

Overview

The iManage integration for Rapid Legal streamlines the movement of documents for eFiling orders between the two systems.

What is iManage?

iManage is a Document Management System (DMS) that helps Law Firms manage all the documents created and used by the firm. It provides document version control, access control, collaboration, and many other features. Their website is: <https://imanager.com/>

Key Benefits

The integration streamlines the movement of documents in two ways:

1. When placing an eFiling order, documents can be loaded into the Rapid Legal workflow directly from iManage. This saves time by eliminating the need to download a document from iManage to the local computer first before uploading it to Rapid Legal.
2. When an eFiling order is completed by the court clerk, returned documents are automatically saved into the iManage system in the proper Client and Matter folder.

Using the Rapid Legal and iManage Integration

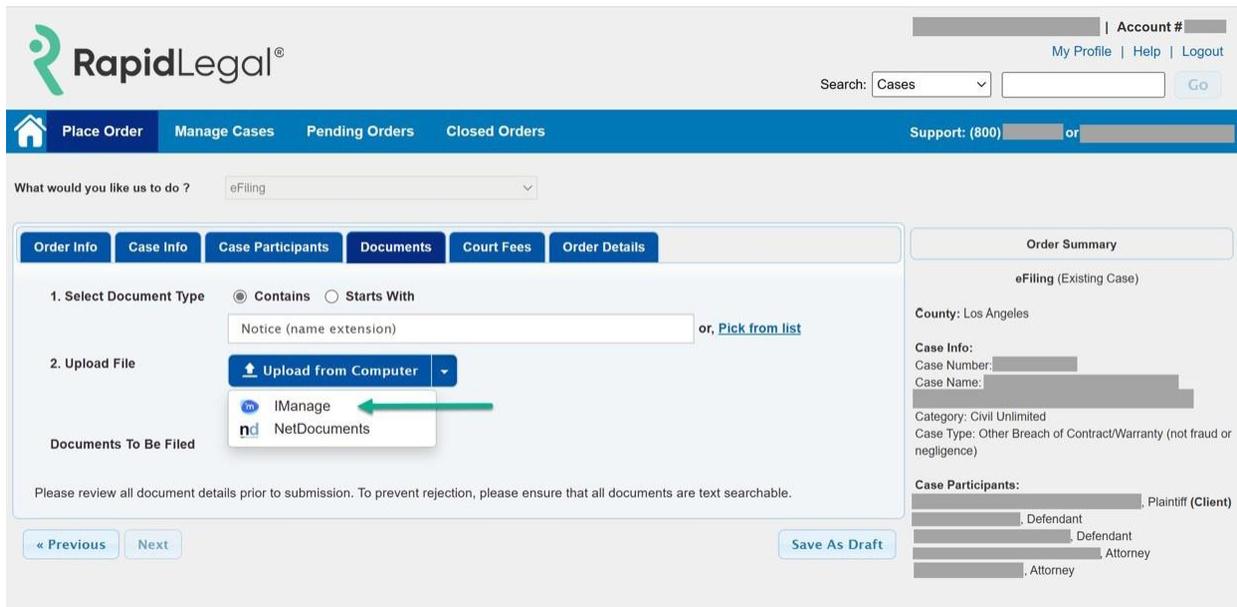
Customers who log in to the Rapid Legal portal will see the iManage option when uploading a document to an eFiling order, but only customers who have an iManage account will be able to make the connection and use the integration.

Connecting iManage to Rapid Legal

Customers placing an eFiling order will see the option on the Documents tab. After selecting to upload a file from iManage, the user will be prompted to make the connection.

