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Understand CAM Licensing

CAM is a Software-as-a-Service (SaaS) platform that enables and governs your organization's use of modern collaboration systems, including iManage, NetDocuments, Microsoft 365 and network File Shares. Through CAM, you can provision, manage, move, analyze, comply, and protect your data, folders, projects, workspaces, and more - across multiple collaboration systems. As the way legal work is delivered evolves and organizations embrace modern cloud-first collaboration systems, CAM provides powerful features for innovation, knowledge management, continuous improvement, IT and risk teams to unlock the potential of these systems, securely. CAM supercharges collaboration while mitigating data chaos and reducing risks related to privacy & cybersecurity.

CAM enables you to see where client and matter data is stored across collaboration systems, provides rich custom metadata capabilities, and helps risk management teams to understand context so they can apply the proper security and minimization policies.

What organizations can do with CAM

☑ Provision Workspaces, Folders, Teams, Channels, Private Channels, SharePoint, OneDrive, OneNote, Planner, Lists, users & groups, and more

☑ Apply rich metadata, templates, and standardized naming conventions to drive content location & context

☑ Minimize data when no longer necessary or place on litigation hold

☑ Protect data by applying Zero-Trust policies, managing access across systems, and creating document archives to access in case of outages or incidents

☑ Sync, copy, and move data & projects between systems (Microsoft 365 & Document Management Systems)

CAM supports various collaboration systems, including Microsoft 365 (Microsoft Teams, SharePoint Online, OneDrive, OneNote, Planner, Lists), iManage, NetDocuments, File Share, and more to come.

CAM also integrates with source systems, Time & Billing, Portfolio Management, Practice Management, HR Systems, CRM, etc.

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License What You Need

PROVISION
Streamline Your Workflow

- Boost your team's productivity with easy setup processes
- Create workspaces that match your firm's unique needs

MANAGE
Centralized administration of matter content

- Permit administrative activities without the requiring administrative access to the DMS
- Optimize data management with PowerDesktop license

MOVE
Effortless Document Mobility Across Platforms

- Keep your firm's operations running smoothly with seamless data mobility
- Encourage collaboration with easy content transfer across workspaces and systems

ANALYZE
Intelligent Data Insights for Informed Decisions

- Leverage data insights to drive success
- Track key metrics with easy-to-use dashboards
- Get a bird's eye view of all workspace activities for swift decisions
- Action on data derived from multiple data sources in a flexible graphical interface

CAM PROJECT TEAMS
Manage Add-On

- Fortify your client data with advanced access management (Project Teams)

BUSINESS CONTINUITY
Analyze Add-On

- Minimize loss with built-in business continuity features

Collaboration Systems

Microsoft 365 · Microsoft Teams · SharePoint Online · OneDrive · OneNote · Microsoft Planner · Microsoft Lists · iManage · netdocuments · File Share

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CAM Features Explained

PROVISION Features

Workspace Creation and Management

Create and maintain matter workspaces in your firm's or client's preferred collaboration systems, utilizing data from your firm's source systems.

USE CASES:

- Provision a workspace in your preferred Document Management System (DMS) - Currently Supported: iManage and NetDocuments.

- Provision a team in Microsoft Teams.

- Provision a SharePoint Online site.

- Provision a file share - Roadmap: G-Suite, Box.

- Provision a workspace / site / project /deal room in a workflow tool - Roadmap: Kira, Transact, HighQ.

CUSTOMER VALUE:

- Easily manage the provisioning workflow for matter workspaces on several collaboration systems from one interface.

- Restrict provisioning to authorized personnel or allow attorneys to self-service provision a new collaboration workspace.

- CAM can automatically read data from several source systems (such as Elite, Aderant, Active Directory etc.) to minimize the manual effort to provision workspaces.

- Standardization of workspace and site naming conventions and structure across matter types for a consistent end-user experience.

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Workspace Directory and Content Location

Access a single directory showing the collaboration systems, metadata and security that are being used for firm data, on a client and matter basis.

