



MATTER  
MOBILITY

LEGAL

## INFORMATION MANAGEMENT SOLUTIONS FOR MODERN LAW FIRMS

### Records Management, Governance, Matter Mobility

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#### Matter Mobility

Facing an increase in lateral moves? FileTrail's Matter Mobility automates the process of attorney transfers. Stop spending unnecessary manual labor hours to handle their file transfers.

Automated workflows for attorney transfers:

- ✓ Reduce the risk of human error.
- ✓ Save time and cut costs.
- ✓ Improve the attorney experience.

In addition to reducing risk and saving both time and money with a streamlined process, the firm gains other important benefits:

- ✓ Newly arriving attorneys get settled in — and billing time — faster. Their clients are quickly impressed, validating their decision to join your firm.
- ✓ Departing attorneys get documents reviewed and approved faster and with less risk. Documents and document metadata are pulled automatically from all connected sources.

#### Matter Mobility Provides Real, Lasting Value to Law Firms

- ✓ **Save time and money** – Accommodate arriving and departing attorneys faster and with less effort.
- ✓ **Eliminate reliance on IT** – Automatic loading and retrieval of documents and data puts you in control, giving you immediate results.
- ✓ **Enhance visibility** – Gain visibility into what documents exist in any connected repository for any matter.
- ✓ **Filter emails** – Exclude internal emails from file releases with the Email Analyzer.
- ✓ **Maintain billability** – Exceed arriving attorneys' expectations. Keep them productive, informed, and happy about their early experience with the firm.
- ✓ **Work efficiently** – Automatic notifications spur reviewer to complete approvals online.
- ✓ **Speed implementation** – FileTrail's experienced team will have you operating quickly.
- ✓ **Improve marketing** – Show off your onboarding process system to potential recruits.

# Matter Mobility's powerful and flexible workflow provides valuable impact to arriving and departing attorneys.

## Onboarding Workflow

- ✓ Provides arriving attorneys the ability to prioritize matters & with visibility to matter status
- ✓ Logs critical milestones including client approval, conflicts checks and intake
- ✓ Loads documents and metadata provided by the originating firm automatically, pushing them to the firm's EDMS without IT support
- ✓ Merges multi-volume documents into a single one\*
- ✓ Automates review and approval, with notifications to reviewers

\*Coming soon

## Outbound Workflow

- ✓ Logs critical milestones including client and partner approvals, and more
- ✓ Eliminates most ineligible emails before the review with Email Analyzer
- ✓ Uses classifications to identify client-owned documents to retain
- ✓ Retrieves documents and metadata automatically
- ✓ Lets you set the timeframe to delete documents after delivery to client or departing attorney
- ✓ Provides powerful filtering or search on any data fields
- ✓ Highlights document content search results in document previews

**FileTrail Connectors enable Matter Mobility to work seamlessly with your current DMS and RMS, as well as security, archival and financial systems.**

## Existing connectors include:

### Document Repositories

- ✓ iManage™ Work 8.5/9/10
- ✓ NetDocuments
- ✓ File Shares
- ✓ iManage Cloud

### Archival Systems

- ✓ Access Corp
- ✓ Iron Mountain
- ✓ Datasafe
- ✓ O'Neil
- ✓ Restore

### Financial Systems

- ✓ Thomson Reuters Elite™
- ✓ Aderant®

### Records Management Systems

- ✓ iManage IRM
- ✓ Legal-RM iCompli
- ✓ OpenText LegalKEY™
- ✓ ARM
- ✓ Thomson Reuters Elite 3e
- ✓ FileTrail RM

FileTrail is the leader in information governance for law firms throughout North America, the UK and the EU. Through long-term partnering relationships with law firms, we have built knowledge that is reflected in our solutions.

As your partner, we guide you through the implementation of your IG strategy. We deliver physical records management, visibility and disposition of documents across your many repositories, automation of attorney transfers, and archiving of matter documents to lower cost storage. We integrate with a major legal EDM systems, file shares,

major financial systems, and security provisioning systems, to create a fully integrated and automatic solution that saves labor, reduces costs, and reduces the reliance on internal IT staff.

Stay on track with FileTrail. We'll help you get there. Contact us today for a quick discovery call.

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