

Amplifying your Intelligence

iMANAGE AI UPDATE

DECEMBER 2024



iManage

Making knowledge work

What is iManage's AI Vision?

Enabling AI capabilities in the iManage Platform

It's a way of
improving search



It's a way of adding
additional context
to content within
iManage



Enabling customers to **leverage their data**
with AI with tooling that **iManage** provides,
Microsoft provide, **third parties** provide, and
customers provide themselves



It's a way of
improving firm
productivity &
governance:

- Enhancing search
- Knowledge reuse
- Boost productivity
- Better governance

It's a way of improving repeatable tasks

- **Email filing classifier**
- **Ask Knowledge**
- **Signature page detection for signed agreements**
- **And much more...**



It's a way of
improving quality
and finding the
right answers to
questions



iManage AI
services will power
new functionality in
all iManage apps



PLATFORM Built on a Trusted Platform

Built on proven iManage Cloud on Azure architecture

Leverage a decade of data science **AI PEDIGREE**

Leveraging proven and established data science processes

Geo-Bound Processing

AI processing in regional hubs
respecting data-protection
requirements in place

Protection in Place

No need to move data, already
managed security, information
barriers respected

Proven Legal Engineering

Qualified teams building, testing and
benchmark our AI services

Focus on Precision

Focus on Quality & Transparency, iManage is
establishing standards in benchmarking

iMANAGE AI

Customer Data Advantage

Ability for you to leverage your
best asset, your data!

Engagement-Centric

Leverage organized information
architecture of Engagement with AI

Evidence/Citation in Context

Providing proof as to where an answers have
been derived

Collective AI

Collaborative AI prompt
creation & sharing.

Leverage your best assets to deliver real value

DATA Grounded in your data

Meet users where they work iManage Work or Office 365

Seamless Adoption **CAPABILITY**

DELIVERING GLOBAL CLOUD AI SERVICES

iManage Cloud on  Azure with  OpenAI private instances on Azure



Azure Data Centre Locations **

Country	Primary	Secondary
Canada	Toronto	Quebec
USA	Iowa	Virginia
Brazil	Sao Paulo	Dallas
UK	London	Cardiff
Netherlands	Amsterdam	Dublin
Japan	Tokyo	Osaka
Singapore	Singapore	Hong Kong
Australia	New South Wales	Victoria
UAE	Dubai	Abu Dhabi
new Switzerland	Zurich	Geneva



AI Factories across the globe*



Empower Copilot with iManage data



Secure access to Large Language Models



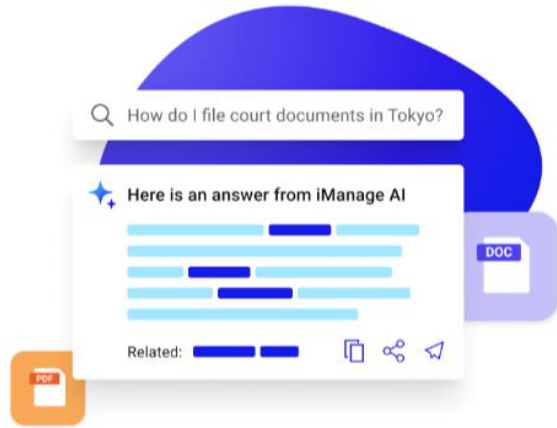
Process data in region – respects local processing privacy regulations



*iManage has applied for, and received, an exemption from Microsoft’s abuse monitoring and human review

** iManage AI will be made available within regions dependent on customer demand and availability of Azure OpenAI services within those regions

Key iManage AI capabilities



Ask iManage

Q&A with your content

LLM grounded in your data

Reduced 'hallucinations'

Maintains security and ethical walls

Pre-trained models

MS Copilot Connector accessible via MS Teams (R&D)