USE CASES:

- Firms can view where client and matter data are being used in underlying collaboration systems and can perform a variety of actions from directly within the Workspace Directory interface.

- Firms can view the metadata and security assigned to the matter for each collaboration system.

CUSTOMER VALUE:

- Single source of truth for where client data is being used in your firm.

- Take critical action directly from within CAM, without needing to go to each underlying collaboration system.

- Firms can take action without needing to access the underlying content, further protecting confidentiality, privilege and regulatory obligations.

Templating

Create automatic or on-demand template workspace structures in your preferred collaboration systems.

USE CASES:

- Create consistent folder structures and metadata assignments in your preferred Document Management System based on practice group, matter type, office, or any other variable(s).

- Create preferred channel and tab structure in Microsoft Teams based on practice group, matter type, office, or any other variable(s).

CUSTOMER VALUE:

- Enforce the firm's best practice for naming conventions and folder structures.

- Easily update templates as your firm's standards change or evolve.

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Advanced Template Management

- Provides support for reassigning a new template to a workspace created from another template which features adding, removing, reorganizing or merging existing folders into the new template structure.

- Metadata and security from the new template can be applied.

- CAM also supports the ability to generate a new template from an existing workspace, creating a whole new template that can be used for future workspace generation.

- Supports modifying existing templates such as adding or removing folder, or updating metadata or security, and then pushing those changes retroactively to workspaces previously created from that template

USE CASES:

- If a matter is opened under the wrong matter type or that type of work changes, Admins can easily update or change the template of an existing workspace without creating a whole new workspace and copy the existing documents to the new workspace structure.

- In cases where no template exists for an existing workspace, but where the practice likes the way that workspace is organized, you can generate a new template from an existing workspace that will incorporate the metadata and security parameters.

- The ability to generate a template from an existing workspace is also useful for DMS implementations where no workspace generator tool was used, and no templates existed. Firms can identify exemplar workspaces from each practice and use those to create the template structure for that practice.

- Sometimes a practice group simply wants to add a new folder to their workspaces. With CAM's "Apply to Workspace" command, changes to templates can be pushed back to all pre-existing workspaces based on that template.

CUSTOMER VALUE:

- Supports many administrative actions that are required to update, modify or create templates that would normally require a lot of time-consuming, manual and tedious work.

Manage Folders

Add additional folders in workspaces, as needed, but within the structure and business rules set by each practice group. CAM provides structured folders that can be selected from a list or the ability to add custom folders, where needed.

USE CASES:

- Not all folders need to be added to the workspace when it is created. That causes many unnecessary folders that may never be used and thus remain empty. Allowing users to select from a pre-defined, pre-configured list of folders, when the folder is needed, keeps the workspace tidy.

- Add the same on-demand folder more than once provided that add a prefix or suffix to the name.

- The ability to add a custom folder (not from a picklist) can be controlled by practice and folder level.

CUSTOMER VALUE:

- Users have the flexibility to add folders only when needed, keeping the workspace free of unnecessary empty folders.
  This keeps the workspace tidy, helps with navigation, and increases user adoption of the DMS.

Request Workflows

A flexible framework that allows users to request ad hoc creation of workspaces, Teams, Sites and File Shares, with or without approval. Workflows can also be configured to grant access to content.

USE CASES:

- In cases where workspaces or Teams are not created automatically upon matter open but rather are created on an as needed basis. Users will dictate when that need arises, but the business requires that any workspace still follow a set of rules for structure, naming, metadata and security. Request workflows provide that consistency and structure while also allowing for an approval workflow where needed.

CUSTOMER VALUE:

- Provides users the flexibility to create workspaces or Teams when needed outside of normal automated process while giving organizations the structure, security and approval processes needed to keep the content in line with the business rules.

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Basic Access Management

Includes:

- Assigning and managing user and group security for workspaces, Teams, Sites and File Shares.
- Dynamic groups for quickly adding or removing access to workspaces without costly refiling time.
- Basic ethical wall integration and enforcement.

