

# Legal Operations

BUYERS GUIDE: 2020 EDITION



# Remote Productivity, Meet Security – How to Support Remote Work for Your Legal Team in 2020

By: Michelle Lundberg



Michelle Lundberg is the Director of Product Marketing at [NetDocuments](#), and she brings over twelve years of product marketing experience working with a variety of small, mid-sized, and Fortune 300 companies. She's worked in regulated industries, including healthcare and financial services, as well as cloud-based technology (SaaS). She loves the challenge of connecting the dots between customer needs, market trends, and product solutions. In her free time, she enjoys hiking and playing with her puppy, Rupert.

Gone are the days of grinding out 80-hour weeks in the office in addition to a long daily commute. Whether it's flexible hours, flexible locations, working from home, or going "part-time," companies are changing their ways and opening the door to new policies that benefit both employees and the bottom line. With the right strategy and cloud technology in place, your company can use that as an employee perk while maximizing profitability, reducing turnover, and achieving the required level of security.

The trend to work remotely – or simply going to the cloud – is, however, not a trend that is new or derived from the recent COVID-19 pandemic. Even before the 2020 pandemic restricted millions of workers to the confines of their own homes, corporations were embracing remote work with 50% of firms offering flexible, remote, or working from home options.<sup>1</sup> That number will continue to grow as legal teams become better prepared for the future and what might be the "new normal."

Pandemic or not, giving your legal team flexibility will be crucial in 2020 and beyond. Organizations that have embraced the tools and technologies to make remote work easy are already starting to reap the benefits and are building their competitive advantage for the future. Being able to pivot quickly is something our customers appreciate. A recent customer survey by NetDocuments revealed that 100% of users were up and running remotely within 5 days of being "sent home" due to COVID-19 with 87% up and running within 24 hours. Additionally, working remotely can contribute to the happiness of employees and helps maximize productivity.

## Here are three simple ways your legal department can support your remote workforce:

### 1. Develop a Cloud-First Approach

Digging through documentation that can only be accessed in the office is not the kind of efficiency that lawyers and legal staff need in order to maximize productivity and the day-to-day demands of the organization. Additionally, on-premise systems can make remote work difficult for IT teams if they need to step in for support.

When your team's systems are in the cloud, everyday employees and IT teams alike can access a suite of tools that support efficient and effective work — whether in the office, at home, or on-the-go. Many NetDocuments customers who adopt a cloud-first approach note these three benefits:

- **Centralized Work:** Thanks to cloud-based document management, all matter or project files are stored centrally where all the necessary people can easily access them without using VPN.
- **Remote Access:** Cloud systems mean work can be accessed anywhere on any device and they keep lawyers and staff productive no matter where they are.
- **Enhanced Collaboration:** Not only can employees access work from anywhere in the world with a cloud-based solution, they can also more efficiently provide feedback on the work of others and they can communicate quickly with peers, colleagues, and other departments in the business.

*To learn more about why legal teams are moving to the cloud, download this guide, [Why Are Legal Teams Moving to the Cloud?](#)*

#### Note:

1) Special Counsel: "2019 Salary Guide for Legal Professionals."

## 2. Build Your Best-in-Class Tech Stack

When your legal team begins to work remotely, the experience needs to be seamless. As the backbone of any legal team, document management systems (DMS) are quickly becoming the go-to platform. While generic business solutions exist, legal teams have specific and unique security and collaboration needs.

Ensuring that technology is built around legal specific workflows, rather than generic solutions, will set it up for success. Regardless of which DMS platform you select, it's recommended that you find a solution that is cloud-based with an open API and a robust partner ecosystem. That will allow you to integrate with other important software platforms to increase efficiency and automation across a department and it includes:

- **Practice Management:** Keep everything in sync when you integrate your practice management platform with your DMS.
- **Analytics:** Get insights into platform use statistics, track documents, and monitor security from centralized systems.
- **Artificial Intelligence (AI):** AI comes in many forms. Choose from any number of tools to create the tech stack that fits your unique needs.