iManage AI Enrichment

Automatically enhances findability

Auto classify 82+ of document classes

Enrich search with key data point extraction for contracts

Pre-trained models

Models provided out of the box by iManage Knowledge Engineering



Mailbox Assistant

Minimizes manual filing burden

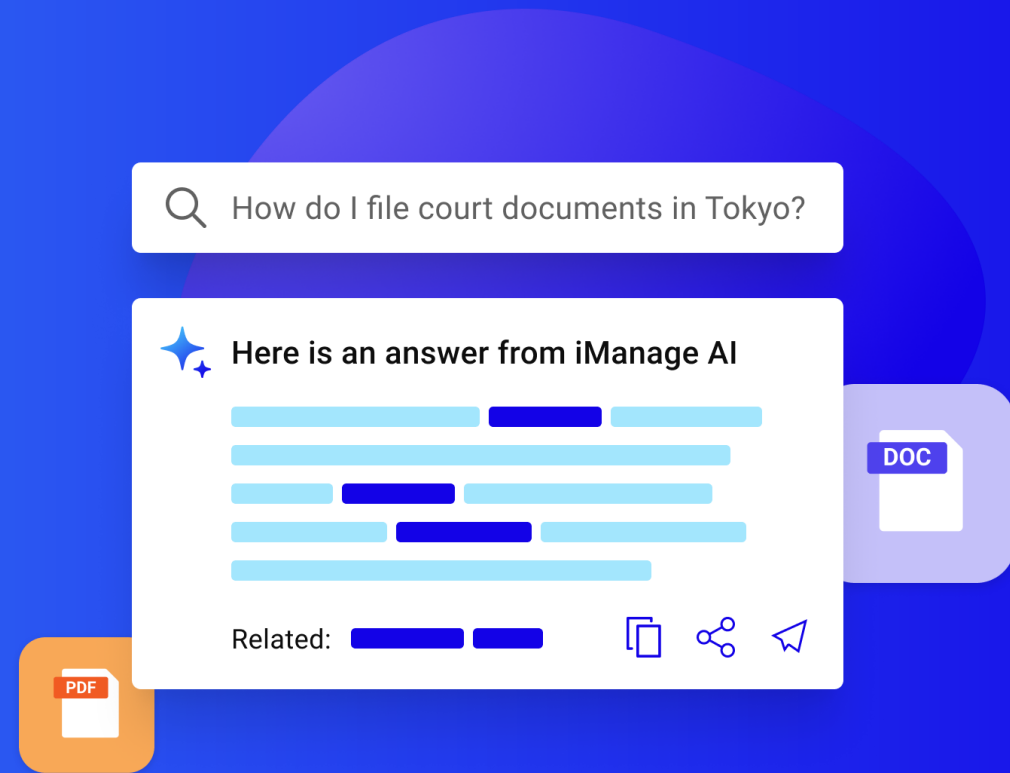
Automatically file unfiled emails

Cleanup large legacy volumes

Learns from organization behaviour

Retrains automatically overnight

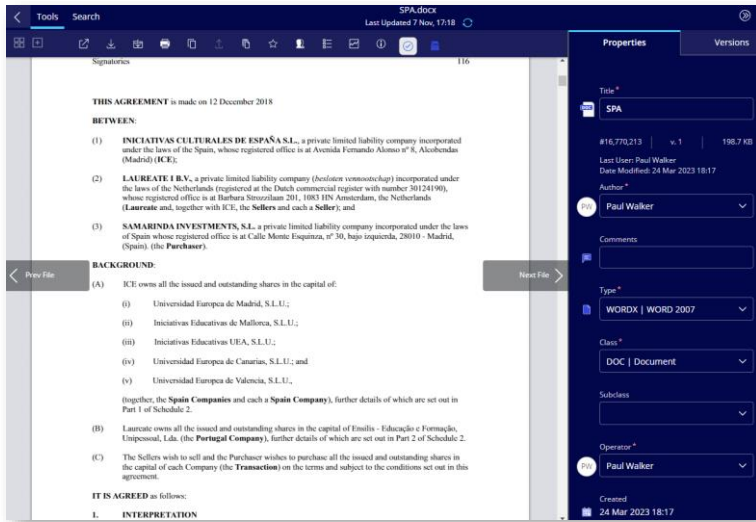
Ask iManage & AI Enrichment



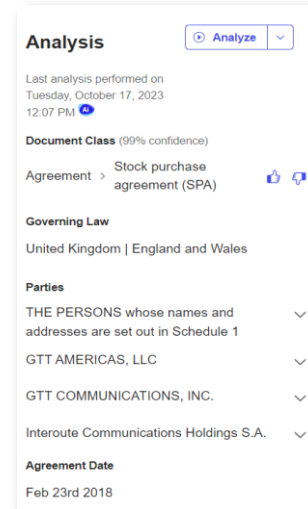
iManage AI Enrichment

Automatic Content Classification and Extraction

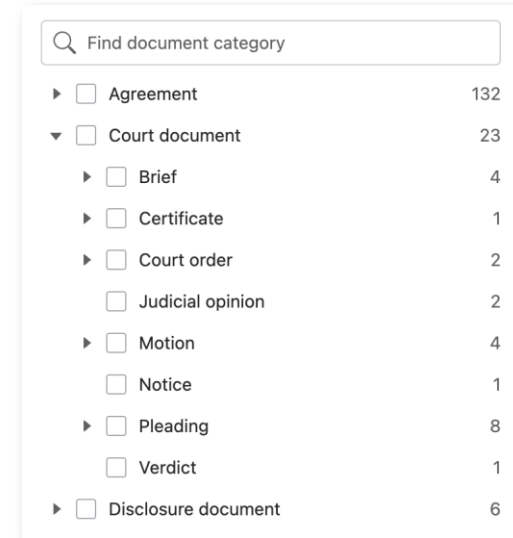
Ongoing and legacy data cleanup



Extraction of standard contract data points



Deeper search and more relevant answers



Full List of Classes Here



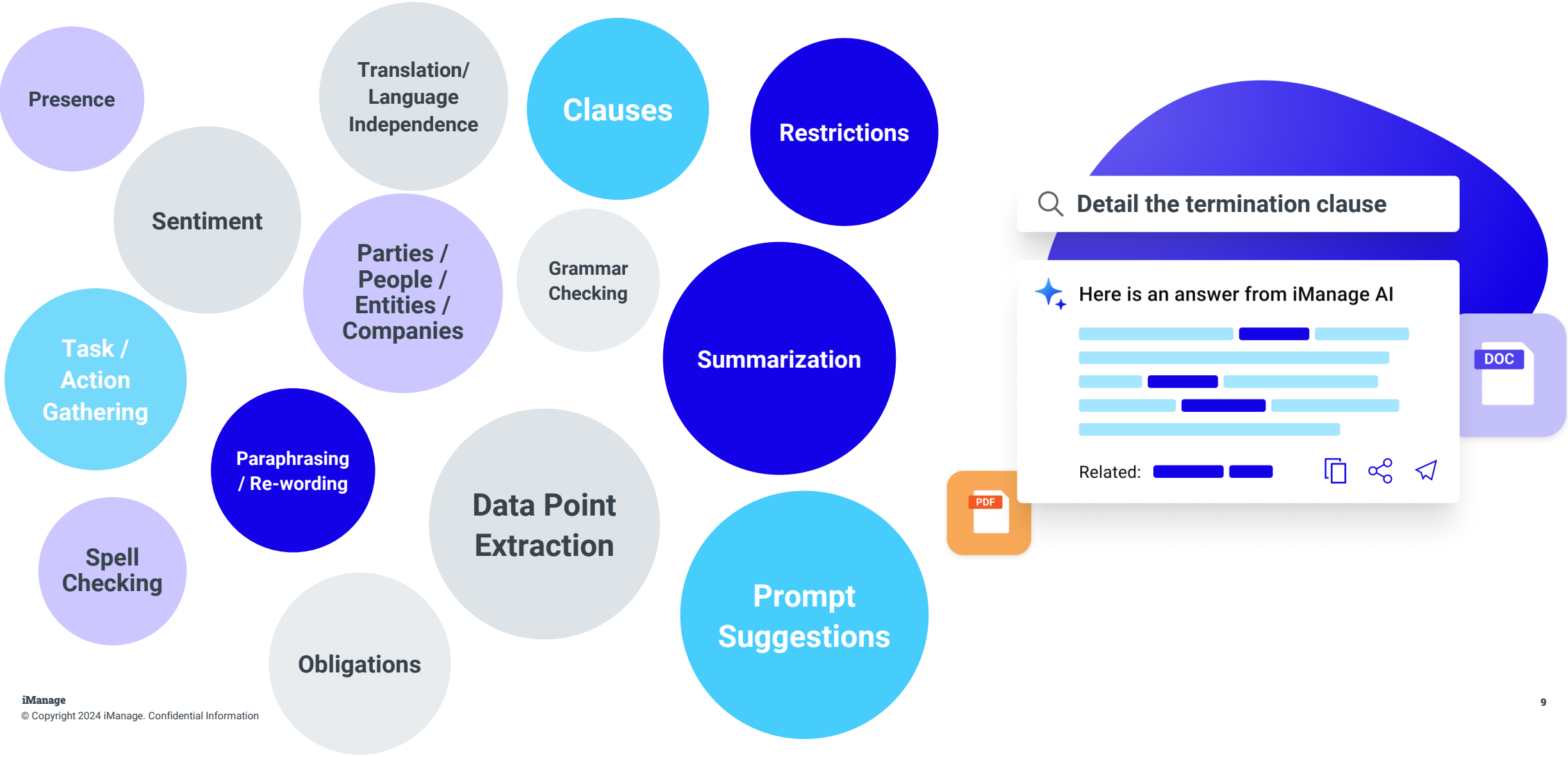
82+ iManage pre-trained document classes (more in training)

