ORION

Perceptive Software
Measurable Results

WORLDOX® Integration *Module*

Financial *Management*
Time *Management*
Document *Management*
Contact *Management*
Case *Management*
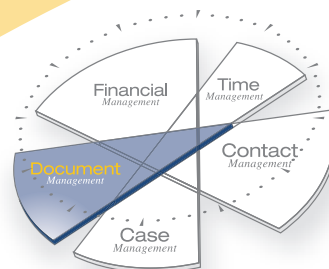
Not just another Connector: True **Product Integration**

Worldox®

Today's law firms cannot stay competitive without case and document management technology to help them organize all their client data in a centralized way. With this in mind, Orion and Worldox have joined forces to create a seamlessly integrated solution that brings comprehensive financial and practice management together with a full-featured document management system. By leveraging the combined power of these two leading software programs, lawyers and legal staff can operate a more effective, productive and profitable law practice.

Earning a reputation as an innovator and leader in law firm management software, Orion has developed several key points of integration with Worldox designed to provide both a higher level of visibility to profiled documents, e-mails, voice mail messages, images, etc., as well as features that will improve workflow and productivity for both attorneys and staff.

Launch, View and Search for Worldox Profiled Documents within Orion

- Recently-accessed profiled documents can be viewed and launched from within Orion's Worldox view at either the Client or Matter level.

- View ALL related documents, e-mails, voice mail messages, images, etc. to a Client or Matter by initiating a standard search from within Orion.

- Initiate a custom Worldox search from within Orion.

At a Client, Matter or Event (related Appointments and To-Do's) level, you're able to view recently accessed word processing files and spreadsheets, e-mails, scanned documents and even voice mail messages. Virtually anything that can be stored as a file in Worldox can be viewed and accessed with a simple click of your mouse.
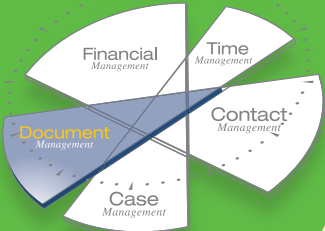
"As a Shareholder at the firm, I have noticed that the integration has made our firm more efficient since it is easier to locate and manage e-mails, documents and images associated with our cases through Orion's seamless integration with Worldox."

William J. Dunaway, *Shareholder*

Clark, Partington, Hart, Larry, Bond & Stackhouse

Orion and Worldox Communicate and Synchronize for Greater Accuracy and Automation, Reducing Duplicate Efforts

- Incorrect profiling is greatly minimized when a document or e-mail is initiated because Orion shares key Profile Field information with Worldox. In addition, users are prompted to create a billable Fee related to the profiled document or e-mail upon completion.

- Automatically create Quick Profiles, Bookmarks and Drop Folders in the Microsoft® Outlook® folder tree based on a user's "My Matters" list in Orion.

- As new Clients and Matters are opened in Orion, each is immediately available to the end-user without the need to use a scheduled import event, thus optimizing the Worldox Indexer performance during peak business hours.

- Upon closing a Matter in Orion, the status is changed in Worldox to "Inactive". Likewise, if a Matter is re-opened in Orion, the status will be changed back to "Active".

- Automated archiving of profiled items using the Worldox Document Retention Module based on a Matter's status in Orion.

