Sharepoint for Legal Document Management

PLEIT – Oct 6, 2016

Jonas Abrahamsson – Sales Director
Staffan Hugemark – Product Owner

Contentworker
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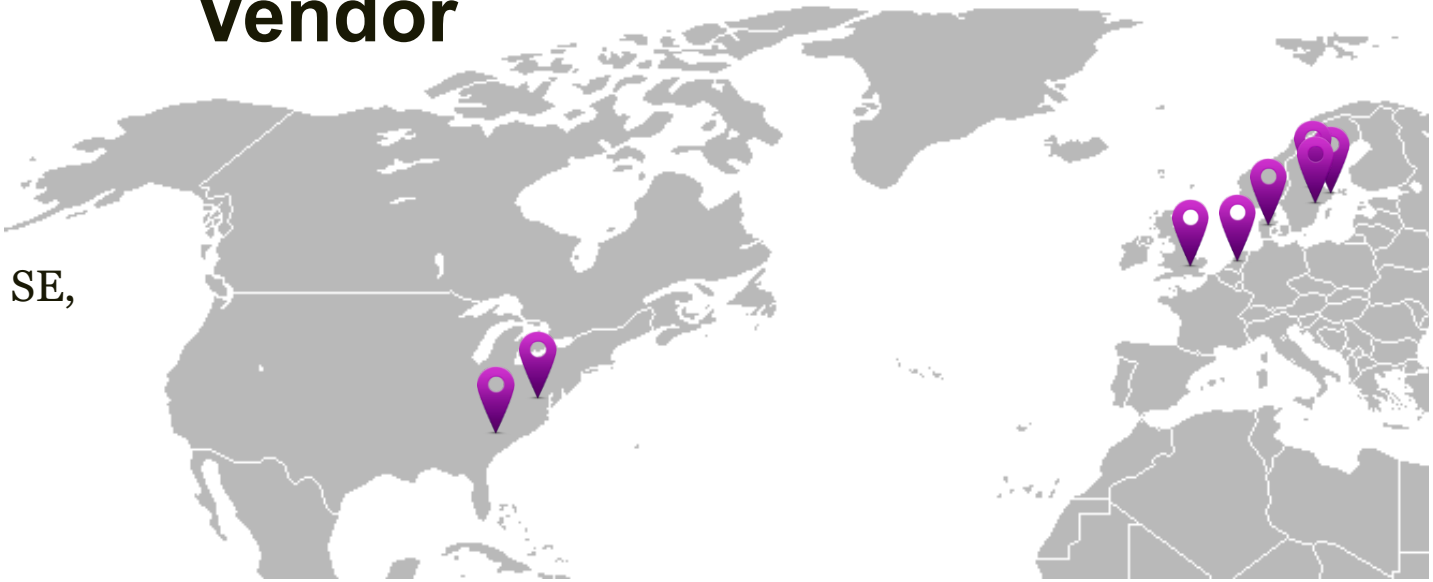
Largest European ECM Vendor

300
employees

Offices in DK, SE,
NL & UK, US

Traded at
Nasdaq OMX



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- Division of Formpipe Software, focusing on the Legal Domain
- Document Management to law firms since 2000
- Initially solution provider - Now mainly a software company
- If you have OpenText eDOCS, you likely use our software
  - Dynamic Views – part of core eDOCS product
  - Email Filing – sold as eDOCS add-on (400 sites, 100K+ seats, 25+ countries)
- Focus today is SharePoint and Email Filing (for various platforms)

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Why build a DMS on SharePoint?

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- Existing leading DMS systems…
  - ….has a big install base
  - ….evolved slowly
  - ….struggled with robust Office integrations (lost edits, ZBF)
  - ….generally high cost of ownership

- SharePoint….
  - ….is evolving fast
  - ….is native to Office
  - ….is intuitive
  - ….has intranet capabilities on the same architecture
  - ….and built-in social capabilities
  - ….has a huge ecosystem (products and people)

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Native SharePoint

- Strengths:
  - Lots of good DMS features
  - Intuitive interface (mostly)
  - Powerful & flexible
  - Great search capabilities

- However:
  - More of a toolbox than a turnkey DMS
  - Folder based or metadata – no connection between
  - Web based network drive
  - No excluding security
  - Non-existing Outlook integration
  - Perhaps a bit too technical to users

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Contentworker bridges the gap

- Defined business rules
- Matter workspace creation
- Automatic metadata assignment
- Enhanced Office integration
- Security management and Ethical walls
- Outlook integration and Email Filing
- Scaling

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User's Home Screen

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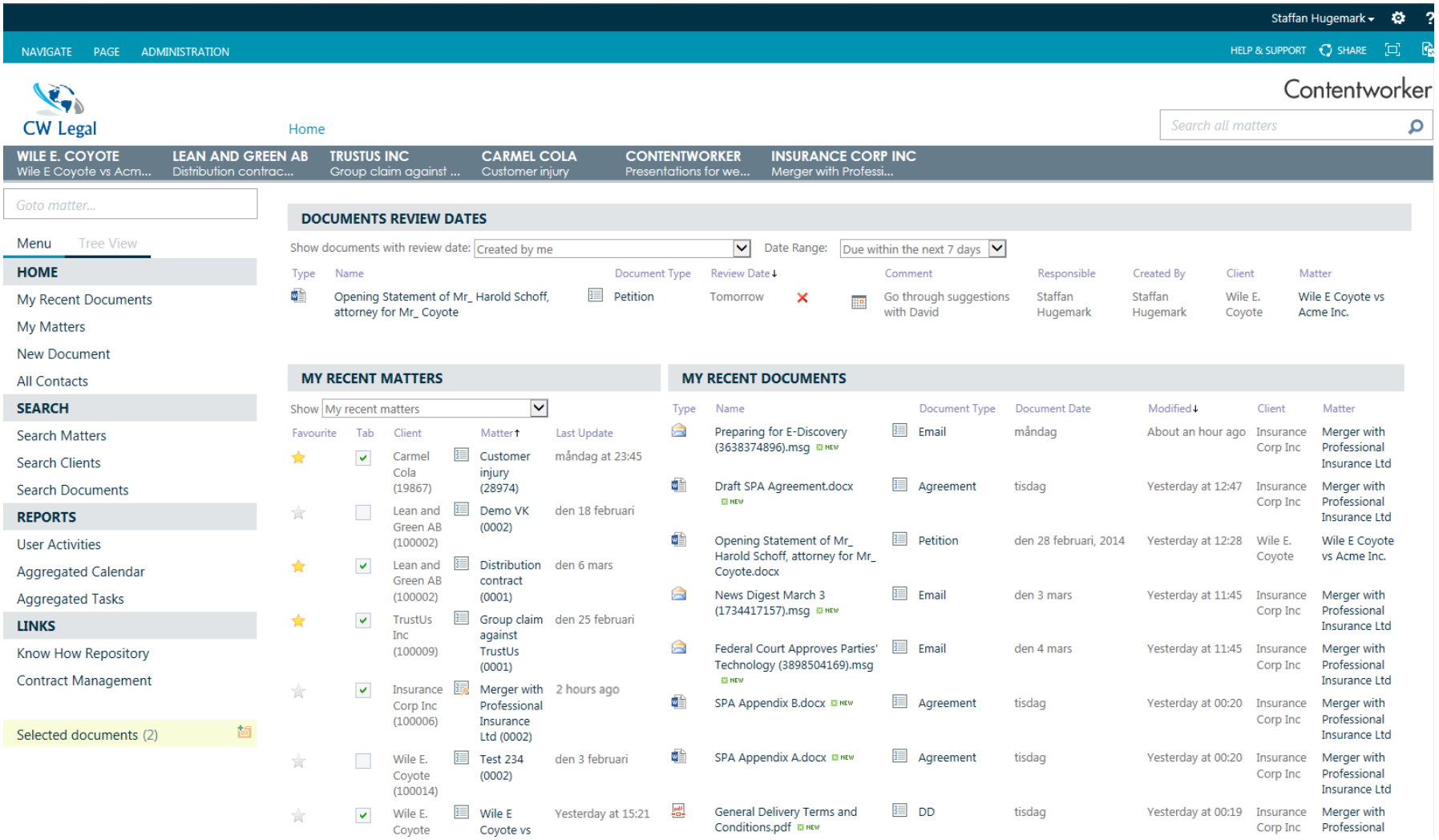

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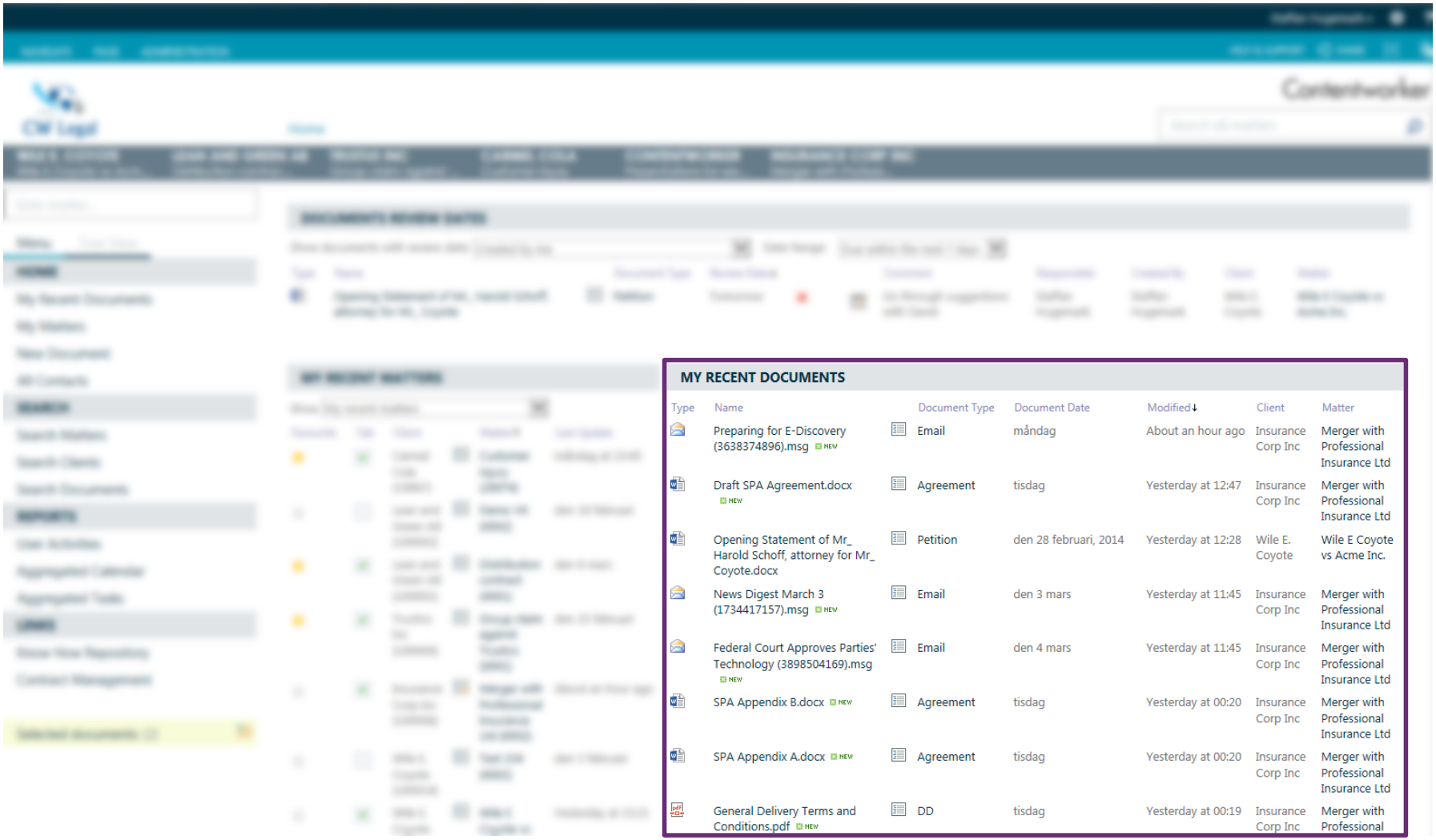
My Recent Documents