## 3. Work Securely from Anywhere

Security can be one of the biggest concerns with remote work because increased flexibility between tools, devices, people, and locations, etc., can lead to increased risk. What you may not know is that many of the tools that make remote work possible actually deliver more security to your team and organization, not less.

NetDocuments, for instance, helps teams to achieve the mobility they want with the security they need. Access rights give you control over who sees what while you can also share files securely with external users via CollabSpaces. Individual document encryption ensures that even if one of your documents is hacked, the rest of your content won't suddenly become accessible to the hacker.

Meanwhile, NetDocuments has your back by staying on top of all major compliance regulations so you don't have to worry about them.

## Need a Bit More Convincing?

In a recent survey of NetDocuments customers, 91% noted the same level of productivity while 9% noted an increase in productivity since moving their company to working from home during the COVID-19 pandemic. No customers reported a decrease in productivity.

Pandemic or not, working remote is a trend that is now here to stay. Legal teams and organizations that are prepared for remote work are the ones who will continue to remain productive and profitable in even the most difficult circumstances. While this pandemic will come to an end, future employees will continue to seek employers who provide the ability to work remotely — even choosing the flexibility over other benefits.

## NetDocuments is Here to Help

We know times are uncertain and demanding and difficult for everyone right now. NetDocuments is here to help. Whether you need support with greater security, an easier transition to working remotely, or you simply want to learn what options are available – we are here for you.

Learn how you can get started in the cloud free for 180 days and also learn more [here](#) or call NetDocuments at (866) 638-3627 today.



# netdocuments®

Secure, Collaborative, Cloud-Based Platform For Managing Documents, Emails, and Digital Files in a Legal Department that is Fully Integrated into Web Browsers, Microsoft Outlook and Office Applications

“For over 20 years, NetDocuments has delivered innovative, cloud-based security content services platform to over 2,750 professional services firms and corporate legal departments across the globe.”

“NetDocuments understands how lawyers work: a document management system is not a place where they go ... it's what they do.”

Some days it seems like you're drowning in a vast sea of documents, files, and emails with no way to raise your head above the craziness. Regrettably, many legal departments struggle with manually juggling files and folders with scant security and no protection against files being moved, copied, or deleted.

With over 20 years of legal industry and cloud-based document management system expertise, NetDocuments understands the true needs of lawyers and legal departments when it comes to their documents and work product. A document management system is not a place where lawyers go ... it's what they do. With NetDocuments, lawyers can work intelligently utilizing the applications they already use to do the majority of their work such as Microsoft Word and Outlook.

NetDocuments provides law firms and corporate legal departments with document and email management constructively combined with matter collaboration software. The eponymous platform stores, manages, shares, and governs billions of documents every day.

**Easily Search Documents and Files**  
Whether you have 2 lawyers or 200, NetDocuments offers the same software and features to all customers allowing lawyers to work inside Microsoft Word, Outlook, web browsers, and even from mobile devices (iOS and Android).

As there is no shortage of documents in legal departments, it's critical for lawyers to access a DMS that can search and find content in an instant – which is exactly what NetDocuments helps lawyers do.

With a search function that sits atop the web browser interface, simply type in the box as one would for a Google search and results will appear instantly with related file names, subject lines, or all content. See Figure 1.

Users can conduct simple keyword searches or use sophisticated Boolean search strategies with wildcards. Moreover, the search function applies to the full text of all content, even including PDF images.