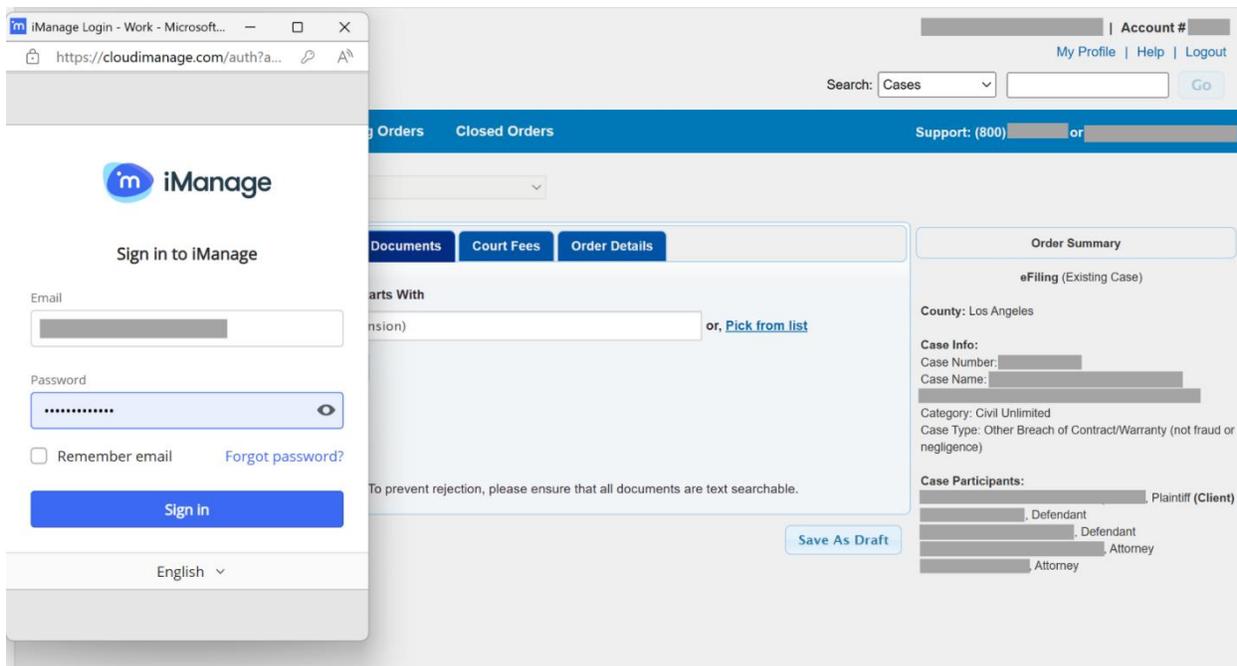
Explanations and illustrations for each step begin on the next page.

1. From the “Documents” tab of an eFiling order, after selecting a Document Type, click the down arrow to the right of the “Upload from Computer” button then select “iManage”.



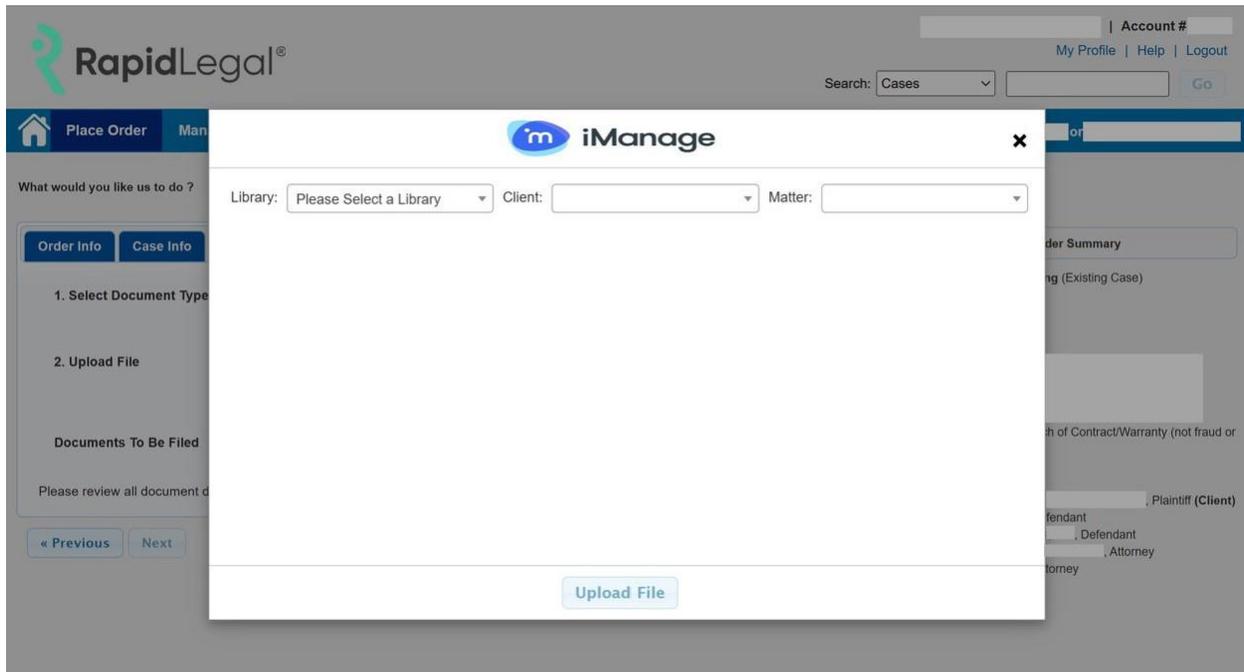
The screenshot shows the RapidLegal eFiling interface. The 'Documents' tab is active. Under '1. Select Document Type', the 'Contains' radio button is selected, and 'Notice (name extension)' is entered in the text field. Under '2. Upload File', the 'Upload from Computer' button has a dropdown arrow. The dropdown menu is open, showing 'iManage' and 'NetDocuments' options. A green arrow points to the 'iManage' option. The 'Documents To Be Filed' section shows 'NetDocuments' as the selected option. The 'Order Summary' panel on the right shows case details for an existing case in Los Angeles County.