MY RECENT DOCUMENTS

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	Preparing for E-Discovery (3638374896).msg NEW	Email	måndag	About an hour ago	Insurance Corp Inc	Merger with Professional Insurance Ltd
	Draft SPA Agreement.docx NEW	Agreement	tisdag	Yesterday at 12:47	Insurance Corp Inc	Merger with Professional Insurance Ltd
	Opening Statement of Mr_ Harold Schoff, attorney for Mr_ Coyote.docx	Petition	den 28 februari, 2014	Yesterday at 12:28	Wile E. Coyote	Wile E Coyote vs Acme Inc.
	News Digest March 3 (1734417157).msg NEW	Email	den 3 mars	Yesterday at 11:45	Insurance Corp Inc	Merger with Professional Insurance Ltd
	Federal Court Approves Parties' Technology (3898504169).msg NEW	Email	den 4 mars	Yesterday at 11:45	Insurance Corp Inc	Merger with Professional Insurance Ltd
	SPA Appendix B.docx NEW	Agreement	tisdag	Yesterday at 00:20	Insurance Corp Inc	Merger with Professional Insurance Ltd
	SPA Appendix A.docx NEW	Agreement	tisdag	Yesterday at 00:20	Insurance Corp Inc	Merger with Professional Insurance Ltd
	General Delivery Terms and Conditions.pdf NEW	DD	tisdag	Yesterday at 00:19	Insurance Corp Inc	Merger with Professional

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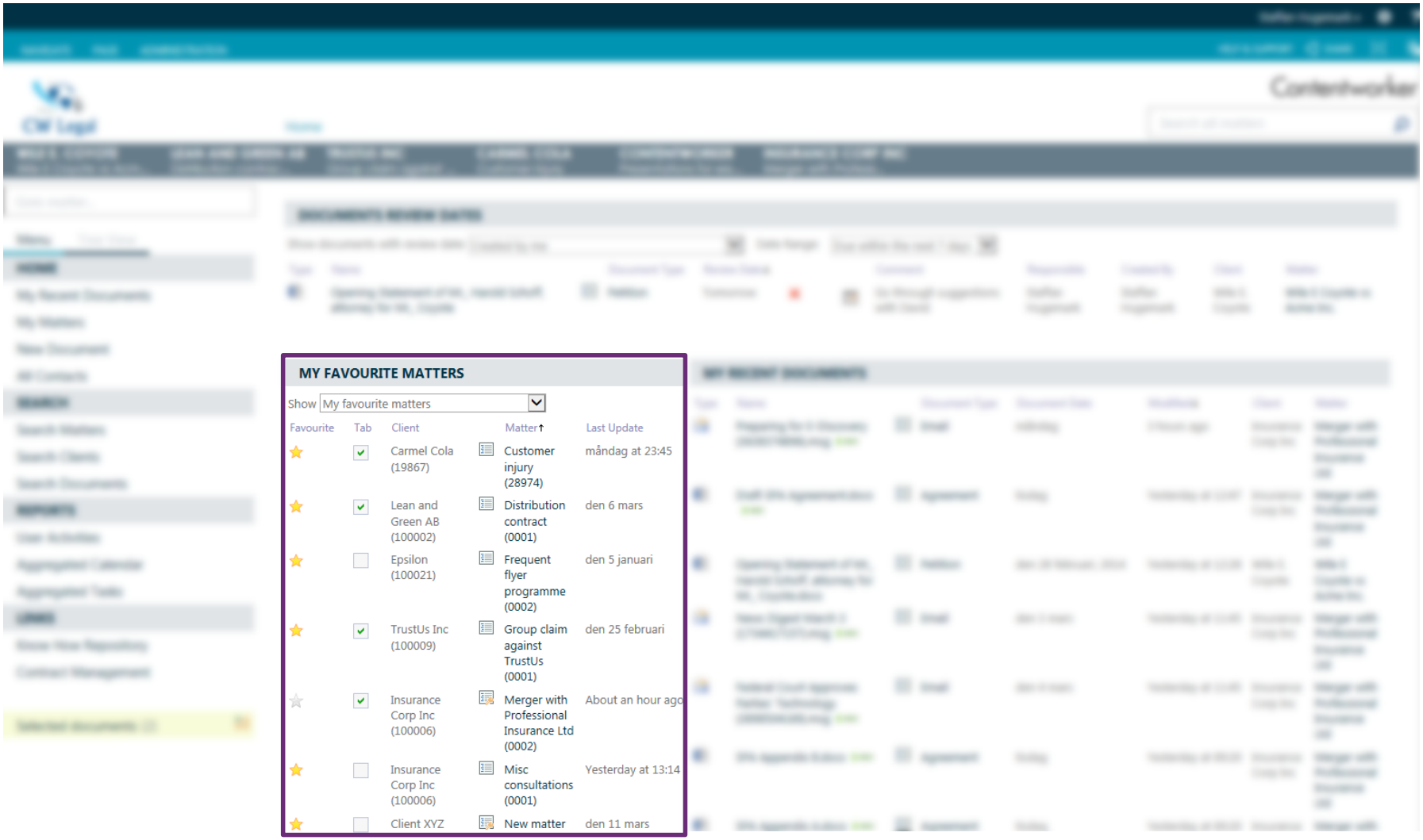
My Favorite Matters



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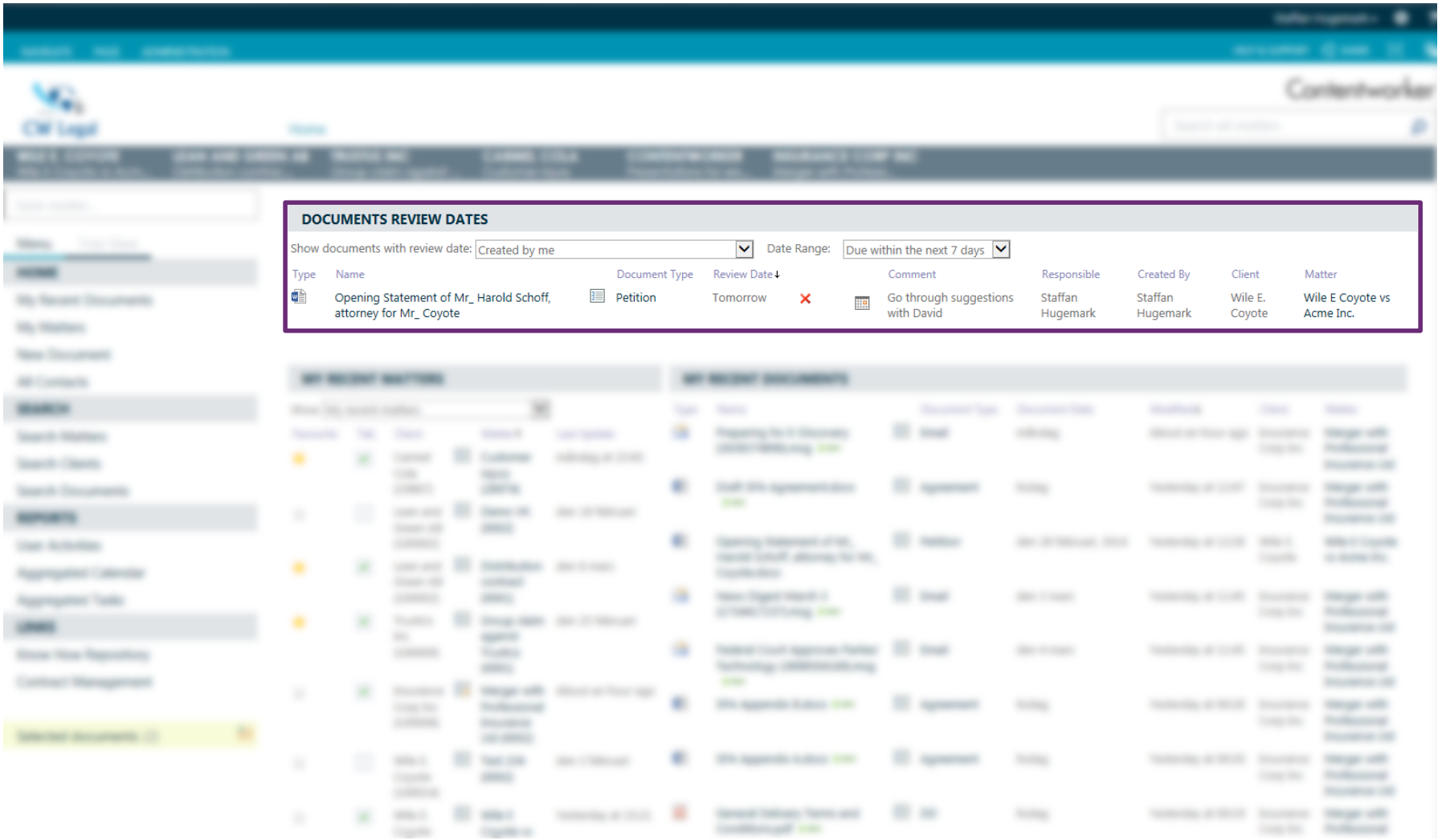
Review Dates



