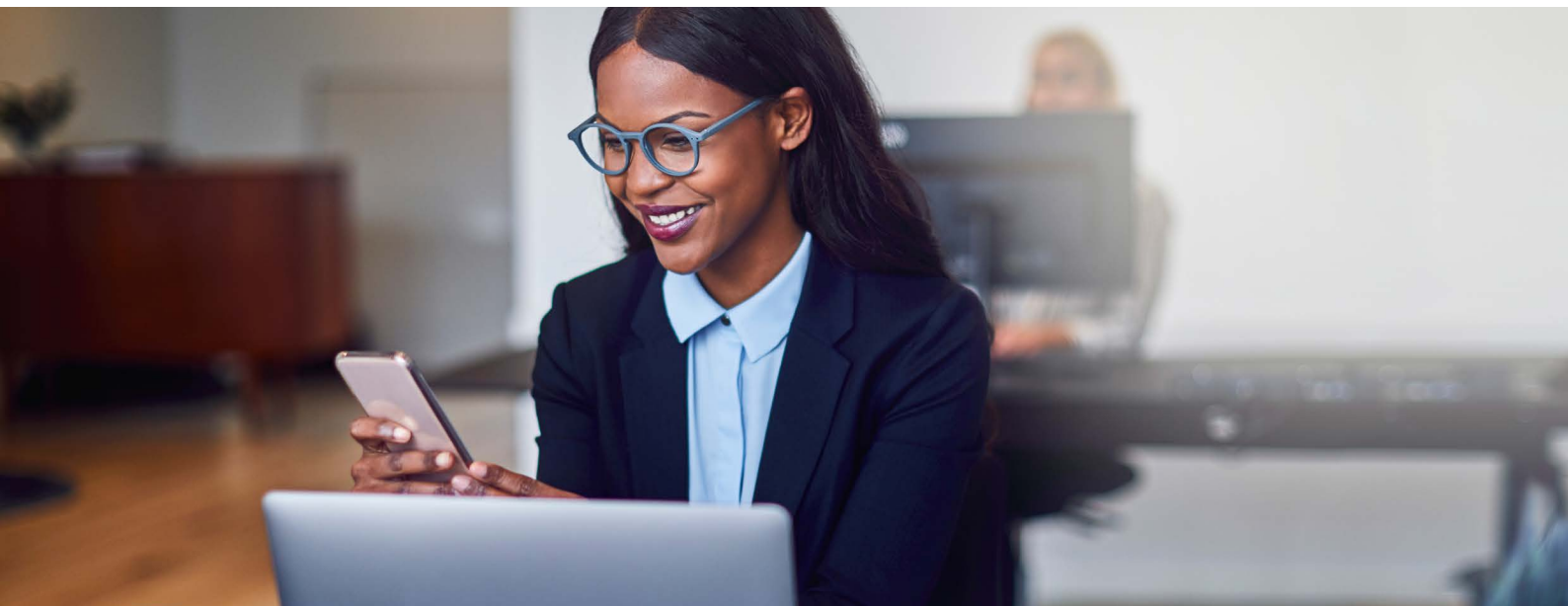



SERVICE OVERVIEW


# Matter Management Integration Service for OpenText™ eDOCS


Integrate eDOCS with leading matter management systems to unify legal operations, gain complete visibility into your entire legal landscape, and improve strategic collaboration with stakeholders



 **Integrate** content management capabilities—on premise or in the cloud

 **Find** the most current case information quickly

 **Protect** documents with synchronized security permissions

 **Eliminate** repetitive matter intake tasks and focus on strategic work

**Streamlining legal operations and integrating your organization's data sources help gain complete visibility into their entire legal landscape. Having instant access to every aspect of every matter in one place—from documents, emails and e-billing reports to deadlines, calendars, and personnel—is critical to saving time, reducing data security risks and enabling strategic collaboration.**

Connect OpenText™ eDOCS to all major matter management systems, including Thomson Reuters Legal Tracker™, Onit™, Thomson Passport™, TeamConnect™, Mitratech LawManager™ and other leading systems for unified matter insight and content management throughout the legal matter lifecycle.

eDOCS integration with matter management systems provides legal teams with synchronized capabilities. OpenText™ eDOCS provides a flexible, highly secure and intuitive way to manage, find and quickly access work product and other legal content, and matter management systems provide a centralized system for managing routine processes such as opening matters, managing workflow and running reports.