USE CASES:

- Users and groups can be automatically added or removed on workspace ACLs during the workspace provisioning or workspace modification process.

- When users are added or removed from the workspace access control list (ACL), the workspace security needs to be refiled to add or remove that user from all the document and folder ACLs. With dynamic groups, users will automatically be added or removed from the ACL group which does not require refiling to ad or remove access.

- When provisioning into systems where ethical walls may not be enforced, CAM will do a check against the ethical wall to ensure users are not added to Teams or Sites where they are excluded by an informational barrier (typically Teams and SharePoint).

CUSTOMER VALUE:

- Appropriate security can be applied to client matter content while respecting existing ethical walls.

- Reduces the costly refiling time of security needed at the folder and document level when adding or removing user's access. The user is simply added to or removed from the dynamic group that already has access.

User & Group Management

- Reads users and groups from source Active Directory, Azure AD or other HRIS systems and provisions those to the content collaboration systems.
- Keeps group memberships in sync across all systems.
- Disables or deletes departed users in content systems.
- Sets users preferred or default libraries in the DMS

USE CASES:

- As users and groups are added to an organization's network, they are automatically provisioned to the DMS, Teams or other content collaboration systems supported by CAM.

- Users are added to the preferred libraries based on practice or region.

- If group membership changes, those changes are updated across systems.

- Disabled or departed users are disabled or deleted from content systems.

CUSTOMER VALUE:

- Reduces administration of users and groups across content collaboration systems. If the user's status or group membership changes in the firm's HRIS or Active Directory System, CAM will make those changes to the downstream content systems.

Master Metadata Management

Create a consistent and rich metadata structure for firm, client and matter data, which extends across all the underlying supported collaboration systems.

USE CASES:

- Create a common metadata structure across your underlying collaboration systems for firm, client and matter data.

- Each collaboration system can track varying levels and numbers of metadata at the organization, client, matter or people level. CAM aggregates this metadata and can link, report and manage client/matter workspaces and sites by metadata.

CUSTOMER VALUE:

- Apply a consistent metadata framework from within a single application interface, across multiple collaboration systems.

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Cloud and On-Premises Source Systems Integrations

For automation of provisioning jobs, CAM can read from on-premises data sources such as Practice Management Systems (PMS), Time & Billing databases, or other data warehouses. CAM also provides a framework to extract data from cloud data sources such as MS Dynamics, Azure AD and other common cloud-based matter management systems.

USE CASES:

- Firms that utilize on-premises data sources such as Elite 3E or Aderant can extract client, matter and security data from those on-premises sources in order to automate the provisioning of workspaces, Teams, Sites, users and groups into cloud-based content systems.

- As firms move their data to the cloud, CAM also provides a flexible framework to attached to those cloud systems to source new client, matter or user & group data for provisioning to content systems.

CUSTOMER VALUE:

- CAM meets organizations where they are providing the flexibility to utilize both on-premises or cloud-based data sources to create new matter content, users and groups in the DMS or other collaboration systems.

Link Handler

USE CASES:

- Desktop application that can be used to redirect old NRL links to new Cloud NRLs or NetDocs documents.

CUSTOMER VALUE:

- When moving to the cloud, old iManage NRL links will no longer work as the documents now have an NRL. If the firm moves from iManage to NetDocuments, old iManage NRL document links will no longer work.

MANAGE Features

Service Desk

Allow administrators, service desk personnel, record management teams and other approved individuals to perform certain administration tasks, without requiring access to the underlying collaboration system.

USE CASES:

- Check-in or unlock a document in a Document Management System (DMS) - Supported systems: iManage, NetDocuments.
- Perform actions such as bulk security or metadata updates to documents, folders and workspaces without requiring Admin access to the DMS.
- Download data reports.
- Reassign workspaces from one template to another.
- View content history.

CUSTOMER VALUE:

- Firms can take action on content without needing to access the underlying content, further protecting confidentiality, privilege and regulatory obligations.

