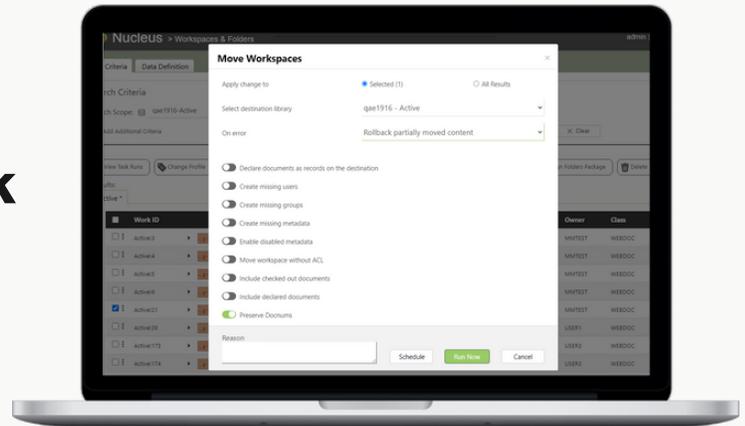


# TRANSFER



**RBRO SOLUTIONS**  
A CORA Legal Group Company

## Facilitate the movement of data between iManage Work libraries while ensuring integrity of data, profile, & security information



Often, within a document management system, there is a need to move content within or across libraries quickly, easily, and without losing the integrity of the content.

*Transfer* is a quick, user-friendly, configurable, cost-effective solution for moving content within iManage Work. *Transfer* also improves user search functionality by moving content to an archive library on a scheduled basis, ensuring that only active content is visible to users. *Transfer* has two available modules - *Admin Transfer* and *Quick Transfer*. With *Admin Transfer*, admin staff can perform mass or ad hoc movement of matters that need to be moved to a different library for purposes like archiving or region change. With *Quick Transfer*, end-users are empowered to move content within or across libraries easily and without involving admin staff.

### **ACCELERATE WORKSTEPS**

- Automate tasks for moving workspaces and content between iManage libraries.
- Move large volumes of folders and documents from one workspace to another, rapidly and with ease.
- Quickly search and locate workspaces and folders to facilitate transfers.

### **MAINTAIN DATA ACCURACY**

- Move data between libraries and maintain data integrity, profiles, and security.
- Automate content transfer tasks for archiving of matters based on a defined criteria or a data definition.
- Copy missing profiles, users, and groups from a source library to a destination library.

### **EMBRACE FLEXIBILITY**

- Choose between rollback on transfer error or continue to transfer as much content that can be transferred.
- Finish a previous partial transfer by rerunning the task.
- Schedule & automate tasks and view task status on the task management screen.



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## PRODUCT FEATURES:

### Admin Transfer

- Move workspaces and content across a library/server based on search results or list of workspace IDs.
- Automate workspace transfer by setting up a schedule.
- Move folders and choose to inherit profile and security or keep the source values.
- Declare documents as records on destination for archiving.
- Choose to rollback or continue transfer when an erroneous record stops the transfer.
- Create missing profile, users, and groups on a destination library.
- Temporarily enable any disabled profile values for the purpose of transfer.
- Option to transfer a workspace without the security from the source so new security can be applied.
- Preserve docnums when transferring workspaces across libraries.
- Choose whether to move documents that have been checked out or declared.



### Quick Transfer

- Allow users to move documents and emails across libraries.
- Validate permissions while performing a document move.
- Inherit a destination folder's profile in the moved documents.
- Maintain a comprehensive history of moved documents.
- Information about the source library name and document ID is appended to the document's comment when it is moved across libraries.



## ABOUT RBRO SOLUTIONS:

*A premiere iManage Partner since 2003 and trusted globally by over 400,000 business users, RBRO Solutions is dedicated to helping organizations get the greatest value from their business content and work processes by extending the power of their iManage Work solution. With over 700 iManage engagements, RBRO applies best practices and know-how to simplify iManage implementations, upgrades and migrations. RBRO transforms how organizations get work done with adoptable and scalable improvements in business efficiency and agility that integrate seamlessly across corporate systems, adding value to the iManage Work solution and enabling you to decrease your overall cost of ownership by simplifying tasks and empowering users.*



*"With multi-generational knowledge of iManage Work solutions, RBRO have developed an intimate understanding of how lawyers work and their day-to-day challenges.*

*• Sandeep Joshi, VP Business Development, iManage*



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