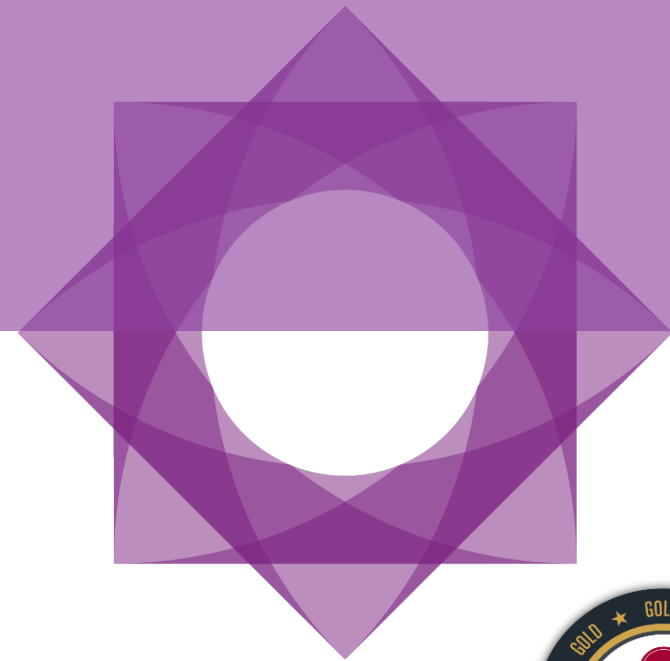


Sharepoint for Legal Document Management PLEIT – Oct 6, 2016

Jonas Abrahamsson – Sales Director
Staffan Hugemark – Product Owner



Contentworker
by Formpipe



© Formpipe Intelligo

Who We Are



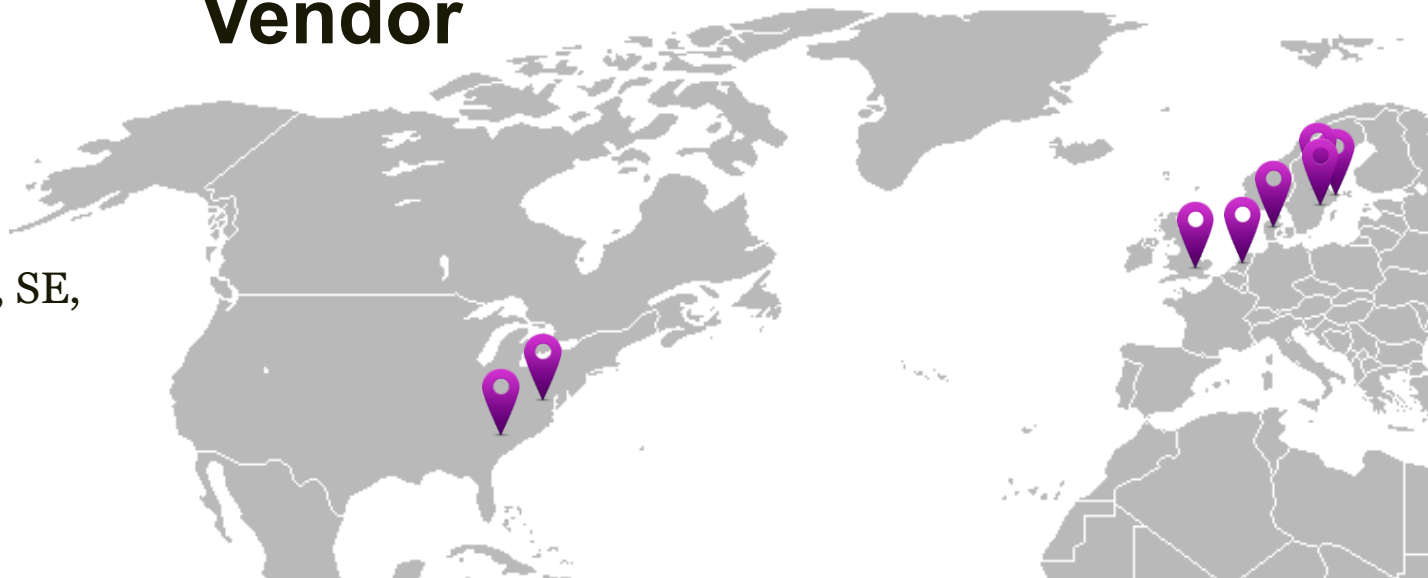
Formpipe.

**Largest European ECM
Vendor**

300
employees

Offices in DK, SE,
NL & UK, US

Traded at
Nasdaq OMX



© Formpipe Intelligo

- 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)

Why build a DMS on SharePoint?

- 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)

- 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

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





Contentworker

by Formpipe

User's Home Screen



NAVIGATEPAGEADMINISTRATION

HELP & SUPPORTSHARE

Staffan Hugemark

?

CW Legal

Home

WILE E. COYOTE

Wile E Coyote vs Acme...

LEAN AND GREEN AB

Distribution contrac...

TRUSTUS INC

Group claim against ...

CARMEL COLA

Customer injury

CONTENTWORKER

Presentations for we...

INSURANCE CORP INC

Merger with Professi...

Goto matter...

Search all matters

MenuTree View

HOME

My Recent Documents

My Matters

New Document

All Contacts

SEARCH

Search Matters

Search Clients

Search Documents

REPORTS

User Activities

Aggregated Calendar

Aggregated Tasks

LINKS

Know How Repository

Contract Management

Selected documents (2)

DOCUMENTS REVIEW DATES

Show documents with review date: Created by me

Date Range: Due within the next 7 days

Type	Name	Document Type	Review Date	Comment	Responsible	Created By	Client	Matter
	Opening Statement of Mr_ Harold Schoff, attorney for Mr_ Coyote	Petition	Tomorrow	Go through suggestions with David	Staffan Hugemark	Staffan Hugemark	Wile E. Coyote	Wile E Coyote vs Acme Inc.