2. A pop-up window will open asking the user to enter their iManage credentials.



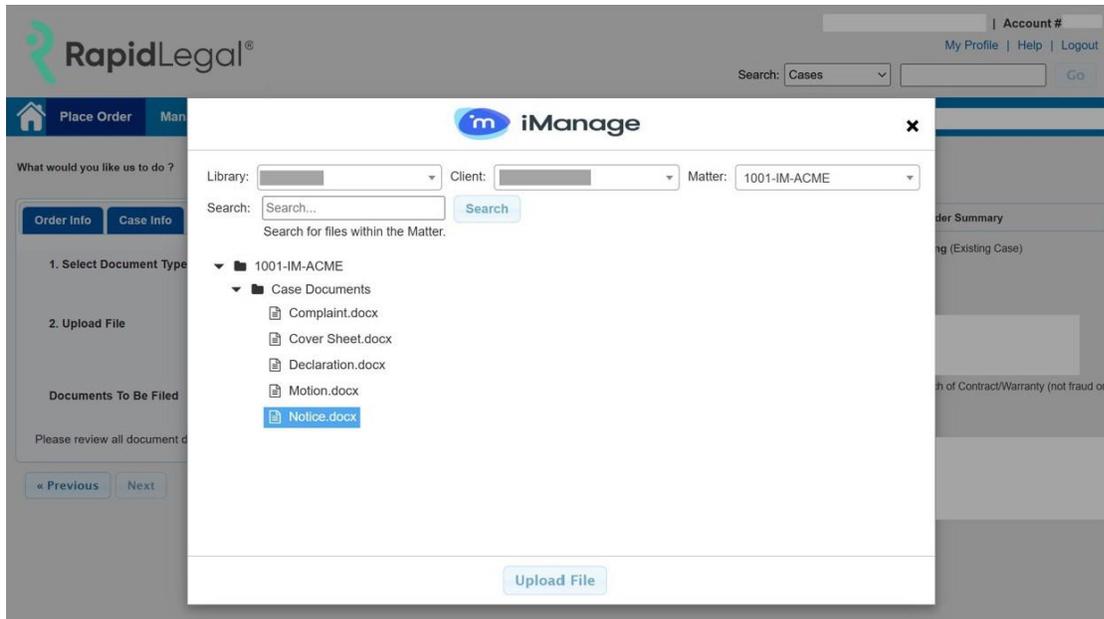
The screenshot shows the RapidLegal eFiling interface with an iManage login pop-up window overlaid. The pop-up window is titled 'iManage Login - Work - Microsoft...' and contains the following fields: 'Email' (with a text input field), 'Password' (with a password input field and an eye icon), and a 'Remember email' checkbox. There is also a 'Forgot password?' link and a 'Sign in' button. The background shows the same eFiling interface as the previous screenshot, but the 'iManage' option is no longer visible in the dropdown menu.