Search results display the file name and a snippet of content highlighting search

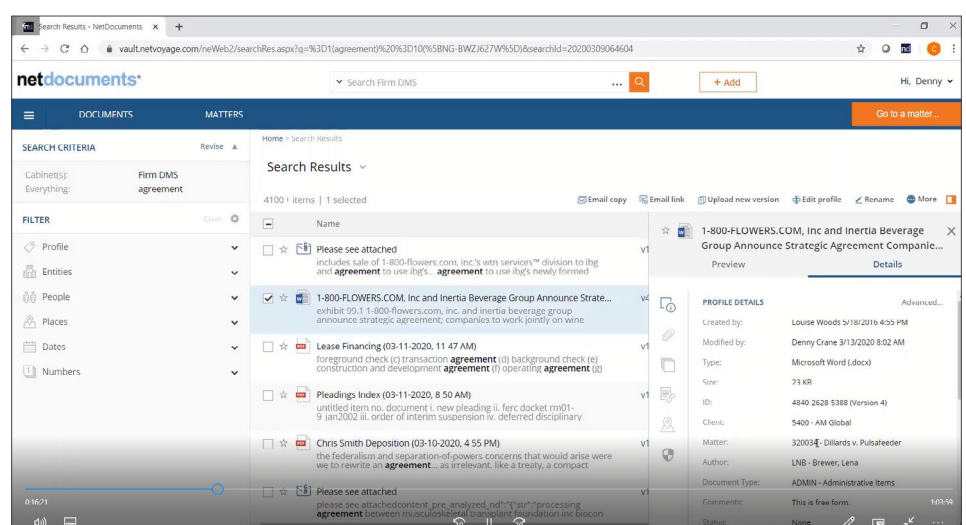


Figure 1: NetDocuments search interface is akin to a Google search with additional functionality that hones searches by file name or content and immediately returns to a favorite or previous search in one click.

“Whether you have 2 lawyers or 200, NetDocuments offers the same services allowing you to work in Microsoft Word, Outlook, web browsers, or mobile devices.”

keywords in context. Select a document to view the details and versioning. The web browser interface allows you to preview content before opening it to edit.

Users can filter searches by matter and any available document metadata such as creation date. For example, organizations can filter searches by document types such as Word documents, Excel spreadsheets, or email and document tags such as complaints, contracts, letters, and patent applications.

### The Matter-Centric Workspace

Users can quickly access their favorite materials in one click from their homepage whenever they access NetDocuments and they can do this even from within a Microsoft Office application or on the web. Simply click the star that is associated with the content to make it a “Favorite.”

Legal professionals also need to quickly find material related to a particular “Matter” by navigating to a particular matter or searching for it. Begin typing the name of a client in the global search window until the name of the client or matter appears.

The Matter Workspace is the center of gravity for everything associated with a case or project in NetDocuments. See Figure 2.

In the matter view, DMS administrators can standardize the folder structure and limit the flexibility of users to create new folders. This provides a consistent folder structure across all matters where users can traverse any matter folder and easily find content. In the alternative, administrators can allow users to create new folder structures to accommodate new data types or meet the needs of clients, outside counsel, or partners.

NetDocuments even goes offline when users disconnect from the internet. A local cache of recent documents enables users to work on their device during an outage, regardless of whether it was planned. Users can also synchronize a matter to a desktop so they can work on the go without worrying about internet access.