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Menu

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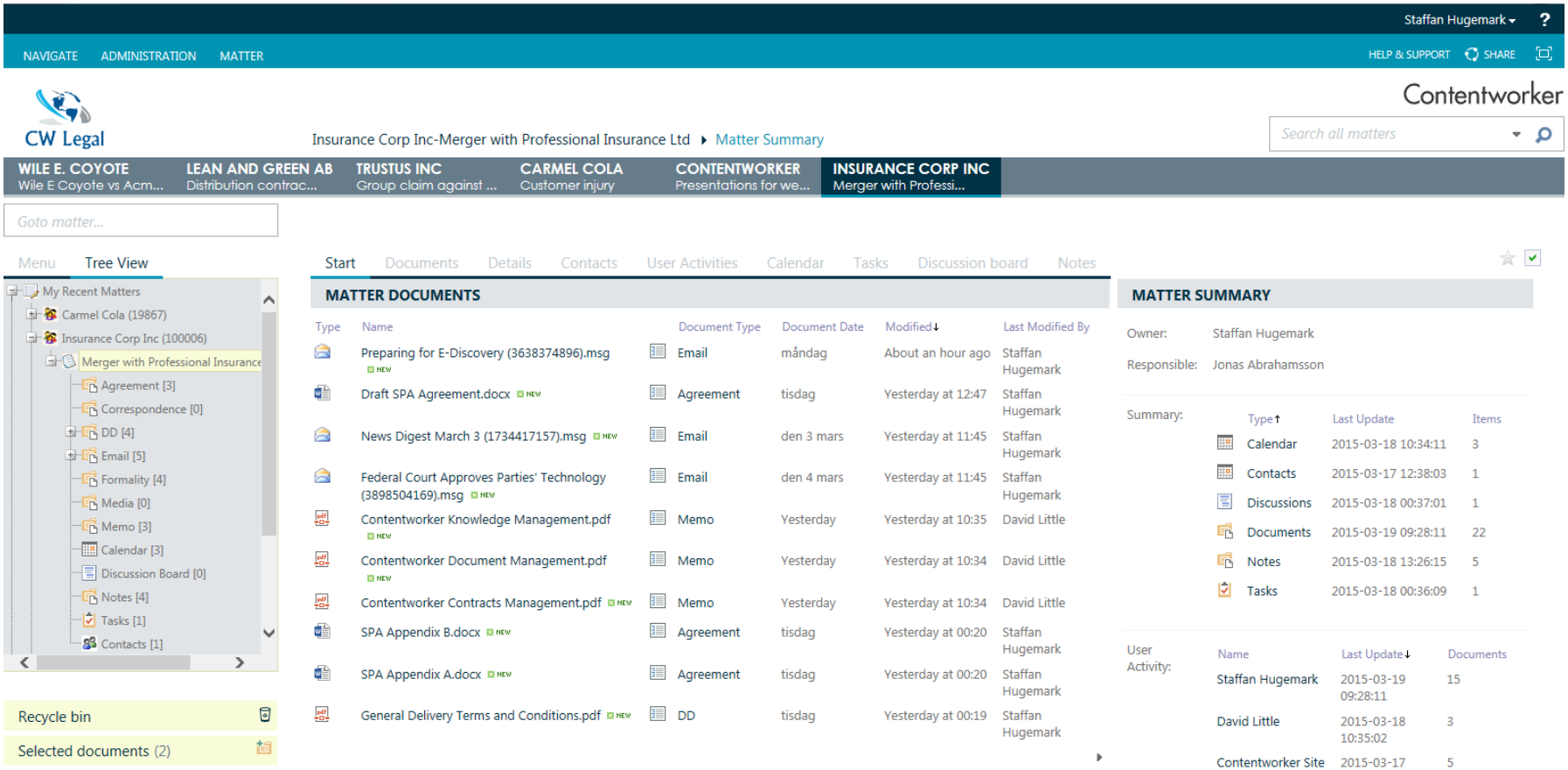
The Matter Workspace



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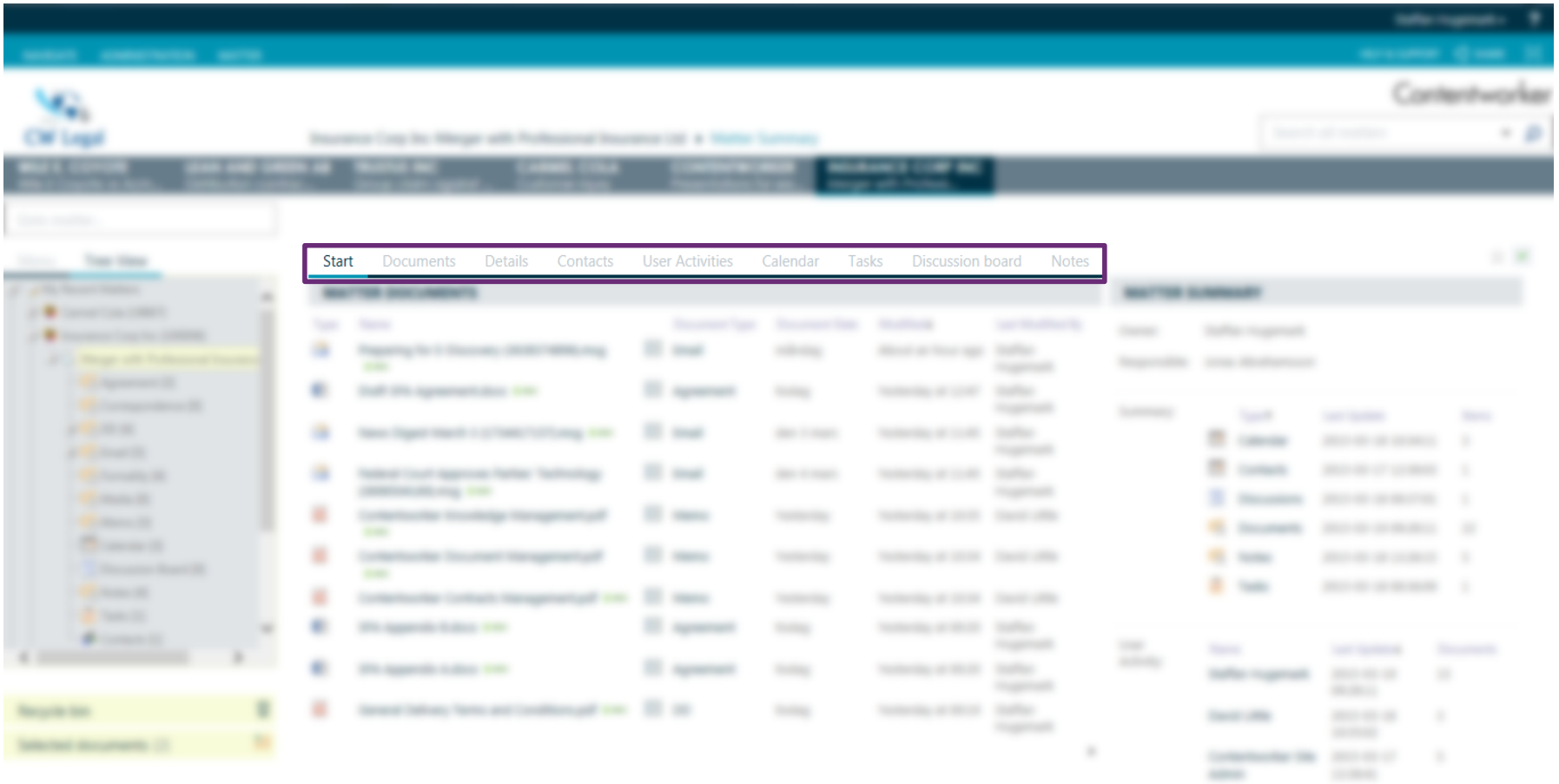
Tabs for Different Content



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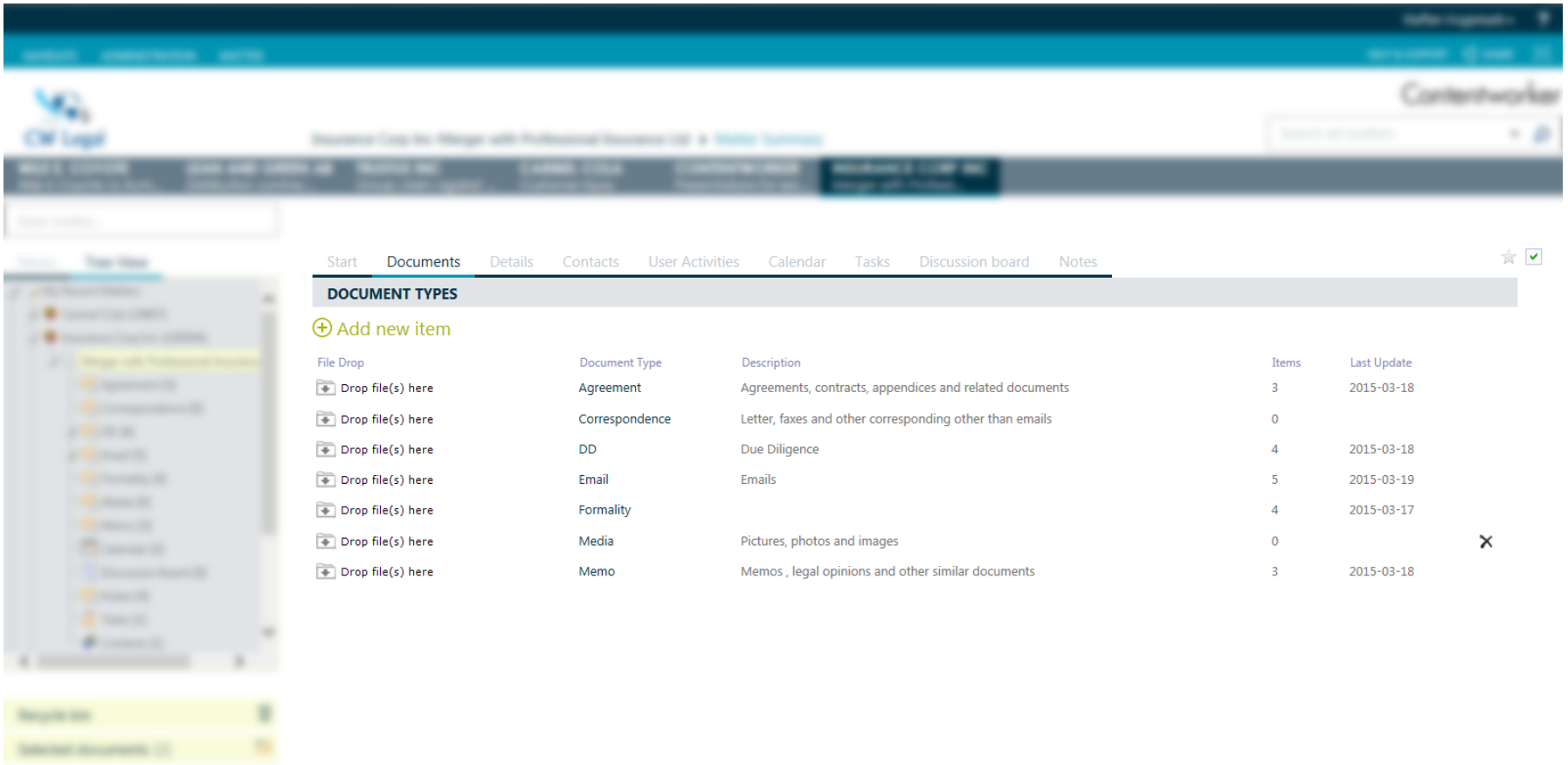
Matter Documents Tab