3. After logging in with their iManage credentials, the pop-up window closes and the user returns to the Rapid Legal order workflow and sees the iManage file selection window.

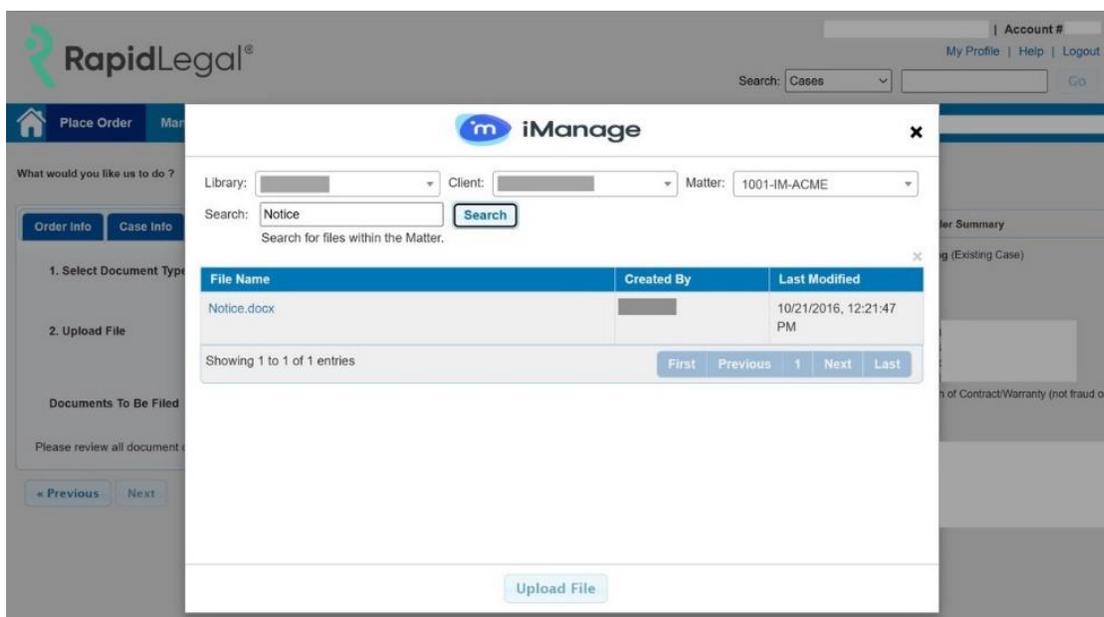


Uploading a Document to Rapid Legal from iManage

4. After establishing the connection between Rapid Legal and iManage, the user can browse to an iManage Library, Client, and Matter and see the folders and files.