- Accounting record
- Agency agreement
- Agreement
- Asset purchase agreement (APA)
- Court document
- Assignment agreement
- Disclosure document
- Assignment of lease
- Legal analysis
- Bond
- Legislation
- Bond final terms
- Marketing material
- Business associate agreement
- Organizational material
- Collaboration agreement
- Patent
- Collaboration agreement (R&D)
- Process material
- Custodian agreement
- Procurement request
- Data processing agreement
- Deed of trust
- Distribution agreement
- Escrow agreement
- Facility agreement
- Franchise agreement
- Goods and services agreement
- Master services agreement (MSA)
- Guarantee
- Indemnity agreement
- Indenture
- Inter-creditor agreement
- ISDA
- Joint venture agreement (JVA)
- Commercial lease agreement
- License
- Merger agreement
- Non-compete agreement
- Employee non-compete agreement
- Non-disclosure agreement (NDA)
- Novation agreement
- Partnership agreement
- Pledge agreement
- Promissory note
- Security agreement
- Shareholders' agreement
- Software-as-a-service (SaaS) agreement
- Software license agreement
- Stock purchase agreement (SPA)
- Subscription agreement
- Termination agreement
- Termination of employment agreement
- Term sheet
- and more...

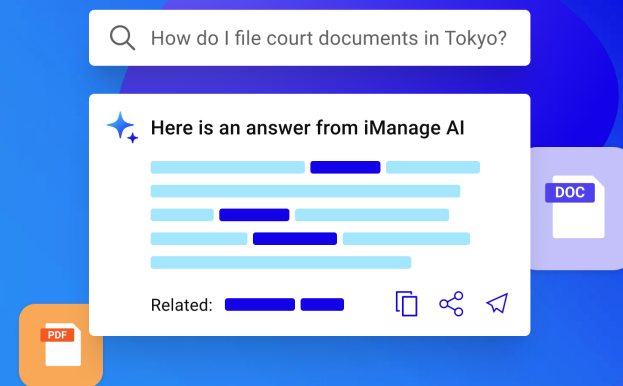


Ask iManage – Prompt capabilities

The following are the types of questions we can ask of a set of documents



AI Enrichment & Ask iManage Demo





Ask iManage 'Wayfinder' Program



Ask iManage

Wayfinder



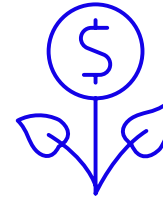
Learning

Enables you to get hands-on with Ask iManage to gain a **clear understanding** of how it can empower your users by leveraging GenAI capabilities **natively inside** iManage Work.



Value

Enables you to identify and prove out **potential use cases** that will help **demonstrate the value** of Ask iManage to your users and drive wider adoption.



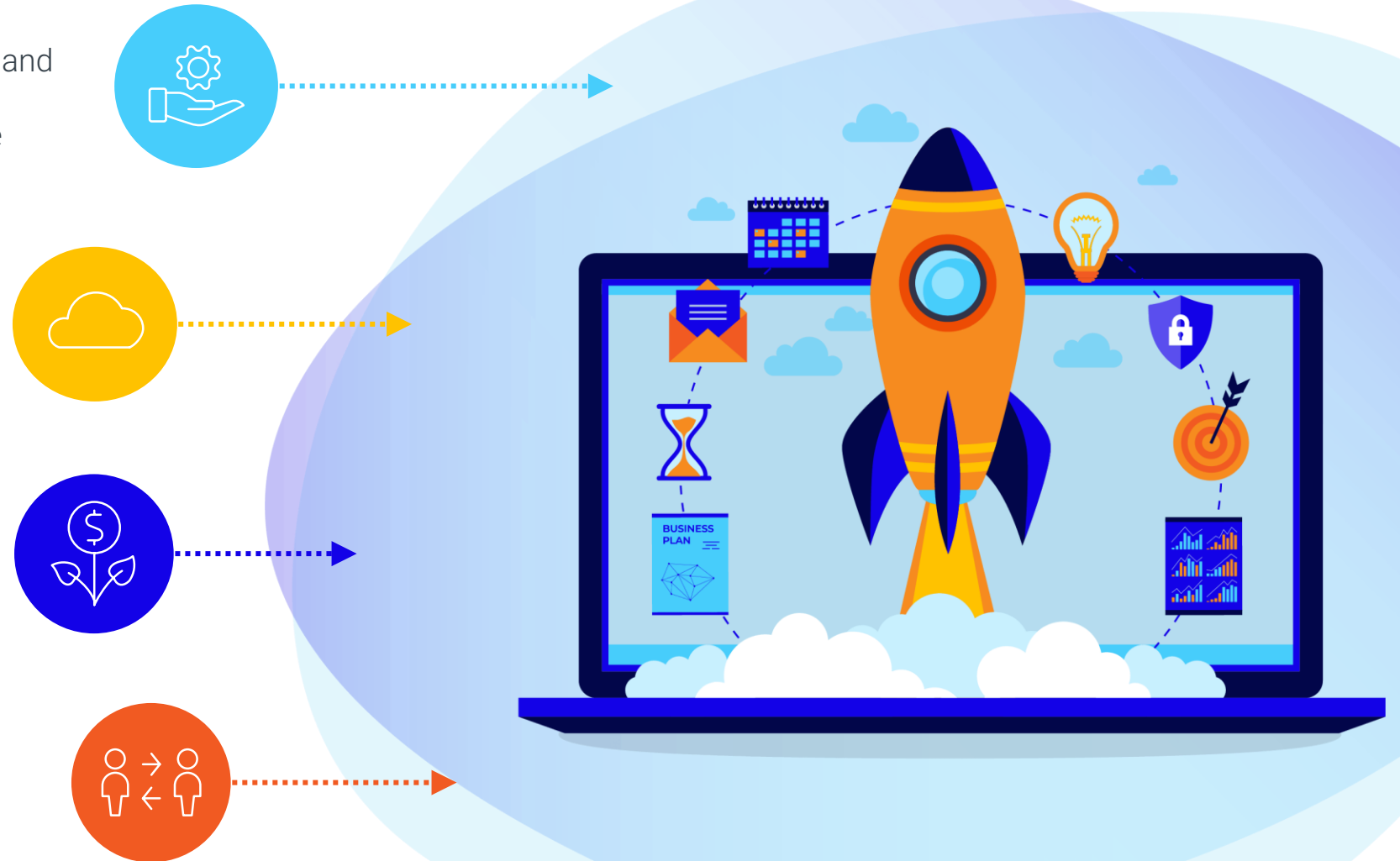
Strategic Investment

Initial 12-month subscription including **enablement and adoption program** designed to prepare your users to integrate Ask iManage into their daily workflows



Ask iManage 'Wayfinder' is GO!

