-use document and e-mail management functionality to enable professionals, staff, and clients to collaborate effectively around work in progress, and intuitively manage client files.*
- *WorkSite Web enables busy professionals and clients to have 24x7 portal access to client files.*
- *WorkSite OffSite lets professional services workers access complete client files and full document management functionality while disconnected from the network, out of the office or at a client site.*
- *WorkSite Mobility gives mobile users the ability to interact with client files and store, send, and attach WorkSite documents to e-mails via their mobile device for uninterrupted productivity.*
- *Interwoven Records Manager gives records managers and file clerks complete tools for establishing and managing records retention policies while making full regulatory compliance painless for firms and their professionals.*

## Autonomy iManage Professional Services Solution in Action

What you can do	How we solve it	Example
Access to client files from standard office applications	Deep integration with standard Microsoft applications for transparent access to client files.	An administrator drafts a letter to a client within Microsoft Word, but will need everyone working with the client to have access to it for review. Simply 'Save As' and get instant access to the WorkSite client folder.
Simple to use e-mail management	WorkSite drag-and-drop access from within Microsoft Outlook or Lotus Notes	The administrator now needs to file a substantial number of client e-mails, directly from within Outlook they simply need to select the e-mail, drag it to the proper client folder and they are done.
Automatically profile documents as they're stored	Engagement/ matter-centric organizational model	Every time the administrator saves a new document, files an e-mail, or scans a paper file to a client folder it automatically inherits the right metadata and appropriate file permissions so they don't have to do it manually.
Quickly find a document anywhere in the system	Extensive full-text and metadata search capabilities	By simply clicking on the search button and filling in full-text, metadata, or both, search criteria document hits are quickly returned, but only those they have permission to access.
Have access to client files from anywhere in the world	WorkSite's Mobility solutions provide file access to mobile devices on or off line.	One of your fee earners is stuck at the airport and a client is requesting a copy of an important document—via their BlackBerry device the fee earner can access, review and forward the document to the client without a lengthy delay. Or, by synchronizing their client files to their laptop they can have instant, offline access, make edits, review documents and, when they plug back into the firm's network, have them all automatically resynchronized with the main client file repository.
Provide clients with their own private and secure document workspace	WorkSite Web's extranet capabilities provide an intuitive access point for clients to have 24x7 access	It's Friday night and a client of your firm really needs to access some important merger documentation that the firm's been working on, for review. By simply logging into the safe extranet provided by the firm the client now has instant access to files, not all of them, but the ones that the firm has allowed privileges for the client to see.
Provide unified paper and electronic records management capabilities to the firm and the records managers of your organization.	Interwoven Records Manager merges the paper and electronic world of records into a single unified retention policy management system.	A records manager of your firm is requested to place a litigation hold on all documents related to XYZ Corp. By running a simple report within Interwoven Records Manager they get a unified view of all paper and electronic records of the firm so they can quickly lock-down the important documents. Or, you're a fee earner working on a client engagement; you realize there is some past content that would greatly benefit the current project. By pulling up the search panel and doing a search all electronic and paper records are visible for you to place a request for review—it's automatically routed to the right records staff where the request can be processed and sent to the fee earner.

## Getting started

To learn more about how Interwoven's Solutions for Professional Services Firms can help your organization grow financially, reduce risk, and improve efficiency, please visit us at [http://www.interwoven.com/solutions/professional\\_services](http://www.interwoven.com/solutions/professional_services) or contact your local sales representative.

## About Autonomy

Autonomy Corporation plc (LSE: AU. or AU.L), a global leader in infrastructure software for the enterprise, spearheads the Meaning Based Computing movement. It was recently ranked by IDC as the clear leader in enterprise search revenues, with market share nearly double that of its nearest competitor. Autonomy's technology allows computers to harness the full richness of human information, forming a conceptual and contextual understanding of any piece of electronic data, including unstructured information, such as text, email, web pages, voice, or video. Autonomy's software powers the full spectrum of mission-critical enterprise applications including pan-enterprise search, customer interaction solutions, information governance, end-to-end eDiscovery, records management, archiving, business process management, web content management, web optimization, rich media management and video and audio analysis.

Autonomy's customer base is comprised of more than 20,000 global companies, law firms and federal agencies including: AOL, BAE Systems, BBC, Bloomberg, Boeing, Citigroup, Coca Cola, Daimler AG, Deutsche Bank, DLA Piper, Ericsson, FedEx, Ford, GlaxoSmithKline, Lloyds TSB, NASA, Nestlé, the New York Stock Exchange, Reuters, Shell, Tesco, T-Mobile, the U.S. Department of Energy, the U.S. Department of Homeland Security and the U.S. Securities and Exchange Commission. More than 400 companies OEM Autonomy technology, including Symantec, Citrix, HP, Novell, Oracle, Sybase and TIBCO. The company has offices worldwide. Please visit [www.autonomy.com](http://www.autonomy.com) to find out more.

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