When integrated, users can find synchronized information quickly—saving time associated with repetitive tasks so they can focus on strategic work.

***“The OpenText Professional Services team handled our implementation. They worked with us to get through customizing the product, making it work for our users and with all the layers that we needed for our business. They basically held our hand through the whole process.”***

Chris Garrett,  
Office of General Counsel,  
City of Jacksonville, Florida

## **Integrate content management capabilities—on premise or in the cloud**

By integrating matter management with eDOCS, legal teams and their project stakeholders can manage, personalize, and automate working document environments whether working via mobile devices, remotely, or in the office. With one-click, users can set-up, search, open and archive documents and work seamlessly with centralized information.

## **Find the most current case information quickly**

With a unified view into the most current work product, case and client information stored in integrated content and matter management systems, legal teams and other stakeholders can quickly find their matter-related content. Matter management integration for eDOCS is customized to customer needs and designed to automatically synchronize matter and matter-related data into eDOCS using a Windows Service application. Legal teams can also take advantage of eDOCS advanced search technology--including full-text, Boolean, hybrid metadata and content queries—to easily narrow the results with search term highlighting, document summarization and faceted filters.

## **Protect documents with synchronized security permissions**

Legal practitioners have access to confidential and sensitive legal information ranging from PII and privileged documents to communications regarding contract negotiations. When disparate systems house sensitive and confidential documents, along with different security permissions, conflicts of interest may arise or sensitive data may inadvertently be exposed. To protect these communications from unauthorized viewing, integration between eDOCS and matter management systems automatically synchronizes security permissions applied during the matter lifecycle, automatically applying these permissions into eDOCS minimizing the risk of exposing sensitive data.

## **Eliminate repetitive matter intake tasks and focus on strategic work**

Integration between eDOCS and matter management systems eliminates human efforts related to repetitive matter intake tasks. After metadata is captured and stored in the matter management system, eDOCS automatically applies the stored information helping users, cross-functional teams, and internal clients focus on their strategic work.

Matter Management Integration Service for OpenText™ eDOCS is designed to support the specific needs of law firms, corporate legal departments, and other professional services organizations. eDOCS ensures that sensitive work product is managed and secured throughout the content lifecycle. Matter management systems manage the entire matter lifecycle from billing and attorney profiles to calendars. When integrated, they deliver a powerful, unified system that provides complete visibility into your entire legal landscape while streamlining productivity and operations.

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OpenText offers a comprehensive portfolio of training and learning services to support the effective use of OpenText software. These include [Learning On Demand self-paced learning](#) and [Instructor-led Training \(ILT\) courses](#) as well as [certification exams](#).

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MMS Integration Services Functional Areas			
Function	Matter Management System (MMS)	Professional Services Deliverable	eDOCS
Metadata	Matter-related data: clients, matters, area of law, and similar	Matter Metadata Synchronization	View content from your MMS within eDOCS
Security	Matter-related security for documents and emails	Matter Security Synchronization	Apply security details automatically to matter, documents and email within eDOCS
Archiving	Matter-centric documents and Email stored in MMS	Storage transfer of documents and emails	Automatically synchronize and store documents and email within eDOCS
End User Access	Display matter-related documents and email contained within eDOCS	Launching eDOCS managed documents and email	Search in eDOCS and display directly in your MMS

[🔗 eDOCS product overview](#)

[🔗 eDOCS webpage](#)

### OpenText Professional Services provides for easy integration of your Matter Management System

- Automatically synchronize matter content into eDOCS from your MMS.
- Manage matter & document security permissions between your MMS and eDOCS
- Search and launch eDOCS managed documents and email with a client-side integration directly from your MMS.

OpenText™ eDOCS provides legal teams with a flexible, highly secure and intuitive way to manage, find and quickly access work product and other legal content, on-premises or in the cloud, in a purpose-built content management system. eDOCS eliminates legal data management silos by storing all legal documents and work product in a single place.

To talk to a Professional Services expert please contact [eDOCSServices@opentext.com](mailto:eDOCSServices@opentext.com)

### About OpenText

OpenText, The Information Company, enables organizations to gain insight through market leading information management solutions, on-premises or in the cloud. For more information about OpenText (NASDAQ: OTEX, TSX: OTEX) visit: [opentext.com](http://opentext.com).

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