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**The smart way to  
manage legal templates**

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# BEST PRACTICE FOR YOUR PRACTICE

Wouldn't it be great if you could spend more time practicing law and less time worrying about documents? With Iphelion Outline you can.

Outline lets you win back the time you may have lost due to inefficient manual processes, improves integration and compliance and produces documents with a consistent house style that project a truly professional image.

You may already have tried using templating systems based on legacy technology or software developed in-house. Indeed, some IT departments have spent considerable effort developing customisations for Microsoft Word.

Legacy platforms and proprietary add-ins are often difficult to integrate and almost impossible to maintain. So why try to reinvent the wheel when you can use a solution that has proven its value at some of the world's leading law firms: Iphelion Outline.

“ A robust and reliable template management system that works seamlessly with the key elements of our desktop, enhancing productivity for secretaries and fee earners ”

Chris Petrie  
IT Director

Stephenson Harwood LLP

Key benefits:



## BOOST EFFICIENCY

Boilerplate forms allow anyone to rapidly create professional documents with predefined house styles for legal numbering and language, standard openings, salutations and so on.



## INTEGRATES WITH OTHER PLATFORMS

Information from CRM, case management systems, SQL databases and web services can be included in templates without leaving Word or writing a single line of code.



## EASY TO CUSTOMISE

Easily create and deploy new templates and precedents with our user-friendly, Word-based designer app. Templates can also be managed from within the document management system, improving security and version control.



## BRAND CONSISTENCY

Any changes to your corporate brand, house style or document layouts are automatically deployed across the firm, ensuring everyone has the latest version.



## MINIMAL TRAINING REQUIRED

Outline builds on the already familiar Word environment therefore minimising end-user training and ensuring a smooth roll-out.



## SMART PRINTING

Quickly print client and file copies of your documents to your printer without worrying about tray settings.



## INTELLIGENT FILING

Tight integration with your document management system makes filing easy and ensures document numbers update automatically if you re-use the document.



# Streamline workflow, optimise efficiency, impress clients

Outline is a templating extension for Microsoft Word that has been designed with the help of leading national and international law firms to offer real benefits to your whole team.

- **Paralegals** and support staff will warm to the many features that streamline routine tasks, enabling them to be more productive, whether they are preparing routine correspondence or complex legal submissions.
- **IT specialists** will appreciate how easy Outline is to install and maintain, freeing resources for other projects and making upgrades easy.
- **Fee earners** will be impressed by how Outline helps standardise and optimise previously inefficient processes and ensures the firm presents a consistent house style and professional image to clients.



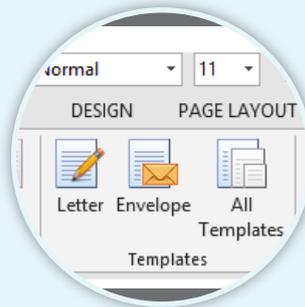
“Because I’ve got better things to do with my time than copy and paste text”

## NEXT GENERATION FEATURES



### Designed by law firms, for law firms

Outline was designed with input from support staff, lawyers and partners, so it meets the needs of your company, in a flexible, fuss-free fashion.



### Customisable look and feel

Personalised ribbon and brandable user interface provide an optimised experience within a familiar Office environment.



### User-friendly boilerplate wizards

Build powerful forms and populate the data fields automatically. Best of all, no coding is needed, except for exceptionally complex documents!



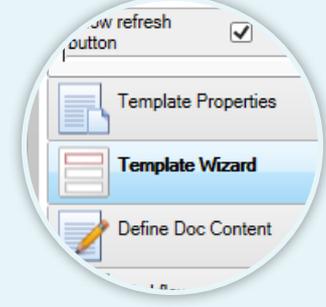
### Flexible template access

Launch templates from any environment including Office, third-party document management systems, SharePoint or bespoke applications.



### Offline working mode

Stay productive even when not connected to the corporate network - you can continue creating and working on your documents wherever you are.



### Integrated template designer

Instantly create new templates and precedents from within Word with the powerful template designer. No need to wait for offsite vendor support, just make the templates you need, when you need them.

# Your questions answered

## **We're running an old version of Microsoft Office. Can we still use Outline?**

Office 2010 or later is needed to be able to run Outline. We have helped many firms convert from previous versions of Office so get in touch and we'll talk you through the migration process.

## **Our firm often has problems ensuring our various offices use the same procedures and templates. Can Outline help?**

The centralised management feature of Outline means that when you develop a new form wizard or template, the changes are automatically deployed to all offices on your network, standardising procedures and achieving a consistent house style simply and easily.

## **We're a family practice, not a Magic Circle firm. How could Outline help us?**

In an average month, even a modest firm will produce hundreds of documents. Outline provides a simple, cost-effective way to automate the production of those documents, which reduces errors, saves time and helps your staff become productive.

## **What can Outline do that we can't do already with our existing templating software?**

Many firms have turned to Outline after struggling to overcome the limitations of legacy template platforms or proprietary software. Get in touch, tell us where your current system falls short and let us show you a better way to work.

## **We recently acquired another law firm. Can they use Outline as well?**

One of the great advantages of Outline is that it's easy to design and deploy new templates and add multilingual content if needed without having to call on a third-party service provider to customise the software. You can even integrate new companies, merging or retaining different identities and styles, as required.



## **Why Iphelion?**

Iphelion is a UK-based software house specialising in the legal sector. It was started in 2006 by Managing Director Andy Driskell, formerly of Open Text, and Technical Director Simon Ashby-Crowe, formerly with KPMG, who shared a vision of providing a fresh approach to software and development within the legal sector.

To date, Iphelion has successfully delivered projects to some of the leading regional, national and international legal practices.

## **Technical Features**

- Microsoft Office 2010 or later.
- Full client only installation, so no additional server, cloud hosting costs or maintenance overhead.
- Support for screen readers such as JAWS.
- Full multi-lingual support for document content in any language.
- Connector for Microsoft SQL-based data sources and web services.
- Excel-styled formatting engine for enhanced document control.
- English and Spanish user interface with more languages soon.

## **Integration**

Outline is fully compatible with all leading CRM, DMS and practice management platforms and offers out of the box integration with:

- HP Autonomy WorkSite
- NetDocuments DMS
- Lexis-Nexis InterAction CRM
- Thompson Elite

Contact us if your software is not listed or you require bespoke integration.

Find out what Outline can do for your business by requesting a no obligation demo at [www.iphelion.com](http://www.iphelion.com) or emailing [info@iphelion.com](mailto:info@iphelion.com)