### File Email Messages (and Attachments) In Outlook

NetDocuments provides many ways to work in Microsoft Outlook such as

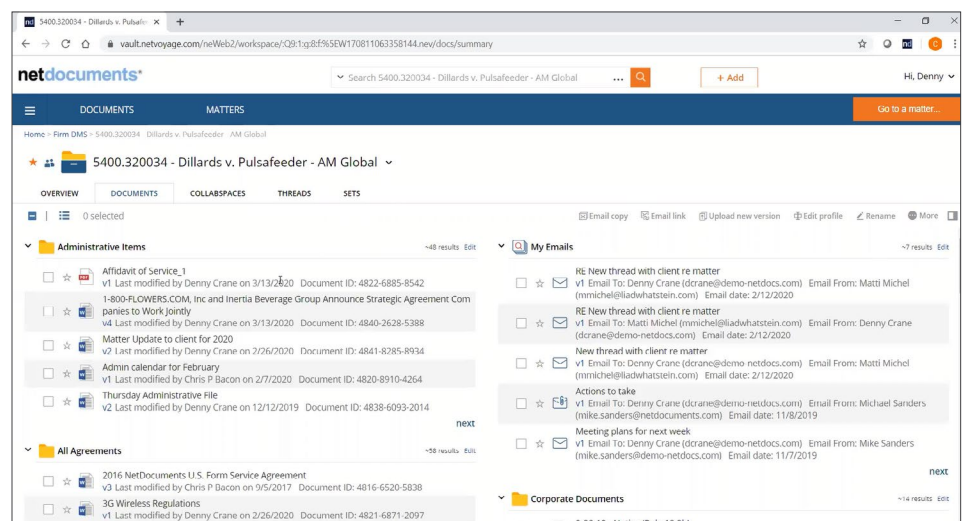


Figure 2: NetDocuments matter workspace.



“ Instead of using email, users can chat about specific matters and documents through ndThread which is built into the DMS platform.”

mapping DMS folders in Outlook to then dragging-and-dropping messages into the folders to store them in NetDocuments.

With **ndMail**, the predictive filing feature helps recommend where a matter message should be filed. The feature analyzes email, examines the sender and receiver, and determines if there are attachments that need to also be filed. It also reviews existing matter content and historical filing information to make recommendations. See Figure 3.

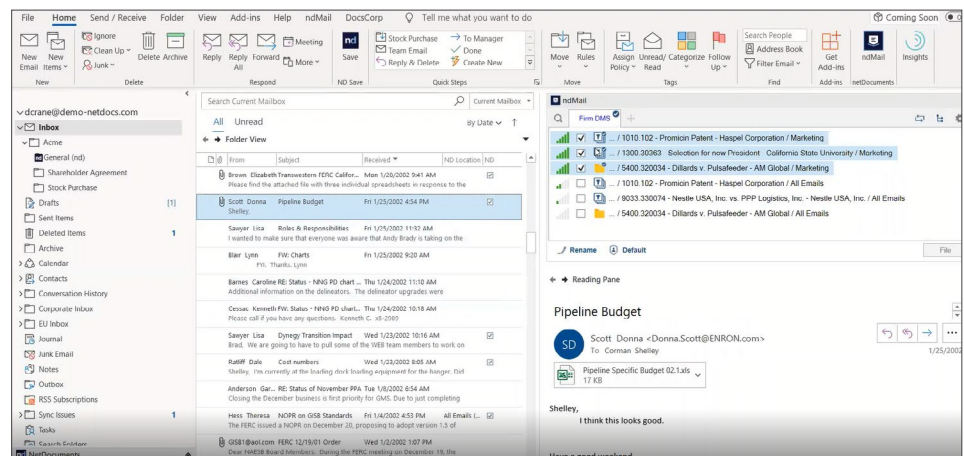
Once a user files an email, a green checkmark displays next to the message which indicates that the message has been filed in NetDocuments. Outlook users can see recent documents and favorites while browsing matter content from the NetDocuments panel in Outlook.

### Sharing Links and Using CollabSpaces

Not all content in a matter is internal. Rather than sharing files with external third parties via email, users can share matter content via a secure link from NetDocuments. A secure link can be created by right-clicking a file and choosing the secure link function. See Figure 4.

Sharing a file with a secure link keeps the content in one place – the DMS. But sharing more than one record with third parties can be cumbersome and time-consuming. To keep file sharing centralized in the DMS, NetDocuments offers **CollabSpaces**. See Figure 5 on page on next page.

**Figure 4:** In the Secure Link box, users can set a password, choose an expiry date, and send the link via email. The recipient can use the link to view the document in a web browser or, with permission, download the material for review and edit.



**Figure 3:** ndMail uses machine learning to suggest filing email in a matter in the DMS. A confidence indicator, like a cell phone signal strength, tells you how strong the prediction is.

CollabSpaces is NetDocuments' answer to cloud-based storage services but the sharing takes place in secure folders and subfolders of NetDocuments. The content stays in one place making governance simpler, access rights remain consistent with the firm or corporate compliance requirements, and all file access and changes are tracked and logged.

