

Legal workflow automation

Power Automate in iManage



A paradox exists in knowledge work companies today: though they may have advanced document management capabilities, they lose substantial time on manual processes. But today, Power Automate and the iManage platform automate and improve work, achieving competitive advantages for your firm without sacrificing security standards.

Power Automate in iManage resolves time-consuming tasks at scale by turning documents and content into action using workflows with no-code so knowledge workers can focus on producing value for your organization.

Business benefits of Power Automate in iManage



Accelerate Productivity

Automate workflows and reduce manual tasks so teams operate at their best



Mitigate Risk

Reduce end user workarounds like copying and pasting documents or metadata between systems



Ensure Security

Content is never exposed and remains secure, governed, and protected



Automate at Scale

Workflows can be set up beyond the individual contributor level



Stay Flexible

Tailor workflows to meet your needs



Organize by Context

Workflows can be associated by matter, client, practice area, and more

Popular use cases

- **Opportunity & order management:** When an opportunity is created in Salesforce, create a task for the finance team to evaluate and approve the deal size
- **Matter management:** When a change request is submitted, create new tasks in Tracker and assign owners by role
- **Legal request management:** Generate a Tracker task list from a template list and assign the owner.
- **E-signatures and approvals:** Send a document for approval prior to sending for esignature and storing the final document back to your DMS
- **Knowledge curation:** When a user submits work product for review, capture metadata in a form in Work 10 and turn on status notification emails for contributors and reviewers
- **Permissions & access changes:** When an employee is terminated, automatically remove their access to certain matters
- **Audit reminders:** Schedule reminders based on document expiration dates, an audit, or other important deadline
- **Reporting & analytics:** With PowerBI, track aggregate activity of Power Automate workflows



Contact your iManage Representative to see how **Ask iManage** and **Power Automate** can make knowledge work for your organization today.