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DOCUMENT MANAGEMENT, ASSEMBLY & PDF TOOLS

BUYER'S GUIDE: 2022 EDITION

Document Management, Assembly & PDF Tools Buyer's Guide: 2022 Edition
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Solution by Firm-Size

Small Firms: 1-25 Attorneys	Midsize Firms: 26-100 Attorneys	Large Firms: 101+ Attorneys
ABACUSLAW	ABACUSLAW	
DocStyle	DocStyle	DocStyle
	iManage	iManage
MOXO	MOXO	MOXO
mycase		
netdocuments	netdocuments	netdocuments
VIQ	VIQ	VIQ

About

The Document Management, Assembly & PDF Tools Buyer's Guide: 2022 Edition is a publication of the Legal Tech Publishing division of the Legal Tech Media Group (LTMG) **legaltechmg.com**.

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Introducing the 2022 Legal Tech Publishing Buyer's Guide: Document Management, Assembly & PDF Tools

Cathy Kenton, CEO,
Legal Tech Media Group/Legal Tech Publishing

Documents are the lifeblood of legal practice. Managing documents and automating document creation happens every day in virtually every type and size practice.

Document management is not a new category in legal software. In fact, the earliest products have been available for more than two decades. Today, mature tools and new applications all vie to increase usage and market share.

The goal of the 2022 edition of the Document Management, Assembly & PDF Tools Buyer's Guide and ATL's dedicated Non-Event page is to ensure you have the resources you need to make educated decisions.

To your success,

Cathy Kenton,
CEO, Legal Tech Media Group/
Legal Tech Publishing and

Brian Dalton,
SVP, Breaking Media

Brian Dalton, SVP, Breaking Media

Document and Practice Management Systems

AbacusLaw

Leverage Customization and Flexibility to Improve and Automate Your Firm's Practice Management with AbacusLaw

MOXO

Modernize Client Interaction Workflows and Streamline Document Management, Responsiveness, and Collaboration

mycase

MyCase Lets You Do More of What Matters with All-in-One Law Practice Management Software for Small and Midsize Law Firms in All Practice Areas

ABACUSLAW

Leverage Customization and Flexibility to Improve and Automate Your Firm's Practice Management with AbacusLaw

> "Once a matter is created, users navigate through the case via tabs: Litigation (case information), Notes, Linked Names (from contacts, cast of characters), Events, Documents, and Emails. Users can click on a Bill button throughout the application to quickly capture time."

Company Name Brand
AbacusNext

Product Name Brand
AbacusLaw

Latest Developments and Updates

- Role-based dashboard layouts deliver tailored displays of pertinent information selectable by a user's role.
- Abacus Payment Exchange (APX) enhancements include schedules, recurring charges, payment plans, and evergreen subscriptions.
- Pay Now button for convenient client payments from secure client portal or email inbox.
- User Interface (UI) updates with dark mode toolbar and refreshed desktop, dashboard, contact, and matter views.
- HotDocs integration for advanced document automation.

End-to-End Matter Management
AbacusLaw is a comprehensive practice management tool that provides a central location to manage day-to-day activities as well as the financial business of the firm. Host the system on-premises or securely in a private cloud. The platform is easily customizable for whatever a firm needs, including input screens, automation rules, documents, reports, and more. AbacusLaw integrates with O365, Salesforce, DocuSign, Nextiva, Case Status, APX, and Infusionsoft. AbacusLaw has a mobile app that works with both iOS and Android devices for users on the move.

The central function of AbacusLaw is matter management. A firm determines what information they need to manage each type of case, and a user can create a new matter in the system using the Intake icon. After assigning legal team members and case numbers, the case open date is logged, and