MY RECENT MATTERS

Show My recent matters

Favourite	Tab	Client	Matter	Last Update
★	✓	Carmel Cola (19867)	Customer injury (28974)	måndag at 23:45
★		Lean and Green AB (100002)	Demo VK (0002)	den 18 februari
★	✓	Lean and Green AB (100002)	Distribution contract (0001)	den 6 mars
★	✓	TrustUs Inc (100009)	Group claim against TrustUs (0001)	den 25 februari
★	✓	Insurance Corp Inc (100006)	Merger with Professional Insurance Ltd (0002)	2 hours ago
★		Wile E. Coyote (100014)	Test 234 (0002)	den 3 februari
★	✓	Wile E. Coyote	Wile E Coyote vs	Yesterday at 15:21

MY RECENT DOCUMENTS

Type	Name	Document Type	Document Date	Modified	Client	Matter
	Preparing for E-Discovery (3638374896).msg	Email	måndag	About an hour ago	Insurance Corp Inc	Merger with Professional Insurance Ltd
	Draft SPA Agreement.docx	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	Email	den 3 mars	Yesterday at 11:45	Insurance Corp Inc	Merger with Professional Insurance Ltd
	Federal Court Approves Parties' Technology (3898504169).msg	Email	den 4 mars	Yesterday at 11:45	Insurance Corp Inc	Merger with Professional Insurance Ltd
	SPA Appendix B.docx	Agreement	tisdag	Yesterday at 00:20	Insurance Corp Inc	Merger with Professional Insurance Ltd
	SPA Appendix A.docx	Agreement	tisdag	Yesterday at 00:20	Insurance Corp Inc	Merger with Professional Insurance Ltd
	General Delivery Terms and Conditions.pdf	DD	tisdag	Yesterday at 00:19	Insurance Corp Inc	Merger with Professional

My Recent Documents



MY RECENT DOCUMENTS

Type	Name	Document Type	Document Date	Modified↓	Client	Matter
	Preparing for E-Discovery (3638374896).msg	Email	måndag	About an hour ago	Insurance Corp Inc	Merger with Professional Insurance Ltd
	Draft SPA Agreement.docx	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	Email	den 3 mars	Yesterday at 11:45	Insurance Corp Inc	Merger with Professional Insurance Ltd
	Federal Court Approves Parties' Technology (3898504169).msg	Email	den 4 mars	Yesterday at 11:45	Insurance Corp Inc	Merger with Professional Insurance Ltd
	SPA Appendix B.docx	Agreement	tisdag	Yesterday at 00:20	Insurance Corp Inc	Merger with Professional Insurance Ltd
	SPA Appendix A.docx	Agreement	tisdag	Yesterday at 00:20	Insurance Corp Inc	Merger with Professional Insurance Ltd
	General Delivery Terms and Conditions.pdf	DD	tisdag	Yesterday at 00:19	Insurance Corp Inc	Merger with Professional

My Favorite Matters



The screenshot displays the Formpipe user interface. A sidebar on the left contains navigation links such as 'Home', 'My Recent Documents', 'My Matters', 'New Document', 'All Content', 'Search Matters', 'Search Clients', 'Search Documents', 'User Activities', 'Aggregated Calendar', 'Aggregated Tools', 'CRM', 'New Matter Reporting', and 'Contact Management'. The main content area is titled 'DOCUMENTS UNDER REVIEW' and includes a table of documents. A modal window titled 'MY FAVOURITE MATTERS' is open, showing a list of favorite matters with columns for Favourite, Tab, Client, Matter, and Last Update.

Favourite	Tab	Client	Matter	Last Update
★	<input checked="" type="checkbox"/>	Carmel Cola (19867)	Customer injury (28974)	måndag at 23:45
★	<input checked="" type="checkbox"/>	Lean and Green AB (100002)	Distribution contract (0001)	den 6 mars
★	<input type="checkbox"/>	Epsilon (100021)	Frequent flyer programme (0002)	den 5 januari
★	<input checked="" type="checkbox"/>	TrustUs Inc (100009)	Group claim against TrustUs (0001)	den 25 februari
☆	<input checked="" type="checkbox"/>	Insurance Corp Inc (100006)	Merger with Professional Insurance Ltd (0002)	About an hour ago
★	<input type="checkbox"/>	Insurance Corp Inc (100006)	Misc consultations (0001)	Yesterday at 13:14
★	<input type="checkbox"/>	Client XYZ	New matter	den 11 mars

Review Dates



Home

My Recent Documents

My Matters

New Document

All Documents

SEARCH

Search Matters

Search Clients

Search Documents

REPORTING

User Activities

Appointed Calendar

Appointed Tasks

TOOLS

View New Reporting

Content Management

Selected Documents (2)

DOCUMENTS REVIEW DATES

Show documents with review date:

Created by me

 Date Range:

Due within the next 7 days

Type	Name	Document Type	Review Date	Comment	Responsible	Created By	Client	Matter
	Opening Statement of Mr_ Harold Schoff, attorney for Mr_ Coyote	Petition	Tomorrow	Go through suggestions with David	Staffan Hugemark	Staffan Hugemark	Wile E. Coyote	Wile E Coyote vs Acme Inc.

My Recent Documents

Showing 1-10 of 10 documents

Type	Name	Document Type	Document Date	Workflow	Status	Notes
	Preparing for 10 documents 2024-01-01-2024-01-01	Agreement	2024-01-01	2024-01-01	Completed	Wile E Coyote vs Acme Inc.
	Draft 10 documents 2024-01-01-2024-01-01	Agreement	2024-01-01	2024-01-01	Completed	Wile E Coyote vs Acme Inc.
	Opening Statement of Mr_ Harold Schoff, attorney for Mr_ Coyote	Petition	2024-01-01	2024-01-01	Completed	Wile E Coyote vs Acme Inc.
	New 10 documents 2024-01-01-2024-01-01	Agreement	2024-01-01	2024-01-01	Completed	Wile E Coyote vs Acme Inc.
	New 10 documents 2024-01-01-2024-01-01	Agreement	2024-01-01	2024-01-01	Completed	Wile E Coyote vs Acme Inc.
	New 10 documents 2024-01-01-2024-01-01	Agreement	2024-01-01	2024-01-01	Completed	Wile E Coyote vs Acme Inc.
	New 10 documents 2024-01-01-2024-01-01	Agreement	2024-01-01	2024-01-01	Completed	Wile E Coyote vs Acme Inc.
	New 10 documents 2024-01-01-2024-01-01	Agreement	2024-01-01	2024-01-01	Completed	Wile E Coyote vs Acme Inc.
	New 10 documents 2024-01-01-2024-01-01	Agreement	2024-01-01	2024-01-01	Completed	Wile E Coyote vs Acme Inc.
	New 10 documents 2024-01-01-2024-01-01	Agreement	2024-01-01	2024-01-01	Completed	Wile E Coyote vs Acme Inc.