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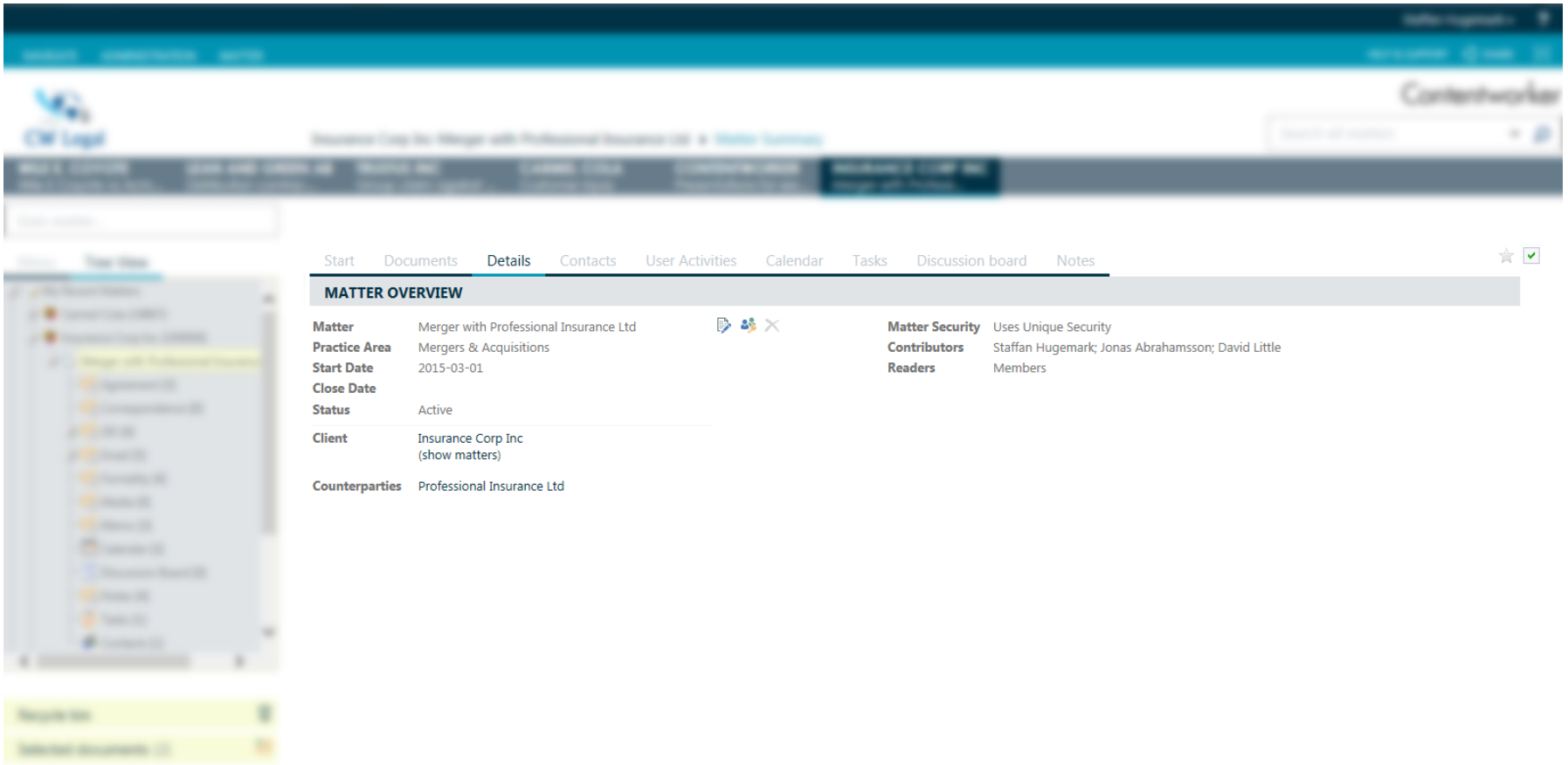
Matter Details Tab



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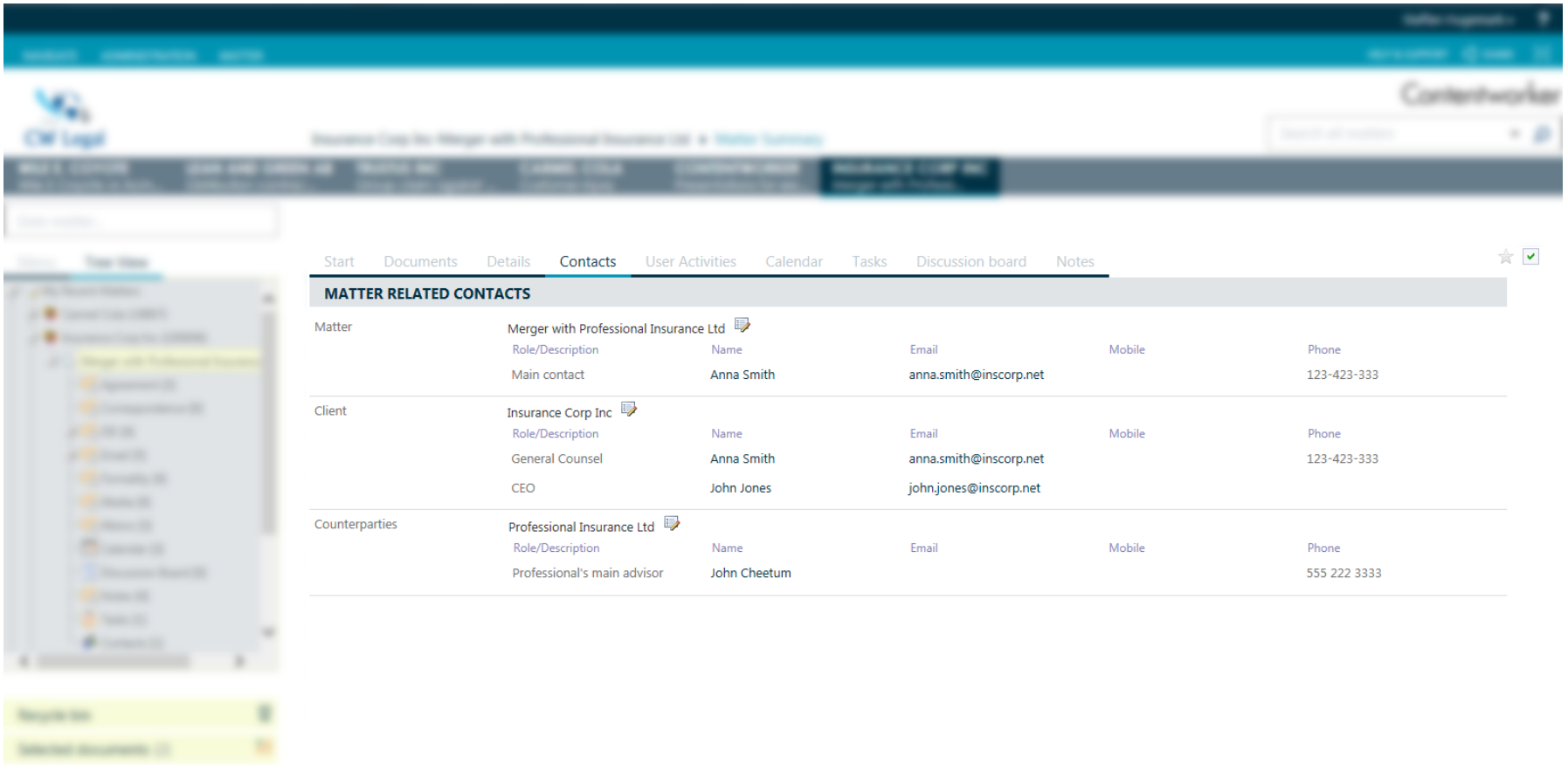
Matter Contacts



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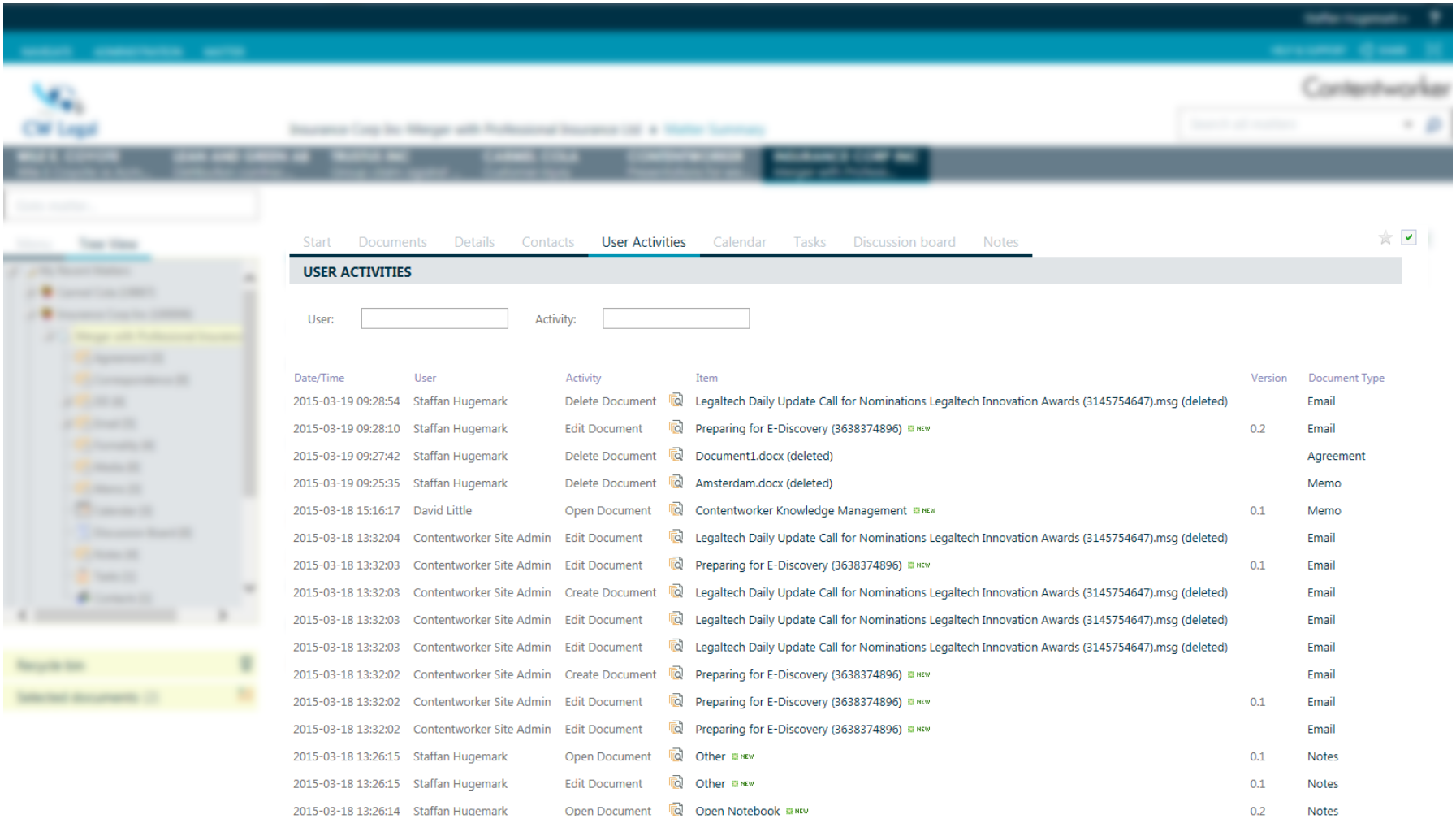
Matter Audit Trail



