

# Template Management for iManage Work 10

## Easily Manage Templates with Sysero and iManage Work 10

iManage Work 10 offers law firms an easy way to access work product by providing a consistent web-based experience across multiple devices. As work product moves online, firms will need to replace macro-based templates with user-friendly web forms. With Sysero, firms can easily create documents via online forms and save the final work product directly to iManage Work 10. Sysero also can be integrated with the firm's CRM, PMS and external data sources to provide a comprehensive template management solution.



### In the Cloud or On Premise

Sysero allows firms to host their templates in the cloud or on-premise. The system uses web-based authentication to enable any iManage user to seamlessly create documents with a single login. All of the iManage security settings are carried over with the template, which allows documents to be easily created and stored without having to access Microsoft Word.



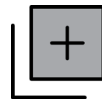
### Code-Free Templates

Sysero's simple mark-up makes it easy to create templates and generate online forms, and doesn't require any coding. Users can access the forms from within the iManage environment, which enables them to automatically save documents to the correct folder. Use single page forms or wizard-based workflows to create simple templates, or entire document packages, all filed securely in the firm's DMS.



### Manage Template Delivery

Connect templates to specific folders and group them into lists for easy management. Users can view pre-ordered lists of matter or project specific templates with a simple click or a press of a finger. Additionally, users can access template lists directly from the Microsoft Word ribbon or even create their own lists of templates to share with colleagues.



### Add Data from your CRM

Using Sysero's Data Action Framework, firms can create scripts to search and include contact data from their in-house or cloud-based CRM for inclusion in correspondence and contracts.



### Advanced Document Automation

Unlike traditional templates, which are created by developers, Sysero Template Builder is used by lawyers to automate some of the world's most complex legal documents. The same tool used to create templates can be extended to automate complex transactional processes.



### Built-In GDPR Compliance

Firms can identify any personal data collected as part of the document generation process to enable encryption, or setup their system up for anonymisation and even pseudonymisation, as required by the GDPR.