Menu



The screenshot displays the Formpipe web application interface. On the left, a sidebar menu is visible, featuring a 'Menu' tab and a 'Tree View' tab. The menu is organized into several sections: 'HOME' (containing 'My Recent Documents', 'My Matters', 'New Document', and 'All Contacts'), 'SEARCH' (containing 'Search Matters', 'Search Clients', and 'Search Documents'), 'REPORTS' (containing 'User Activities', 'Aggregated Calendar', and 'Aggregated Tasks'), 'LINKS' (containing 'Know How Repository' and 'Contract Management'), and a bottom section with 'Recycle bin' and 'Selected documents (2)'. The main area of the interface shows a 'DOCUMENTS REVIEW DATES' section with a table of documents, including columns for 'Type', 'Name', 'Document Type', 'Document Date', 'Workflow', 'Status', and 'Action'. Below this, there are two sections for 'MY RECENT MATTERS' and 'MY RECENT DOCUMENTS', each containing a table of recent items.

The Matter Workspace



Staffan Hugemark ?

NAVIGATE ADMINISTRATION MATTER

HELP & SUPPORT SHARE

CW Legal

Insurance Corp Inc-Merger with Professional Insurance Ltd ▶ Matter Summary

Search all matters

WILE E. COYOTE
Wile E Coyote vs Acrn...

LEAN AND GREEN AB
Distribution contrac...

TRUSTUS INC
Group claim against ...

CARMEL COLA
Customer injury

CONTENTWORKER
Presentations for we...

INSURANCE CORP INC
Merger with Professi...

Goto matter...

Menu Tree View

My Recent Matters

Carmel Cola (19867)

Insurance Corp Inc (100006)

Merger with Professional Insurance

Agreement [3]

Correspondence [0]

DD [4]

Email [5]

Formality [4]

Media [0]

Memo [3]

Calendar [3]

Discussion Board [0]

Notes [4]

Tasks [1]

Contacts [1]

Recycle bin

Selected documents (2)

Start Documents Details Contacts User Activities Calendar Tasks Discussion board Notes

MATTER DOCUMENTS

Type	Name	Document Type	Document Date	Modified	Last Modified By
📧	Preparing for E-Discovery (3638374896).msg	Email	måndag	About an hour ago	Staffan Hugemark
📄	Draft SPA Agreement.docx	Agreement	tisdag	Yesterday at 12:47	Staffan Hugemark
📧	News Digest March 3 (1734417157).msg	Email	den 3 mars	Yesterday at 11:45	Staffan Hugemark
📧	Federal Court Approves Parties' Technology (3898504169).msg	Email	den 4 mars	Yesterday at 11:45	Staffan Hugemark
📄	Contentworker Knowledge Management.pdf	Memo	Yesterday	Yesterday at 10:35	David Little
📄	Contentworker Document Management.pdf	Memo	Yesterday	Yesterday at 10:34	David Little
📄	Contentworker Contracts Management.pdf	Memo	Yesterday	Yesterday at 10:34	David Little
📄	SPA Appendix B.docx	Agreement	tisdag	Yesterday at 00:20	Staffan Hugemark
📄	SPA Appendix A.docx	Agreement	tisdag	Yesterday at 00:20	Staffan Hugemark
📄	General Delivery Terms and Conditions.pdf	DD	tisdag	Yesterday at 00:19	Staffan Hugemark

MATTER SUMMARY

Owner: Staffan Hugemark

Responsible: Jonas Abrahamsson

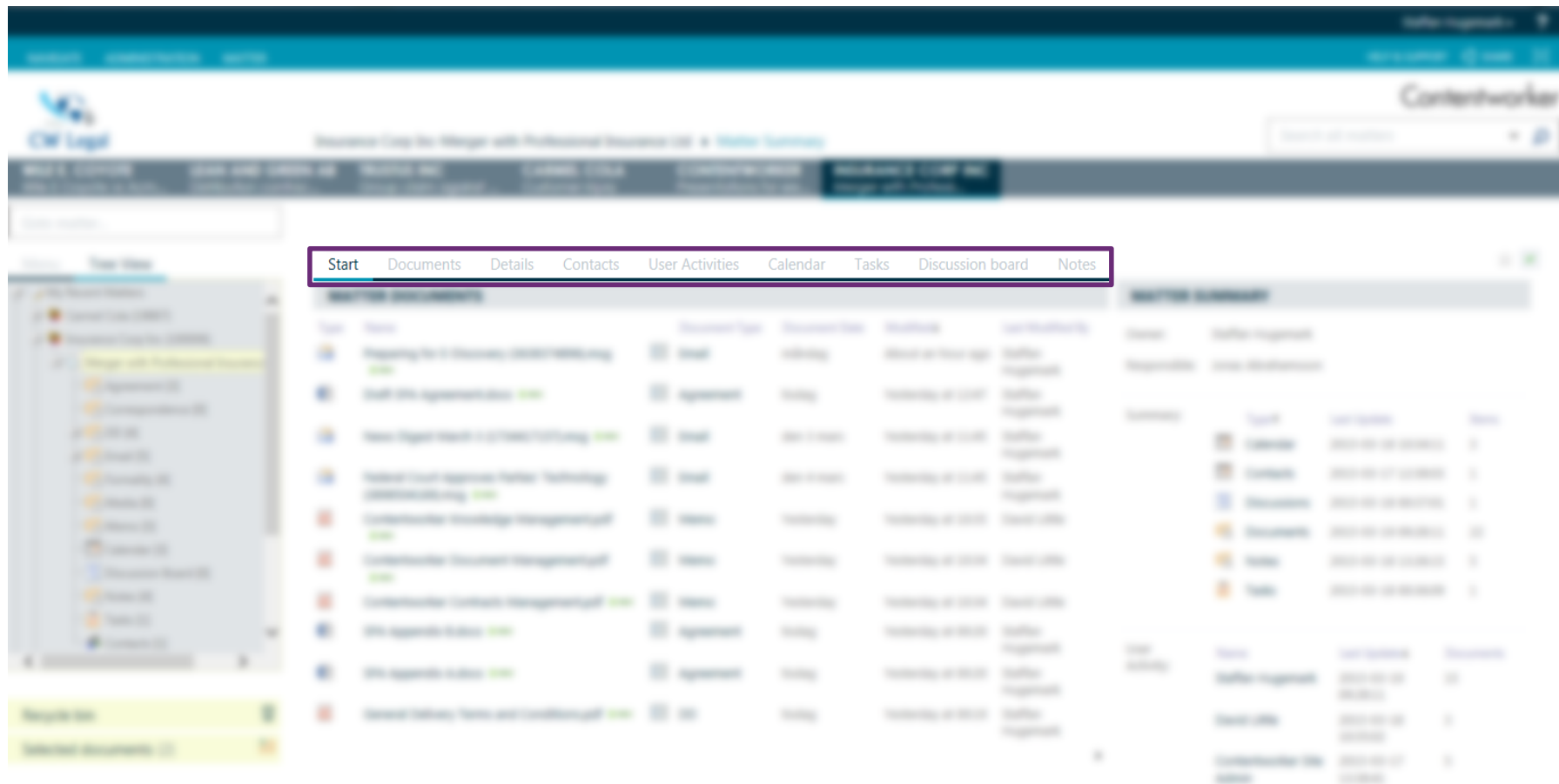
Summary:

Type	Last Update	Items
📅 Calendar	2015-03-18 10:34:11	3
📅 Contacts	2015-03-17 12:38:03	1
📄 Discussions	2015-03-18 00:37:01	1
📄 Documents	2015-03-19 09:28:11	22
📄 Notes	2015-03-18 13:26:15	5
📄 Tasks	2015-03-18 00:36:09	1

User Activity:

Name	Last Update	Documents
Staffan Hugemark	2015-03-19 09:28:11	15
David Little	2015-03-18 10:35:02	3
Contentworker Site Admin	2015-03-17 13:38:41	5

Tabs for Different Content



Matter Documents Tab



The screenshot shows the 'Matter Documents' tab in the Formpipe application. The interface includes a top navigation bar with tabs like 'Start', 'Documents', 'Details', 'Contacts', 'User Activities', 'Calendar', 'Tasks', 'Discussion board', and 'Notes'. The 'Documents' tab is active, displaying a 'DOCUMENT TYPES' section. On the left, there is a sidebar with a tree view of document categories. The main area contains a table of document types with columns for 'Document Type', 'Description', 'Items', and 'Last Update'. A '+ Add new item' button is visible above the table. A file upload area with 'Drop file(s) here' prompts is located on the left side of the table.

Document Type	Description	Items	Last Update
Agreement	Agreements, contracts, appendices and related documents	3	2015-03-18
Correspondence	Letter, faxes and other corresponding other than emails	0	
DD	Due Diligence	4	2015-03-18
Email	Emails	5	2015-03-19
Formality		4	2015-03-17
Media	Pictures, photos and images	0	
Memo	Memos , legal opinions and other similar documents	3	2015-03-18

Matter Details Tab



CW Legal

Insurance Corp Inc Merger with Professional Insurance Ltd & Related Entities

SEARCH

Home

My Matters

My Documents

My Contacts

My Activities

My Calendar

My Tasks

My Discussion Board

My Notes

Home

My Matters

My Documents

My Contacts

My Activities

My Calendar

My Tasks

My Discussion Board

My Notes

Start

Documents

Details

Contacts

User Activities

Calendar

Tasks

Discussion board

Notes

MATTER OVERVIEW

Matter

Practice Area

Start Date

Close Date

Status

Client

Counterparties

Merger with Professional Insurance Ltd

Mergers & Acquisitions

2015-03-01

Active

Insurance Corp Inc
(show matters)

Professional Insurance Ltd

📄

👤

✕

Matter Security

Contributors

Readers

Uses Unique Security

Staffan Hugemark; Jonas Abrahamsson; David Little

Members

Matter Contacts



Matter | Documents | Details | **Contacts** | User Activities | Calendar | Tasks | Discussion board | Notes

MATTER RELATED CONTACTS

	Role/Description	Name	Email	Mobile	Phone
Matter	Merger with Professional Insurance Ltd				
	Main contact	Anna Smith	anna.smith@inscorp.net		123-423-333
Client	Insurance Corp Inc				
	General Counsel	Anna Smith	anna.smith@inscorp.net		123-423-333
	CEO	John Jones	john.jones@inscorp.net		
Counterparties	Professional Insurance Ltd				
	Professional's main advisor	John Cheetum			555 222 3333

Matter Audit Trail



Contentworker

Start Documents Details Contacts **User Activities** Calendar Tasks Discussion board Notes

USER ACTIVITIES

User: Activity:

Date/Time	User	Activity	Item	Version	Document Type
2015-03-19 09:28:54	Staffan Hugemark	Delete Document	Legaltech Daily Update Call for Nominations Legaltech Innovation Awards (3145754647).msg (deleted)		Email
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
2015-03-18 13:32:03	Contentworker Site Admin	Create 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	Legaltech Daily Update Call for Nominations Legaltech Innovation Awards (3145754647).msg (deleted)		Email
2015-03-18 13:32:03	Contentworker Site Admin	Edit Document	Legaltech Daily Update Call for Nominations Legaltech Innovation Awards (3145754647).msg (deleted)		Email
2015-03-18 13:32:02	Contentworker Site Admin	Create Document	Preparing for E-Discovery (3638374896) NEW		Email
2015-03-18 13:32:02	Contentworker Site Admin	Edit Document	Preparing for E-Discovery (3638374896) NEW	0.1	Email
2015-03-18 13:32:02	Contentworker Site Admin	Edit Document	Preparing for E-Discovery (3638374896) NEW		Email
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

Matter Calendar



CW Legal

Home | Documents | Details | Contacts | User Activities | **Calendar** | Tasks | Discussion board | Notes

CALENDAR

← → mars 2015

MÅNDAG	TISDAG	ONSDAG	TORS DAG	FREDAG	LÖRDAG	SÖNDAG
23 10:00 - 10:30 Internal status meeting	24	25	26	27 13:00 - 14:00 Meeting with client	28	1
2 10:00 - 10:30 Internal status meeting	3	4	5	6	7	8
9	10	11	12	13	14	15
16 10:00 - 10:30 Internal status meeting	17	18	19	20 13:00 - 14:00 Meeting with client	21	22
23 10:00 - 10:30 Internal status meeting	24	25	26	27	28	29
30 10:00 - 10:30 Internal status meeting	31	1	2	3	4	5