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2015-03-19 09:28:10	Staffan Hugemark	Edit Document	Preparing for E-Discovery (3638374896) NEW	0.2	Email
2015-03-19 09:27:42	Staffan Hugemark	Delete Document	Document1.docx (deleted)		Agreement
2015-03-19 09:25:35	Staffan Hugemark	Delete Document	Amsterdam.docx (deleted)		Memo
2015-03-18 15:16:17	David Little	Open Document	Contentworker Knowledge Management NEW	0.1	Memo
2015-03-18 13:32:04	Contentworker Site Admin	Edit Document	Legaltech Daily Update Call for Nominations Legaltech Innovation Awards (3145754647).msg (deleted)		Email
2015-03-18 13:32:03	Contentworker Site Admin	Edit Document	Preparing for E-Discovery (3638374896) NEW	0.1	Email
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2015-03-18 13:26:15	Staffan Hugemark	Open Document	Other NEW	0.1	Notes
2015-03-18 13:26:15	Staffan Hugemark	Edit Document	Other NEW	0.1	Notes
2015-03-18 13:26:14	Staffan Hugemark	Open Document	Open Notebook NEW	0.2	Notes

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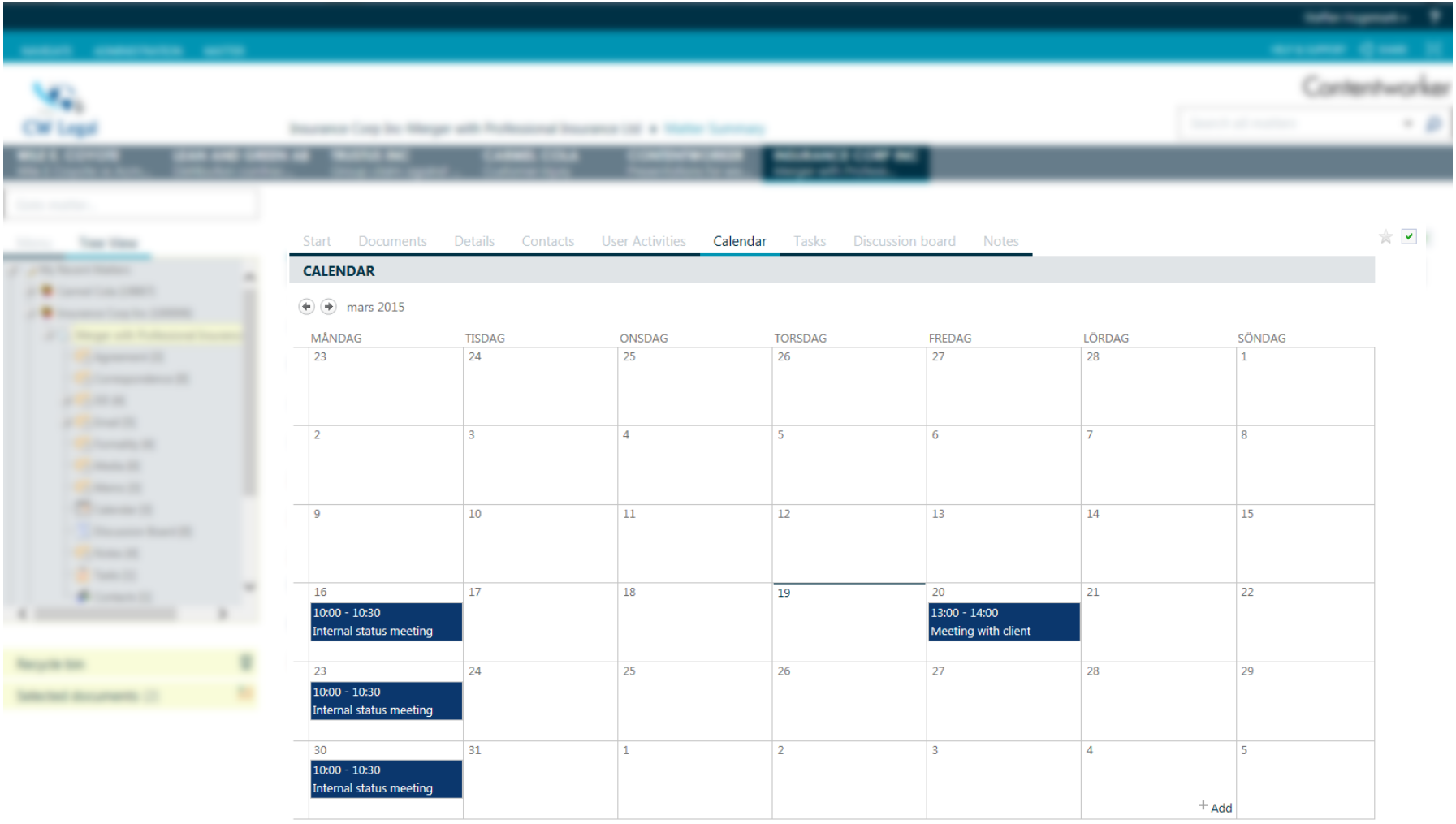
Matter Calendar



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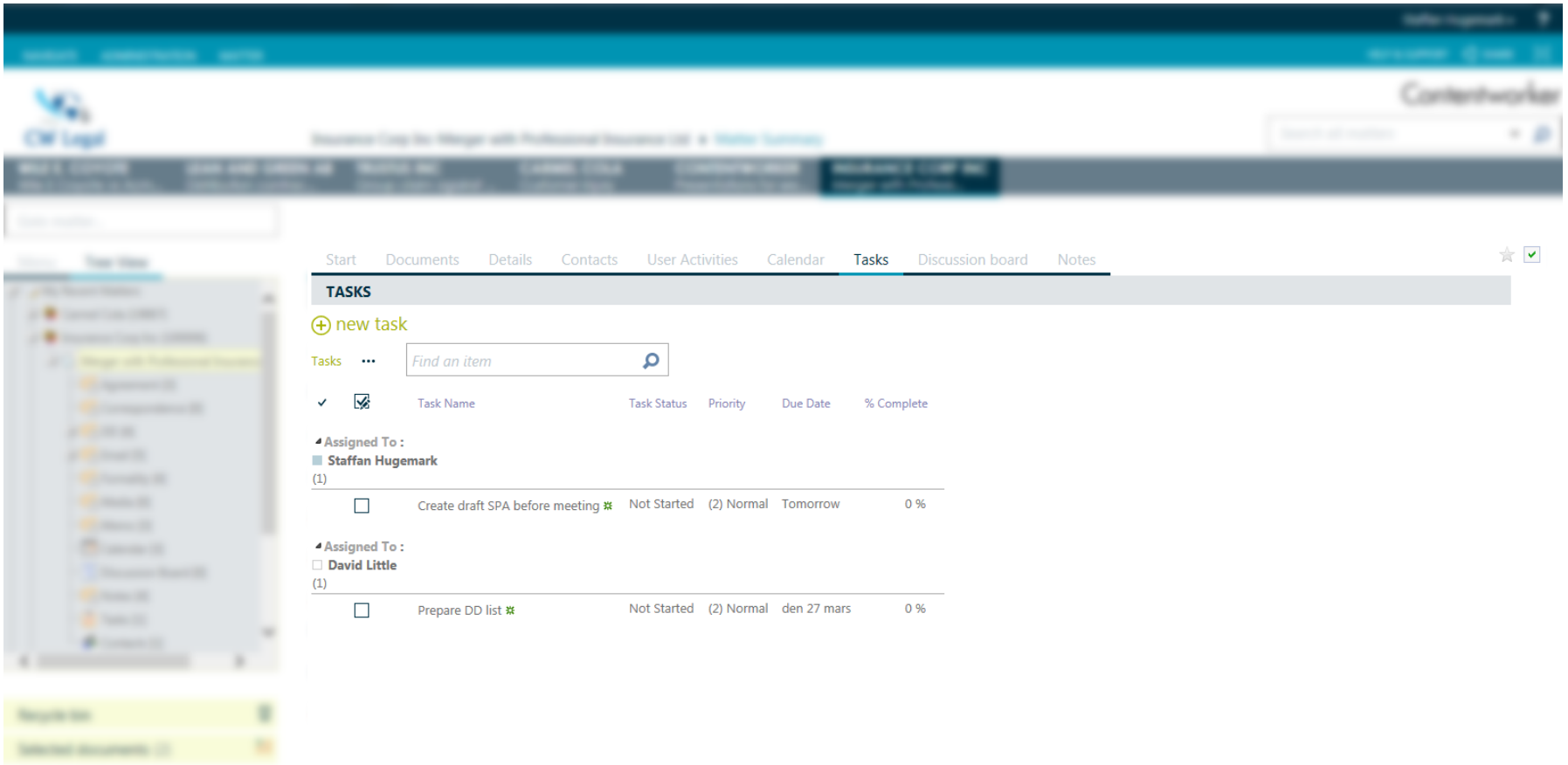
Matter Tasks



