FIRSTLEGAL
COURT & PROCESS

ACCESSING and USING
iMANAGE

The iManage integration with First Legal's eFiling portal, First Connect, 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://imanage.com/

KEY BENEFITS

The integration streamlines the movement of documents in two ways:

▶ When placing an eFiling order, documents can be loaded into the portal 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 the portal.

▶ 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.

CONNECTING iMANAGE
TO FIRST CONNECT

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.

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".
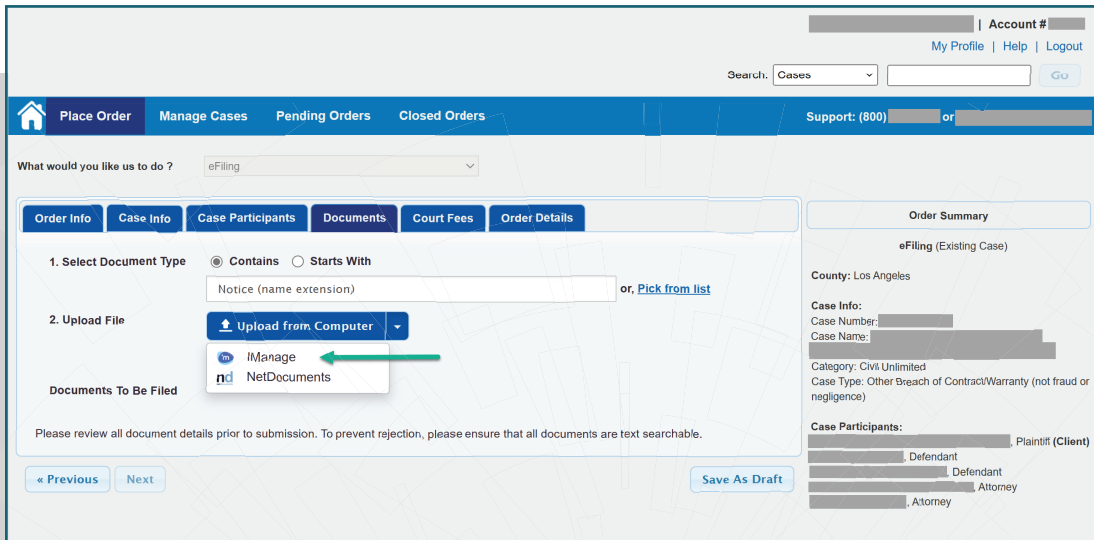
2. A pop-up window will open asking the user to enter their iManage credentials.
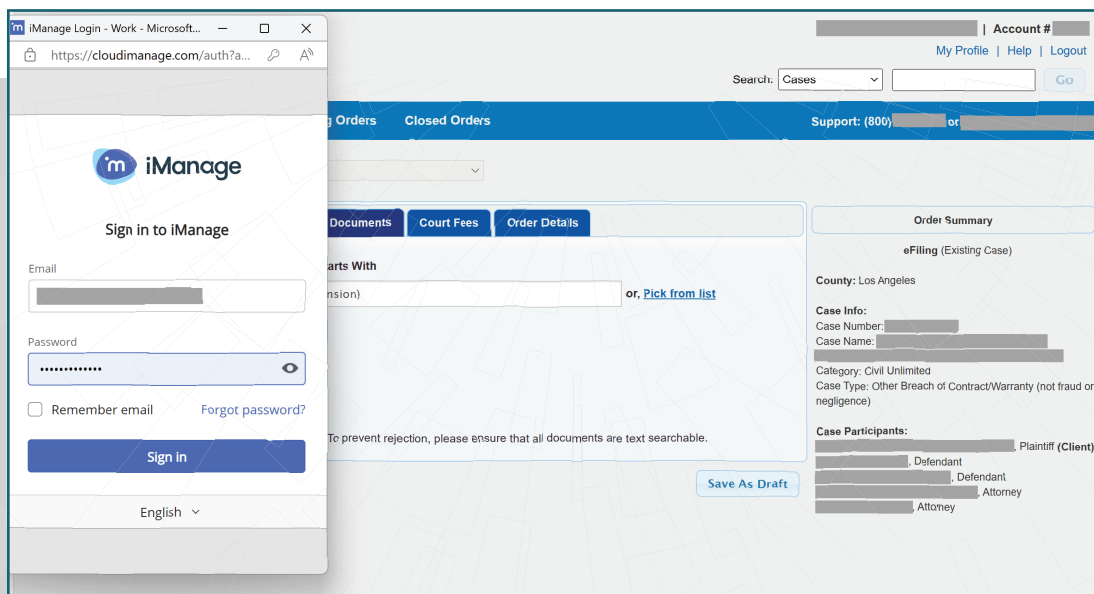
3. After logging in with their iManage credentials, the pop-up window closes and the user returns to the portal order workflow and sees the iManage file selection window.
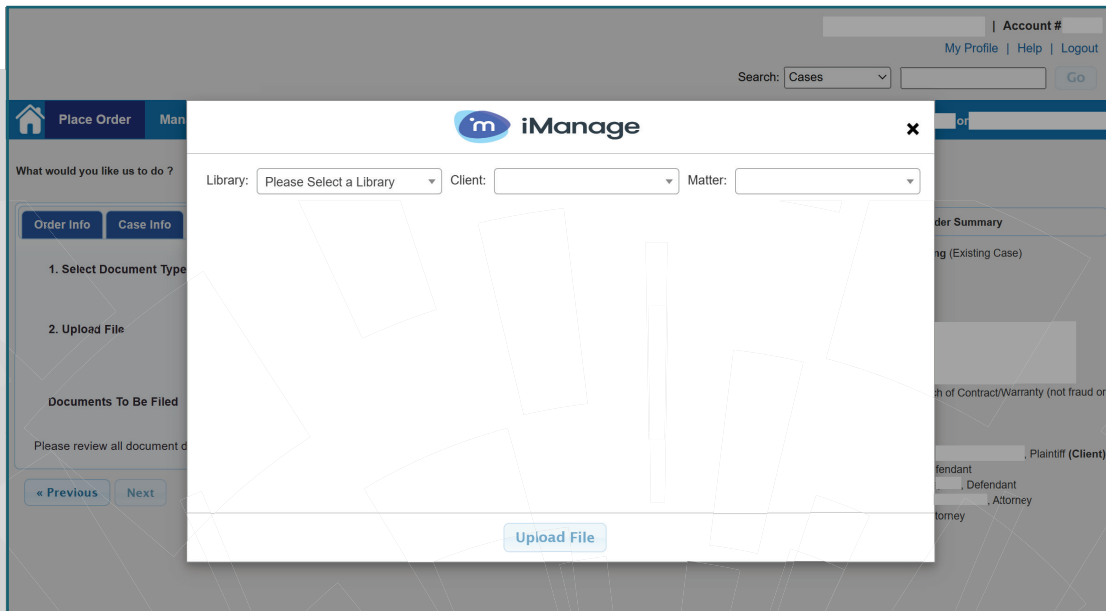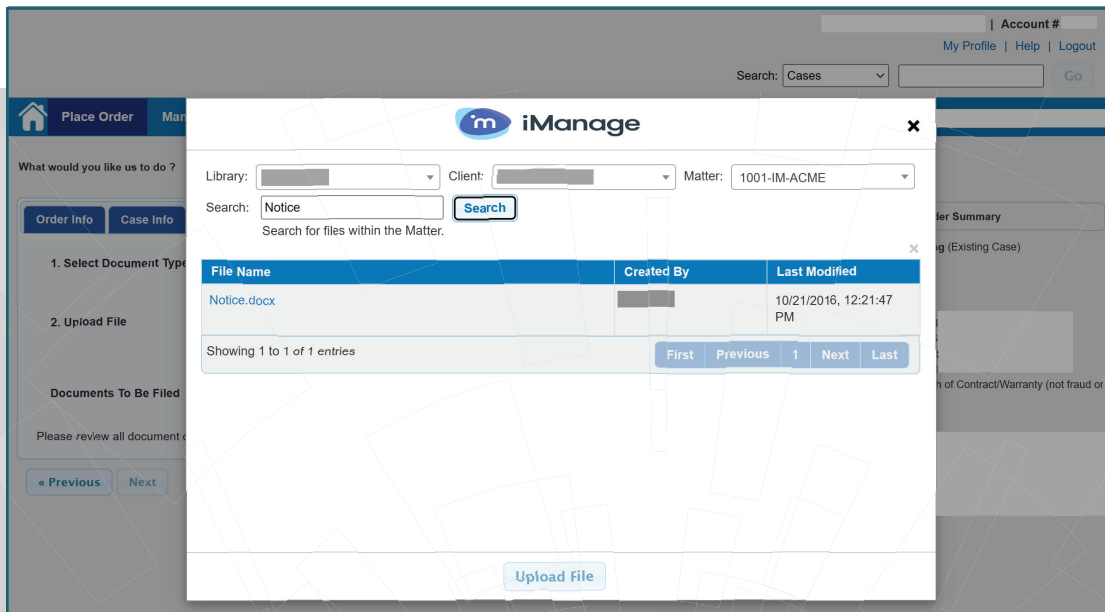