+ Add

Matter Tasks



Contentworker

Start Documents Details Contacts User Activities Calendar **Tasks** Discussion board Notes

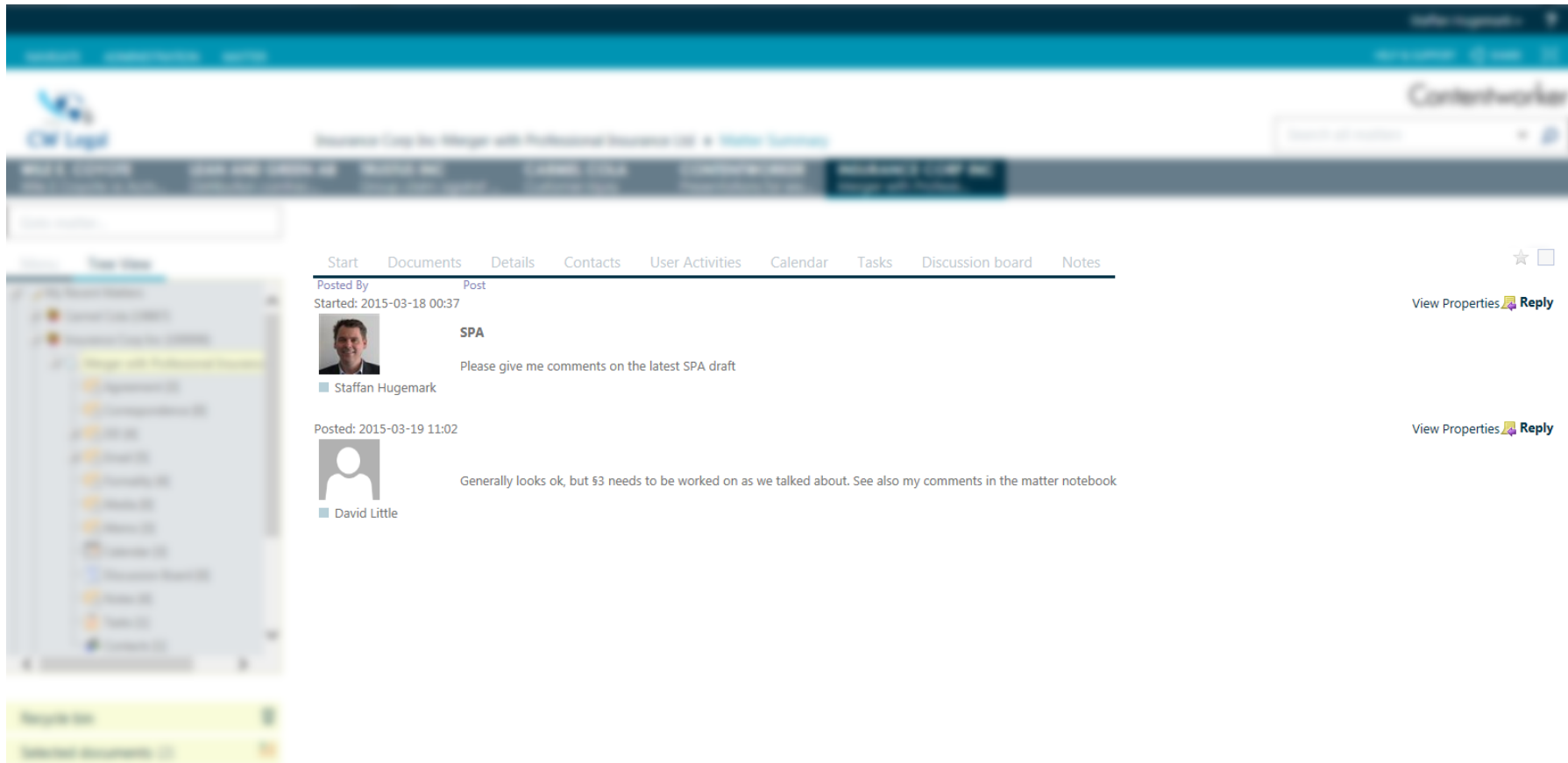
TASKS

[+ new task](#)

Tasks ...

<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Task Name	Task Status	Priority	Due Date	% Complete
Assigned To :						
<input checked="" type="checkbox"/> Staffan Hugemark						
(1)						
<input type="checkbox"/>	<input type="checkbox"/>	Create draft SPA before meeting	Not Started	(2) Normal	Tomorrow	0 %
Assigned To :						
<input type="checkbox"/> David Little						
(1)						
<input type="checkbox"/>	<input type="checkbox"/>	Prepare DD list	Not Started	(2) Normal	den 27 mars	0 %

Matter Discussion Board



Matter OneNote Notebook



Contentworker

Search all matter

Start Documents Details Contacts User Activities Calendar Tasks Discussion board Notes

NOTES

+ open notes

Notes ... Find a file

✓		Name	Version	Modified	Modified By	Document Date	Created By
		Other %	... 0.1	Yesterday at 13:26	Staffan Hugemark	Yesterday	Staffan Hugemark
		Open Notebook	... 0.2	Yesterday at 13:25	Staffan Hugemark	tisdag	Contentworker Site Admin
		Personnel	... 0.1	tisdag at 13:55	Staffan Hugemark	tisdag	Staffan Hugemark
		Financial	... 0.2	tisdag at 13:55	Staffan Hugemark	tisdag	Contentworker Site Admin

Search Box



Search Result



David Little ▾ ?

NAVIGATE ADMINISTRATION

HELP & SUPPORT ↻ SHARE

CW Legal

CWL2 ▾ Search

Contentworker

WILE E. COYOTE
Wile E Coyote vs Acme...

LEAN AND GREEN AB
Distribution contrac...

EPSILON
Passenger injury EP7...

CARMEL COLA
Customer injury

Goto matter...

contentworker

Advanced Property search

Menu Tree View

HOME

My Recent Documents

My Matters

New Document

All Contacts

SEARCH

Search Matters

Search Clients

Search Documents

REPORTS

User Activities

Aggregated Calendar

Aggregated Tasks

LINKS

Know How Repository

Contract Management

Selected documents (3)

Ny brief på filmen_3504601641

Förstå vad det är som gör **Contentworker** bättre och mer intelligentare än andra på ... och enkelt sätt hur allting fungerar och vad **Contentworker** har som alla andra saknar ...