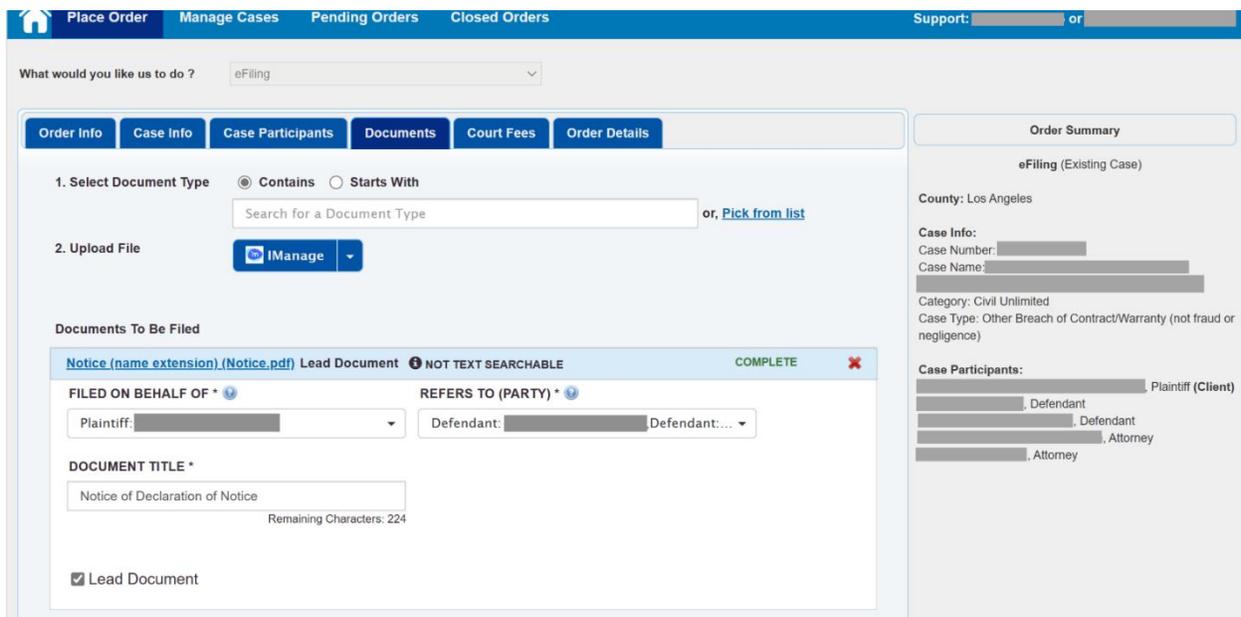


5. Users can also search for the document within that Client and Matter using the Search feature.



6. After selecting a file and clicking the “Upload File” button, the document is pulled directly from iManage into Rapid Legal, added to the order, and appears in the “Documents To Be Filed” section. **PLEASE NOTE:** All document PDFs must conform to court rules for submission. A password-protected, or fillable pdf document will cause an error message to be displayed.

7. From this point the eFiling order workflow continues with no other changes.

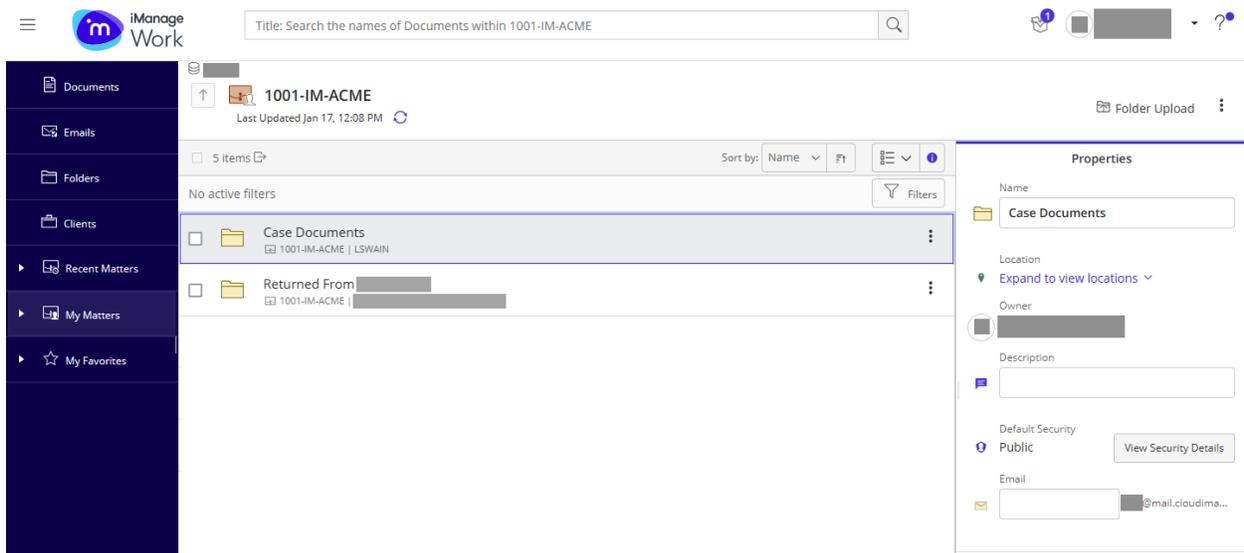
A screenshot of the RapidLegal eFiling interface. The top navigation bar includes "Place Order", "Manage Cases", "Pending Orders", and "Closed Orders". A search bar at the top right shows "Support: [redacted] or [redacted]". Below the navigation is a dropdown menu for "What would you like us to do?" with "eFiling" selected. The main content area has tabs for "Order Info", "Case Info", "Case Participants", "Documents", "Court Fees", and "Order Details". The "Documents" tab is active, showing "1. Select Document Type" with radio buttons for "Contains" (selected) and "Starts With", and a search box for "Search for a Document Type" with a "Pick from list" link. Below is "2. Upload File" with an "iManage" button. The "Documents To Be Filed" section shows a document titled "Notice (name extension) (Notice.pdf)" with a status of "Lead Document" and "NOT TEXT SEARCHABLE". It includes fields for "FILED ON BEHALF OF" (Plaintiff) and "REFERS TO (PARTY)" (Defendant), a "DOCUMENT TITLE" field with "Notice of Declaration of Notice" and "Remaining Characters: 224", and a checked "Lead Document" checkbox. On the right, an "Order Summary" panel shows "eFiling (Existing Case)", "County: Los Angeles", "Case Info" (Case Number, Case Name), "Category: Civil Unlimited", "Case Type: Other Breach of Contract/Warranty (not fraud or negligence)", and "Case Participants" (Plaintiff, Defendant, Attorney).