PowerDesktop

A dedicated desktop application geared to provide easy, configurable, and fast exports and imports of data to and from the firm's DMS.

USE CASES:

- As lawyers leave and join firms, there is an increasing need for easy faster exports and imports of client/ matter data out of and into the firm's DMS.
- When exporting client/matter data, lawyers require that metadata is exported along with the content so it can be easily imported into the new firm's DMS.
- Import files may come with pre-defined metadata in a csv that can be imported into the target DMS.
- Import from or export document(s) to a file share.
- Extract folders and emails from PST files to prepare for import into the DMS.
- Export document(s) to a .zip file.

CUSTOMER VALUE:

- Easily create a copy of required documents for lateral partner moves.
- Easily import client/matter content from incoming lateral partners.
- Respond to regulatory requests across multiple collaborations systems from within one interface.

MOVE Features

Document & Folder Mover within a DMS Library

Through the Service Desk, users of the Service Desk can move documents between workspaces within the same server/tenant/cabinet for your Document Management System (DMS).

USE CASES:

- Support instances where documents or folders need to be moved or copied from one workspace to another with options to retain or update security and metadata.

CUSTOMER VALUE:

- Perform all your document moves or copy from within the Service Desk, which allows personnel to perform the action, but does not require administrative access to the underlying document.

Workspace Mover between DMS Libraries

Moves workspaces to different libraries or regional instances within the same DMS.

USE CASES:

- Matters move all the time. A matter that is opened in one office or region may move to another. DMS systems may be configured for regional support so the entire workspace may need to move from one database or cabinet to another or move from one regional DMS tenant to another.

- Matters are sometimes created in the wrong database or cabinet. An administrative matter may be created mistakenly in a Legal database or cabinet and needs to be moved to the correct location.

CUSTOMER VALUE:

- Provides flexibility for matters to move between databases, cabinets or servers within the same DMS system.

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Content Mover for M365

Move documents and data between your Document Management System (DMS) and Microsoft Teams for collaboration.

USE CASES:

- When using Microsoft Teams for collaboration, many firms would like to ensure all content created in Teams gets ultimately moved to the DMS for governance and retention. This includes files, posts, OneNote & Planners created in Teams.

- Copy or checkout a document from your Document Management System into Teams for co-authoring.

- Checking a document from Teams back to the DMS and remove the copy from the Team.

- For firms using Teams for both internal and external collaboration, the need to copy documents regularly up to Teams from the DMS may be required so MS Teams members can see automatic updates of content created or updated in the DMS.

- Create granular folder mappings from the DMS to Teams or Teams to the DMS in order to copy only what is required based on the type of work.

CUSTOMER VALUE:

- Unlock the power of Microsoft's native collaboration tools for attorney productivity while ensuring documents end up in your system of record.

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ANALYZE Features

Metadata Sync & SQL Analytics

Automatically sync key metadata from across your collaboration systems to review, monitor and audit user behaviors in CAM.

USE CASES:

- Provide access to all the SQL metadata and security that is lost when the firm moves from an on-premises DMS to the cloud.
- Run a variety of reports for user activity based on your own SQL queries.
- See content a user is accessing across multiple collaboration systems.

- Audit critical user behavior to monitor for suspicious activity.
- Create compound, complex queries and perform bulk security or metadata updates to the results without direct administrative access to the data source.

CUSTOMER VALUE:

- Provides firms with a full data warehouse of the content systems metadata, security and audit for reporting and performing bulk updates on complex search results.

Dashboards

Visualise insights based on underlying metadata and take action from directly within CAM.

- Includes a flexible report builder interface that allows admin users to build their own reports using joins between table or other data entities that can be uploaded via CSV.

USE CASES:

- Creating reports from queries displays a flat list of results that do not easily provide insights into the data. Administrators would like to be able to graphically display results so they are easier to consume and can be aggregated with other data sources to provide a complete picture of user behavior, client matter performance and activity.

CUSTOMER VALUE:

- Furnish firms with the ability to visualize and action on data derived from multiple data sources in a flexible graphical interface.