Users can share documents, email messages, and other files with third-party individuals or groups by dragging and dropping folders or files into CollabSpaces. Access rights can be set and external users can be notified via email. Like secure links, external users access CollabSpaces with their email address and create a password to access the system.

Users can share specific document versions with external parties using CollabSpaces and assign granular rights such as read-only, read-write, and download. If auto-versioning is turned on for a document, a new version is automatically created when external users make changes. External users can be given the right to add formulas and data to spreadsheets but their ability to change existing data can be limited.

NetDocuments can alert customers when CollabSpaces documents are accessed or edited. Customers can subscribe to folders, subfolders, and files to get updates when new data is added to folders or files are edited.

To distinguish shared documents, CollabSpaces places a silhouette of two people next to the file name but not all files in CollabSpaces have to be shared. Data in CollabSpaces can be limited to internal users only or exceptions can be created for files in shared folders.

### ndThread: Chat About a Matter!

In most organizations, communicating back and forth about a matter is

conducted by email. To keep conversations about matters and related materials in the DMS, NetDocuments offers **ndThread** which is part of the company's vision to improve collaboration and productivity. See *Figure 6 on page next page*.

All ndThread users create posts and receive activity notifications and @ mentions, similar to today's modern social media platforms. But with ndThread, the collaboration occurs in the DMS and it is subject to the organization's configurations for compliance, ethical walls, security, and terms of use. Users can chat one-on-one or in group conversations in ndThread on a PC, Mac, or mobile device (Android or iOS).

### SetBuilder: Generate Document Bundles into PDF

Anyone who has created a checklist or organized several documents together into a set will find NetDocuments **SetBuilder** an indispensable tool. SetBuilder allows you to compile and create a digital document binder. Documents can be brought together from a matter and from external sources and can be dragged and dropped into a digital binder. The materials in the set can be

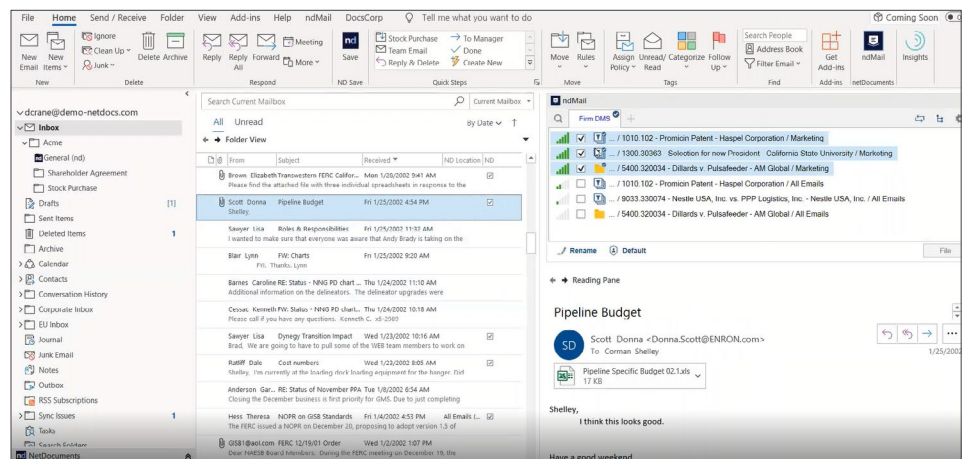
edited, reordered, and renamed. The set can be digitally bound into a binder by turning the documents into a combined and bookmarked PDF file.

NetDocuments acquired SetBuilder (formerly named Closing Binder) from the Chicago law firm, Chapman and Cutler, and seamlessly integrated it into the overall platform. Today, SetBuilder is used to compile a variety of documents including board books, deal binders, deposition preparations, lease financing deals, and pleadings indices.

### Going Mobile with NetDocuments

Go mobile with NetDocuments' native apps for Android and Apple iOS devices. Mobile users can see their most recent content while having the ability to search, use one-click access on homepage content, explore matters, and view and share documents.

