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DOCUMENT MANAGEMENT, ASSEMBLY & PDF TOOLS

BUYERS GUIDE: 2021 EDITION





Make Your Law Firm Productive By Creating, Organizing, Protecting, and Delivering Documents From One Source of Truth

“The power and simplicity of a single global instance of NetDocuments software, seamlessly upgraded and made available to all our offices and users, truly elevates the level of services, data protection, and productivity tools we provide to our attorneys and our clients.”

Bob Craig,
CIO, Baker Hostetler

Company Name Brand
NetDocuments Software, Inc.

Product Name Brands
ChatLink, CollabSpaces, ndThread, NetDocuments, NetKnowledge, SetBuilder

Latest Developments and Updates

- Get insights into user behavior and activity with Analytics to enhance NetDocuments adoption.
- [ChatLink](#) connects NetDocuments workspaces to Microsoft Teams conversation channels.
- The Outlook experience on mobile devices (Android, Apple iOS) now predicts filing locations.
- Use multifactor authentication to access NetDocuments and use those credentials to authorize the use of other network resources.

A Wide-Ranging Matter Content Management Solution

With a new emphasis on working from home, law firms and corporate legal departments must reevaluate their technology architecture with a heightened focus on remote access to resources

including a document management system (DMS). A traditional DMS stores, manages, and organizes documents. In order to maintain the highest levels of efficiency and productivity, however, generic document and email management tools must be upgraded with a best-in-class cloud-based solution that inspires your best work. [Law firms and corporate legal departments require more from a DMS](#) including a matter-centric design, email management from any device (Windows, Android, Apple iOS and MacOS), software integration with legal apps, advanced search, and security. All of those attributes, and more, are available from cloud-based NetDocuments.

NetDocuments makes client matters the center of gravity in its eponymous DMS and is the one place to go for anything related to a matter including a place to collaborate, share, and create content in CollabSpaces, Threads, and even Microsoft Teams.

So Happy (Working) Together

NetDocuments' CollabSpaces allows you to share content in secure folders and subfolders of the DMS. Shared content is not replicated but stays in one place,

netdocuments®

VIDEO REVIEW

Click to view a short video review of [netdocuments](#)

“The integration between Microsoft and NetDocuments cloud technologies helps make secure document management seamless to our joint users.”

Rob Howard,
Director of Office 365, Microsoft

making governance more straightforward. Access rights remain consistent with the organization's compliance requirements and all file access and changes are tracked and logged.

Users can share documents, email messages, and other files within and outside the organization, including third-party individuals or groups, by dragging and dropping folders or files into CollabSpaces. When you set access rights to files and folders in CollabSpaces, NetDocuments notifies users of the content's availability via hypertext links in an email. Internal users can directly access the content while external users log in to CollabSpaces with their email address and a password to access the system and the selected content.

CollabSpaces further provides the ability to set up customized deal rooms and extranets. You have control over who has access, who can do various tasks and activities, and what they can see in the workspace. Best of all, the workspace becomes part of the matter. If you allow external users to upload content, you don't need clients to follow an ingestion process to get documents into the matter for review. Just set up a CollabSpace. *See Figure 1.*

CollabSpaces allows you to share specific document versions with others and assign granular rights such as read-only, read-write, download, and upload. You can even set the ability of users to add formulas and data to spreadsheets but limit the right to change existing data.

Name	Document ID	Last modified by	Last modified date	Deal Size	Created date	Effective Date	Expiration Date
Historical Documents	4840-6995-7036	Michael Sanders	11/7/2019 1:32 PM		11/7/2019 1:31 PM		
To Complete	4834-1341-2249	Denny Crane	2/24/2021 8:27 AM		6/10/2019 12:02 PM		
To Review	4845-5419-7401	Denny Crane	2/24/2021 8:30 AM		6/10/2019 12:02 PM		
Upload	4813-4750-7166	Denny Crane	2/24/2021 8:27 AM		2/24/2021 8:27 AM		
1-800-FLOWERS.COM, Inc and Inertia Beverage Group Announce Strate...	v2: 4841-0366-7382	Mike Sanders	11/2/2020 1:28 PM		3/4/2020 3:13 PM		
Bond Values	v1: 4828-8550-0236	Denny Crane	12/29/2019 1:26 PM		6/10/2019 12:01 PM		
Box IPO Financial Model	v1: 4829-5260-9100	Edwina Frost	8/18/2016 5:48 AM		6/10/2019 12:01 PM		
Business Valuation	v1: 4829-6938-6316	Mike Sanders	7/16/2019 7:53 AM		6/10/2019 12:01 PM		
Court Order	v1: 4849-9564-1551	Denny Crane	9/15/2020 11:46 AM		10/16/2020 1:11 PM		
Court response dated June 6	v4: 4832-4600-6631	Paul Lewiston	3/9/2020 6:39 AM		6/10/2019 12:01 PM		
Response to client inquiry regarding outstanding actions on case	v4: 4836-5276-0215	Denny Crane	6/17/2019 9:42 AM		5/17/2019 7:51 AM		

