

James & Wells reduces document management complexity with iManage

Specialist law firm uses iManage APIs to integrate core systems with the iManage knowledge work platform



JAMES & WELLS

— Intellectual Property —

Industry:

- Legal

Headquarters:

- Auckland, New Zealand

iManage footprint:

- iManage Work 10 in the Cloud
- iManage Share
- iManage Security Policy Manager

When law and patent attorney firm [James & Wells](#) needed to modernize their workplace, they planned to replace network sharing with a document management system (DMS). After choosing iManage, the firm's Information and Data Systems team took advantage of iManage APIs, creating an integrated platform that brings [iManage Work 10 in the Cloud](#) together with James & Wells' other essential systems. Attorneys now work far more efficiently, finding it easier to locate and access documents. The firm's support team is freed from manual filing, which also gives the firm greater control over document access. Meanwhile, iManage Share and iManage Security Policy Manager are on the roadmap, and the foundation is set for future innovations with AI.

James & Wells specializes in intellectual property, serving the Australasian market from its six offices spanning Australia and New Zealand. The firm works with clients ranging from international corporations to startups, and the team takes pride in their reputation as "Champions of Innovation," protecting and patenting ideas, applying for trademarks, and conducting litigation on behalf of their clients.



Morae

About Morae Global Corporation

Founded in 2015, [Morae Global Corporation](#) is trusted around the world for the delivery of digital and business solutions for the ever-changing legal sector. It collaborates closely with clients to develop strategies, implement meaningful change, and achieve their business objectives.



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Tizio Panara

[Information and Data Systems Manager, James & Wells](#)



Business outcomes:

- Harmonized firm data
- Improved employee productivity
- Simplified IT management
- Reduced operational costs



iManage has transformed our document management giving us access to powerful, database-driven search capabilities and enabling our staff to find, share and collaborate on documents in an efficient manner.

Tim Walden
Partner
James & Wells

The business challenge

Automate, centralize documents, and harmonize data

James & Wells is a growing firm and as its team of attorneys expands, so does the amount of data they generate, and its specialization in intellectual property brings its own challenges. Attorneys work with multiple third parties and manage numerous disparate documents, adding to the complexity.

Thankfully, the firm has “Champions of Innovation” beyond the legal team. Tizio Panara, James & Wells’ Information and Data Systems Manager, focuses on simplifying systems and implementing better data governance to increase productivity.

The existing DMS was acceptable; however, as their caseload grew, they adopted solutions to optimize practice management. Ultimately, though, James & Wells wanted to harmonize its data and achieve central visibility of its documents.

“The easier we can make life for our attorneys, the better. We needed automated processes, better onboarding, and for information to be available from anywhere,” he explains. “That meant a total overhaul of our legacy systems.”

They began looking for a cloud solution that could be integrated with their other core systems while giving them better version control and access management. “File paths had become incredibly long and complicated,” says Panara, “so we needed to create a new folder structure, establish new governance on naming conventions, and win user buy-in to get people following one set of rules.”



The solution

Build a unified knowledge work platform

Panara wanted to build a custom environment that was tailored to the firm’s unique requirements. He looked for a DMS that he could integrate and adapt, comparing iManage, NetDocuments, and OneDrive.

“iManage is the go-to knowledge work platform in New Zealand and Australia, so it was top of mind when we went to market,” Panara explains. “After comparing iManage to NetDocuments and OneDrive, I confirmed that iManage was the right fit. iManage is reliable, well known, and integrates natively with Microsoft Outlook, Office 365 and other application platforms we use. For everything else, we use the iManage API. I love it.”

Given the special requirements and 40 years of accumulated data, James & Wells appreciated working with [Morae Global Corporation](#) throughout the implementation. To simplify the process, including file naming, Panara wrote a series of customized scripts so that when a new case is opened in their practice management system, it is automatically saved in iManage, which creates a folder structure and case number.

The firm created a tri-folder system for every case, filing internal documents and correspondence together in one folder, official external documents in a second folder, and working files in a third. Staff can quickly save files when opening a new case so that the support team is freed from that task, while iManage access management controls prevent unauthorized changes.