NetDocuments is a Microsoft Cloud Storage Provider and can replace OneDrive. When mobile users edit a Word or other Office document, a system-to-system connection opens between Office and NetDocuments with no intermediary



**Figure 5:** ndMail uses machine learning to suggest filing email in a matter in the DMS. A confidence indicator, like a cell phone signal strength, tells you how strong the prediction is.

like OneDrive. Word checks out the file from the DMS and downloads it to the device for edit. Post edit, Word directly saves the document to NetDocuments.

### Strategic Integrations You'll Find In NetDocuments

There are over 115 integrated software packages available to users in NetDocuments [App Directory](#). The directory includes Intapp software for ethical walls, redlining tools from Litera and DocsCorp, and contract analysis systems from Diligen and Kira Systems.

### Who is NetDocuments?

From its headquarters in Lehi, Utah and other U.S. and international offices, [NetDocuments](#) provides document and email management services to more than 2,750 global law firms and corporate legal customers in more than 134 countries. The company's primary market consists of legal professionals and service providers including accountants, financial planners, and real estate professionals. The

company focuses on the North American market with dedicated teams for Asia-Pacific, Latin America, and EMEA (Europe, the Middle East, and Africa).

### Recent Developments and Updates:

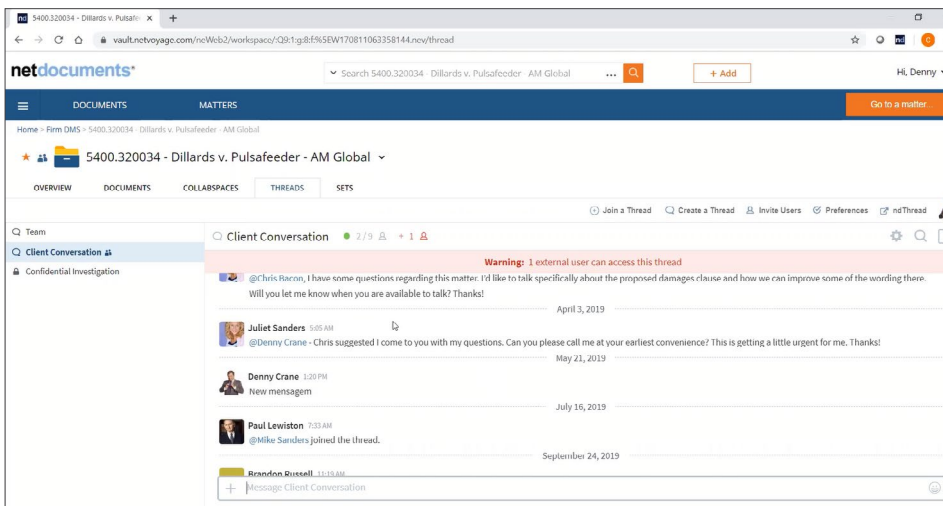
- ndThread: Direct-messaging and chat services allow users to securely and instantly communicate outside of the inbox on specific matters and documents.
- SetBuilder: Users can easily build and generate document sets by combining multiple documents into a single bookmarked PDF file that can be exported and shared instantly.
- Sub-versions: Users can save document versions in increments of whole numbers (e.g., 1.1, 1.2, 1.3, etc.) to ensure consistency and clarity around the latest version of a document.
- Autosave: Document features include an autosave function that identifies changes to files and automatically iterates document versions.

### Why Should You Consider NetDocuments?

- NetDocuments' DMS platform is available where lawyers conduct their work in Microsoft Office, Outlook, or web browsers.
- A matter-centric workspace organizes documents and emails by clients and matters with secure document links and collaboration spaces to share content.
- PDF document binders can be built and generated with SetBuilder.
- NetDocuments is a Microsoft Cloud Storage Provider and a OneDrive replacement.

### Try Out NetDocuments for Yourself!

Visit [www.netdocuments.com](http://www.netdocuments.com) to request a prompt demo of the platform and get answers to your questions!



**Figure 6:** NetDocuments creates a thread for each matter which allows a team to communicate about the matter. The threads become part of the matter history and makes it easy for users to review and remain current with their assignment.





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