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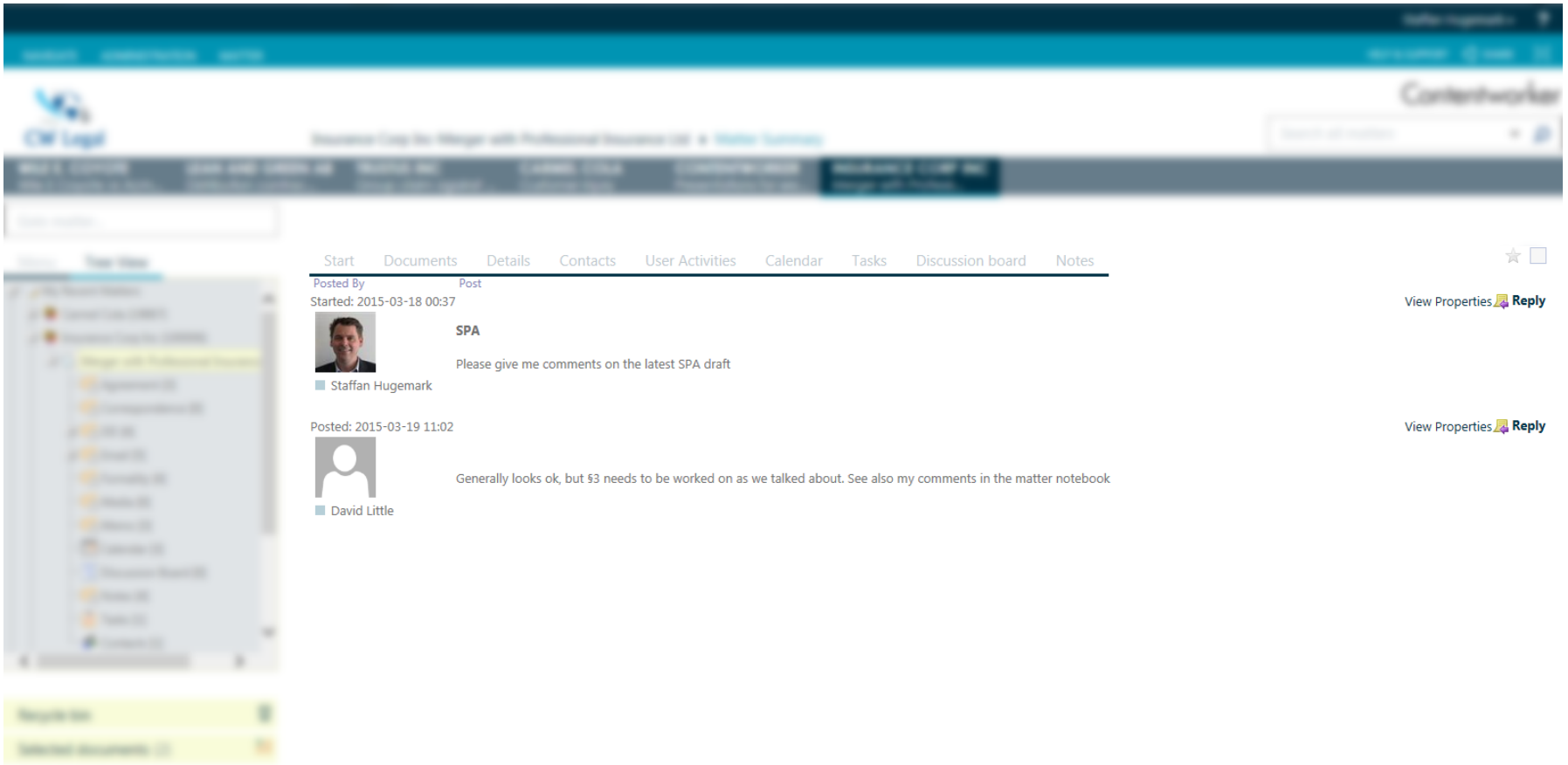
Matter Discussion Board



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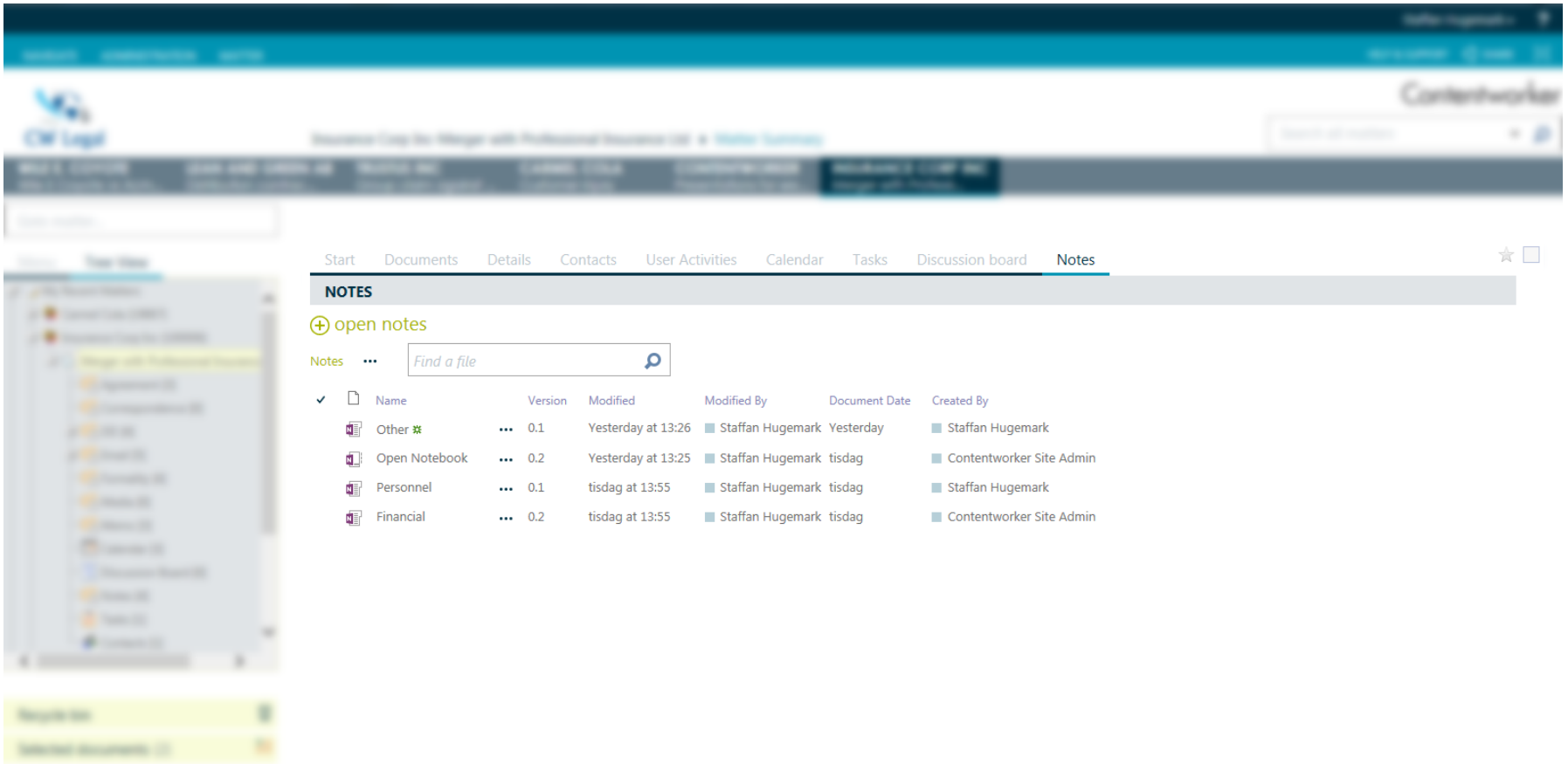
Matter OneNote Notebook



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Search Box

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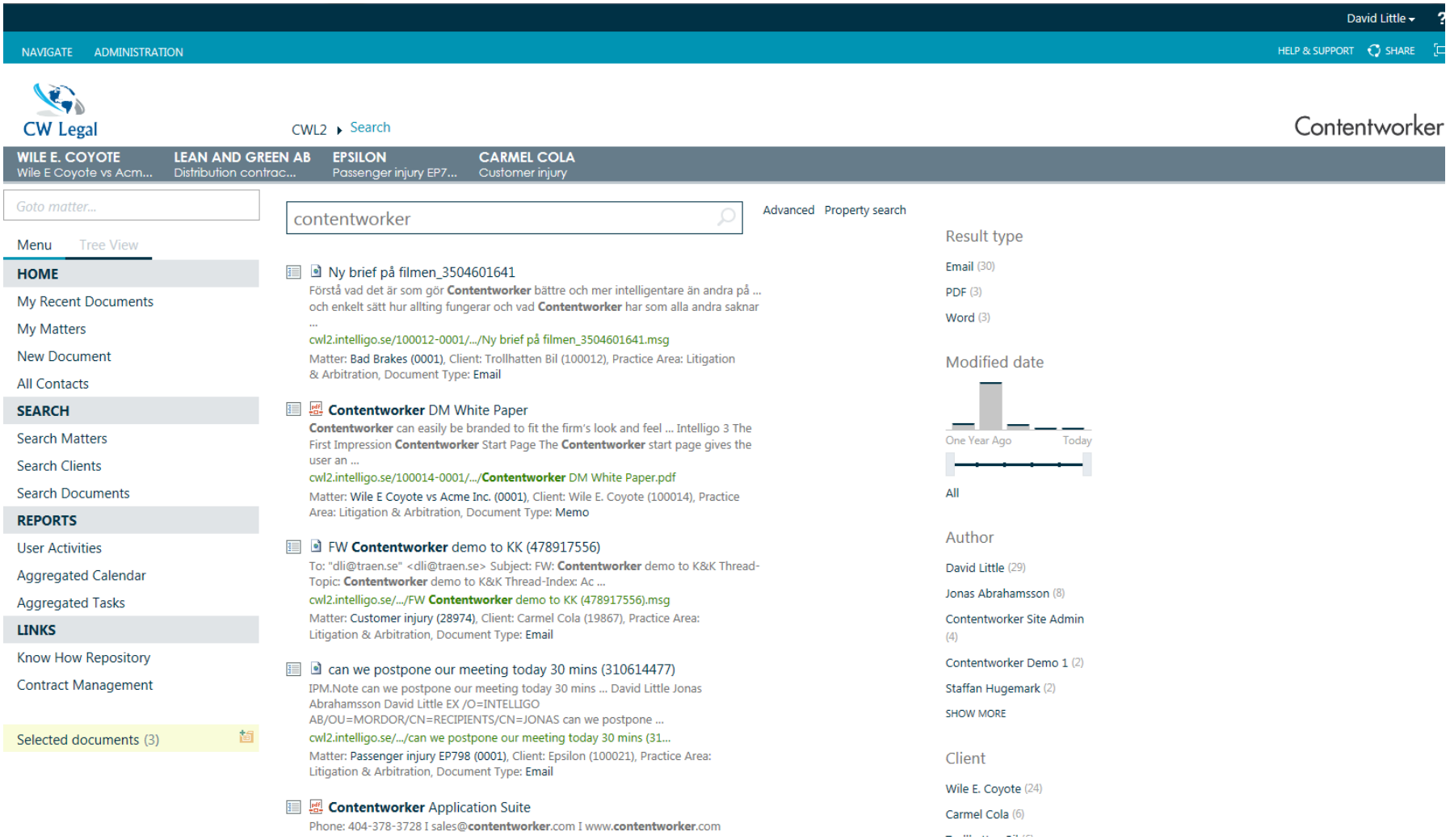
Search Result



