



IRIS PMS & ERP Connector

*Bringing iManage Work
closer to your Practice
Management System*

The documents stored in iManage Work usually belong to a matter, client, engagement or project that you are also managing in a PMS (Practice Management System) or ERP (Enterprise Resource Planning). Therefore, a lot of information that you want to use for searching and organizing your documents is going to carry a strong relation to the information you are tracking in your PMS/ERP system. The PMS & ERP Connector creates and structures all that information in iManage Work automatically, making your document management an efficient and effective complement to your PMS.

THE IRIS ANSWER

The PMS & ERP Connector aims to be the next best thing after having a document management system integrated directly into your PMS or ERP system, without sacrificing any of the strengths of a dedicated document management system. By

**“Users can save their
documents to workspaces
directly from the PMS or
ERP system.”**

creating workspace templates for clients and specific projects, matters or engagement types, and by popu-





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lating them with all the relevant information on that client, project, engagement or matter, no additional work in iManage Work is necessary and users can save their documents to workspaces and inherit their security and metadata directly from there. If a matter, client, engagement or project becomes confidential in the PMS system, the whole workspace including all its documents will follow the same rule right

away. As a result, the key players for a project can receive elevated security automatically, but more importantly when this security level changes, you can choose to replace the original security with it, or just add it on top. That workspace can also show up in the user's My Workspaces / My Matters folder automatically, optionally categorized by client, for instance.

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GENERAL INQUIRIES

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SUPPORT SERVICES

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Member of **Canon** Group

KEY FEATURES

- Can be connected to nearly any database driven system;
- Read only new and updated information from your PMS to make the impact on your PMS hardware and function as low as possible;
- Can transform the data at various steps in the process to suit the needs of the integration process;
- Fill custom lookups in iManage Work with information from your PMS or ERP;
- Advanced workspace creation process that can use templates for new workspaces which can still dynamically fill search folder profiles and email address names in email folders;
- Automatically applies security to the workspaces in iManage Work based on the security coming from the PMS/ERM system (optional);
- Automatically create and update iManage Work security groups and their members based on information from your PMS or ERP (optional).

REQUIREMENTS

- iManage Work 9.0 (or higher);
- SQL Server 2012 or higher.