[cwl2.intelligo.se/100012-0001/.../Ny brief på filmen_3504601641.msg](#)

Matter: Bad Brakes (0001), Client: Trollhatten Bil (100012), Practice Area: Litigation & Arbitration, Document Type: Email

Contentworker DM White Paper

Contentworker can easily be branded to fit the firm's look and feel ... Intelligo 3 The First Impression **Contentworker** Start Page The **Contentworker** start page gives the user an ...

[cwl2.intelligo.se/100014-0001/.../Contentworker DM White Paper.pdf](#)

Matter: Wile E Coyote vs Acme Inc. (0001), Client: Wile E. Coyote (100014), Practice Area: Litigation & Arbitration, Document Type: Memo

FW **Contentworker** demo to KK (478917556)

To: "dli@traen.se" <dli@traen.se> Subject: FW: **Contentworker** demo to K&K Thread-Topic: **Contentworker** demo to K&K Thread-Index: Ac ...

[cwl2.intelligo.se/.../FW Contentworker demo to KK \(478917556\).msg](#)

Matter: Customer injury (28974), Client: Carmel Cola (19867), Practice Area: Litigation & Arbitration, Document Type: Email

can we postpone our meeting today 30 mins (310614477)

IPM.Note can we postpone our meeting today 30 mins ... David Little Jonas Abrahamsson David Little EX /O=INTELLIGO

[cwl2.intelligo.se/.../can we postpone our meeting today 30 mins \(31...](#)

Matter: Passenger injury EP798 (0001), Client: Epsilon (100021), Practice Area: Litigation & Arbitration, Document Type: Email

Contentworker Application Suite

Phone: 404-378-3728 | sales@contentworker.com | www.contentworker.com

Result type

Email (30)

PDF (3)

Word (3)

Modified date

All

Author

David Little (29)

Jonas Abrahamsson (8)

Contentworker Site Admin (4)

Contentworker Demo 1 (2)

Staffan Hugemark (2)

SHOW MORE

Client

Wile E. Coyote (24)

Carmel Cola (6)

Document Search Form



DAVID LITTLE

NAVIGATEADMINISTRATION

HELP & SUPPORTSHARE

CW Legal

CWL2 ▶ Search By Properties

Contentworker

WILE E. COYOTE
Wile E Coyote vs Acme...

LEAN AND GREEN AB
Distribution contrac...

EPSILON
Passenger injury EP7...

CARMEL COLA
Customer injury

Goto matter...

MenuTree View

HOME

My Recent Documents

My Matters

New Document

All Contacts

SEARCH

Search Matters

Search Clients

Search Documents

REPORTS

User Activities

Aggregated Calendar

Aggregated Tasks

LINKS

Know How Repository

Contract Management

Selected documents (3)

Find documents that have...

All of these words:spa

The exact phrase:

Any of these words:

None of these words:

Result type:All results

With the following properties...