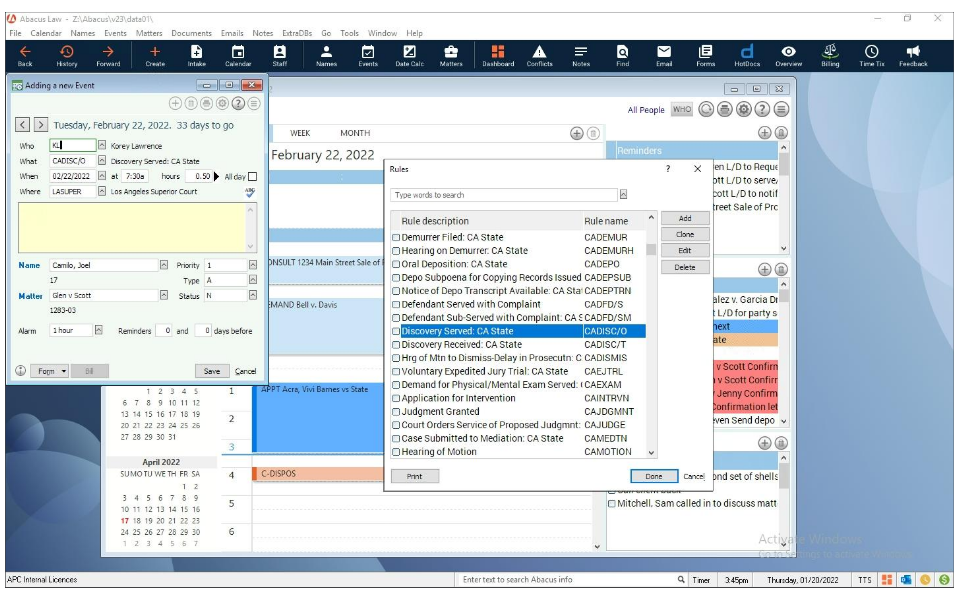

Figure 1: Automate calendar events using docketing court rules or designing rules that enforce firm workflows. Rules can trigger other calendar events, tasks, or document creation.

> **"A user can assemble complex documents like contracts, pleadings, or estate plans and pull client and matter information directly from AbacusLaw into HotDocs."**

a case code can be applied. You can automate the type of information collected based on the type of matter being created.

Once a matter is created, users navigate through the case via tabs: Litigation (case information), Notes, Linked Names (from contacts, cast of characters), Events, Documents, and Emails. Users can click on a Bill button throughout the application to quickly capture time.

The Notes tab is a place for team members to memorialize information on the case, similar to a familiar yellow notepad. However, unlike the yellow pad, these notes are available to the entire team.

Contacts within the platform are associated with matters, and firms can customize what information they want to collect for each contact, such as phone numbers, emails, and addresses. Additionally, contacts can be identified by their role in a matter, such as opposing counsel, client, judge, and expert. Each data point entered can then be used to filter or search for pertinent information.

Calendar Tasks and Automation

The automation features of the calendar can save time and money. The application enforces rules-based calendaring, supporting firm-specific rules or jurisdictional docketing rules. For example, by creating one event in the calendar, a firm can implement a designated workflow by triggering other calendar events, required tasks, alerts, reminders, or document creation. This can be useful across matter type, practice area, or individual attorney workflow. *See Figure 1 on the previous page*.

Document Management

AbacusLaw comes with a complete document management system, including version control, access permissions, and security. Documents can be word processing files, images, spreadsheets, and other types—and are associated with a name or matter.

Users can automate mandatory court forms using the forms library, including fillable forms from different jurisdictions. A firm can also supplement the library and design its own forms. For more complex document assembly, HotDocs is integrated directly into AbacusLaw. A user can assemble complex documents like contracts, pleadings, or estate plans and pull client and matter information directly from AbacusLaw into HotDocs. HotDocs offers interactive interviews that walk a user through the document assembly process. *See Figure 2*.

Dashboards and Reports

Dashboards give users a focused view of data, presenting apps and customizable charts based on role, practice area, or user preference, providing a set of tools for insight or action. Dashboards can automatically open when users log in to the application or by clicking the dashboard icon at the top of the screen. Users can work directly from their dashboard and add apps, including tasks and subtasks (can be sorted by date and priority order), events in the

