IMPORT

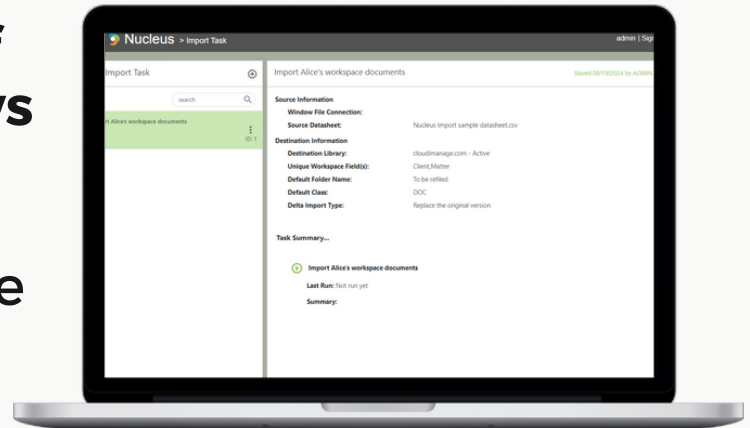**RBRO SOLUTIONS**
A CORA Legal Group Company

Empower support staff to bulk import Windows files & folders into iManage by targeting workspaces using profile information from datasheets

When attorneys/lawyers join a law firm, corporate legal department, or financial institution, they need the content from their previous business available in the new document management system (DMS) ASAP so that they can continue to manage their work with minimal business disruptions. Support staff are often responsible for importing these contents into different workspaces in iManage libraries, which can be an arduous and time-consuming task.

Import is a robust, reliable, and versatile tool that can identify the correct matters and then import the content into iManage without needing to constantly monitor progress. The solution streamlines and expedites processes for identifying, associating, and importing the correct material into the DMS so that attorneys/lawyers can seamlessly join the team and focus efforts on their work. Support staff can import into existing matching folders or create any missing folders while merging the folder structure on Windows and the corresponding iManage Workspace.

☑ STREAMLINE PROCESSES

- Reduce manual effort by automating content identification and association.
- Seamlessly integrate content into the new iManage DMS.
- Maintain consistent workflow, minimizing delays and disruptions.

☑ EXPEDITE ONBOARDING

- Accelerate onboarding by quickly importing content into iManage.
- Minimize downtime with fast file organization and folder creation.
- Speed up and improve the import process, ensuring attorneys/lawyers start work immediately.

☑ ENSURE ACCURACY

- Match content with matters and workspaces with precision.
- Organize content within iManage to preserve structure.
- Reduce manual data entry errors by automating key import work steps to allow to ensure for the accuracy of information.

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PRODUCT FEATURES:

- Identify workspaces based upon unique identifying profile values as specified in the datasheet and import the content on the Windows file path into the identified workspace.
- Match the folder name with existing folders or create any non-matching folders.
- Maintain the integrity of top-level folders by importing non-matching top-level folders to a different folder.
- Specify the Author and Operator for individual workspaces via the datasheet.
- Perform a delta import when content has been modified and then import it as a new version or replace the original with the new material.
- Automatically inherit profile and security information from the parent location for metadata that hasn't been specified.
- Display all content imported in a task, including errors or warnings, via the import viewer.
- Utilize powerful filters on the import viewer to assist in locating and auditing the imported content.
- Import document profiles based on a profile datasheet
- Import documents to matching folders or place them under a sub-folder under the workspace specified
- Handle documents that are at the workspace/tab level by placing them under a specified folder
- Preserve the document's version from the source.

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.

iManage

"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