

Matter-Center for Office 365 Solution Overview

Matter-Center for Office 365 is a legal document and email management solution structured in the context of clients and matters.

This document describes the solution, what it does and how it works for a business-IT audience. If your interest is in the business capability and benefits of a modern document management solution, please refer to our website www.matter-center.com

Background

Microsoft developed the Matter Center framework for their Corporate, External & Legal Affairs (CELA) group to provide a single view of all project-related email communications and document content.

Originally planned to be developed as a sellable product, it was released as an open source framework in December 2015 for Microsoft partners to use as a basis for custom solution development. Matter-Center Limited has developed the framework into a fully productised solution, offering:

1. A responsive HTML5 browser application interface that works on any device.
2. Email auto-file on send and one click file on receipt.
3. Content versioning that persists outside of the application.
4. Software-as-a-Service (“SAAS”) business solution delivered through Microsoft Azure that connects to your Office 365 subscription.

The solution provides one click filing of all matter related documents and emails in a common location, visible to authorised team members using any secured device. Version history management and threading ensures provenance is easy to identify and automatic metadata tagging makes the content findable to re-use.

Innovation

Electronic document management solutions for the legal industry have been around since the 1980s, elaborating on metadata tagging and hierarchical tree views.

Rather than roll the same old stuff onto Office 365, our focus is on simplifying document management to emulate the traditional paper bundle that works on any device, when you want, anywhere.



To work on small form factor touch driven devices, the simplified browser interface does not provide a traditional tree view hierarchy for clients/matters. Content is created in and launched from the Matter-Center home screen, rather than the client application for cross device functionality.

Home page

The solution is driven from the home screen where a client and matter are selected to display a time ordered list of documents and email correspondence associated with the matter. These can be filtered and sorted on title, version, classification and date. For quick reference a preview is provided for Microsoft Office and Adobe PDF file types.

New content can be created from templates and precedents managed in the system, and existing content can be copied to other matters for re-use. External content can be imported and classified. In all cases duplicate file warnings are provided.



Office integration (Word, Excel, PowerPoint)

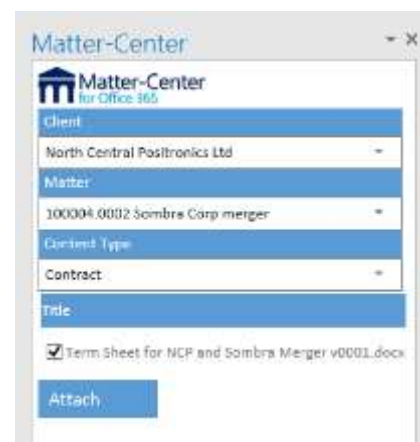
When saving a document in an Office application, the user is prompted to save as the current version, or create a new version (PC only). With Office on mobile devices the version number can't be incremented.



Office integration (Outlook)

To associate sent emails with a matter for automatic filling in Matter-Center, an Outlook "Send from Matter-Center" add-in appends a unique tracking code to the email subject line, and allows content in Matter-Center to be attached. The email and attachment are automatically filed to the matter as they are sent (PC only). For non PC devices "Save to Matter-Center" function can be used to manually save items once they have been sent.

Received emails are saved with the "Save to Matter-Center" add-in. If the received email has a unique tracking code to associate with a matter it is automatically matched. If there is no tracking code the user is prompted to select client and matter. File attachments are always saved with the email, and can also be saved separately to maintain the version chain.



Search results page

Full text content search is provided on the header of each page. By default only managed content from the Matter-Center sites is returned, excluding your other content stored in SharePoint Online. The search results can be sorted and refined with Matter-Center metadata elements such as date, version, client, matter, practice, area of law, author, content type.

Client page

Matter-Center supports up to 5,000 active client records and unlimited inactive clients. Each client needs a unique name and the Matter-Center owner ("Client Partner"). Additional information can be defined as optional or mandatory if there is no CRM or PMS system: contact details, address, registration, notes. Client creation is restricted to named users through membership of an Active Directory group.

Matter page

Matter-Center supports up to 5,000 matters per client. Each matter needs a unique name (under that specific client). If there is no practice management system, additional information can be defined as optional or mandatory for reference: contact, description, practice, area of law.

Practice and area of law are used for search categorisation and reporting. They can be purposed to meet your organisation needs: Office, Partner, Geography, Department, Business Unit.

A compliance conflict check can be recorded: who conducted, date, conflicted user list. If a matter has conflicted users it is automatically made confidential so only named team members have visibility and access. A matter can also be made confidential without conflict. Matter creation is not restricted to specific users.

Content principles

The objective of Mater-Center is to simplify document and email management with meta-data enrichment for management and re-use, whilst preserving traceability for provenance.

To avoid overhead and ensure metadata quality only three elements are needed: title, version and a content type classification. Defaults are not offered to avoid busy users classifying everything as default.

Additional system information is automatically generated to enrich the content: a globally unique file number, the globally unique file number of the source or parent document, Owner (or email received by), Author (or email sent by), Client number, Matter Number, Date created (email sent), Date modified (last changes saved). All times are UTC to support international organisations.



Whilst duplicate file and email warnings are provided, the user can chose to ignore and over-ride them. Since Office 365 does not include an item level restore from backup, we have not provided a content delete function to limit the opportunity for error.

Security

The Matter-Center Azure web application publishes a secure web server end point (HTTPS Port 443) to which access is controlled using the same Azure Active Directory that manages your Office 365 environment.

The Matter-Center application creates the following AD Groups, membership is managed through your Office 365 administration portal:

- Matter-Center all internal users – rights to access the Matter-Center application, members are counted against your subscription key users.
- Matter-Center client create – rights to create new client records.
- Matter-Center settings administrator – rights to modify the settings page.

Administration

Excepting user/group security, all application administration is managed through the settings page, which includes:

- Updating the licence key on date expiry or to add more users
- Updating optional/mandatory client and matter settings

- Updating lists of Practice, Area of Law, Content type

Matter-Center updates are notified to your subscription administrator and need to be run by an Office 365 Global Administrator. Some non-operational support activities may need to be performed by a SharePoint administrator such as:

- Delete files, matters or clients
- SharePoint audit log trimming and reporting

Service subscriptions

Our Matter-Center for Office 365 solution is built for Microsoft Office 365 (business premium edition or above) and Office 2016. You need to be licensed for these to use our service as we do not include Office 365 in our service.

The Matter-Center for Office 365 service subscription is a per user per month fee that is billed annually in advance. The number of users can be increased during a subscription period, but only decreased on annual renewal. If the membership of Active Directory group “Matter-Center all internal users” exceeds the licence key value, create new clients and matter functions are disabled until either the group membership is reduced, or, additional user subscriptions are purchased.

Service Availability and SLA

The Matter-Center application availability is 99.9% which is defined by the dependency on the Microsoft Office 365 sites and email service availability.

The Matter-Center subscription agreement terms of service (TOS) support includes email submission of technical product incidents with 8 (UK) working hours response.

Data Ownership and Security

The Matter-Center web application will, where possible, be hosted in an Microsoft Azure data centre in the same geography as your Office 365 tenancy to simplify data sovereignty.

The Matter-Center web application stateless and does not persistently hold any of your information (apart from cached client and matter lookup tables). All of your documents and email are stored in your Microsoft Office 365 tenancy.

Information backup and recovery is provided by your Office 365 tenancy and managed through your Microsoft Office 365 support function or a third party service.



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