As you add Matters to the "My Matter List" view in Orion, the "nicknames" defined in Orion are used to automatically create Bookmarks (i.e. Find Template), Quick Profiles (for documents and e-mails) and Drop folders in Microsoft Outlook (for automatic profiling of e-mails and attachments by dragging and dropping them to a "folder" while in Outlook).
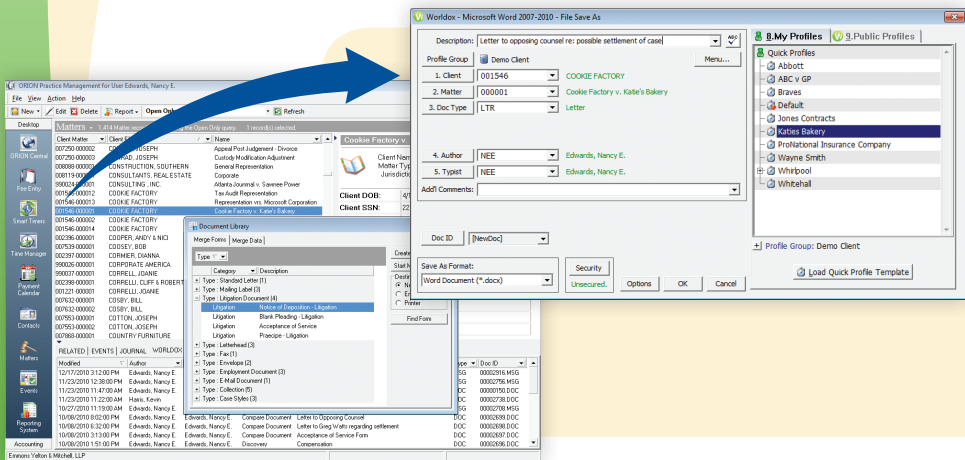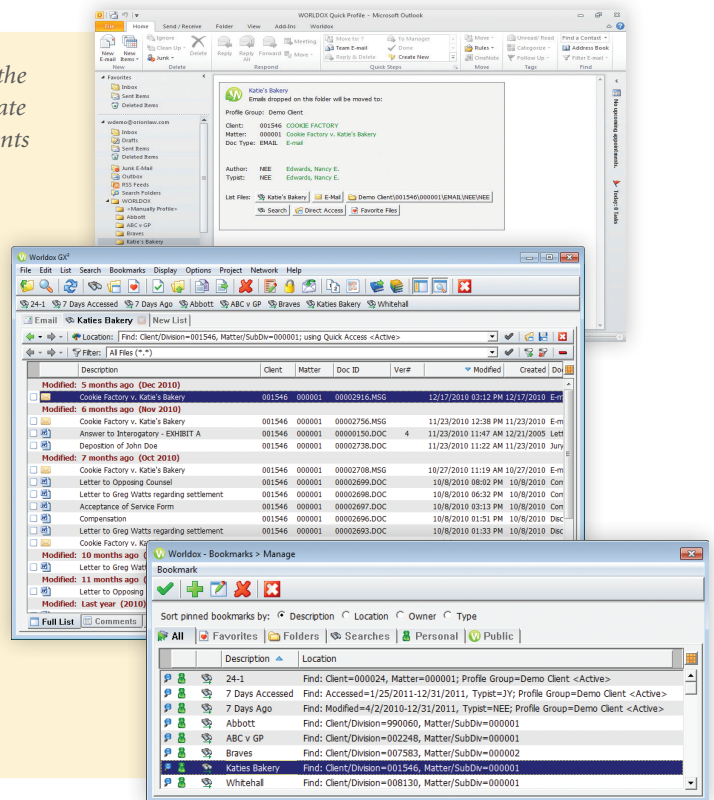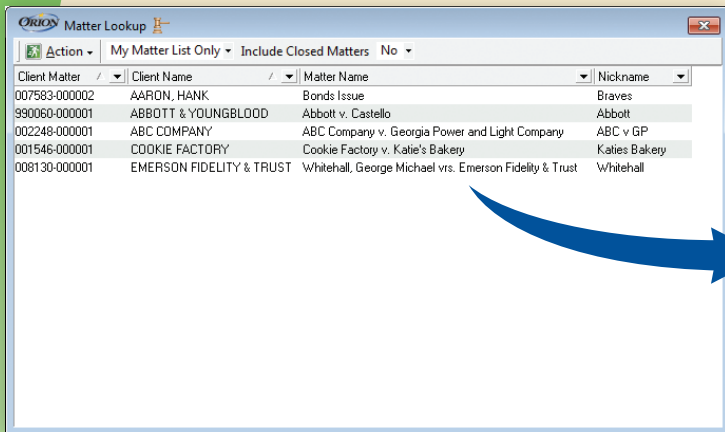
When a firm or practice group related document is initiated from Orion's Document Library® and Assembly process, common fields such as the Client and Matter Code, Document Type, Author and Typist are autocompleted by Orion, thus minimizing the possibility of incorrectly profiling the document to the wrong case. Not only does Orion simplify the process of saving files to the correct case, but users bill more time as Orion generates a related billable Fee for documents and e-mails launched from Orion.