

# Automate your disposition processing workflow

## KEY BENEFITS

- Electronic review and approval
- Email notification with reminders for overdue reviews
- Multiple out of the box workflow options
- Approval at matter, workspace, folder or document level
- Progress tracking and monitoring

It is important for every professional service firm to have an established records retention policy that provides for the retention and destruction of documents and other records maintained by the firm, both electronic and physical. Over-saving records, storing them indefinitely or simply longer than needed, can create unnecessary risk, cost and challenges.

- **Risks** include the potential for cyber criminals to access and steal sensitive content that should have been disposed.
- **Costs** include those related to the storage and maintenance of unnecessary records, either at an offsite storage vendor or in-house.
- **Challenges** include the additional information that must be checked in the event of a legal dispute that requires relevant material to be located and produced.

Having a records retention policy is important but it is critical that the firm operates the policy, reviews content that is a candidate for disposition and disposes approved items. The review process typically involves responsible attorneys with knowledge of the content and/or records management staff who ensure the process is run in line with the policy.

The Disposition Workflow add-on component for iManage Records Manager provides professional service firms with an easy and intuitive way to automate and track the end-to-end process by which content that is eligible for disposition is handled. The component enables firms to operate their records retention policy and reduce the risks, costs and challenges from over retention.

Multiple out-of-the-box workflows allow firms to choose the appropriate single or multi-approver process that best meets their firm's needs.

Summary emails for each review task are sent to designated approvers (for example the responsible attorney) with a link that takes the approver to a web page where a personalized summary of items is given plus a list of all matters, workspaces, electronic folders, electronic documents that have been declared records, and physical media that are eligible for disposition. All items can then be reviewed along with their key metadata values and either approved or not approved at the matter, workspace, folder or document level.

The frequency by which items that are eligible for disposition are actioned is configurable, allowing the review process to be initiated and review tasks sent out as often as the professional service firm requires.

Review tasks can be transferred if the designated approver is out of office or has left the firm. Automatic email reminders and central monitoring helps ensure review tasks are completed in a timely fashion.

## IMANAGE INDUSTRY AWARDS



INNOVATIVE SOLUTION  
PROVIDER OF THE YEAR



IT SECURITY PROVIDER  
OF THE YEAR



SUPPLIER OF THE YEAR  
(TECHNOLOGY)



BEST USE OF  
TECHNOLOGY

## IMANAGE WORK PRODUCT MANAGEMENT

### Document + Email Management

- **iManage Work:** Secure document and email management
- **iManage Share:** Secure, governed file sharing and collaboration

### RAVN Artificial Intelligence

- **iManage Extract:** Automatic extraction of critical business information from large volumes of documents and unstructured data sets
- **iManage Insight:** Enterprise content search and analysis
- **iManage Classify:** Intelligent categorization of large volumes of business data

### Security + Information Governance

- **iManage Security Policy Manager:** Need-to-know security policies at scale
- **iManage Threat Manager:** Data protection from internal and external threats
- **iManage Records Manager:** Electronic and physical records management without professional user burden

The list of items in a review task and their key metadata can be exported to Microsoft Excel if required, allowing detailed inspection of the items.

Once all reviews have been completed, content that was approved for disposition is disposed automatically.

lan ,

You have been tasked to review records that are eligible for disposition for the following client matters:

137 items for Client: 600126 Hoolie, Matter: 000006 Pied Piper Buyout

137 items for Client: 600126 Hoolie, Matter: 000007 Pied Piper Lawsuit

155 items for Client: 600127 Massive Dynamic, Matter: 000125 Hoolie Takeover

155 items for Client: 600127 Massive Dynamic, Matter: 000137 Initech Litigation

Please complete this task by Wednesday, August 24, 2016.

You can approve records to be disposed by Client Matter, or individually.  
Click on the link below to get started.

[Start reviewing records](#)

Completed tasks will stop future emails

*Summary emails for each review task are sent to designated approvers.*

Responsible attorney: Ian Raine      Number of matters: 4

Report date: 8/22/2016 12:00:00 AM      Total records: 584

Below is a list of client matters to review before disposition. You can approve records to be disposed by client matter, or individually.

Matters	Action	Details
600126 Hoolie 000006 Pied Piper Buyout <a href="#">Show more details</a>	Action: Not actioned Actioned by:	Records: 136 Approved: 0 Not approved: 0 Not actioned: 136 <a href="#">View records</a>
600126 Hoolie 000007 Pied Piper Lawsuit <a href="#">Show more details</a>	Action: Not actioned Actioned by:	Records: 136 Approved: 0 Not approved: 0 Not actioned: 136 <a href="#">View records</a>
600127 Massive Dynamic 000125 Hoolie Takeover <a href="#">Show more details</a>	Action: Not actioned Actioned by:	Records: 154 Approved: 0 Not approved: 0 Not actioned: 154 <a href="#">View records</a>
600127 Massive Dynamic 000137 Initech Litigation <a href="#">Show more details</a>	Action: Not actioned Actioned by:	Records: 154 Approved: 0 Not approved: 0 Not actioned: 154 <a href="#">View records</a>

Page Size: 20

Export

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Docvinder AR Record Manager (2016.08.16.01)

*All items can be reviewed and either approved or not approved at the matter, workspace, folder or document level.*

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### About iManage™

iManage is the leading provider of work product management solutions for legal, accounting and financial services firms and the corporate departments they serve. [ILTA's 2017 Innovative Solution Provider of the Year](#), iManage helps professionals streamline the creation, sharing, governance and security of their work product. Over 3,000 organizations around the world — including more than 2,000 law firms — rely on iManage to help them deliver great client work.

Headquartered in Chicago, IL, iManage is a management-owned company. For more information, please visit [imanage.com](http://imanage.com).