Context

Name

Client

Matter

Practice AreaMergers & Acquisitions

Document Type

Counterparty

Other Party

Other

Document ID

Comment

History and dates

Created By

CreatedLast year

Last Modified By

Last Modified DateExact date

Document DateExact date

Review DateExact date

Email

Tostaffan

From

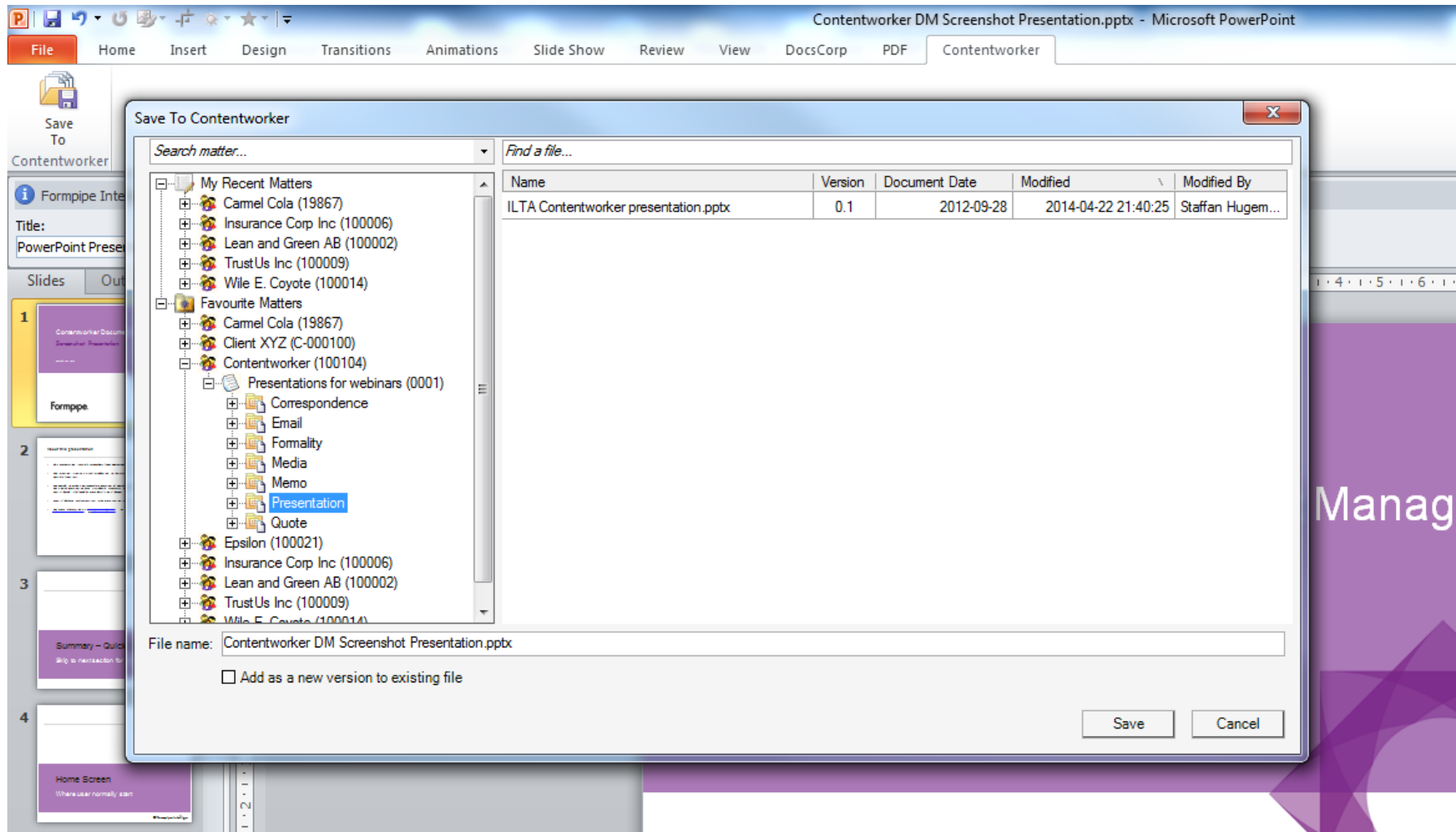
SentExact date

ReceivedExact date

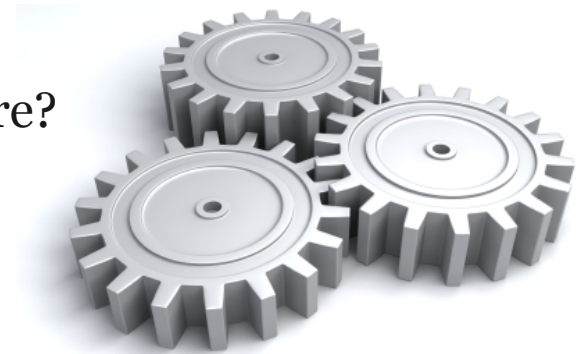
Search

© Formpipe Intelligo

Save from Microsoft Office



- 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?



Outlook Integration



Demo email - shu@traen.se - Microsoft Outlook

File Home Send / Receive Folder View Add-Ins DM

Ignore Clean Up Delete Reply Reply All Forward Meeting IM More Quick Steps Move Rules OneNote Unread/Read Categorize Follow Up Find a Contact Address Book Filter E-mail Settings Privacy Manager

Contentworker Filing

Insurance Corp Inc (100006) - Misc consultations (0001) Save

My recent matters

- Insurance Corp Inc (100006) - Merger with Professional Insurance Ltd (0002)
- Wile E. Coyote (100014) - Wile E Coyote vs Acme Inc. (0001)
- Camel Cola (19867) - Customer injury (28974)
- Lean and Green AB (100002) - Distribution contract (0001)
- TrustUs Inc (100009) - Group claim against TrustUs (0001)
- Lean and Green AB (100002) - Demo VK (0002)
- Wile E. Coyote (100014) - Test 234 (0002)

My favourite matters

- Insurance Corp Inc (100006) - Merger with Professional Insurance Ltd (0002)
- Wile E. Coyote (100014) - Wile E Coyote vs Acme Inc. (0001)
- Camel Cola (19867) - Customer injury (28974)
- Client XYZ (C-000100) - New matter (0001)
- Lean and Green AB (100002) - Distribution contract (0001)
- TrustUs Inc (100009) - Group claim against TrustUs (0001)
- Zoo bracket AB (100011) - Acquisition of Idun Tools (0001)
- Contentworker (100104) - Presentations for webinars (0001)
- Insurance Corp Inc (100006) - Misc consultations (0001)
- Epsilon (100021) - Frequent flyer programme (0002)
- Epsilon (100021) - Budget 2014 (0003)