- Wayfinder launches in Dec 2024 in US
- Wayfinder will launch in Feb 2025 for UK and ANZ customers
- EU DC early Q2 2025 (if interested please speak with your Account / Partner Exec)
- Subscribing customers must:
 - be live in cloudmanage.com and use Ask iManage with production data
 - have data located in Ask iManage-enabled DCs (US, UK, AU initially)
- Introductory Subscription Pricing
 - Ask iManage "Essentials"
- Requires minimum subscription of:
 - 20 users (if < 1,000 users)
 - 50 users (if => 1,000 users)
 - Maximum 100 users capped
- Streamlined, "ready to deploy" solution
- Launch program includes onboarding and enablement with ongoing support



Wayfinder – How does it work?

Wayfinder is a partnership between us, you and your users



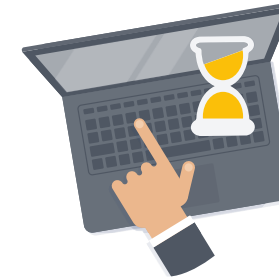
What we do

- **Provide expertise** to help you familiarize with and identify use cases for Ask iManage
- **Meet and work with your users** to understand how they work
- **Advise on your rollout** to ensure Ask iManage lands as well as possible
- **Share learnings** with iManage teams to improve Ask iManage



What you do

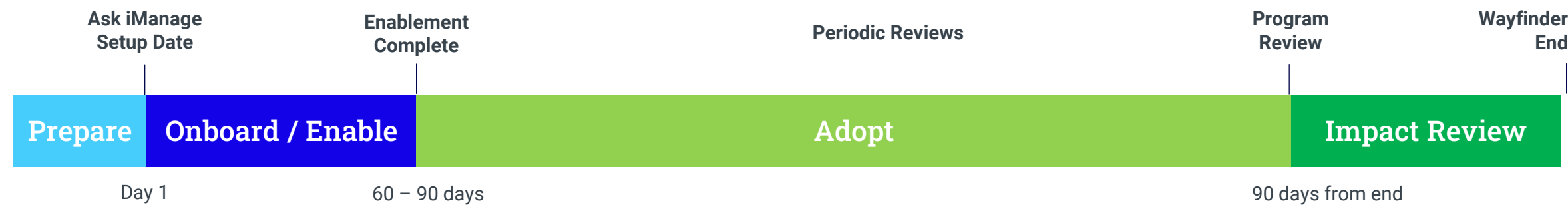
- **Time commitment** from IT / innovation teams to assist with Ask iManage setup, program logistics and ongoing support for your participant users
- **Provide access** to your initial Wayfinder participant users for first 60-90 days to deliver enablement support
- **Work with us** to analyse and identify priority use cases
- **Keep connected with us** for remainder of Wayfinder program and your ongoing adoption



What we deliver

- **Learning assets** for Ask iManage including self-service training and documentation
- **Example use cases** to assist with initial identification and adoption
- **Feedback** on what we learned during your enablement sessions
- **Ongoing updates to Ask iManage** for duration of Wayfinder program to continue to deliver value

Wayfinder: 12-month Program Timeline



Activities

Prepare	Onboard / Enable	Adopt	Impact Review
<ul style="list-style-type: none">Your program champions will connect with our success experts to guide them through your ideal end user selection, onboarding and enablement.Enable your end users for access to our Ask iManage Training hub and documentation to support their initial learningEnd users gain clarity on AskiManage prior to kick off maximizing their time to value.	<ul style="list-style-type: none">AskiManage is enabled, users trained and your kick off is completeUsers get access to “Getting Started” Workshop with subject matter experts to help navigate day-to-day use cases and adoption guidanceUp to 3 additional “Success Plays” are held to support continued adoption and use case workflows maximizing end user efficiency	<ul style="list-style-type: none">Regular value reviews aligning to the established joint impact planOngoing usage and consumption reports providing valuable insight driving efficiencyAsk iManage community updates and office hours enabling time saving tips and tricks with new featuresContinued access to training content and materials providing critical need feedback every step of the way	<ul style="list-style-type: none">90 days prior to Wayfinder close, your account team will prepare a final impact value review to discuss your experienceYour account team will provide a roll-up of impacts achieved, use cases obtained in workflows and consumption of training content.Your account team will recommend next steps for our continued partnership before your strategic investment of the Wayfinder program ends.


Ask iManage – Virtual Training Hub



Flexible, self -enablement that empowers end users participating in Wayfinder

About this Hub

Ask iManage made easy



Ask iManage made easy

This Hub will help you get started with Ask iManage, quickly fetching answers, reusing question sets, and eliminating repetitive tasks to keep you focused on deeper insights.


You have 4 resources left to complete

Scroll down and explore the resources!

Incomplete

Ask iManage: The basics

Here's a quick guide to streamlining your workflow with Ask iManage. Whether you're asking questions, utilizing predefined



Wayfinder: Resources needed for success!



Initiative Champion

Assign a dedicated champion for Wayfinder willing to work with us every step of the way by managing program logistics, handling your communications with your ambassadors, scheduling workshops, etc.



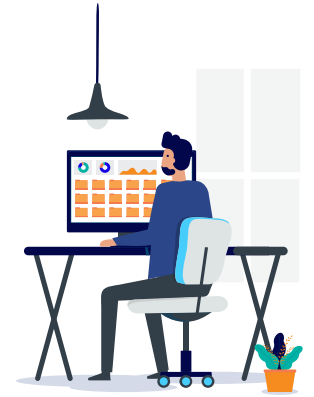
Chief Ambassador

Your lead ambassador who will familiarize with all aspects of AskiManage enablement and adoption to lead and rally your dedicated ambassadors along their path to impact with Wayfinder.



Dedicated Ambassadors

Strategic and willing users that will engage, inquire, and participate in Wayfinder by getting dedicated hands-on time with AskiManage providing consistent real-world feedback.



Technical Champion

Assign technical resource to ensure that Wayfinder is prepared for launch by setting up access to Ask iManage and Training, acting as initial technical support point of contact, etc.