UPLOADING A DOCUMENT TO THE PORTAL FROM iMANAGE

4. After establishing the connection between the portal and iManage, the user can browse to an iManage Library, Client, and Matter and see the folders and files.
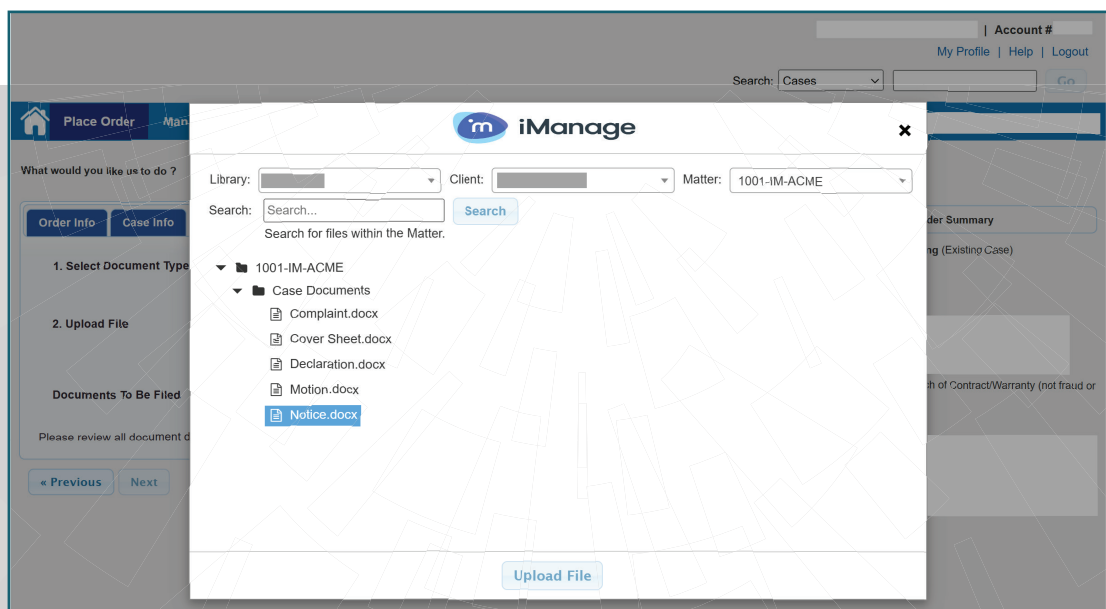
5. Users can also search for the document within that Client and Matter using the Search feature.