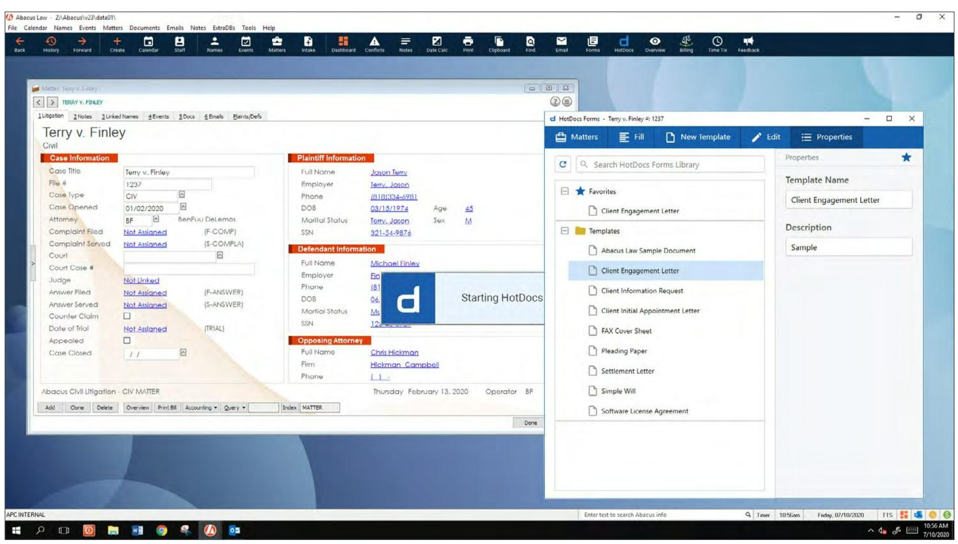

Figure 2: The icons on the top of the screen make navigation within AbacusLaw easy. Users can click on any icon to go directly to key areas in the application: Intake, Calendar, Staff, Names, Events, Date Calc, Matters, Dashboards, Conflicts, Notes, Find, Email, Forms, HotDocs, Overview, Billing, and Time Tix.

“The application accommodates hourly, flat fee, or contingency billing, allowing users to set the billing frequency and preferred method of payment. You can customize each matter to set up minimum or maximum fee warnings, helping the legal team stay within budget.”

calendar, and even a subset of deadlines. Some of the charts displayed in a dashboard can include a recent matters list, billable time, and net income. Information captured using the quick notes feature on the dashboard can be stored, shared, saved, and converted to a billable record. *See Figure 3*.

Use the overview option to see a list of all activities at the client or case level, which is sortable and filterable by any field. Finding information within the system can be done via the global search feature accessible from most screens within the application. The search feature uses Boolean logic, and as words are typed, matches will appear in the results window. You can filter by names, events, matters, notes, linked documents, or emails simply by checking the appropriate boxes.

Time, Billing, and Accounting

AbacusLaw recognizes that managing the financial side of a law firm can be cumbersome and complicated—and as a result, the platform includes a full accounting suite. The application accommodates hourly, flat fee, or contingency billing, allowing users to set the billing frequency and preferred method of payment. You can customize each matter to set up minimum or maximum fee warnings, helping the legal team stay within budget. A user can generate reports on specific matters, practice areas, or firm-wide results with just a few clicks. Further, Abacus Payment Exchange (APX) enables firms to accept credit cards and ACH payments and process them securely to trust and operating accounts.

Pricing

AbacusLaw uses a simple subscription model, starting at $69 per user per month.

Who is AbacusNext?

AbacusNext is a vertical SaaS provider for compliance-focused professional services markets. Their purpose-built cloud infrastructure puts customers’ business data and vital applications into a virtual workspace accessible anywhere, anytime, and from any device, enabling small and midsize legal and accounting firms to grow an efficient, secure, client-focused practice. More than 100,000 users worldwide benefit from a complete product portfolio, including practice management and case management solutions, tailored cloud options, document automation, and payment processing. To learn more, visit abacusnext.com.

Why Buy AbacusLaw?

- Complete law practice management (LPM) solution with tightly integrated front and back-office functionality.
- Powerful and personalized LPM for any size firm and any practice area.
- Flexible deployment options: On-premises, in Abacus Private Cloud, or other cloud platforms.
- Workflow automation options to increase firm productivity and profitability from client intake to payments.

Schedule a Demo Today

Visit AbacusLaw today to request your demo.