Figure 1: NetDocuments organizes its matter interface in tabs: Documents, Threads, Sets, Tasks, and CollabSpaces. Here, a CollabSpace of a client portal displays files and folders shared from NetDocuments and is indicated by a silhouette of two people next to the object.

netdocuments

Search: 5400.320034 - Dillard's v. Pulsafeeder - AM Global

Hi, Denny

Go to a matter...

OVERVIEW DOCUMENTS COLLABSPACES THREADS SETS TASKS

Team

Confidential Investigation

Dillard's Client Portal

Client Communication

Warning: 1 external user can access this thread

Denny Crane 1:31 PM

@Denny Crane joined the thread along with @Alice Landing, @Juliet Sanders and @Paul Lewiston.

@Juliet Sanders - Thanks for joining us in this confidential conversation. This should be pretty simple for you to use. The first thing I'd like to do is have you review what we are planning to start with.

1 Reply Last reply 11 months ago

Denny Crane 7:36 AM

You'll see this document that I've posted here. I've also made a few comments in strategic areas. Please review and let me know if you are comfortable with this approach.

@Denny Crane referenced a document:

Court response dated June 6.pdf

v4 last modified by Paul Lewiston 6 years ago

Message (Client Communication)

Figure 2: NetDocuments includes an ndThread tab that is labeled "Threads" in each matter, allowing users to communicate in threads or channels about topics related to a case and link to content in the DMS.

“NetDocuments makes client matters the center of gravity and is the one place to go for anything related to a matter including a place to collaborate, share, and create content.”

NetDocuments alerts users when CollabSpace documents are accessed or edited and files are downloaded or uploaded. When users need to talk on a matter amongst themselves, email is outmoded by message threads.

ndThread Enhances Communication

Most organizations use email to communicate back and forth about a matter. Email can be inefficient and time-consuming, however, and even disconnected from a matter. To keep conversations matter-centric and linked for review with other related materials in the DMS, NetDocuments offers ndThread. See *Figure 2 on the previous page*.

In a matter's Threads tab, users create posts and receive activity notifications and @ mentions, similar to modern social media platforms. With ndThread, the collaboration occurs in the DMS and is subject to the organization's configurations for compliance, ethical walls, security, and terms of use.

Like CollabSpaces, you can grant external users access to ndThread. A good practice is to limit external users to a thread focused on client or third-party communication. Users can chat one-on-one or in group conversations in ndThread on a PC, Mac, or mobile device (Android or iOS).

Threads become part of a matter's history, making it easy for users to review and remain current with the matter, related

documents, and assignments that come via assigned tasks.

Tasks Made Easy

To simplify and enhance your workflow, you don't even have to leave NetDocuments to create tasks for associates and staff. In the Tasks tab of a matter, create assignments in message format, as if you were in Threads, using an @ mention and include documents from the DMS without making a copy. Assigned tasks and their details remain in the matter to review for status and completion, in on-demand task lists and Kanban-style boards. See *Figure 3*.

You can filter the Tasks tab by your tasks to view jobs with subtasks, checklists, and any Q&A regarding the work. Coming soon, tasks created in NetDocuments will sync with Microsoft 365 and Outlook.

ndThread and Tasks demonstrate the strong focus of NetDocuments on collaboration around documents. The software further supports document collaboration with features like Margin Notes that allows users to comment on documents and view them in preview windows. Previewing comments does not require you to download or open a file.