WayFinder: Key Information



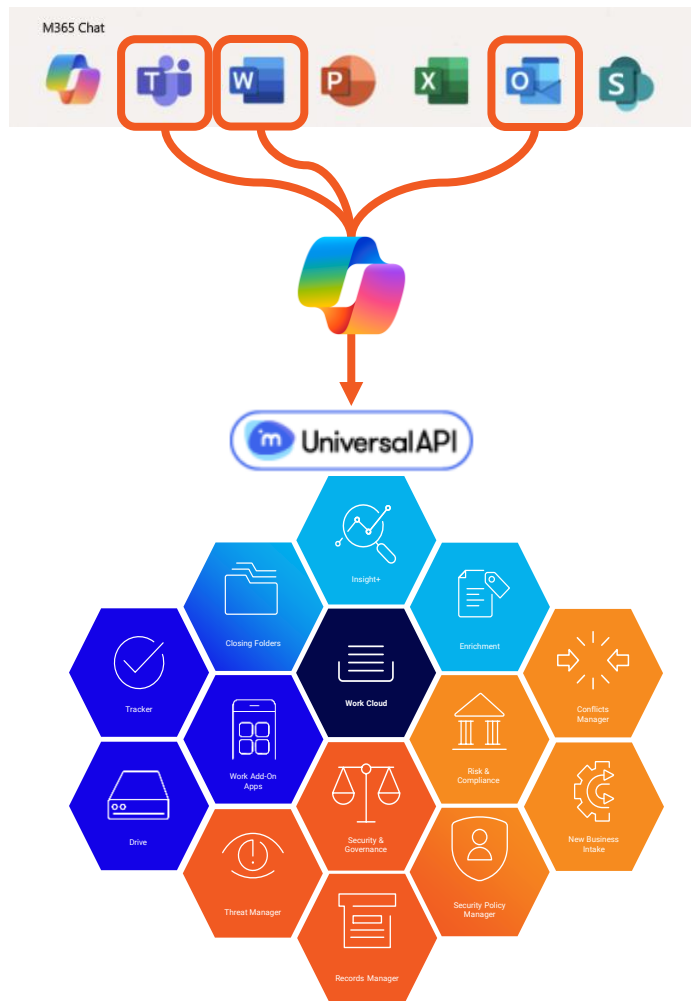
- Ask iManage available via a **standalone, 12-month fixed subscription term**
- Governed by your existing iManage Cloud Agreement with an additional Addendum to govern use of new AI services
- **No limits imposed** on Ask iManage service consumption for the 12-month term
- Overages will apply for **non-licensed users** enabled for Ask iManage additional to licensed user commitment
- Ask iManage access can be **transitioned to other users** during Wayfinder
- **New users** can be added to your subscription at any time during Wayfinder term (up to 100 users) with enablement and adoption support included
- **Usage metrics** will allow monitoring of consumption (users, docs, prompts) to determine value and assist with adoption analysis

iManage Cloud and Microsoft Copilot



iManage Copilot with Work content

Initially targeting Microsoft Teams, Outlook and Word use cases



- 1 User starts conversation with CoPilot in Teams

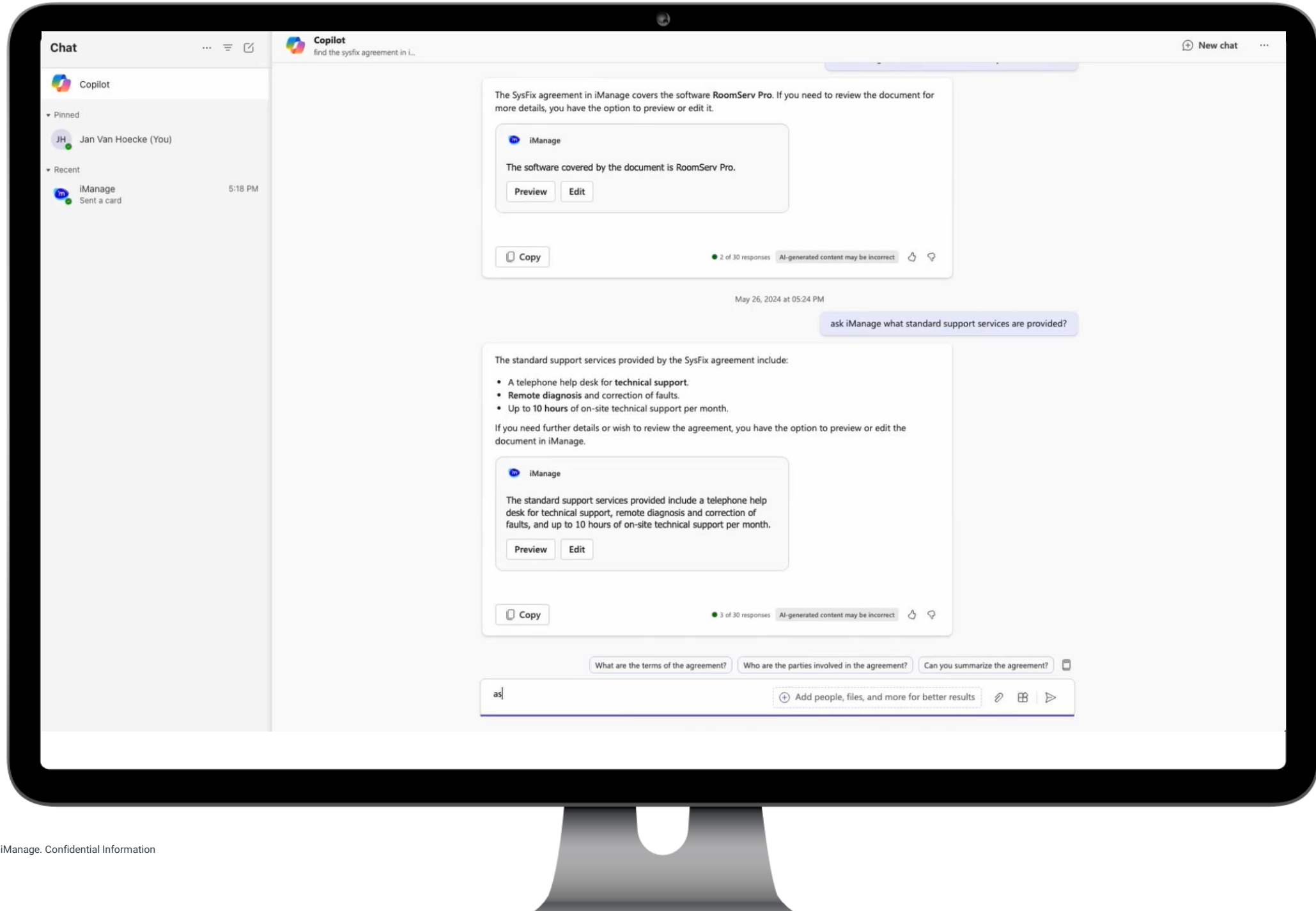
- 2 User asks: "Find me the executed **negative pledge** clauses for **[facility agreements]** with **[Bank A]**?"