Viewing Documents Returned from the Court

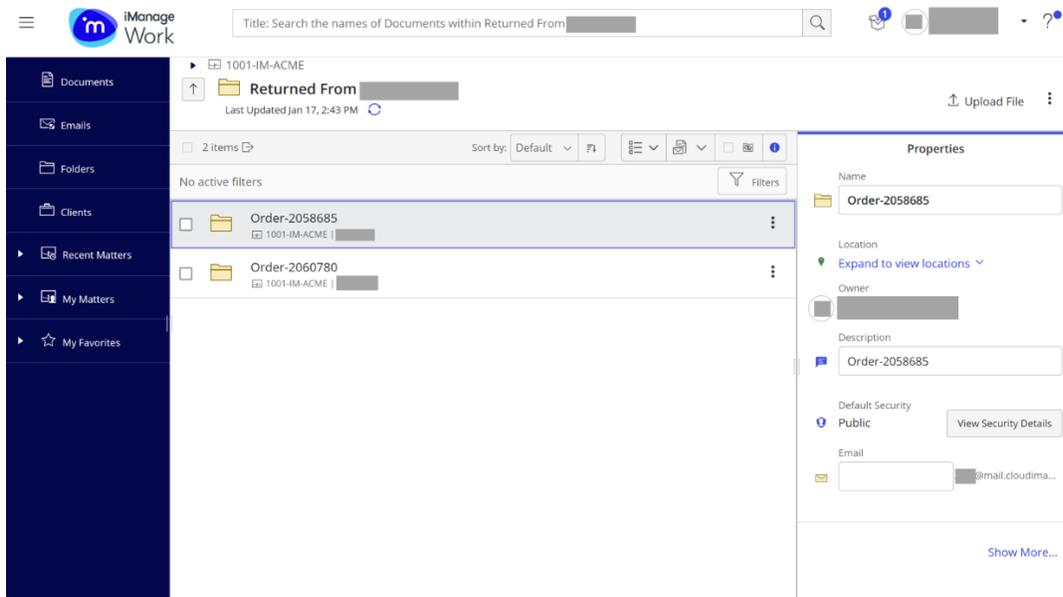
When utilizing the integration between iManage and Rapid Legal, all standard Rapid Legal functionality for court returned documents is still available. Court returned documents will be viewable in the “Deliverables” tab of the Rapid Legal order, and you will receive the email from Rapid Legal indicating whether your eFiling order was Accepted, Rejected, or Partially Accepted along with links to download the documents.

In addition, the court returned documents will be automatically saved into your iManage account under the Client and Matter you selected when submitting the order.