NetDocuments saves comments in a separate layer from the document, avoiding any accidental edits or additions to the original file. It allows you to share the file with clients and solicit comments without

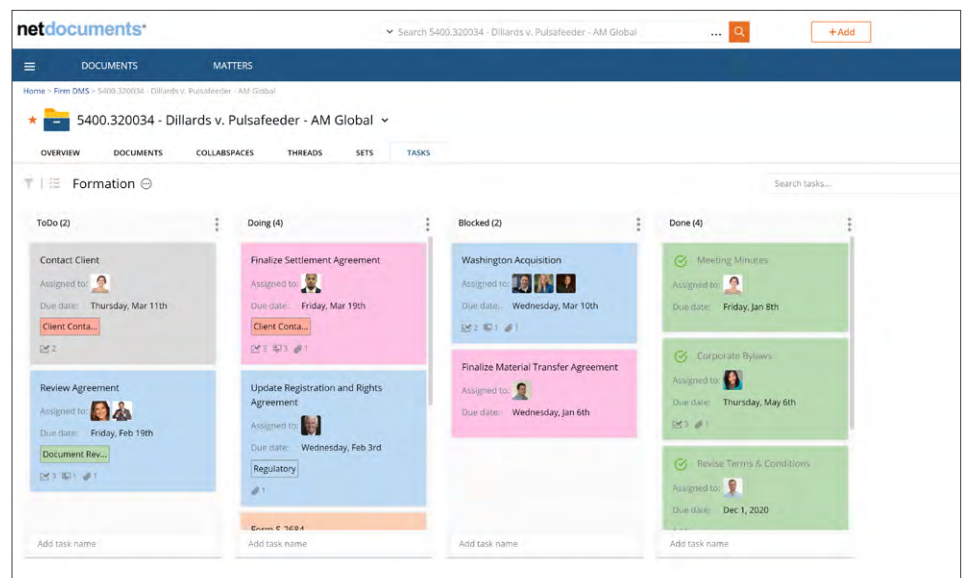


Figure 3: Tasks in NetDocuments can display in the message format, task lists, or Kanban-style boards to quickly review status and track progress.

“Users can share documents, email messages, and other files within and outside the organization including third-party individuals or groups.”

fear that they may inadvertently change the content. [Margin Notes](#) are specific to document versions so a new version does not spring forward with comments.

Fueling Sophisticated Document Creation

Legal professionals often create documents from multiple files. Whether they work in M&A, real estate, or criminal law, lawyers and staff make deal bibles, closing binders, trial exhibits, witness packages, and more. SetBuilder collects and organizes documents and email messages into a cohesive set to share, collaborate, and create content. *See Figure 4.*

To construct any such advanced binders, drag and drop files from the DMS, email, local storage, or another location into a set that presents the files in numerical order. Files dragged to the collection that are not in the DMS are copied to a matter's documents. Create placeholders for new files and reorder the group with drag-and-drop functionality, automatically updating the new order's numbering scheme. Preview snapshots of what a PDF binder will look like and, when it's time, create one regardless of the set's varying file formats.

SetBuilder can create a PDF binder of the set complete with a cover page, a hyperlinked table of contents and bookmarks, and links to other documents—all with page numbers. To avoid starting a new project from scratch, you can clone and modify a set for another matter.

NetDocuments in Teams? Yes!

The NetDocuments feature-rich DMS to manage, share, collaborate, and create content is not only for use in web browsers. It works as an app in Microsoft Teams where you can access NetDocuments without restriction. *See Figure 5 on the next page.*

NetDocuments' ChatLink sends Microsoft Teams' channel posts to ndThread in the corresponding NetDocuments workspaces. Like the posts-to-threads integration, NetDocuments will soon receive Teams content as an option to OneDrive and SharePoint. In effect, you will have the functionality of NetDocuments in Teams. If a Team is deleted or removed, the record still remains intact in NetDocuments.

NetDocuments analyzes user activity and behavior to enhance user adoption of the cloud software. Analytics delivers insight into how users interact with content, providing visibility into how they use the platform including document types and areas to improve documentation and training. Administrators and users alike will quickly be able to identify top contributors and external contacts involved in matters and projects.

