

WHY YOU NEED THE BEST OF BOTH

iCOMPLi
by LegalRM

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netdocuments®


What can be achieved by integrating NetDocuments and iCompli?

A cloud-based DMS provides much of the foundational functionality required to implement your information governance strategy for electronic records that are held in the form of documents, be that Word files, emails, presentations, etc. Because documents are organized in to matter or project workspaces, a DMS can help with effectively and securely managing records.

The DMS can be configured and organized so that those workspaces or folders reflect your records management file plan. However, in today's world of growing privacy legislation, outside counsel guidelines and ISO standards the need to proactively manage the lifecycle of your content calls for a best of breed solution, such as iCompli.

Leveraging the metadata fields in NetDocuments, iCompli can manage declaration of documents (in situ), seamlessly for your end users, whilst adhering to your firm's information governance policies. Also, in addition to the content held within NetDocuments, iCompli can manage the retention and disposition of physical and electronic records across multiple and diverse systems, including content stored in Office 365 and shared drives.

Save time

Optimize senior lawyer hours with destruction authorization workflows that automate and engage.


Find physical and digital assets quickly with targeted and saveable searches.

Protect and speed up revenue streams by streamlining client on and off boarding.


Facilitate Data Subject Access Requests (DSARs) in a timely manner.


Save money

Reduce cloud and warehouse storage costs. Less content = lower storage costs!

No need for other third party applications to import, export or archive Information assets.

Protect reputation

Reduce liability. Lost documents and failed audits can mean costly litigation.

Reduce the quantity of data held to limit the risk should your firm be subject to a security breach.

All your assets in a single view

With iCompli you can see all your physical and digital assets regardless of where they are held, in a single view, without any manual intervention thanks to our real time synchronization with NetDocuments and other applications used by your firm.

Integrated physical records management

Regardless of where your firm is on its digital journey there is likely to always be a need to retain original paper files. Whether you are storing one document or thousands in an offsite facility (or in office cabinets and on desks!), you need to know what you hold and where it is.

What's more, physical assets are subject to data privacy legislation. The ability to apply retention and disposition policies and to view an accurate and current list of what documents you are holding so that you can respond accurately to Data Subject Access Requests (DSARs) and apply legal holds is a must.

Using barcoding and RFID technology iCompli can provide a holistic approach to content management. Regardless of whether a matter file is made up of physical or digital documents, or a combination of both, it is possible to surface in iCompli, an inventory of what documents you hold in relation to a specific client or matter. You can then apply retention policies at either the client, matter or asset level if you need to.

Build and share reports easily

Real time, interactive business relevant views of records are instantly produced with iCompli's reporting dashboard. Your teams will have up to date and reliable information that can be used to visualize and action the next steps in information governance processes and workflows that are underway or due.

Comply with multiple data retention policies and keep cloud and warehouse storage costs under control

Across the world privacy legislation is exploding in complexity and clients are understandably being more and more demanding about how firms manage and retain their data. So, on top of the risk of fines, there is also the risk of losing clients and being sued!

iCompli assists law firms across the world manage their retention and disposition policies seamlessly and securely by providing a single view of all physical and electronic assets, across multiple information repositories. Our platform simplifies and automates retention, disposition, and overall compliance by:

- ▶ Creating rules and prioritizations for managing records retention regardless of whether the document is physical or electronic.
- ▶ Applying appropriate policies (or exceptions), to uphold internal governance directives, data privacy legislation or outside counsel guidelines, to an asset either at its creation or at any time throughout its lifecycle.
- ▶ Triggering disposition workflows and alerts to individuals or teams when files are due for review or disposition.

iCompli also fully integrates with the core systems used by firms, to ensure that compliance obligations are met in real time regardless of where your client or admin content resides.



Audits in a fraction of the time

Auditing is necessary for a multitude of reasons, including the need to know where an asset is located, the history of who has had access or confirmation that your firm's (and your client's) retention and disposition policies and being met.

iCompli can dramatically cut the time taken to audit your physical and digital assets, regardless of where they are held and provide a comprehensive audit trail for any given asset.

Complete control and tracking of who accesses your data



Ethical walls

iCompli can create and manage exclusionary and inclusionary walls to isolate records and matters from inappropriate access, or can integrate seamlessly with NetDocuments or Intapp Walls.



Chain of custody

You can also demonstrate rigorous tracking of sensitive records thus reducing the risk of inappropriate access.



