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iManage Connector for Passport®

Wolters Kluwer ELM Solutions' iManage Connector empowers Passport clients to leverage iManage to efficiently manage and organize high volumes of matter-related emails and documents, such as depositions, briefs, contracts, and affidavits. Staff can quickly locate the documents they need, and teams can easily collaborate and share essential information.

The connector establishes communication between Passport and iManage, supporting the comprehensive and secure management of emails and documents and their associated matters directly from the Passport user interface or the Microsoft Office Suite, including Outlook (requires Passport Office Companion).

The iManage Connector is bidirectional, allowing users to work in the iManage Work user interface (UI) or Passport on their matters. Documents are securely stored in the iManage server. All permissions and roles in Passport apply to the library and workplace structure in iManage Work UI for matters.

Key benefits
→ Seamless integration for user-friendly control over matter-related documents and emails
→ Seamless integration between Passport and iManage Work interface through SSO
→ Content search, store, and work with documents in iManage without leaving Passport or Outlook
→ Scalable to easily manage millions of documents
→ Allows teams to create and share content securely, from anywhere and on any device

Key features provided by the connector

Direct access from Passport to documents and emails stored in iManage workspace
→ Upload/attach documents to be stored in the iManage DMS and associate to matter, people, organization, and invoice records
→ Drag and drop documents and emails from Passport, Office Companion, or iManage Work web Interface and work seamlessly within Office applications and save documents to matters or document folders
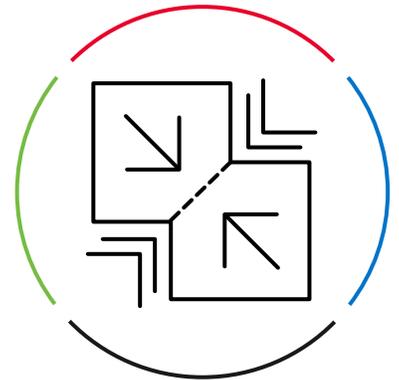
Provides a single source of truth for matter-related documents and emails

The iManage Connector brings together the industry-leading matter and spend management capabilities of Passport with the scalability and configurability of the iManage platform. iManage connects documents and emails and saves them in a single unified folder, organized by client, legal matter, invoice, organization, or people. This structure puts all the relevant information and content at your fingertips.

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→ Search for, view, access, and download all Passport-entity related documents, such as invoices, depositions, contracts, briefs, etc.
→ Add and reorder columns while in a documents list view and save custom filtered views of document lists
→ The Passport security framework ensures users only have access to appropriate records and documents in Passport and from iManage Work UI

Create folders and subfolders to organize documents and emails

→ Store documents across multiple iManage workspaces
→ Manage matter-related email messages and email folders stored on an iManage server from Passport, Outlook, and Office Companion
→ Supports archive and purge capabilities for documents and folders within the Passport application

Collaborate and share information more easily and efficiently

→ Easily check-in and check-out documents to provide concurrency control in Passport and iManage Work UI
→ Supports preservation of multiple versions of a document on the iManage server
→ The iManage connector provides Passport REST API methods to create, modify, and delete Passport documents and folders and vice versa.
→ The client's iManage cloud or on-premise server sits outside of the Passport instance, maintaining a discreet environment.

Staff can quickly locate the documents they need, and teams can easily collaborate and share essential information.
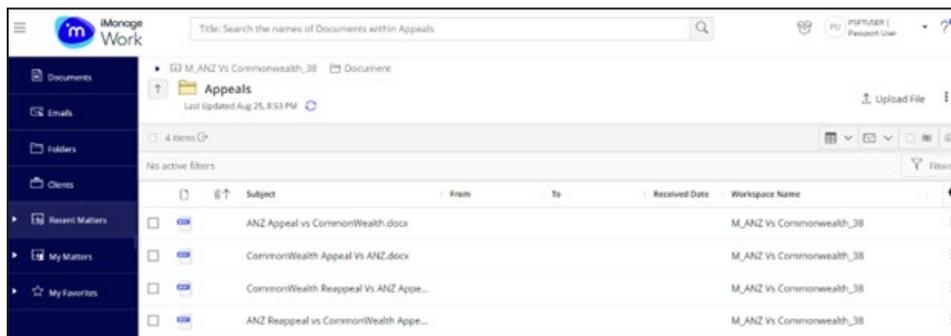
Matter-related documents are bidirectionally shared between Passport and iManage, available within the iWork interface, and carry over roles and permissions from Passport.

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