App Integrations

There are more than 125 apps in NetDocuments' App Directory including PacerPro Manifold, which captures and stores federal filings with custom document profiles, and Scrive eSign to sign documents on any device. Besides integrated apps,

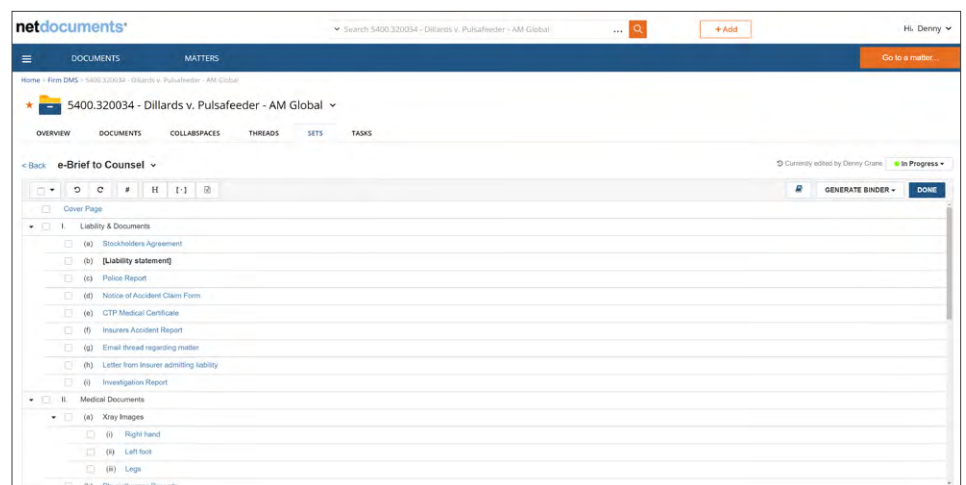


Figure 4: Drag and drop files and folders in SetBuilder, reorder them in the same way, and create a PDF binder complete with a hyperlinked table of contents and bookmarks.

NetDocuments' technology partnerships integrate with leading providers including Diligen, which uses artificial intelligence to analyze contracts stored in the DMS. The company also partnered with BA Insight to create NetKnowledge which connects NetDocuments content with other data repositories to facilitate an intelligent enterprise search experience.

Pricing

NetDocuments and channel partners sell the software on a subscription basis per user per month with added costs depending on implementation requirements and added software modules and apps. [Book a consultation with a NetDocuments legal technology expert for more information.](#)

Who is NetDocuments?

Founded in 1999 and based in Lehi, Utah, NetDocuments provides cloud-based document and email management and collaboration software to more than 3,050 worldwide customers. Law firms comprise most of their customers with 25 percent in corporate legal departments, wealth management firms, and government agencies. The company has more than twenty years of experience in providing cloud-based content services that are now compliant with more than thirty-eight standards and regulations including

Systems and Organization Controls 2 (SOC 2), the EU's General Data Protection Regulation (GDPR), ISO 27001, HIPAA, and SEC Rule 17a-4.

Why Buy NetDocuments?

- NetDocuments provides matter-centric document management with collaboration and content creation tools.
- Use ndThread in matters to link documents and communicate with associates, staff, and clients.
- Create content-filled workspaces, client extranets, and deal rooms with CollabSpaces that inspire you to accomplish work.
- Build PDF binders from various content stored in the DMS, email, and other storage locations with SetBuilder.
- Create tasks with subtasks and checklists and assign them to associates and staff within NetDocuments.

Contact NetDocuments Today!

When you never have to choose between productivity and security, *That's Work Inspired.*

[Request a consultation today](#) to learn more about solutions to ORGANIZE, PLAN, PROTECT, DELIVER and LEARN.