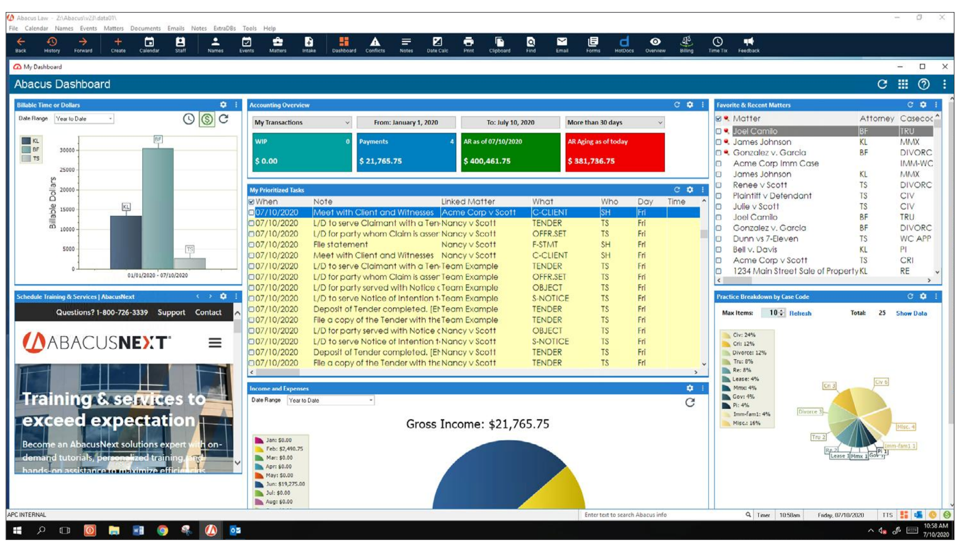

Figure 3: Dashboards give users a focused place to work on day-to-day activities and only see the information they need, such as task lists and calendar items that are specific to them.

MOXO

Modernize Client Interaction Workflows and Streamline Document Management, Responsiveness, and Collaboration

> “Law firms can manage their entire matter within the hub and collaborate with clients. Moxo provides workspaces specifically for the client and the law firm or business partner.”

Company Name Brand
Moxo

Product Name Brand
The OneStop™ Client Interaction Hub

Latest Developments and Updates

- Moxo Flow is a recent update to the Moxo platform to help organizations streamline and drive the efficiency of their client-centric business operations by routine task automation and custom workflow configuration that align with a client’s business processes.

Much More Than Just Document Management
Moxo can do more than manage documents. Law firms can manage their entire matter within the hub and collaborate with clients. Moxo provides workspaces specifically for the client and the law firm or business partner.

Client and Business Portals
The client portal is designed for clients, customers, or partners to communicate with legal teams and is available in both web and mobile applications. The business portal has a similar look and feel but is designed for the legal and business teams. Both portals allow users to collaborate through managing tasks, chatting, video message, video calls, and sharing and annotating documents.

Document Management
Moxo’s document management is done through the Content Library, which includes document and E-sign template folders and is available through the business portal. The Content Library stores all documents across all matters, and role or group permissions control secure access. You can set up the library according to a firm’s organizational requirements. For example, a firm can create templates for each practice area (such as real estate, healthcare, business litigation, and insurance) with specific folders and sub-folders. *See Figure 1*.

Templates will enforce consistent folder naming and structure across matters and

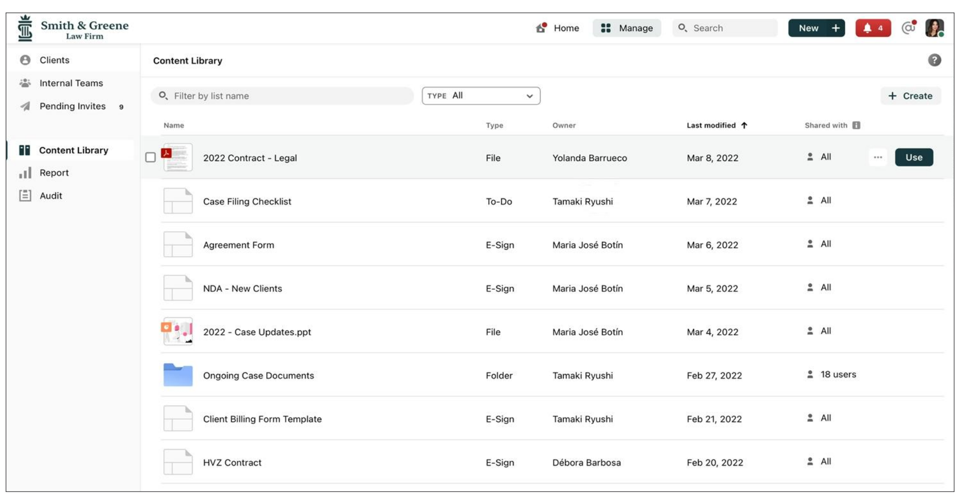

Figure 1: The Content Library can be accessed directly from the Manage button in the top menu bar, then Content Library in the left panel. Add folders using the + Create button in the upper right corner. Users can filter the folders using the search bar or clicking on the type, which will show E-sign and document folders.