Lean & Green [100002-0001]@

Trustus Group Claim [100009-0001]@

CW AutoFiling

Demo Thread Filing

Demomail

Mail

Calendar

Contacts

Tasks

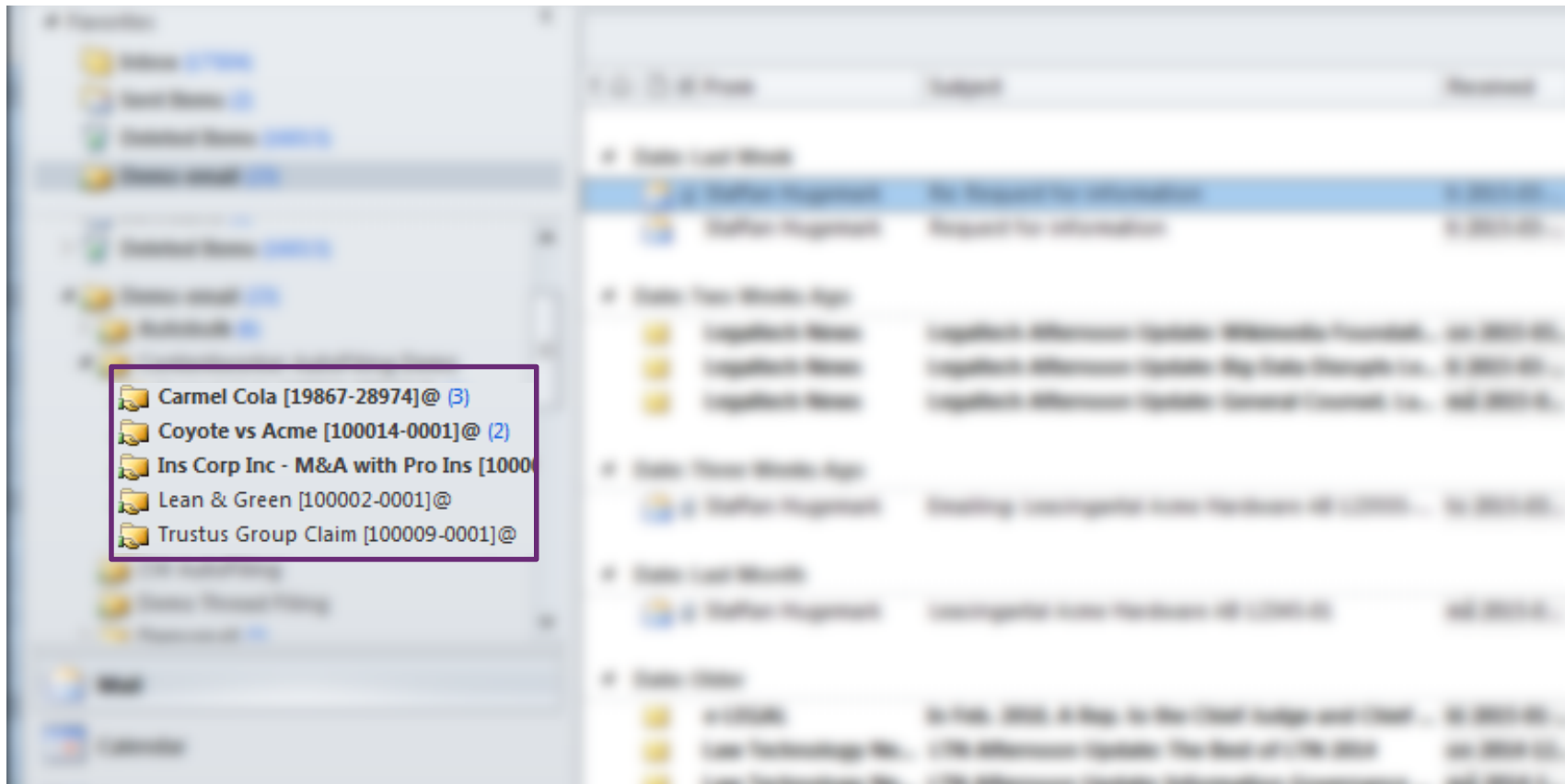
Notes

Items: 128 Unread: 23 Reminders: 9

All folders are up to date. Connected to Microsoft Exchange 100%

Subject	Received	Categories	Size
gemark Re: Request for information	ti 2015-03-...	In SharePoint; #100006-0002 : Insurance Corp Inc-Merger with Pr...	1 MB
gemark Request for information	ti 2015-03-...		7 KB
Ago			
News Legaltech Afternoon Update: Wikimedia Foundat...	on 2015-0...	In SharePoint; #100006-0001 : Insurance Corp Inc-Misc consultat...	52 KB
News Legaltech Afternoon Update: Big Data Disrupts L...	ti 2015-03-...	In SharePoint; #100006-0001 : Insurance Corp Inc-Misc consultat...	52 KB
News Legaltech Afternoon Update: General Counsel, La...	må 2015-0...	In SharePoint; #100006-0001 : Insurance Corp Inc-Misc consultat...	52 KB
Ago			
@ Staffan Hugemark Emailing: Leasingavtal Acme Hardware AB 123555-...	to 2015-03-...		88 KB
Date: Last Month			
@ Staffan Hugemark Leasingavtal Acme Hardware AB 12345-01	må 2015-0...		90 KB
Date: Older			
e-LEGAL In Feb. 2010, A Rep. to the Chief Judge and Chief ...	lö 2015-01-...		186 KB
Law Technology Ne... LTN Afternoon Update: The Best of LTN 2014	on 2014-1-...	In SharePoint; #TrustUs Inc-Group claim against TrustUs : Email	40 KB
Law Technology Ne... LTN Afternoon Update: Information Governance ...	må 2014-1-...	In SharePoint; #TrustUs Inc-Group claim against TrustUs : Email	42 KB
Dagens Juridik Advokat döms för grov otillbörlig marknads påverk...	fr 2014-10-...	In SharePoint; #Wile E. Coyote-Test 234 : Email; #Wile E. Coyote-T...	34 KB
Dagens Juridik "Att ta domarnas värderingar på allvar - är att först...	fr 2014-10-...	In SharePoint; #Wile E. Coyote-Test 234 : Email; #Wile E. Coyote-T...	57 KB
Dagens Juridik Är affärsjurister alltför mycket "hängslen och livr...	fr 2014-10-...		34 KB
Dagens Juridik Dagens Juridik - Jobb & Karriär	to 2014-10-...	In SharePoint; #Wile E. Coyote-Test 234 : Email; #Wile E. Coyote-T...	67 KB
Dagens Juridik "Anmärkningsvärt oskicklig" advokat får upprätel...	to 2014-10-...	In SharePoint; #Wile E. Coyote-Wile E Coyote vs Acme Inc. : Email...	55 KB
Dagens Juridik Är affärsjurister alltför mycket "hängslen och livr...	to 2014-10-...		34 KB

Monitored Folders for Automatic Filing



Large Volumes



Many documents
... and even more emails

Does it scale?



SharePoint has some
limitations



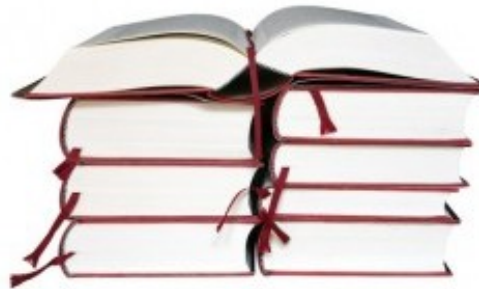
Contentworker
by Formpipe



Contentworker
overcomes them



Document
Management



Knowledge
Management



Contract
Management

Contentworker

by Formpipe

Contentworker Knowledge Management



NewsfeedSkyDriveSitesStaffan Hugemark

BROWSEPAGE

SHAREFOLLOW

Contentworker

Know How Repository

Search...

Know How RepositoryMy FavouritesProperties SearchAdministration

TAXONOMY PATH

Know How Repository -> General Corporate

Upload

DOCUMENT FILTER

Show Filter

TAXONOMY FILTER

Know How Repository

Stock Market (3/0)

General Corporate (14/4)

Articles of Association (0/0)

Bonus Issue (1/0)

Establishment (1/0)

Establishment of a Limited Liability Company (0/1)

General Issues (1/0)

Management of the Company (8/0)

Board (4/0)

Corporate Governance (0/0)

General (0/0)

Managing Director (4/0)

DOCUMENTS

View: Verbose List Brief list

Type	ID	Name	Version	Document Type	Comments	Language	Edit
	36	Avtal om överlåtelse av aktier (Apport)	1.4	Agreement	Kommentar	Swedish	
	37	Avtal om överlåtelse av aktier (Kontant betalning)	1.0	Agreement		Swedish	
	72	Board Budget	0.1	Memo	A comment...	English	
	30	Bolagspapper byte av firma (företagsnamn)	1.1	Other		Swedish	
	75	CEO Instruction - Extended version	0.1	Instruction	-	English	
	74	CEO Instruction	0.1	Instruction		English	
	68	Changing Company Name - Government Form	0.4	Other	Kommentar	English	
	73	Checklist Board's Rules	0.1	Instruction	-	English	
	25	Checklista styrelsens arbetsordning	1.0	Instruction		Swedish	
	8	Sekretessavtal	1.1	Agreement	Kommentar	Swedish	
	76	Share Purchase Agreement (SPA) - Cash Payment	0.1	Agreement		English	
	29	Styrelsens budget	1.1	Memo	Liten kommentar	Swedish	

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