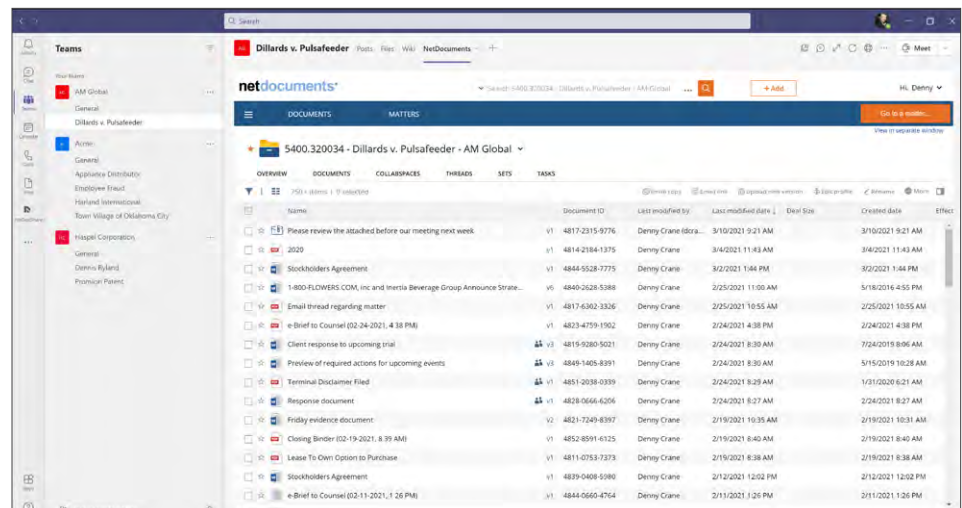


Figure 5: A NetDocuments matter file can be seen in the context of its corresponding team environment in Microsoft Teams.

How Firms Can Unlock the Secrets of Productivity By Using Their Most Trusted Solution

By: Sam Emery



Sam Emery is a Product Marketing Manager at NetDocuments with over five years of experience developing and executing product marketing strategies across various industries at both small businesses and Fortune 500 corporations. An expert on cloud-based technology and the benefits it provides to professionals, Sam is inspired when he sees complete alignment between the benefits of software and a customer's needs. Since joining NetDocuments in 2019, Sam has been essential in the development of the platform's latest security, compliance, and data offerings and has worked closely with customers and product teams to ensure that truly inspired solutions are being delivered to the market.

It is no secret that big data has been trending across businesses for years. Early on, companies big and small saw the potential impact of data-driven process optimization, knowing it could lead to huge cost savings and sizeable increases in output that would ultimately grow their bottom lines and increase employee satisfaction.

Law firms have generally been happy bystanders, looking on as the businesses and clients they serve make leaps in process optimization. That notion was even supported in the [13th Annual Law Department Operations Survey](#) published by the Blickstein Group, which showed only 36% of Legal Ops respondents agreed that their law firms were innovative.

Today, clients hold the firms they work with to the same productivity standards they have built in their own organizations, leaving many law firms grasping for ways to improve productivity without access to the information required to effectively do so.

The panic and stress that may be setting in for some firms is likely a bit premature. Firms that have embraced the benefits of a legal-centric cloud document management system (DMS) already have the advantage of a centralized work system that collects the information needed for rapidly improving processes.

So, before getting into a tailspin, let's explore how firms of all sizes can tap into the dormant data in their DMS.

DMS: Big Data Where You Might Not Expect It

Smart legal teams know that a DMS isn't just a dumping ground for documents and files. As the center of a firm's knowledge base, a document repository is the single source of truth for documents, information, and data in the business. Document management systems built specifically for legal work take file storage a step further, offering features that support an efficient legal document creation process such as

simple versioning, powerful search, and secure file sharing. That means the majority of modern legal work ties back to this central system.

In addition to documents, a modern and legal-centric DMS stores latent information important to a firm including interaction history with clients, information on which projects are the most active, heavily accessed documents (seemingly identifying the most critical), and even identifies which browsers are being utilized to access the system. In other words, your document repository is a virtual treasure trove of critical data.

Access to this key process information holds many benefits for firms of all sorts. Understanding which clients and their respective matters are active can enable effective resource shifts to deliver timely and excellent services, a huge boon for firms struggling to avoid burnout. That information further opens doors that can help identify best practices from successful matters, determine useful templates in order to save time on future matters, and even help identify key subject matter experts that lawyers can reference. Those are all ways to help relieve stress when a legal team is strained for time.

Even though we understand *where* big data is stored and the potential *benefits*, the question remains whether everyone in your organization understands and will therefore utilize it?

The Problem with Big Data

The challenge many firms, and businesses in general, face is that simply having data is not enough. Data must be *meaningful* without requiring a degree in data science to understand it. To achieve that, two goals must be met: relevancy and simplicity.

For data to be *relevant*, it must be pertinent to the people consuming it. Otherwise, it is essentially wasted information. Data for the sake of data, no matter how potentially fascinating, does not ultimately benefit anyone. While relevant data can be

exciting, it can quickly become overwhelming. That is why it is critical for data to be presented in *simple* and structured frameworks that eliminate the noise and go straight to the value.

In practice, large data sets meet the relevancy and simplicity goals by filtering out any potential distractions (e.g. how many documents start with a W) and pinpointing what will matter most to a specific viewer with minimal effort.

Critical areas for a legal-specific DMS include showing how content is organized and information on how, when, or where users are accessing it together with document and user trends and, generally, what will be most important for firm efficiency.