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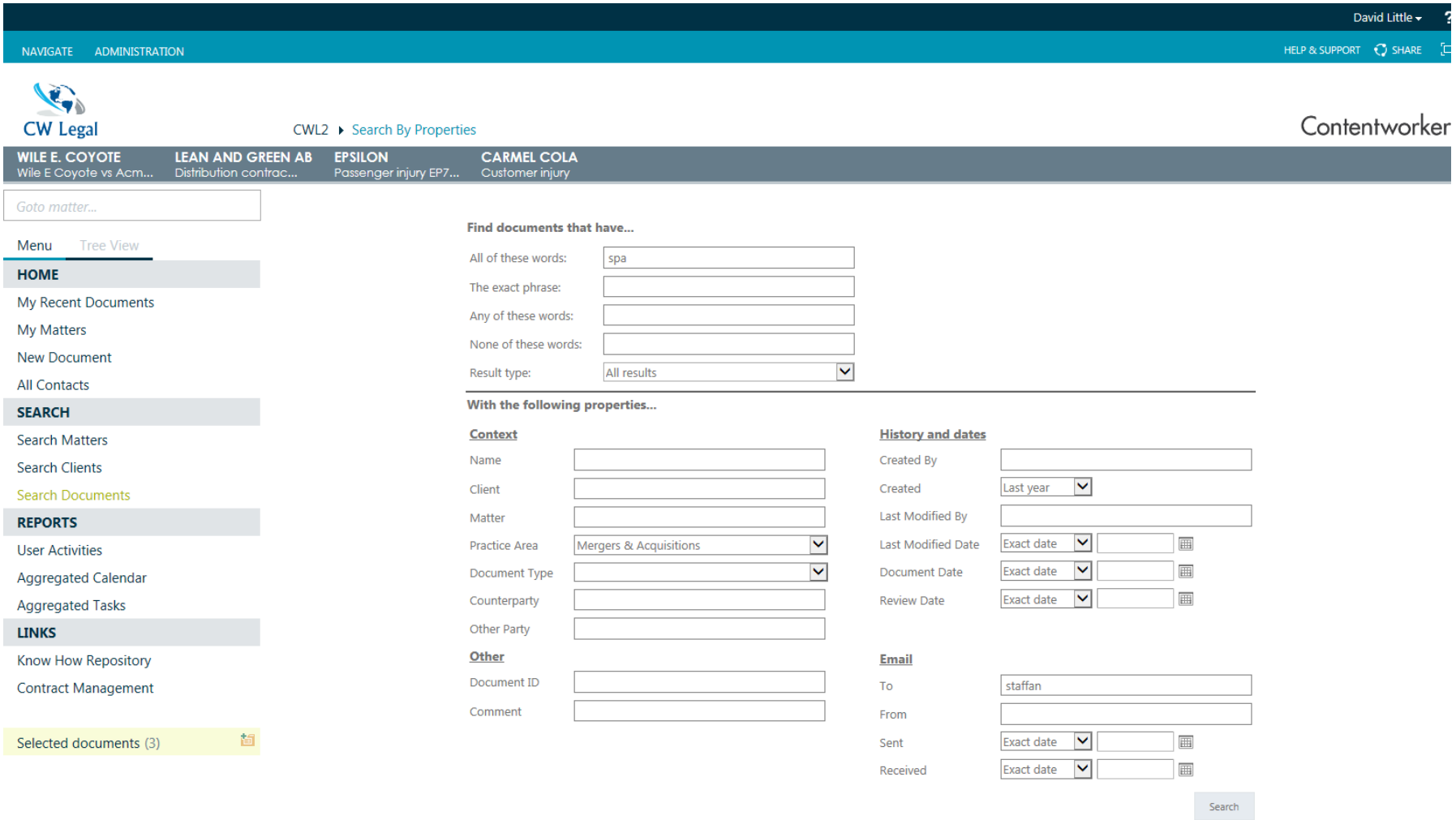
Document Search Form



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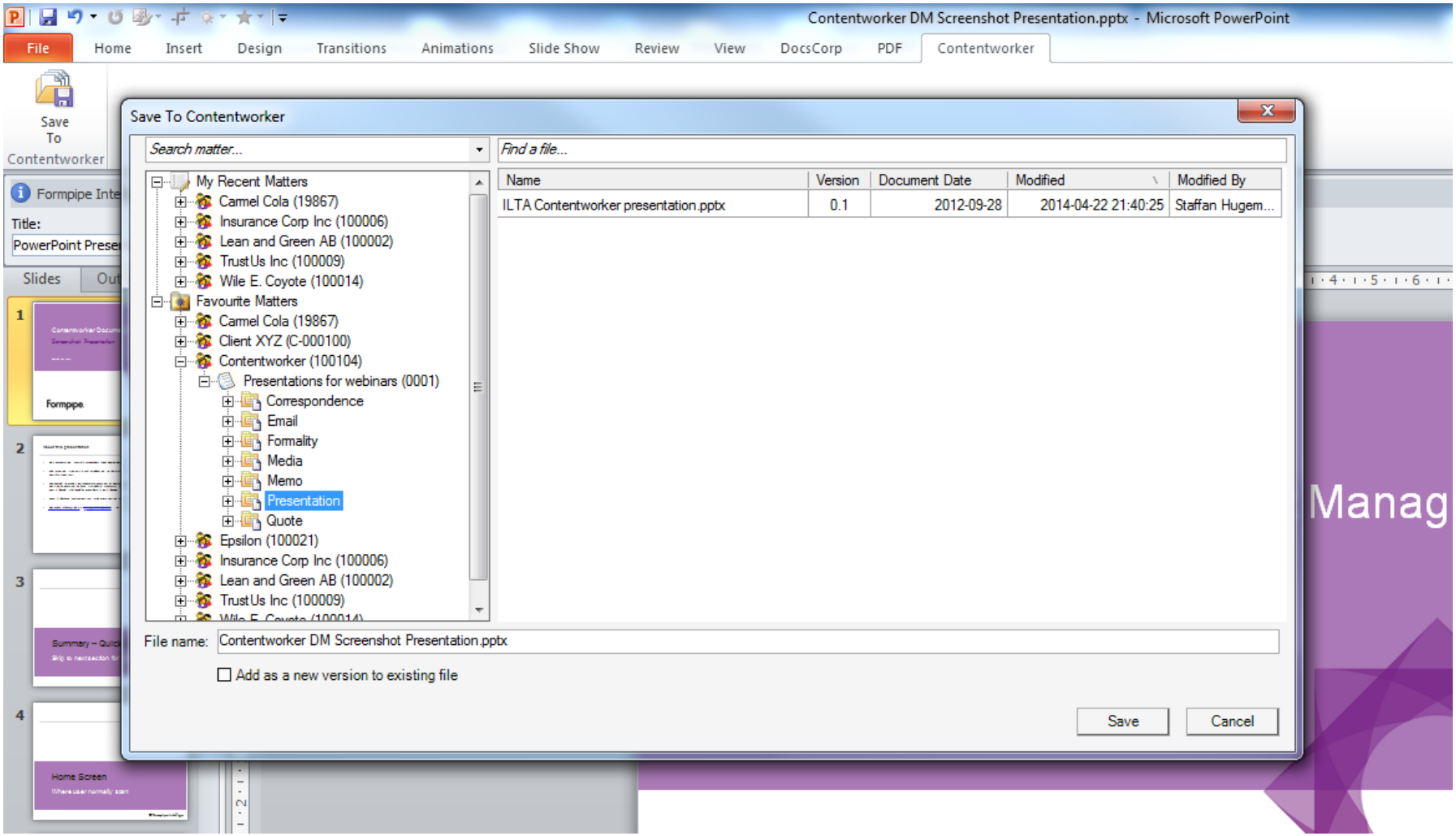
Save from Microsoft Office



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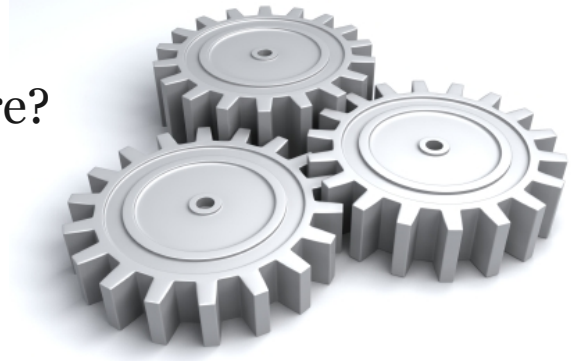
Email Management

- Outlook functions:
  - Ad-hoc filing (emails & attachments)
  - Attach files
  - Save & send

- Automated background functions:
  - Monitored folders – File from ANY device
  - Email Marker – What is filed, by whom and where?