6. After selecting a file and clicking the "Upload File" button, the document is pulled directly from iManage into the portal, 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.
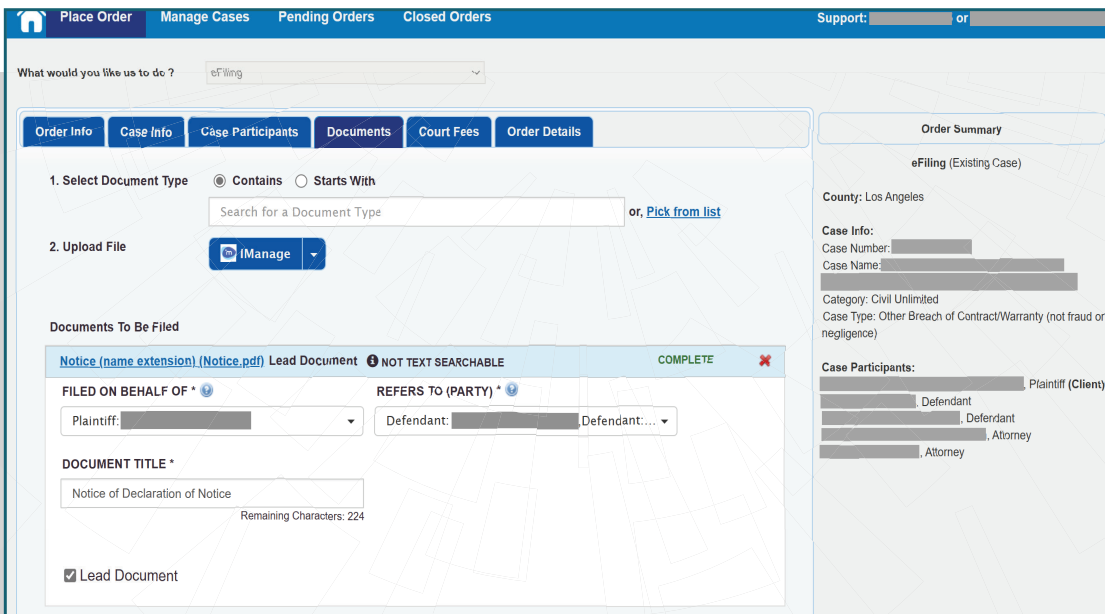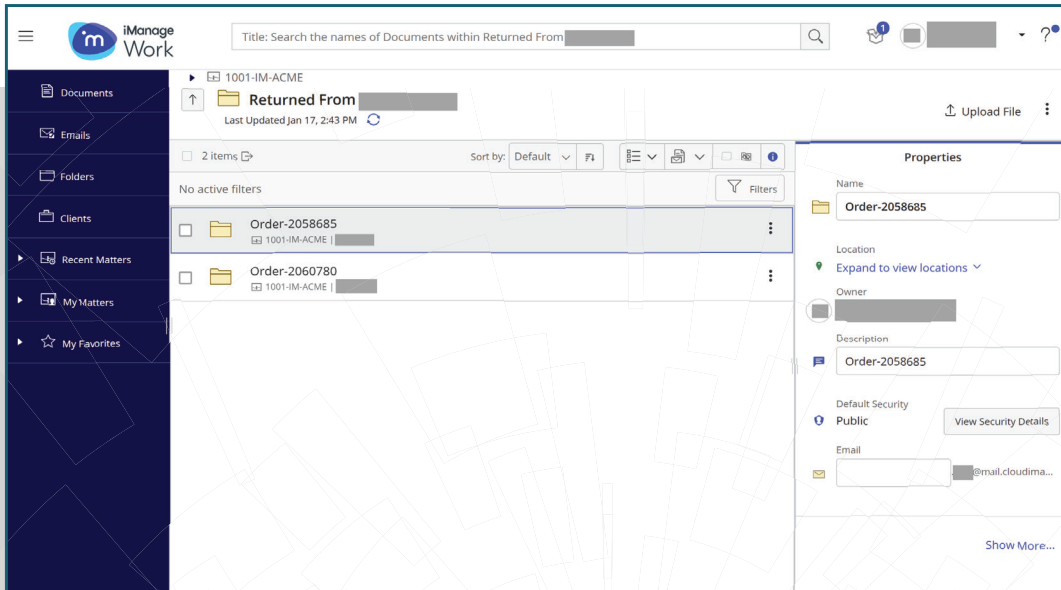
VIEWING DOCUMENTS RETURNED FROM THE COURT

When utilizing the integration between iManage and First Connect, all standard portal functionality for court returned documents is still available. Court returned documents will be viewable in the "Deliverables" tab of the portal order, and you will receive the email from First 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.

