

■ Product Overview

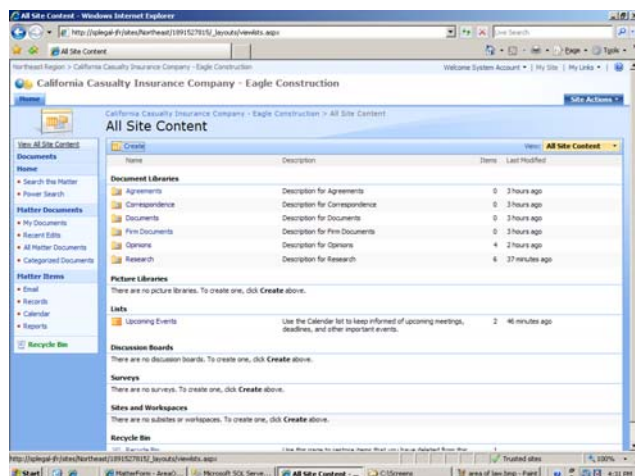
# Open Text Legal Information Management for Microsoft SharePoint

Utilize Microsoft SharePoint for matter lifecycle management while helping to mitigate legal and compliance risks

Today's legal community requests greater control over their content. Regardless of the repository, content needs to be managed in a consistent way across the firm. The rapid growth of content means that lawyers spend more time searching for, sifting through, and organizing information. As a consequence, firms suffer losses of productivity. Perhaps even more importantly, time spent finding content is time that could otherwise be used to fine-tune advice and turn around high quality client deliverables more quickly.

**"Innovative firms are looking to technology to gain an edge in an increasingly competitive market. Together with Open Text, Microsoft is empowering employees within law firms to improve productivity, extend the boundaries of collaboration, and provide better document controls and processes."**

**Brian Zeve**,  
Managing Director,  
Microsoft Professional Services  
Industry Solutions



Sites are automatically created for all the Matters in the system. Native SharePoint objects can be included in the Matter site design, such as Calendars and Discussion Boards.

For law firms looking to take advantage of the power of Microsoft® Office SharePoint® Server 2007 for their day-to-day document processing and, at the same time, provide records management and archiving that meet compliance requirements, Open Text Legal Information Management for Microsoft® SharePoint® delivers a solution on top of SharePoint that meets those needs. From content inception to closure, Open Text Legal Information Management for Microsoft SharePoint leverages Open Text's matter- and practice-centric views of content, virtual file cabinets and seamless integration with firm processes while working in the SharePoint environment. The solution makes the most of lawyers' time, reducing costs, minimizing errors and omissions and reducing firm or corporate liability while simplifying IT deployments. Unlike other Legal Solutions, Open Text Legal Information Management for Microsoft SharePoint provides users with a complete view of attorney work products in a dynamic matter- or client-centric view, all within the business tools they work with every day.

## Answers the call to optimize Microsoft SharePoint environments in law firms

As attorneys grow more familiar with using SharePoint to carry out their day-to-day tasks, and more comfortable with using its document management and collaborative capabilities to store and deliver work products, they still have questions about how SharePoint can be extended to meet their specific business issues.

## Powerful information search and retrieval to save time and increase productivity

Legal Management for SharePoint enables attorneys to search for the documents and information they are after with fast, relevant, and contextualized results. Attorneys can search not only the SharePoint sites where they store matter-related documents, but also across other matter sites, various business systems, global document repositories, other content sources, and even archived information—all without having to leave their environment of choice. The unified result list produced by Legal Management for SharePoint enables attorneys to quickly locate the exact information they are looking for without having to conduct multiple searches across the different systems where documents are created and stored.



## Streamlined Matter site creation and “Holistic Matter Views” to increase efficiency and reduce costs

With the thousands of matters that law firms handle each year, creating dedicated matter sites for each one can be an arduous process. Open Text Legal Information Management for Microsoft SharePoint helps firms by eliminating the need for administrative or IT assistance by automating the creation of sites based on SharePoint site templates. Matter site creation can even be triggered as part of the New Business Intake procedure to further streamline the process. Matter sites generated feature a comprehensive and contextualized view of information related to a particular matter, regardless of the source. Open Text Legal Information Management for Microsoft SharePoint builds a snapshot view of the matter comprised of information from document and records management repositories, email servers, SharePoint sites, and business solutions like conflicts management systems, billing and accounting applications, and many more. By automatically building matter sites upon the commencement of new business, Legal Management for SharePoint saves law firms time and money, and frees up valuable IT resources to focus on other initiatives. At the same time, attorneys are provided with a holistic view of the information associated with a matter – from documents and discussion boards to conflicts clearing and billing information.

## Comprehensive records retention to mitigate risk, save time, eliminate confusion, and reduce the need for manual classification by attorneys

In response to the mounting importance of compliance for law firms, many firms are taking a vigorous approach to records management. Open Text Legal Information Management for Microsoft SharePoint offers firms a comprehensive solution that readily maps to the firm’s unique records retention policies and file plan. Legal Management for SharePoint automatically classifies any information (in accordance with firm policies and taxonomy) that an attorney or staff member adds to the matter site. The process is completely transparent, removing any guesswork and placing the responsibility in the hands of the firm’s records management professionals. This saves time for attorneys, while eliminating confusion and ensuring that the firm’s stated records management policies are silently and consistently enforced.

## Enhanced archiving capabilities to ensure content integrity, reduce storage costs, and improve the organization of SharePoint site collections

Open Text Legal Information Management for Microsoft SharePoint provides firms with a solution that ensures the availability and integrity of archived information for attorneys, while providing a cost effective and highly secure framework to support firm-wide archival strategies. Moreover, with automatic matter site archival capabilities, Legal Management for SharePoint can archive entire sites upon the closing of a matter, to free up space on the SharePoint Server and ensure that the environment is free of the “clutter” of closed matters. The entire structure of the matter site is retained so that restoration is simplified in the event that the matter is reopened. All archived information remains searchable so that attorneys can readily locate documents in support of their active matters.

## Open Text Legal Information Management for Microsoft SharePoint Feature Highlights

- Presents all the available Matter information organized in a logical way that is easy to access
- Content comes from various applications, data sources and repositories
- Content is accessed across global WAN environments
- Content is quickly and easily retrieved from across the enterprise and presented in a single view
- Matters are secured to protect against Conflicts of Interest (Ethical Walls)
- Enables a user’s SharePoint sites to be exposed in a hierarchical tree view within both the Microsoft Outlook and Windows Explorer interfaces via Open Text Enterprise Connect Plug-in for Microsoft SharePoint
- Allows the user to view the SharePoint audit trail for a document using an additional document context menu item (a configurable feature that can also be disabled by the administrator).

[Click here](#) for more details such as screen cams and white papers



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Printed in Canada. S\_M\_PO\_OTLIMMOSS\_E(20081016)

## Technical Specifications

Open Text Legal Information Management for Microsoft SharePoint works with:

- Microsoft Office SharePoint Server 2007.
- Open Text Content Lifecycle Management Services for Microsoft SharePoint 10.0
- Open Text Enterprise Connect Plug-in for Microsoft SharePoint 1.0

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