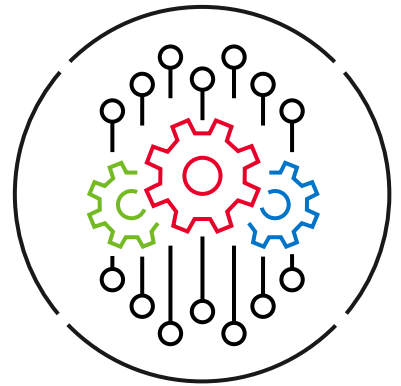ELM Solutions

Alfresco Connector for Passport®

Documents are mission-critical assets that drive business success for lawyers, paralegals and administrative staff as they create, capture, and share information. Whether in the form of a deposition, brief, affidavit, Non-Disclosure Agreement (NDA) or contract – these essential documents require a secure, robust, accessible system for legal personnel to utilize on a daily basis, which makes the efficient management of document workflow so critical.

A recognized leader in the Gartner Magic Quadrant for Content Services Platforms, Alfresco delivers innovative Enterprise Document Management (EDM) solutions that connect, manage, and protect your enterprise's most important documents and information wherever it lives, enabling businesses to increase worker productivity, govern valuable information and deliver exceptional customer experiences.

Using the Alfresco Connector for Passport, you can work directly from the Passport and the Office Companion user interfaces with documents that are stored in the Alfresco One EDM platform.
→ The Alfresco Connector allows you to view, edit, rename, check in, check out, undo checkout, search, and save documents and emails that are stored on the Alfresco server.
→ The Connector also adds support for working with folders, setting up defined folders for matters in a practice area, and working with those defined folders.
→ Within Passport or Office Companion, users can manage Passport emails that are stored in an Alfresco server from the Emails tab of the matter.
→ Our Windows File System Connector uses WebDrive WebDAV client software, which allows you to map your documents that are related to a Passport Matter as a drive in the Windows Explorer window. This allows users to integrate and work with Passport documents.

Wolters Kluwer's ELM Solutions Alfresco Connector empowers Passport clients to leverage Alfresco's digital business platform, available on-line or on-premise, to efficiently manage and organize high volumes of emails and documents, enable staff to quickly locate the documents they need, and allow teams to easily collaborate and share essential information.

The Alfresco Connector establishes communication between Passport and Alfresco, supporting the comprehensive management of emails and documents, and their associated matters directly from the Passport and Office Companion user interfaces.

Wolters Kluwer

The Alfresco Connector brings together the industry-leading matter management capabilities of Passport and Office Companion with the scalability and configurability of Alfresco's web-based platform for enhanced collaboration through cloud storage, content management and data sharing.

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Key features

Direct access from Passport and Office Companion to documents and emails stored in Alfresco's EDM platform

→ Upload/attach documents to be stored in the Alfresco digital business platform, and associate to matter, people, organization, and invoice records.

→ Users can search for, view, access and download all related documents from a list page (accessed via the main Documents Tab or under the Related Items/Documents tab of a Matter, Person, Organization, or Invoice record).

→ Leverages the Passport security framework to ensure users only have access to appropriate records and documents.

Create folders and sub-folders to organize documents and emails

→ Manage email messages and email folders that are stored in the Alfresco platform from the Emails tab of a matter.

→ Allows users to add and reorder columns while in a documents list view, as well as save custom filtered views of document lists.

→ Supports archive and purge capabilities for documents and folders that are associated with matters, organizations, people, and invoices.

Collaborate and share information more easily and efficiently

→ Users can easily Check-In and Check-Out documents to provide concurrency control.

→ Supports preservation of multiple versions of a document on the Alfresco server.

→ Alfresco Connector desktop version is supported in the Passport Mobile version of Alfresco Connector.

→ The Alfresco Connector provides Passport REST API methods to create, modify, and delete Passport documents and folders.

Key benefits

→ All-in-one solution with Passport and the patented Office Companion module helps streamline matter and spend workflows.

→ Enterprise scalability to easily manage very large volumes of documents between Passport and Alfresco's EDM Platform.

→ Search, store, and work with documents in Alfresco's EDM platform without leaving Office Companion and/or Passport.

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