“Moxo’s document management supports interactions amongst clients and legal teams. Build workflows and set up virtual data rooms for sharing documents in a centralized data workspace while keeping records of all shared, categorized, and annotated files.”

ensure team members know where to find documents. There are no limits to the number of folders that you can add. However, it is incumbent upon the firm to enforce the folder structure via administrative security.

Document creation and editing are done in native applications and then uploaded to the content library. When a document of the same name is saved to the content library, Moxo will add a number supporting version control.

Collaboration

Moxo’s document management supports interactions amongst clients and legal teams. Build workflows and set up virtual data rooms for sharing documents in a centralized data workspace while keeping records of all shared, categorized, and annotated files. Collaboration can be done in real-time, regardless of whether users are running the mobile app or web version, as long as they have an internet or data connection.

There are several ways teams can work on documents together. Moxo’s video and conference calling functionality enable documents to be shared via the screen sharing feature. This allows users to mark documents using annotation tools such as drawing, commenting, and highlighting. You can access a clean, annotation-free document in the Content Library, while the marked-up version is stored in the workspace.

Moxo has a secure messaging application that allows team members to collaborate on case-related issues. Suppose a legal team member is drafting a document and has questions for another team member or the client. In that case, they can simply send the document using the messaging application rather than by email or phone call. Additionally, team members can send a post with a video or audio message in the application to explain the what and why of their modifications. Everything is tracked within the workspace, so the entire team knows what is happening on the matter. *See Figures 2 and 3*.

Moxo has streamlined document sharing, whether from the Content Library within Moxo, a cloud repository, or the desktop. Users can annotate, comment, and review within the application, and more detailed editing and redlining are done within the native word processing application.

Documents can be sent for signatures via the E-sign module, designed entirely by the Moxo team. Clients will receive a new action item to click and sign a document from either the mobile or web app. Signed versions of documents are stored securely within the application.

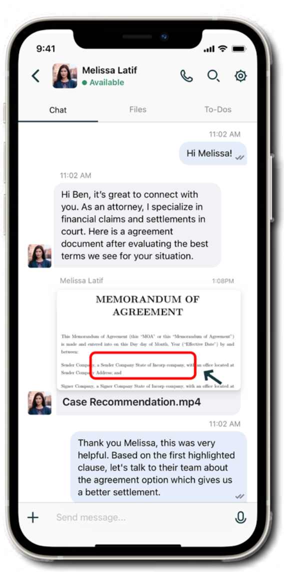

Figure 2: The Moxo mobile application enables a user to contribute to a case and collaborate on documents from anywhere.

