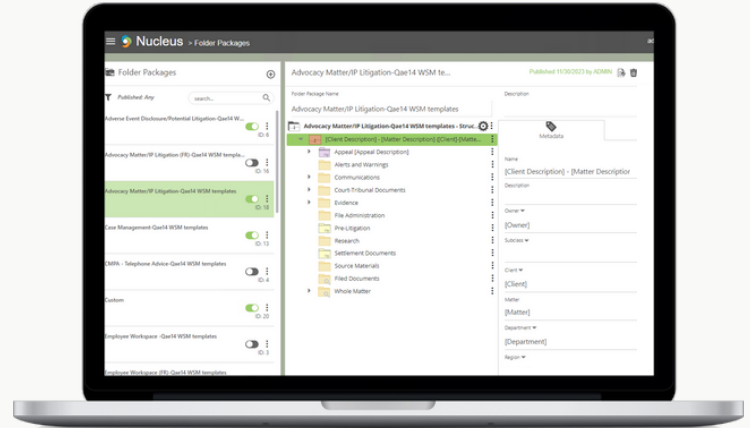# WORKSPACE MANAGEMENT

RBRO SOLUTIONS

Simplify generation, management, and governance of iManage Work Workspaces and Templates

Workspace Management allows for total administrative control of iManage Work workspace structures through an intuitive visual interface that ensures that workspaces maintain the same structure as their associated templates. *Workspace Management* includes *AdminDeploy*, and can be bundled with *QuickDeploy* and *EnhancedDeploy*, based upon your needs.

AdminDeploy is a time-saving mechanism for administrators to set up automated tasks to generate or update workspace structures based on information pulled from an external or internal source. *QuickDeploy* is a powerful tool that allows end users to extend their workspaces based on admin-approved workspace structures without needing a source Practice Management System. *EnhancedDeploy* is a tremendously valuable solution that enables administrators to generate or update workspace shortcuts, either as part of the workspace deployment process or as a separate task.

☑ COMPLETE CONTROL

- Manage all aspects of iManage Work workspace structures
- Utilize an intuitive, visual interface
- iManage Work 10 Server compatible
- iManage Cloud compatible

☑ AUTOMATED PROCESSES

- Automatically generate workspaces and templates
- Set scheduled updates or make changes on the fly
- Automatically move sub-folders
- Apply metadata and security updates to multiple items

☑ INCREASED EFFICIENCY

- Save time with automated processes
- Streamline tasks and expedite workflows
- Safeguard against inaccuracies by minimizing manual inputs
- Ensure for an ease of access to information

WORKSPACE MANAGEMENT

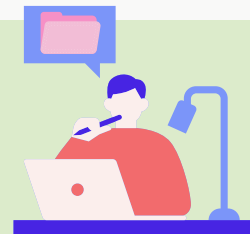**RBRO SOLUTIONS**

PRODUCT FEATURES:

- Create standardized folder packages for automated or quick deployment across an organization.
- Design folder packages that can have profile values on the workspace and folder name.
- Include standard and optional set of folders on the workspace template.
- Add search folders to your folder packages.
- Automate folder creation into the structure for folders that have similar profiles and need to be generated repeatedly.
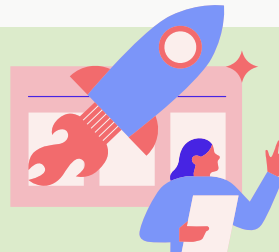
iManage

Technology Partner

CREATE FOLDER PACKAGES

DESIGN FOLDERS WITH VALUES

GENERATE WORKSPACE SHORTCUTS

ADD SEARCH FOLDERS TO PACKAGES

AUTOMATE WORKSPACE CREATION

WORKSPACE MANAGEMENT

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AdminDeploy FEATURES:

- On a scheduled or ad hoc basis, automatically generate new workspaces based on preconfigured data definitions and templates or information imported from multiple external or internal sources.
- Assign dynamic security to workspaces based on information pulled from an external system.
- Associate existing workspaces with Workspace Management templates for simplified updates.
- Maintain the structure, profile, and security of workspaces so they consistently match their assigned template.

- Easily change or update workspace structures, security, and metadata across multiple libraries.
- Set granular update options for folders not on the assigned template.
- Automatically move sub-folders and files from one folder to another.
- Remove folders from a workspace by deciding where to move the content of the deleted folder.
- Ensure that descriptions in iManage Work are consistent with an external master system.
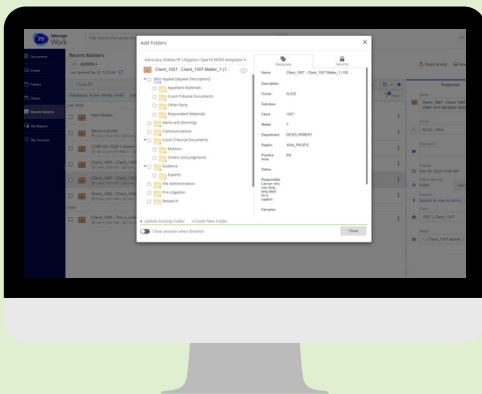
WORKSPACE MANAGEMENT

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QuickDeploy FEATURES:

- Simplify the initial folder structures delivered during workspace generation.
- Allow users to extend their workspace based on needs using admin approved folder packages.
- Control which users have access to add folders to packages.
- Configure which workspaces customized folders can be added to.
- Provision workspaces without relying on a Practice Management system for source metadata.
- Create new metadata as part of the workspace generation based on admin approved format or auto-incremented values for Alias.
- Duplicate workspace and metadata detection.
- Granular control options to specify at what depth from the workspace the end-users will be granted the ability to rename/delete folders.
- Customize which metadata is allowed to be created by end-users.
- Configure which metadata is mandatory when creating the workspaces from iManage Work.
- Option to create metadata values across libraries when it is created in one of the libraries.
- Configure auto-increment feature for metadata aliases and set them to your desired format.
- Customize which users/groups have access to which folder packages.
- Assign categories to folder packages to make it easier for users to find their desired folder packages.
- Allow end users to rename folders without needing ownership of the folder.
- Allow end-users to delete empty folders without needing ownership of the folder.
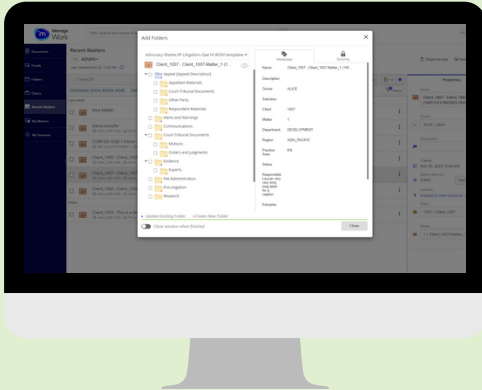

EnhancedDeploy FEATURES:

- *Contains all AdminDeploy features*
- Create workspace shortcuts under customized categories for a dynamic set of users as part of the automated workspace generation.
- Update the shortcut names when the workspace name changes due to an external source change.

WORKSPACE MANAGEMENT

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EnhancedDeploy FEATURES:

- Smart design that distinguishes between name changes by user vs external changes.
- Purge shortcuts when they are no longer needed to ensure that your user shortcut list is kept relevant and at a manageable level.
- Option to deploy workspace shortcuts directly under My Matters or under a customizable category based on the workspace profile or even a static name.

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.

Dickie McCamey

"I don't know what I would have done without RBRO's Workspace Management..."
• Donna Lewis, IT Manager - Enterprise Applications, Dickie, McCamey & Chilcote, P.C.