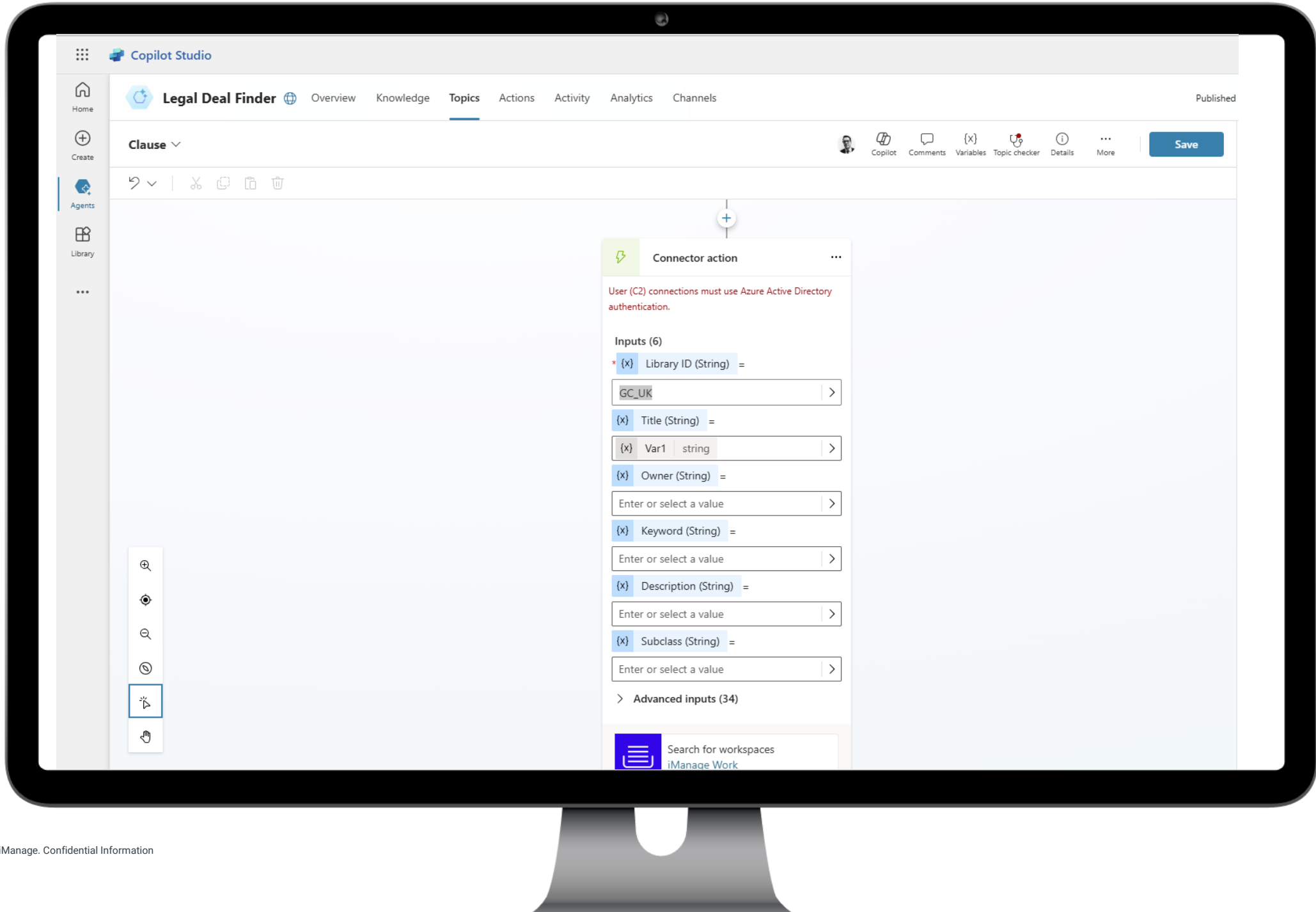
Document Class
Party/Client

- 3 CoPilot calls the Ask iManage API – Search
 - Executed
 - Facility Agreements
 - Bank A

- 4 Ask iManage answers the question

- 5 Cites document(s) and link to the document used to construct the answer of Negative Pledge clauses





AI Enhanced Apps and Workflows



Example – Deposition summarizer

Use Case Summary

1. Read a Deposition Schedule
2. Check that submission meets client AI processing rules
3. Leverage Ask iManage through Power Automate
4. Receive output, Send summary by Email, Write Summary to Work

Alternatives

- Set key court dates in **Tracker Tasks**
- **Approvals, Reporting, Alerting**
- Amend prompt for specific fields extraction

The screenshot displays the iManage Work web application. The main area shows a list of 'Recent Documents' with columns for Title, Version, Document Number, Class, SubClass Description, Database, Activity Date, and Create Date. The list includes various legal documents such as employment contracts, licenses, and court orders.

On the right side, the 'AI Enrichment' sidebar is active, showing a 'Question list' with a selected question: 'Deposition Summariser'. Below this, the 'Results for: Deposition Summariser' are displayed, including 'Key Facts and Claims' and a detailed summary of deposition testimony.

Key Facts and Claims:

- 1. Testimony on Water Discoloration:**
 - The witness confirmed that they were asked if they ever saw the water outside the building change color after washing the floor. They responded that they were sure it did, but they did not look. They relied on logic to assume it changed color.
- 2. Testimony on Drains and Building Structure:**
 - The witness testified about the presence of French drains in the basement level of the main building. They described the basement as entirely below grade with windows sitting upon a concrete foundation.
- 3. Testimony on Storage Tanks:**
 - The witness recalled vertical storage tanks outside the building, describing them as large cylinders holding thousands of gallons, with some being taller than others.
- 4. Testimony on Waste Disposal:**
 - The witness testified that the material washed off the basement floor, which included black or gray sludge, went out to the tailrace and eventually into the river, not into a municipal sewer.
- 5. Experience and Employment:**
 - The witness worked at Metro-Atlantic and testified truthfully to the best of their recollection during previous testimonies in 2002 and 2006. They mentioned working at both facilities and described employees as interchangeable between sites.
- 6. Description of Texas Tower:**
 - The witness described the Texas Tower as a square building, possibly two stories tall, and speculated it might have been constructed from

Ask iManage can make mistakes. Check important information.