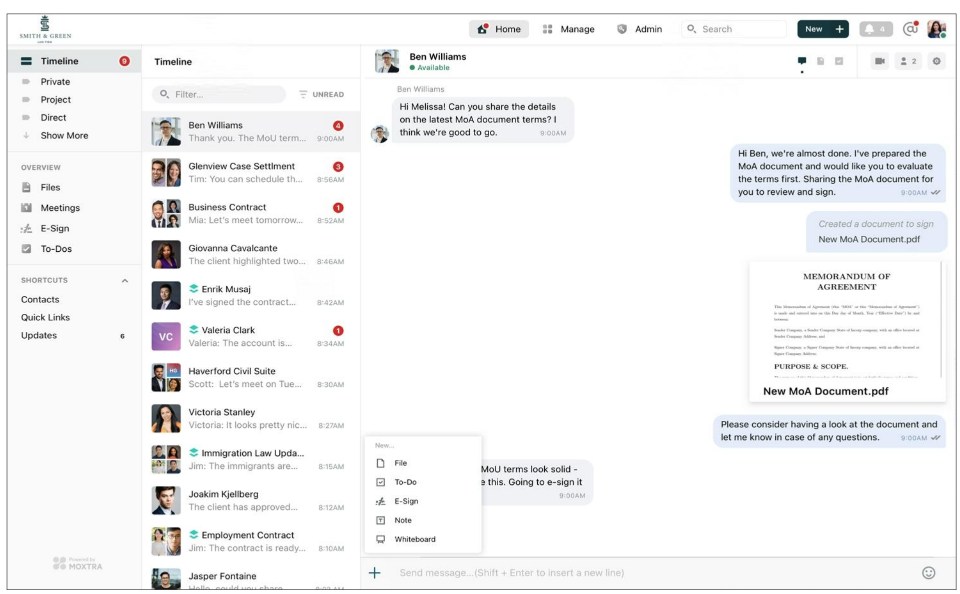

Figure 3: The legal team can keep track of all case information in one spot. Document collaboration is made easy through real-time sharing of annotations and modifications.

"Moxo's video and conference calling functionality enable documents to be shared via the screen sharing feature. This allows users to mark documents using annotation tools such as drawing, commenting, and highlighting."

Moxo has gone even further to help teams collaborate, providing users with client-centric workflows through Moxo Flow. Clients can use the workflow builder to automate processes and document creation, driving time and cost efficiencies.

Security
Moxo is engineered to meet the stringent security requirements of regulated industries, with best-in-class compliance, including SOC III, GDPR, and PSD2. Administrators control access to cases through role or group-based permissions. Data is fully encrypted in compliance with the E-Sign act.

Integration
Integration is available with Dropbox, Google Drive, Box, and OneDrive document repositories. Third-party document management system integration is currently under development. Moxo provides an API/SDK with the custom package, allowing users to create integration with applications specific to their needs.

Pricing
Monthly and annual price options vary with the starter or private label apps. In addition to the pricing below, custom pricing is available.

Who is Moxo?
Modernize your client interaction workflows with Moxo. Today's client engagement activities are stuck in the chaos of fragmented silos—requiring significant manual intervention. Moxo provides a OneStop Client Hub for managing client interactions through modern digital automation. Businesses can streamline deadline-driven client interactions, including account onboarding, account servicing, and exception handling.

Beginning with deep roots in business collaboration and engagement, Moxo was co-founded in 2012 by Subrah Iyar, WebEx founder and former CEO, and Stanley Huang, former WebEx Senior Director of Engineering. Moxo is headquartered in Cupertino, California, with offices in London, New York, Amsterdam, Bengaluru, Shanghai, and Singapore.

Why Buy The OneStop™ Client Interaction Hub?
- Create workspaces for each case, streamline client onboarding, billing transactions, and case workflows, store persistent client records, and manage your practice with full visibility into all digital interactions.
- Easy to use, real-time collaboration and document management.
- Mobile and web apps are intuitive and provide complete access to a matter.
- Customizable workflows with task-dependency encourage consistency and defensibility.

Learn More About Moxo Today!
Learn more about enabling a OneStop™ Client Interaction Hub for your business and follow the company on LinkedIn, Twitter, and Instagram. Or schedule a demo today!

Starter App (Moxo Branded)	Business App, Private-Label
One-time $300 set-up fee and billed $120/month or $1,200/year	One-time $1,500 set-up fee and billed $450/month or $4,800/year
• 10 users, supporting basic customer interaction workflows • Contains complete collaboration suite, including, but not limited to messaging, document exchange, virtual meetings, and task management	• 10 users, supporting basic customer interaction workflows • Contains complete collaboration suite, including, but not limited to messaging, document exchange, virtual meetings, and task management • Scalable user-based capacity • Reporting and auditing • Integrations • Customizable workflows • Private cloud or on-premises

MyCase Lets You Do More of What Matters with All-in-One Law Practice Management Software for Small and Midsize Law Firms in All Practice Areas

"In one click, convert a lead into a client, create a client portal, and select a billing method (hourly, contingency, flat fee, or pro bono). MyCase converts the lead data to client and case management."

Company Name Brand
MyCase, Inc.

Product Name Brand(s)
MyCase, MyCase Payments, MyCase Websites

Latest Developments and Updates

- Mailchimp integration to automate leads and retain new clients.
- Smith.ai integration for telephone receptionist support and messaging.
- Communicate with staff using secure, internal chat.
- The new contact report, which uses customized columnar data and filters, paves the way for full custom reporting.