Log in to your iManage account and navigate to the Client and Matter you selected when submitting the eFiling order in the portal. Locate the folder named "Returned from *First Legal*".
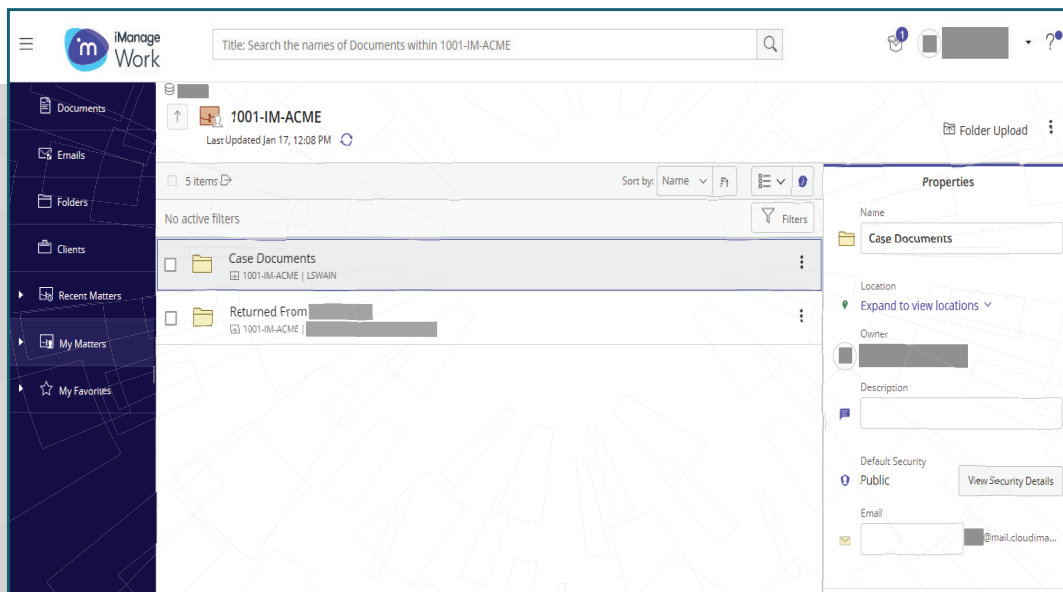
2. In the "Returned from *First Legal*" folder you will see a list of all portal orders submitted under this Client and Matter. Locate the proper folder by matching the Order Number assigned when the eFiling order was submitted in the portal.

3. In the folder "Order-#######" you will see all documents returned from the court including stamped conformed copies, receipts, and notices as appropriate.
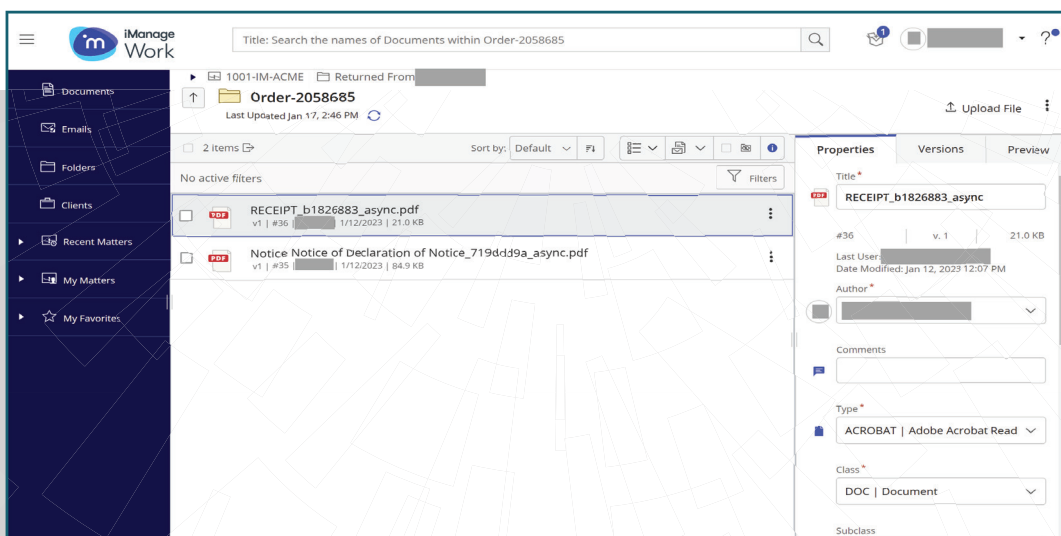
How do I connect to my iManage account?

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.

Do I have to enter my iManage credentials every time I submit a new eFiling order?

The length of time that the connection between First Connect 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.

Does the email address in my First Connect account need to match the email address in my iManage account?

No. Your iManage email and password do not need to match your First Connect email and password. If your iManage credentials are valid the connection will be established.

Can I upload more than 1 document from iManage to the portal in an eFiling order?

Yes. Multiple documents can be loaded into the portal from iManage in the same way that you are able to upload multiple documents from your local computer.

What types of files are supported by the integration? Will the portal convert my Microsoft Word files to PDF?

All document types currently supported by the portal 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 the portal before being submitted to the court.