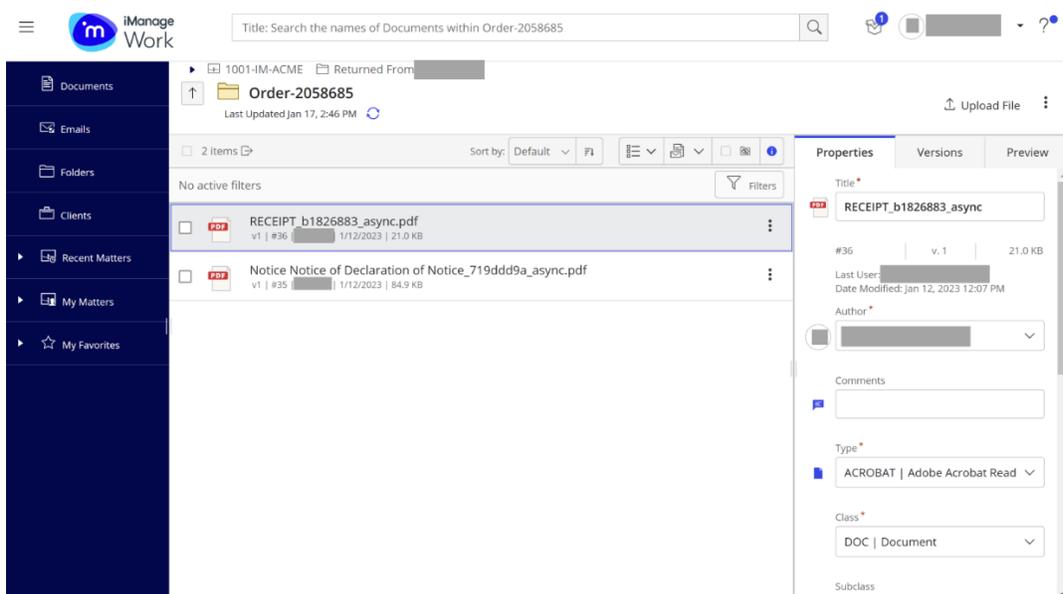
1. Log in to your iManage account and navigate to the Client and Matter you selected when submitting the eFiling order in Rapid Legal. Locate the folder named “Returned from *Rapid Legal*”.



- In the “Returned from *Rapid Legal*” folder you will see a list of all Rapid Legal orders submitted under this Client and Matter. Locate the proper folder by matching the Order Number assigned when the eFiling order was submitted in Rapid Legal.



- In the folder “Order-#####” you will see all documents returned from the court including stamped conformed copies, receipts, and notices as appropriate.



Frequently Asked Questions

1. **How do I connect to my iManage account?**
 - a. Click “Place Order” and start an eFiling order. When you arrive on the “Documents” tab, select a Document Type, and click the down arrow to the right of the “Upload from Computer” button then select “iManage”. When you select this option a pop-up window will open where you enter your iManage credentials and establish the connection.

2. **Do I have to enter my iManage credentials every time I submit a new eFiling order?**
 - a. The length of time that the connection between Rapid Legal and iManage stays active is primarily dependent on iManage. If you submit a second eFiling order immediately after the first one you likely will not have to re-enter your iManage credentials. However longer time periods may require you to allow the connection again. If your iManage credentials are saved by your browser this will make the process quicker as they will automatically populate in the connection pop-up window.

3. **Does the email address in my Rapid Legal account need to match the email address in my iManage account?**
 - a. No. Your iManage email and password do not need to match your Rapid Legal email and password. If your iManage credentials are valid the connection will be established.

4. **Can I upload more than 1 document from iManage to Rapid Legal in an eFiling order?**
 - a. Yes. Multiple documents can be loaded into Rapid Legal from iManage in the same way that you are able to upload multiple documents from your local computer.

5. **What types of files are supported by the integration? Will Rapid Legal convert my Microsoft Word files to PDF?**
 - a. All document types currently supported by Rapid Legal for upload from your local computer are also supported for upload from iManage including PDF, MS Word, Rich Text Files, and many others. Any file that is not a PDF will be automatically converted to PDF by Rapid Legal before being submitted to the court.