Find assets quickly

With visibility of all your firms' documents through one platform, finding digital or physical assets is simple. Users can search multiple metadata points related to your digital records (across languages if necessary) globally. You can filter and narrow the search by criteria such as location, department, practice group, client, matter, author (even previous names) and many more. These searches can be saved so that it is even easier next time. Exporting results to Excel is easy with the click of a button, or you can navigate your information assets by iCompli's matter centric 'tree view'.

If you are hunting for a physical file iCompli's RFID tracker can find that too within moments, even if it's hidden in a cupboard or under a pile of files! And because iCompli is a platform independent cloud solution, there is no tie to specific proprietary hardware and you can use you existing mobile and tracking devices.

Time savings with automation and workflows

Productive time is lost every day to document handling and all those hours spent processing records are hours that could be billed or be used to more positive effect!

iCompli helps firms to stay not just on top, but ahead of their governance requirements by facilitating workflows (for example destruction authorization workflows), automating tasks and alerting individuals or teams when content is due for review or disposition.

Efficiently manage the challenge (and opportunity) of client transfers

In recent years lawyer movement from one firm to another has increased dramatically.

To be successful firms need to support this movement and ensure a smooth transition of data. Whether it be outward or inward, the client transfer needs to be compliant with internal information governance policies.

And don't forget that first impressions are key to building a long and fulfilling relationship with your firms' new clients, so client service needs also to be a priority throughout the procedure.

iCompli supports firms by streamlining the process of client file transfers accurately, whilst reducing risk, improving client service, and growing revenue faster.

- ▶ Record client transfer requests for on and off boarding, or lateral movement.
- ▶ Collate and appraise the data for migration / ingestion.
- ▶ Automate transfer workflows plus increase visibility and reporting capability on actions and status.
- ▶ Create an audit trail of actions and approvals.



Manage legal holds efficiently

iCompli's dual level litigation hold functionality helps you to gather and audit records while respecting directives. Also, the platform allows for court-ordered destruction and includes full audit trails and certification.

Build client trust

Protecting and managing client data correctly is imperative to delivering legal services and building the trust of your clients, but so is demonstrating the rigor in which it is being done.

iCompli can apply outside counsel guidelines to anything from a client matter to an individual asset and compile reports to prove that guidelines are being met if necessary. Plus, well-managed data improves the efficiency of legal processes, such as Data Subject Access Requests (DSARs). Your clients will benefit from faster access to relevant information when they need it.

In addition, if you are looking to gain and retain ISO/IEC 27001 certification, iCompli can help firms demonstrate the necessary information governance requirements.