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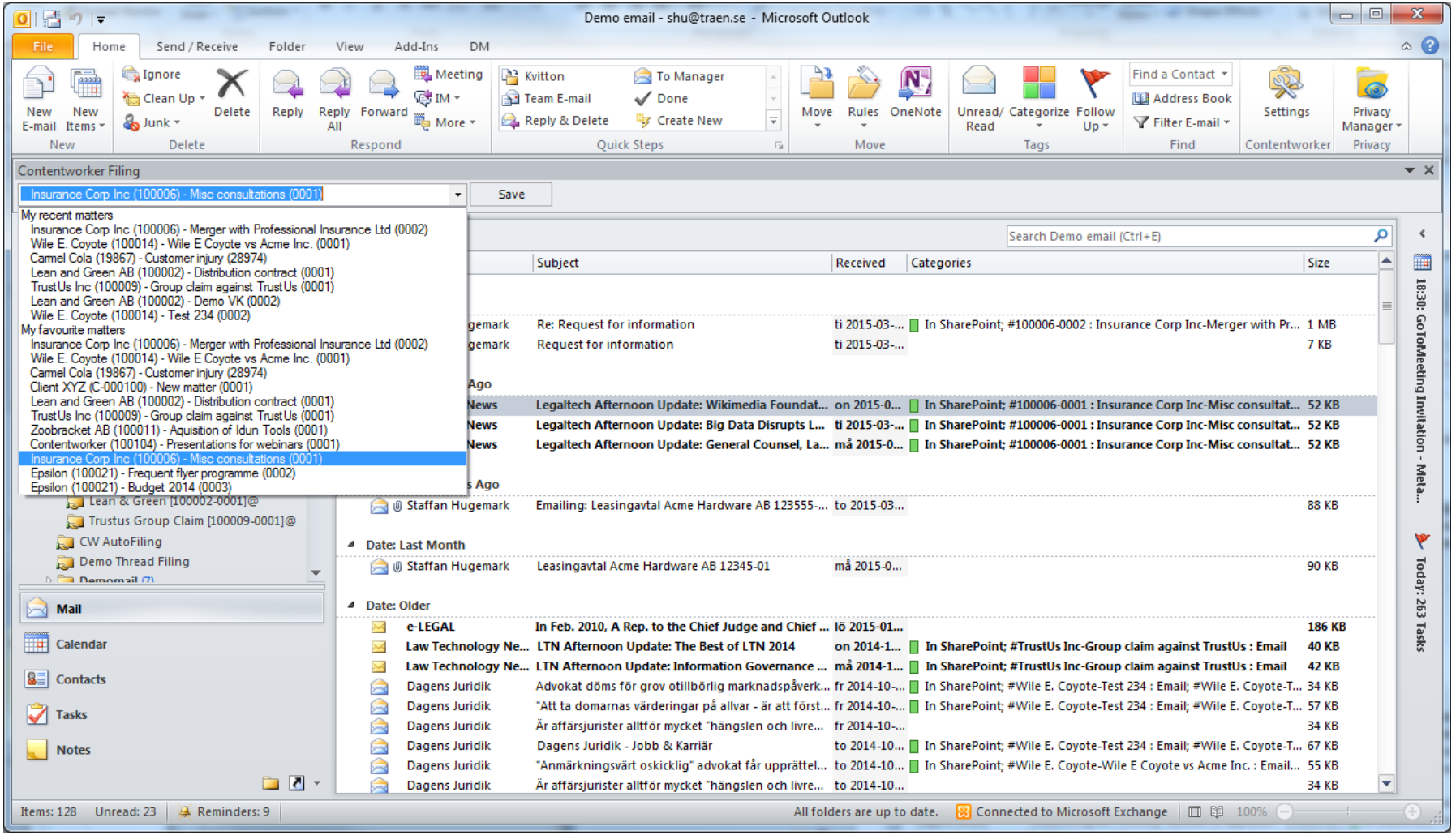
Outlook Integration



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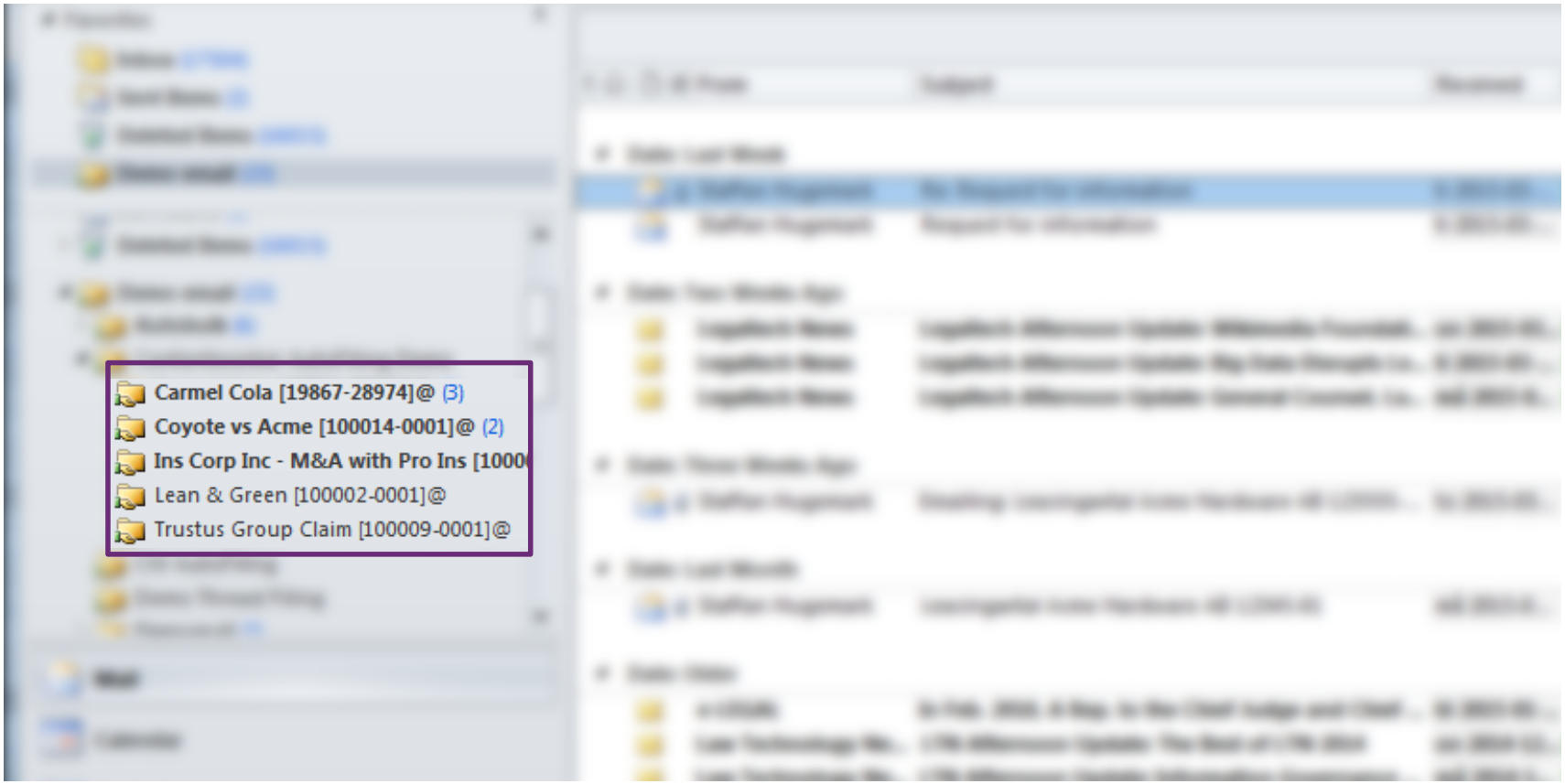
Monitored Folders for Automatic Filing



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Large Volumes

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Many documents
... and even more emails

Does it scale?

SharePoint has some limitations

Contentworker overcomes them

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Document Management

Knowledge Management

Contract Management

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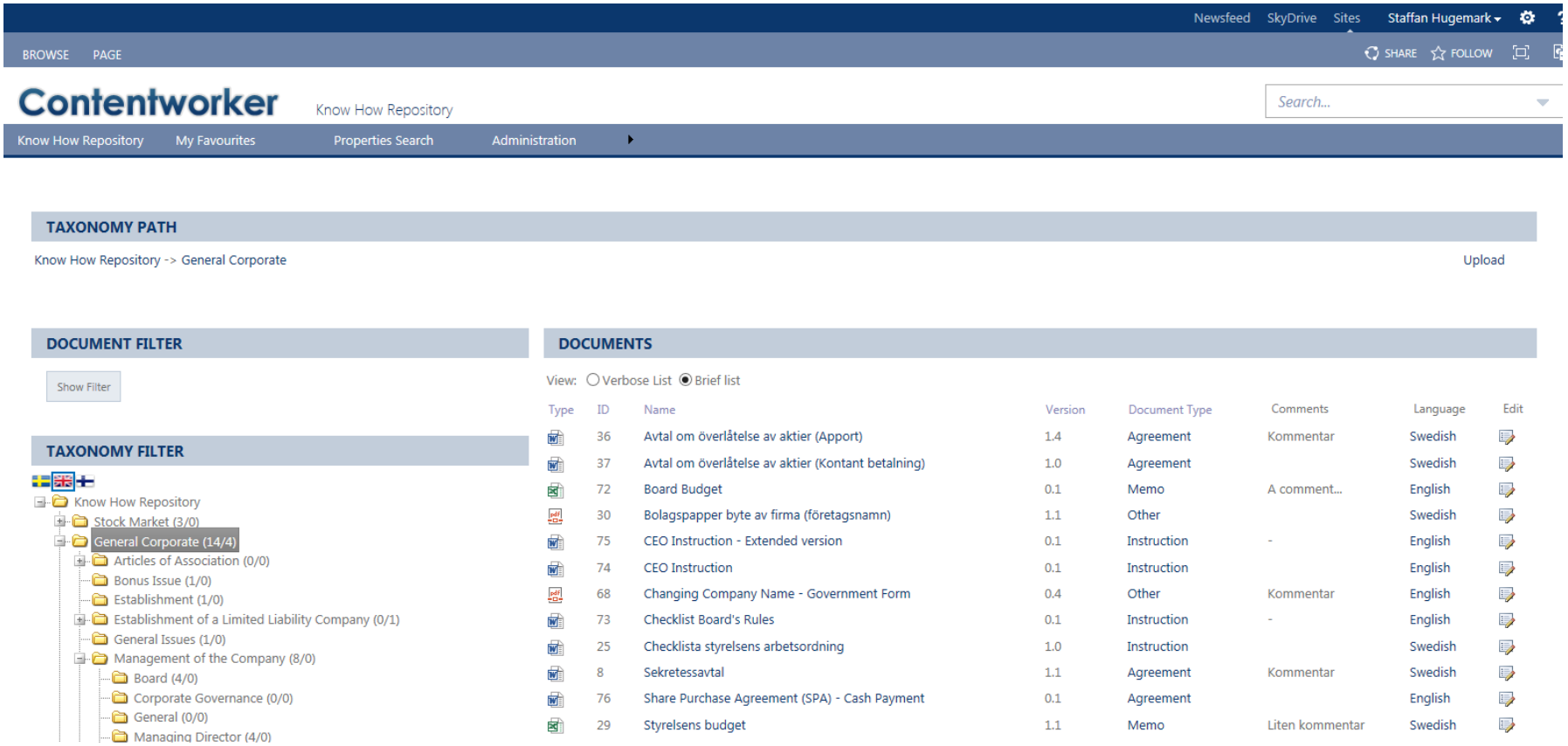
Contentworker Knowledge Management



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Come visit our booth here at PLEIT

Lunch & Learn events – next one in Karel V in Utrecht, Oct 29

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