Documents

Tasks

Emails

Folders

Policy Holders

Recent Claims / Policies

My Claims/Policies

My Favorites

Documents

Title: Search the names of Documents within Insurance

RECENT DOCUMENTS

CHECKED-OUT DOCUMENTS

Recent Documents

Last Updated 13 Nov, 21:42

98 Items

Activities: Edited, Viewed

Databases: Insurance

Date: Last 30 days

Reset

Filters

		Title	Ve...	Policy Sum...	Claims Su...	Document Number	Author	Class Descr...	SubClass D...	Edit Date	File Size	Workspace Name	
		Incident Report - Vehicle Damage.docx	2	Henry Cl...	Henry Cl...	550	JACK.DEN...			07/11/2...	25.3 KB	00000185.L-000366 - Henry Clark - Auto ...	
		*Policy Document - Auto Insurance.docx	1	Henry Cl...	Henry Cl...	548	JACK.DEN...			28/10/2...	36.0 KB	00000185.L-000366 - Henry Clark - Auto ...	
		selfie-passport-720x480(11995.1).jpg	1	Henry Cl...	Policy Ho...	555	JACK.DEN...	Custome...		28/10/2...	114.7 KB	Policy Holder General Workspace	
		Czech_passport_2000_MRZ_data.jpg	1	Henry Cl...	Policy Ho...	554	JACK.DEN...	Custome...		28/10/2...	54.1 KB	Policy Holder General Workspace	
		Test.docx	1	Henry Cl...	Henry Cl...	648	JACK.DEN...	Incident ...		29/10/2...	13.1 KB	00000185.L-000366 - Henry Clark - Auto ...	
		Misleading conduct and unfair contract ...	1	Henry Cl...	Henry Cl...	565	JACK.DEN...			29/10/2...	864.5 KB	00000185.L-000366 - Henry Clark - Auto ...	
		sample-indian-passport-1.jpg	1	Henry Cl...	Policy Ho...	560	JACK.DEN...	Custome...		28/10/2...	132.4 KB	Policy Holder General Workspace	
		german-bundesdruckerei-electronic-pas...	1	Henry Cl...	Policy Ho...	563	JACK.DEN...	Custome...		28/10/2...	1.62 MB	Policy Holder General Workspace	
		Specimen_Personal_Information_Page_...	1	Henry Cl...	Policy Ho...	561	JACK.DEN...	Custome...		28/10/2...	113.4 KB	Policy Holder General Workspace	
		sample-usa-passport.jpg	1	Henry Cl...	Policy Ho...	559	JACK.DEN...	Custome...		28/10/2...	120.8 KB	Policy Holder General Workspace	
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		selfie-passport-720x480.jpg	1	Henry Cl...	Policy Ho...	556	JACK.DEN...	Custome...		28/10/2...	114.7 KB	Policy Holder General Workspace	
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		Loan_Facility_Agreement_DXJ832_2023Fi...	1	Henry Cl...	Policy Ho...	647	JACK.DEN...	Agreement	Facility a...	29/10/2...	13.4 KB	Policy Holder General Workspace	
		DTH_02-11-2007 Hari & Son.docx.pdf	1	Henry Cl...	Policy Ho...	586	JACK.DEN...	Agreement	Commer...	29/10/2...	381.0 KB	Policy Holder General Workspace	
		Employment Contract for EMPLOYEE NA...	1	Henry Cl...	Policy Ho...	596	JACK.DEN...	Agreement	Employm...	29/10/2...	37.3 KB	Policy Holder General Workspace	
		_DO_24_01_2004.docx.pdf	1	Henry Cl...	Policy Ho...	601	JACK.DEN...	Agreement	Commer...	29/10/2...	380.3 KB	Policy Holder General Workspace	
		Aila Logan Employment Agreement for ...	1	Henry Cl...	Policy Ho...	590	JACK.DEN...	Agreement	Collective...	29/10/2...	171.0 KB	Policy Holder General Workspace	
		Contract_2023-11-XYZ234_Final.docx	1	Henry Cl...	Policy Ho...	641	JACK.DEN...	Agreement	Asset pur...	29/10/2...	13.8 KB	Policy Holder General Workspace	
		2023-11-AGMT-TRX902-Def03.docx	1	Henry Cl...	Policy Ho...	636	JACK.DEN...	Agreement		29/10/2...	13.5 KB	Policy Holder General Workspace	
		Employment Contract for EMPLOYEE NA...	1	Henry Cl...	Policy Ho...	574	JACK.DEN...	Agreement	Employm...	29/10/2...	38.4 KB	Policy Holder General Workspace	
		Sumit Nagal Employment Contract FINA...	1	Henry Cl...	Policy Ho...	576	JACK.DEN...	Agreement	Employe...	29/10/2...	119.9 KB	Policy Holder General Workspace	
		LoanFacility_Agt_2023-07-2159_KJH.docx	1	Henry Cl...	Policy Ho...	587	JACK.DEN...	Agreement	Facility a...	29/10/2...	13.6 KB	Policy Holder General Workspace	
		Incident Report - Vehicle Damage.docx	1	Henry Cl...	Henry Cl...	546	JACK.DEN...			29/10/2...	25.9 KB	00000185.L-000366 - Henry Clark - Auto ...	
		Loan Facility Agreement_FW-2023-9912_...	1	Henry Cl...	Policy Ho...	646	JACK.DEN...	Agreement	Facility a...	29/10/2...	13.7 KB	Policy Holder General Workspace	
		Loan Facility Agreement Y2023-11-9154_...	1	Henry Cl...	Policy Ho...	645	JACK.DEN...	Agreement	Facility a...	29/10/2...	14.0 KB	Policy Holder General Workspace	
		Loan Facility Agreement 2023-F34_Rev0...	1	Henry Cl...	Policy Ho...	644	JACK.DEN...	Agreement	Facility a...	29/10/2...	13.5 KB	Policy Holder General Workspace	

Properties

Security

Versions

Preview

Ask iManage

*Policy Document - Auto Insurance

v. 1 | #548 | Modified: 28 Oct 2024, 21:04 | 36.0 KB | Last User: iwadmin

Default Security

Public

Author*

Jack Dennis

Comments

Type*

WORD 2007

Class*

Subclass

Operator*

Jack Dennis

Create Date

28 Oct 2024, 13:51

Where Used

View locations

Policyholder

Henry Clark

Claim / Policy

Henry Clark - Auto Insurance

Claim Status / Policy ...

