

ENTITY MANAGEMENT

 EXPORT ENTITES

 SEARCH BY ENTITY

 ENTITY STATUS

 ENTITY DETAILS

Entity Management

Co-Flo's Entity Management capability aligns your work with the nuances of your organizational structure.

Whether it's a high-performing vendor or a high-priority business unit, Co-Flo enables you to synchronize and monitor every entity and all associated work, directly within iManage Work.



Key Benefits

Replicate Your Organizational Structure

Mapping your organizational structure in Co-Flo ensures work is managed in a contextually relevant way across teams and departments.

Collect and Organize Your Work

Easily collect and align work product with your organizational structure, ensuring every piece of work is accurately linked to the right business unit or department.

Rapid Executive-Level Reporting

Quickly produce executive reports, providing concise evaluations of organizational risk, allowing leaders to make informed decisions in minutes.

Insightful Work and Risk Analysis

Gain clarity on work distribution and risk origination by linking work directly to organizational structures, allowing you to make informed decisions in minutes.

Centralized Entity Data Management

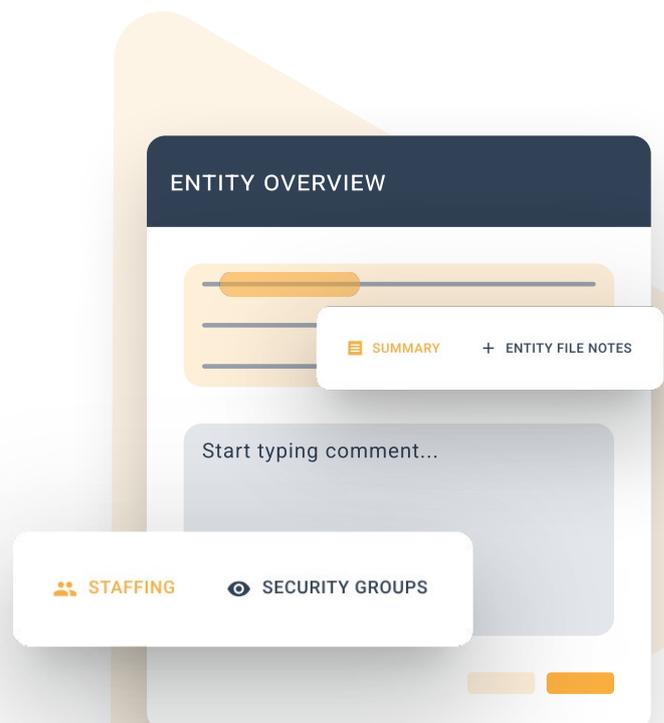
Efficiently manage core entity data centrally to ensure information remains consistent, accurate, relevant and up to date.

Co-Flo's Entity Management capability enables organizations to model the true complexity of the entities they work with, including customers, business units, subsidiaries, and external suppliers or vendors.

By doing so, Co-Flo allows teams to answer questions that are difficult to address using iManage alone, such as:

- Which organizational departments are driving the most work?
- Where is the highest volume of work being generated?
- What trends are emerging in incoming work volume and type?
- What changing demands may require operational change, additional resources, or strategic shifts?

The nature and volume of incoming work is largely outside an organization's control, yet it defines many of the operational challenges teams face.



Link Work to Your Organizational Structure

Co-Flo allows you to link the work done to an entity such as a Business Unit, OpCo or Department. This contextualizes your work whilst reducing the risk of orphaned work as organizational structures change.

The entity listing screens in Co-Flo provide a comprehensive and clear snapshot of all entity details, offering an at-a-glance view of active work associated with each entity.

Instant Executive Reporting

Save hours spent creating executive updates. Co-Flo's Entity dashboards allow you to see the status of all your entities, revealing where most work is coming from and which entities are generating the greatest risk.

With its data export options, Co-Flo enables the export of detailed entity information into user-friendly spreadsheet formats. Users have the autonomy to extract any accessible data directly, eliminating the need for IT requests.

Co-Flo allows you to define specific filtering parameters, ensuring that the information displayed is tailored to your precise needs.

Importantly, the data provided by Co-Flo is consistently up to date and accurate, delivering reliable insights for decision-making and reporting.

A Central Source of Truth for All Entity Details

Co-Flo simplifies entity information management within iManage by enabling the creation of multiple entity types, each of which can be tagged with extensive metadata fields.

Tailored iManage workspaces are automatically generated for each entity type, complete with predefined folder structures that support structured and consistent navigation.

Co-Flo also supports ingestion and synchronization of organizational structure data from external sources, ensuring key details of each entity remain current and accurately reflect changes as the organization evolves.

CO-FLO



About Co-Flo

Co-Flo is a strategic iManage partner, delivering its cloud-native operations management suite for corporate service teams. Built by technology and operations experts, Co-Flo extends iManage into a multi-departmental solution, optimizing service delivery and team productivity across Legal, Compliance, Risk and HR departments. Co-Flo ensures visibility and control over work-in-progress to improve timeliness, consistency and quality of knowledge work.

Visit www.co-flo.com to learn more.



About iManage

Dedicated to Making Knowledge Work™, iManage cloud-native platform enables organizations to work more productively, collaboratively and securely. Employing award-winning AI-enabled technology, an extensive partner ecosystem and a customer-centric approach, iManage provides support and guidance you can trust to help you leverage knowledge to drive better business outcomes.

Visit www.imanage.com to learn more.

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