

InfiniGlobe

COLLABORATIVE THINKING, INSIGHTFUL INNOVATION



How We Can Help:

Implement

- Analyse current processes and suggest effective improvements.
- Implement the Exterro Platform with best practices.
- Migration of legacy data into the Exterro Platform.

Integrate

- Evaluate existing technologies, tools, and data sync.
- Implement Exterro integrations with ELM (TeamConnect)
- Configure out-of-the-box solutions.
- Build custom integrations.

Support

- Custom, one-on-one training for users and admins.
- Provide periodic evaluations of user experience and requirements.
- Post-production support and issue tracking.

Project Implementation Best Practices

We bring our experience and our reputation to every project, along with an arsenal of implementation deliverables that will enrich your solution design and fast-track your project timeline.

- Project Plans
- Requirement Documents
- Spec and Design Documents
- Notice Templates
- Questionnaires
- Industry Best Practices
- Data Migration Plan
- UAT Scripts
- Change Management Plan
- Training Presentations
- Cheat sheet Training Guides
- Go-Live Cutover Plans
- Project Run-Books
- Help Desk Support Portal

About InfiniGlobe

InfiniGlobe is a legal technology consulting and software company located in Newport Beach, California, USA. InfiniGlobe designs, builds, integrates, and services modern software solutions for the legal industry. We offer a full-service provider of client-customized software for integrated and comprehensive software solutions and professional services for corporate law departments, ranging from system implementation to upgrades, optimizations and more. For more information, visit infiniglobe.com.

About Exterro

Exterro was founded with the simple vision that applying the concepts of process optimization and data science to how companies manage digital information and respond to litigation would drive more successful outcomes at a lower cost. We provide software solutions that help some of the world's largest organizations, law enforcement and government agencies work smarter, more efficiently, and support the Rule of Law. For more information, visit exterro.com.

Exterro™ and TeamConnect™ Connector:



Bridging the Gap Between Legal Holds and Matter Management Systems

Managing and complying with the legal hold process is an essential task in corporate law and compliance departments. The legal hold process is intertwined with the matter lifecycle and the two workflows often overlap, sharing files and other data. However, the exchange and syncing of information between these two systems has always been a technology and process challenge, which, if not properly configured, results in inefficiency and compliance issues.

The Challenges

When a law department's Matter Management Systems (MMS) and Legal Hold System (LHS) are two different systems, syncing information between them increase security while reducing time wasted and data lost on duplicate data entry. Most law department staffs look at their MMS as the hub of all information pertaining to a matter, including any legal holds. When an in-house attorney wants to approve the closure of a matter, they need to know the status of all holds for that matter, checking to see if a lift notice has been issued. If the systems are not integrated, they must login to each separately to check, searching for the hold, and confirming information. If the cross-checks, like in the above example, are not performed properly and compliances are missed until it's too late, it could have significant consequences for not just the law department, but for the company as a whole.

The Solution

With extensive experience developing and implementing MMS and LHS integrations, our integration experts spend time with each client legal operations team to understand their desired user experience when working with both the Exterro and TeamConnect systems. In past projects, our team has created a button for users to automatically create holds in Exterro from the TeamConnect screen while syncing all the associated data will be automatically transferred between the two platforms and made hold information visible right next to the matter in TeamConnect.

What It Means for You

To sum up, the InfiniGlobe Exterro - TeamConnect connector has several key benefits.

- Eliminate the need for duplicate data entry.
- View matter and hold status across both systems.
- Run automatic reports including matter and hold information.
- Perform hold actions right from your TeamConnect screens.
- Monitor compliance through a centralized information hub.

Legal Hold Pro™ and TeamConnect™ Connector:



Bridging the Gap Between Legal Holds and Matter Management Systems

For large corporations with numerous active litigation matters at any given time, the legal hold process can be overwhelming with only basic tools like email or excel. Corporations have a huge responsibility to establish official policies, procedures, and processes to meet legal hold requirements and to implement them throughout the company. Failure to comply can result in serious repercussions and sanctions, ranging from monetary penalties to default judgments.

The Challenges

Matter Management Systems (MMS) are by nature project and financial management tools, while Legal Hold Systems (LHS) are designed for automating communications and notifications for fulfilling compliance. Both systems are built and sold as standalone systems, which can create an information disconnect between the two platforms. This was the case of one of our clients, a Fortune 500 utility company, who was using Mitratech TeamConnect™ for matter management and was planning to upgrade its legacy legal hold system to Zapproved Legal Hold Pro™ (a.k.a. ZDiscovery Legal Hold). They faced a big challenge when neither Mitratech nor Zapproved offered an integration connector between their systems. The law department wants to migrate all historical and active hold information from the legacy legal hold system to Legal Hold Pro, and needed help to safely and security transfer their data to their new system.

The Solution

Creating holds for matters is a time-consuming task, but with the integration in place, users were able to create holds right from the TeamConnect screen. As a result, there was a significant improvement in the efficiency of managing holds on any matter, saving time and decreasing the possibility of human error in the manual transfer of data between systems. With the connector in place, legal staff can create and run reports on all matters regarding hold status and other information pertaining to holds, without users needing to switch between platforms.

What It Means for You

To sum up, the InfiniGlobe Zapproved - TeamConnect connector has several key benefits:

- Eliminate the need to manually copy/paste information between systems.
- View matter and hold status across systems.
- Run reports with information about matters and holds.
- Perform hold actions right from your TeamConnect screens.
- Ensure compliance through a centralized information hub.