Pending Approval

Sender

Recipient

Premium Amount

Claim Adjuster

Submission Date

9°C Cloudy

Search

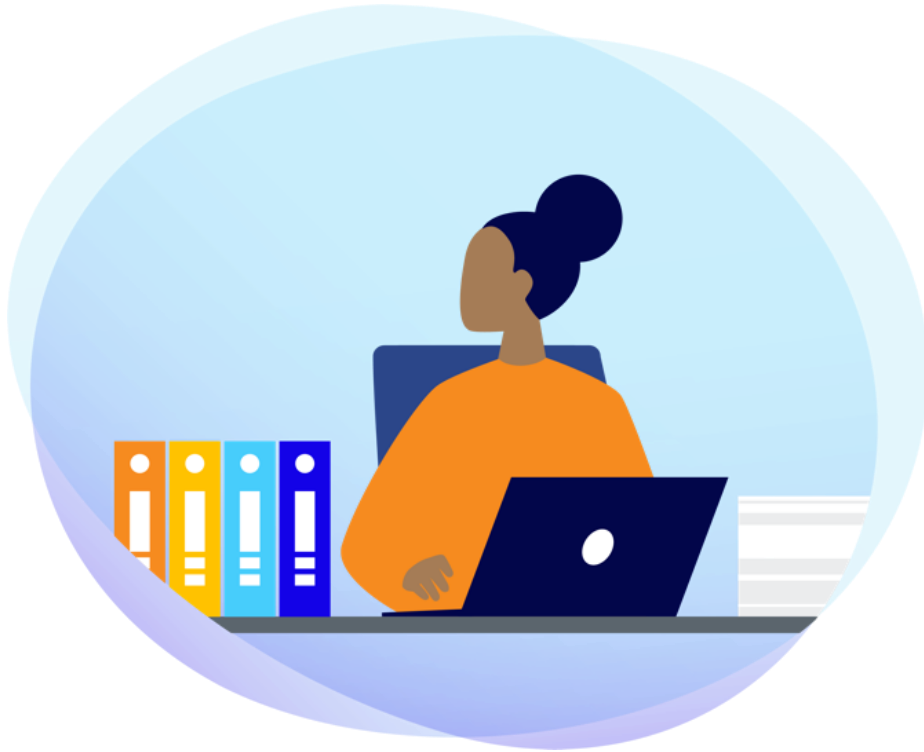
21:42 13/11/2024

iManage Mailbox Assistant



Large number of unfiled emails

Good mix of filers and pilers? We have a solution!



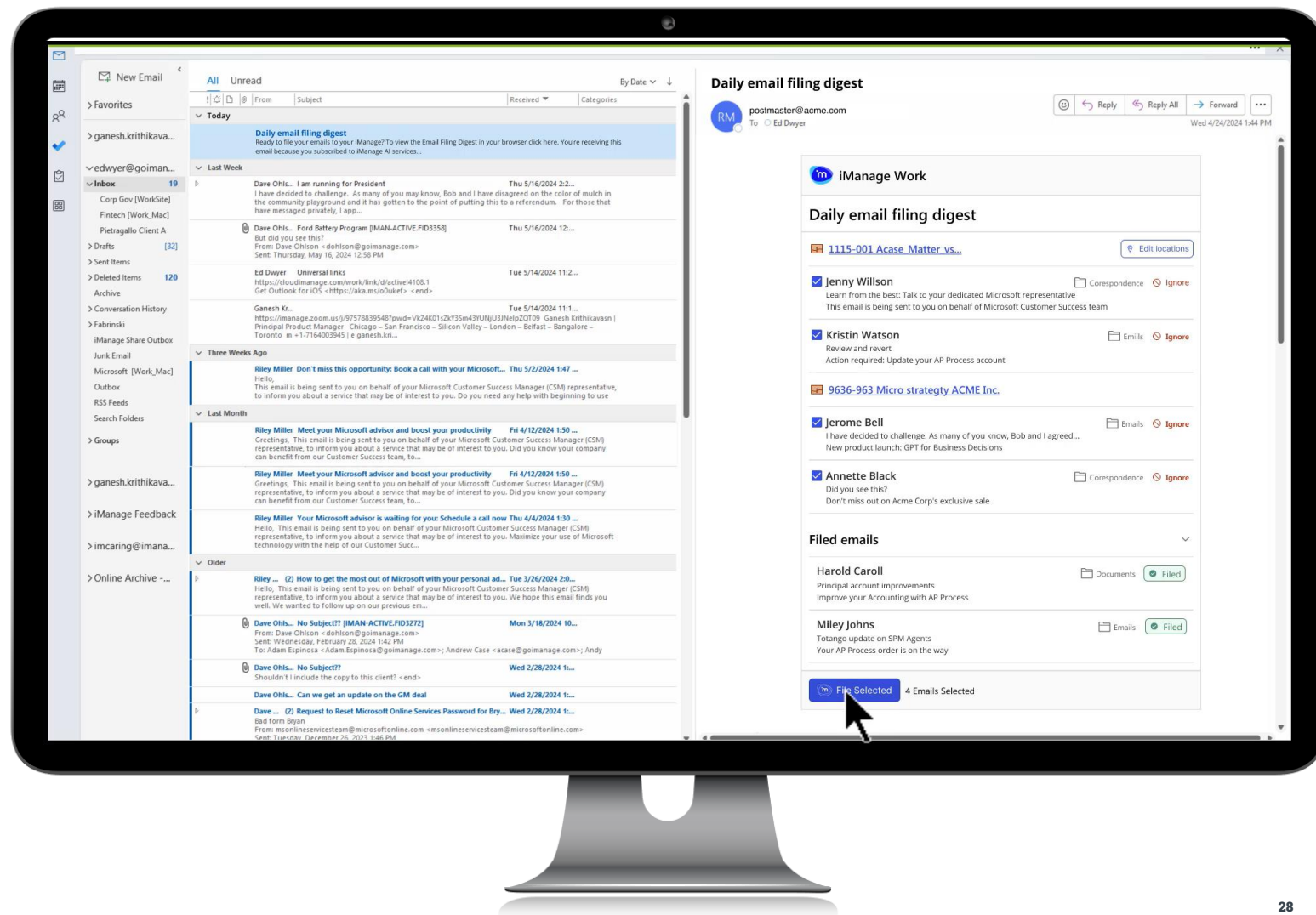
File emails leveraging collective knowledge

Automatically file emails on behalf of users so they can focus on high-value work



Mailbox Assistant

- AI based on organization behaviour and gets smarter over time eliminating mailbox overload
- We plan to extend to also filing attachments separately
- Can also be used to cleanup old unfiled emails





iManage

Making knowledge work



x.com/imanageinc



youtube.com/imanage



linkedin.com/company/imanage