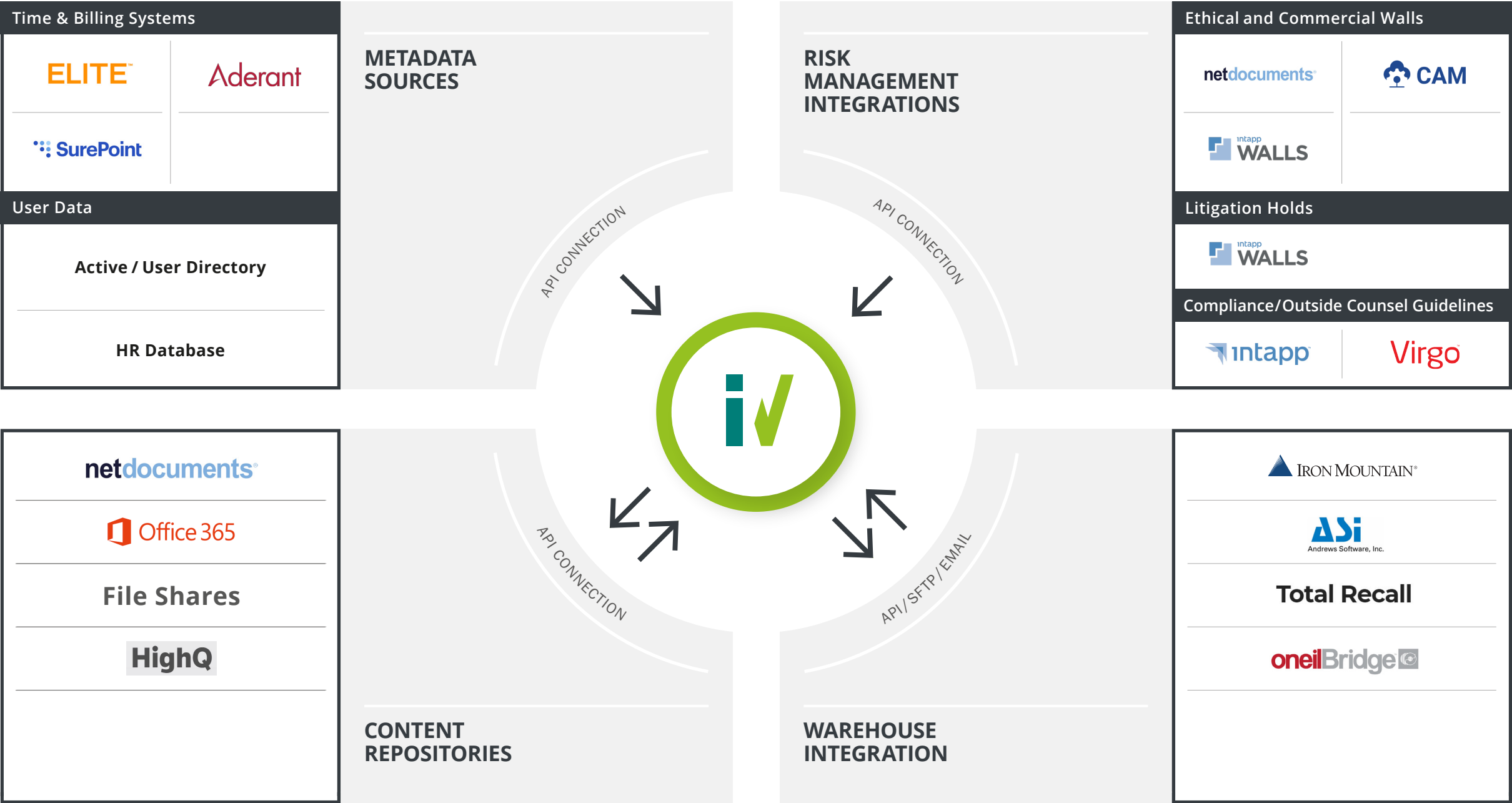
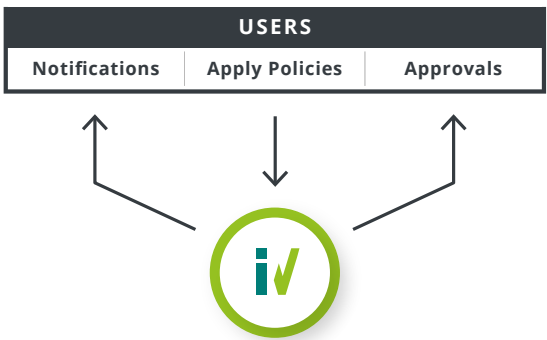
Best of both

NetDocuments and iCompli are both market leaders and top of their game, but there are many benefits to deploying both together.

iCompli from LegalRM is an excellent example of NetDocuments 'extensibility' strategy in practice. When integrated with your NetDocuments platform, iCompli provides a full information governance platform that helps firms of all sizes, no matter where they are in the world, compliantly and efficiently

manage and move their documents throughout their lifecycle.

The tight integration with NetDocuments means that users can seamlessly transition from one application to the other without switching applications, saving time and effort, while making user adoption a dream.



About iCompli

iCompli is used by firms large and small internationally to help them mitigate risks and reduce costs by facilitating complete and compliant control of their documents and assets as they progress through their lifecycle.

We work in partnership with our clients to ensure that the solution we deliver fulfils their exact requirements and is deployed on time and on time and on budget.

Through our integration with many other solutions that firms use we can surface a complete view of all physical and digital records in iCompli and through workflows we can automate information governance processes and procedures.

About NetDocuments

NetDocuments is the #1 trusted cloud-based content management and productivity platform that helps legal professionals do their best work.

Backed by over 20 years of experience in cloud innovation, NetDocuments offers a complete end-to-end platform for document and email organization and management, including award winning security and research capabilities: robust automation, collaboration and search technologies; seamless integrations with other tools professionals use daily; and much more. NetDocuments supports over 7,000 law firms, corporate legal departments, and public sector entities globally.

United States (US)

US +1 844 289 8529

LegalRM Inc.
PO Box 1929
Lyons, CO 80540

United Kingdom (UK)

UK +44 (0)208 289 8529

LegalRM Ltd.
153A High Street
Orpington, Kent
BR6 OLN



legal-rm



legal-rm.com/icompli