Panara didn't want to move from an inconsistent document management process to just saving everything. With the system he put in place, employees know what to save and what to delete. "Everyone follows one data governance framework now," he remarks. "We've got tighter control and higher data integrity with iManage."

Panara's team was able to integrate the firm's task management and practice management systems with [iManage Work 10](#) on the [iManage Cloud](#) platform using the APIs iManage makes available to customers. The platform integration enables James & Wells' staff to create and assign tasks and access any relevant documents in one system, giving them a unified view of each case and the tasks associated with it.

The business outcomes

Increased efficiency and stronger data governance

The new system is a huge success. Staff are now able to quickly and easily find the right documents, and James & Wells are confident that everything is stored correctly.

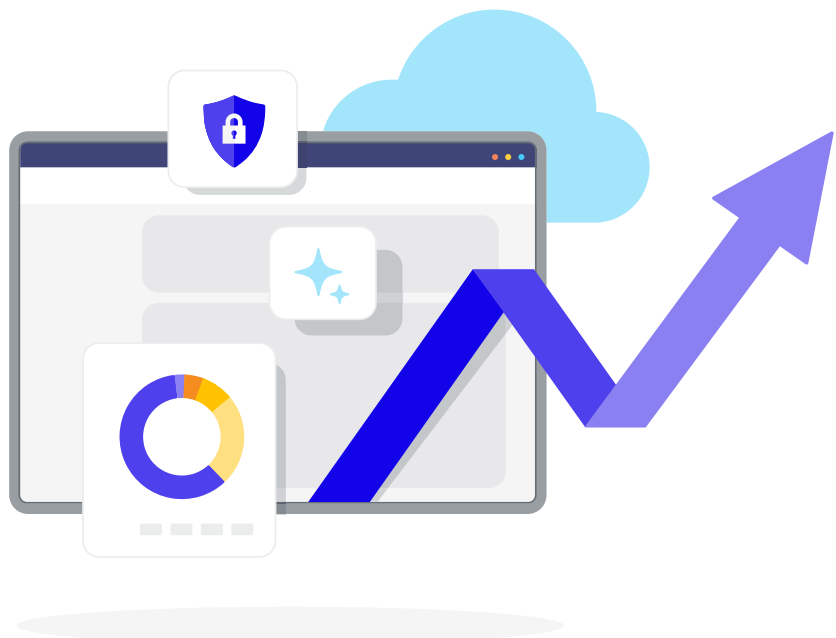
"There's total transparency across the firm now. We know everyone is following the document management guidelines and that files are in the right location," says Panara. "Files are either saved automatically or by an attorney, which means we can free up our support team to focus on more valuable tasks."

Moving to the cloud also means less manual work for the IT team, and James & Wells enjoys high levels of availability. If there are any system issues, iManage fixes them quickly, minimizing their impact.



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Tizio Panara
Information and Data
Systems Manager
James & Wells





“With iManage, our data is better organized and that gives us a great foundation to train large language models (LLMs) when we’re ready to adopt artificial intelligence (AI),” says Panara. “We also have more granular control over access to our sensitive information.”

The platform is more cost effective than the previous system, which had a set fee per case stored, and scales easily as the firm expands. “Our legacy technology was stifling company growth. With iManage, we have a flexible environment that empowers our attorneys to work more effectively while it helps pave the way to even greater success.”

Looking ahead

James & Wells are continuing to create their perfect environment. With help from Morae Global Corporation, they’ll soon be using [iManage Security Policy Manager](#) to set up ethical walls across the platform, and [iManage Share](#) to facilitate collaboration with clients and attorneys overseas.

About iManage™

iManage is dedicated to Making Knowledge Work™. Our cloud-native platform is at the center of the knowledge economy, enabling every organization to work more productively, collaboratively, and securely. Built on more than 30 years of industry experience, iManage helps leading organizations manage documents and emails more efficiently, protect vital information assets, and leverage knowledge to drive better business outcomes. As your strategic business partner, we employ our award-winning AI-enabled technology, an extensive partner ecosystem, and a customer-centric approach to provide support and guidance you can trust to make knowledge work for you. iManage is relied on by more than one million professionals at 4,000 organizations around the world. Visit www.imanage.com to learn more.