When *relevant* data is provided in *simple* ways, professionals can put that data to work and use it to identify processes that are draining time, effort, and money. That will certainly lead to future success and growth for a firm and, hopefully, less lawyer burnout. In order for data to be truly useful, however, it must be accessible at all times.

On Premises versus Cloud Solutions

Many firms and service providers have made moves toward the cloud and, with 89% of [ILTA'S 2020 Legal Technology Survey](#) respondents saying they're considering their own moves, the stage is set for cloud technology to become even more prolific. Unrivaled in work accessibility and speed of development, cloud software — specifically cloud DMS — is well positioned to fill the data needs of modern firms.

Certainly, innovative firms are already familiar with the frequent, but small, update schedule that cloud-DMS providers utilize. Those schedules help to minimize disruptions to lawyers' workflows but can also be used to tackle data challenges quickly and substantially. By employing that rapid development strategy, cloud DMS providers can ensure that firm leaders have first access to the best in legal data — and, therefore, process optimization — without interrupting the flow of regular work.

Selecting a DMS that Will Provide the *Right* Data

It goes without saying that not all cloud DMS providers are created equal and firms must be shrewd in their software assessments to ensure a solution will relieve lawyers' stress while offering answers to the process optimization challenges that lie ahead.

Here are a few things you should ask prior to selecting your next DMS:

Does the solution work?

- Surprisingly, the best place to start is not the data capturing capabilities of the solution. You first need to uncover if the DMS is the right fit for your organization by understanding its capabilities, strengths, and potential areas for improvement. You'll want to look for built-in efficiencies that streamline content, security, and governance while supporting collaborative work in addition to understanding how it is able to capture data.

What kind of data is being captured?

- Firms should understand what data can be captured and processed by their providers. Not only is that good practice from a security standpoint, but it can help firms understand what they can tap into and draw insights from.

Once I know what's being captured, what can I tap into that matters to my organization?

- While a DMS collects massive amounts of information, it's up to a firm to define what KPIs they want to measure. Firms should ask whether that information is available inside the DMS or if they will need to draw from another source.

What information does the DMS provide without any extra work from my end?

- Ultimately, that question boils down to *how easy is it to get what I need?* If the information provided is robust but complicated, it may only be relevant to administrators. On the other hand, if it's too simplistic, it may not even be valuable.

Will it require an integration or does the DMS have a native analytics tool?

- Data is not just numbers in spreadsheets. Ask whether the DMS has native dashboards that can show trends without having to create your own. Will those dashboards have KPIs? How does the provider determine what information is shown?

Can I access the information anywhere?

- The real benefit of a cloud DMS is anywhere access and the data stored within it should be no different. Lawyers and administrators alike should be able to access important insights any time they need.

Legal-Specific Cloud Solutions Will Be the Key for Success

Many legal teams may be surprised to discover just how much work-process data is stored within their DMS.

Cloud DMS providers, in particular, are well positioned to capture data that is valuable to a legal organization, process and provide it to their customers in meaningful ways, and make rapid improvements in how that data is presented over time. In addition, because a cloud DMS is scalable, so is the information within it. That means no firm is too big or too small to benefit from a true cloud DMS and its data solution.

As firms apply the insights gleaned from relevant DMS data presented in easy-to-understand formats, there is little question that firms will be able to dial in their services, do more with less, and grow their bottom line while simultaneously decreasing lawyer burnout.

The truth is that many firms are already experiencing the efficiencies a cloud-based, legal-centric DMS offers. Now, with insights into their work processes, firms will have the information they need to optimize those processes and confidently shape the future of legal work.

About NetDocuments

At NetDocuments, we pride ourselves on providing innovative solutions that our customers can depend on. Our DMS was built with a cloud-first strategy to ensure each of our customers could benefit from our powerful search tools, seamless collaboration features, and innovative security and compliance measures. Our new tool, Analytics, is the latest addition to those efficiency features, aiming to support firms as they strive to meet the high expectations of their clients. Analytics puts key information in front of the right people at the right time with minimal effort, enabling firms to optimize upon their current process.

For more information on what to ask and listen for to ensure your next DMS selection is your last, download this guide: [26 Questions to Ask When Considering a Cloud Document Management Platform](#).

If your firm is ready to take its productivity to the next level and truly Work Inspired, contact us today at (866) 638-3627.

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