

A Partner Solution for Cross Industry

Enhance Accessibility and Organization of Legal Case Documentation



IBM **Information Management** software

Mitratech Holdings, Inc. TeamConnect Legal Suite for IBM ECM

Partner Solution

■ **Target Industry**

Cross Industry

■ **Business Application**

eBilling

Matter/Case Management

■ **Product**

IBM FileNet Content Manager

Business Challenge

In its 2007 Chief Legal Officer Survey, the Association of Corporate Counsel (ACC) compiled insights into the key challenges of corporate legal departments. According to ACC respondents, “chief legal officers and general counsel continue to spend the majority of their time on corporate transactional work as one of their top three areas of focus, followed by compliance.” When asked to identify the next “big issue” they will face, respondents overwhelmingly identified “document/records management issues.”

Attorneys struggle with the lack of a centralized view of legal cases and pertinent documents. Matter/Case Management data is often stored separately from electronic media. Documents stored on local desktops, email or within siloed legal department document management solutions make information searching a time intensive and inefficient activity. This inefficiency in “fact gathering” compromises both the quality and timeliness of legal services and also makes it difficult to comply with record retention policies. Additionally, a lack of process and coordination internally can make the legal department look chaotic in its service to the company.

Having a legal matter management solution integrated with an

organizations’ enterprise content management system provides improved operational efficiencies, reduced legal spend and improved access to the right information at the right time, for better quality of service.

Solution

Mitratech’s TeamConnect Legal Suite for IBM ECM provides nearly transparent access to documents stored and managed in the IBM Enterprise Content Management (ECM) suite of products. The marrying of Mitratech’s TeamConnect Legal Suite for IBM ECM to the IBM ECM repository makes document access streamlined and straightforward. Users do not realize that they are using two distinct systems performing two very different functions. Rather, they simply enter a matter within Mitratech TeamConnect Legal Suite for IBM ECM and an applicable folder is created within the IBM ECM repository to store matter relevant documents.

Document security is established by creating a folder structure organized by legal issue and the nature of the matter. Access to matters and documents may be restricted to legal professionals or may be shared with other employees, partners or vendors. Organizations are assured of proper handling of sensitive matters and documents, as the solution allows access only to individuals assigned to



the associated matter, while restricting access to all other individuals. Document access has never been easier; simply access the document tab within a matter and the system displays a matter-centric document list allowing direct access to applicable documents. The solution also provides check-in/check-out and versioning. Document retention policies may be incorporated into the solution by configuring matter and document metadata or through integration with the companies' records management solution.



Value Proposition

Mitratech's TeamConnect Legal Suite for IBM ECM provides organizations with a solution that combines structured matter/case information with electronic media. The solution provides value to all legal personnel across the organization – including data entry clerks, paralegals, attorneys, managers/supervisors and general counsel/executives.

The solution also enables personnel to view structured matter/case information with electronic media at a matter level, and also allows authorized non-legal staff to access and profile applicable electronic media in a secure environment. Mitratech's TeamConnect Legal Suite for IBM ECM also enables organizations to adhere to corporate enterprise content and records management policies. Vendors may be brought into compliance by requiring the submission of documentation within this secure environment. In the event email is used to submit data, information may be attached to specified matters/cases including attachments. Legal case handlers may view all pertinent information quickly and easily. Record managers may set applicable retention policies and enforce litigation hold policies.

Finally, the solution improves a corporate legal department's ability to deliver appropriate counsel, thereby reducing risk. It also provides enhanced efficiency for attorneys gathering relevant materials, resulting in timelier client service.

Company Description

Mitratech provides market-leading *Collaborative Accountability Applications* for businesses and their trusted partners. With team-oriented domain applications in legal process automation, governance, risk, compliance and security, Mitratech's TeamConnect Collaborative Accountability Suite improves transparency of financial reporting, reduces exposure to risk, and boosts operating discipline, information security and the efficiency of enterprise processes.

Our *Collaborati* browser application also meets the accountability and collaboration needs of proliferating extraprise teams, wherein vendors, partners and service providers often have to be included in sensitive teamwork projects such as electronic billing, legal hold and collaborative budgeting, or those which expose your business to liability. For more information, please visit <http://www.mitratech.com>.

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