Roadmap Development

- Integrate with Zoom to schedule online meetings.
- Integrate with telephone messaging service, LEX Reception.
- Synchronize cloud-based documents on the desktop using MyCase Drive.
- Offer an in-house accounting suite, MyCase Accounting, with three-way reconciliation for expense, operating, and trust accounts.

Manage Your Firm with Increased Efficiency
All-in-one legal practice management (LPM) software, like MyCase, provides efficiencies and time-saving opportunities for busy small and midsize law firms. The company's software-as-a-service (SaaS) platform manages law firm financials, operations, and practices from generating leads and client intake to case management, time and billing, and payment processing. MyCase includes case, calendar, contact, and document management and automation with advanced communication and collaboration tools. Also available are time and billing features, lead tracking, intake forms, client portals, and reporting. MyCase drives product advancement through in-house feature development and offers unlimited data storage to support your firm's growth.

Modern User Interface
MyCase continuously updates its user interface to maximize efficiency. The dashboard presents card-based visuals of financial overviews, open cases, recent activities, and a linear graph of leads generated over time. Dashboards include

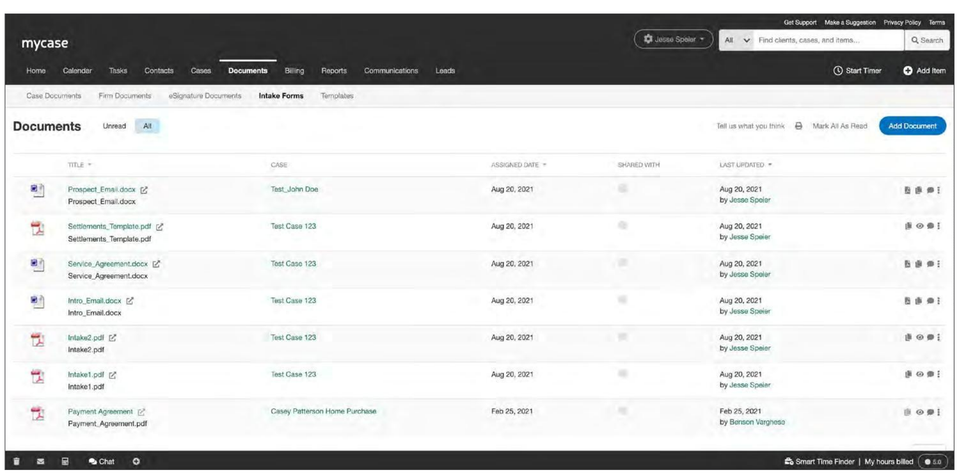

Figure 1: MyCase's user interface for cloud-based document storage.

user tasks, events, alerts, and communications, including email and SMS texts. A persistent top panel navigates users to primary functions, including matters, contacts, calendars, tasks, and documents. The panel includes a global search window and a facility to add new information, including leads, contacts, tasks, events, documents, time and expense entries, invoices, and messages.

Lead Management

Most cases begin with a client lead. MyCase has a built-in feature to create and track leads until they become clients. Alternatively, if the client does not yet retain the firm, the information can be maintained for conflict or compliance purposes.

A firm can generate leads using intake forms and embed contact forms onto the firm's website using iFrame. They also have a service to build your website with all of these key integrations directly into MyCase. To help convert prospects into clients, MyCase Websites offers a customized site with optimized design, MyCase workflow integration, and search engine optimization (SEO). Lead tracking includes information on potential case details, communication, and the ability to accept payments for new client consultations. You can also save calendar events, documents, tasks, and more.

If you need to manage referrals, you can use lead tracking functions or adapt the process and improve your firm's workflows with custom fields. MyCase allows unlimited custom fields to track, manage, and report discrete data.

In one click, convert a lead into a client, create a client portal, and select a billing method (hourly, contingency, flat fee, or pro bono). MyCase converts the lead data to client and case management. If the firm has an account with MailChimp to manage marketing channels and leads, MyCase can automatically synchronize lead and contact information to the case management dashboard in MyCase.

The communication features for lead tracking and case management include centralized two-way text messaging that can be retrieved and replied to on Apple iOS and Google Android devices using MyCase mobile apps. Whatever you can do on the web, you can do on mobile devices, with the exception of batching and sending bills.

Communication features include call logs, which record telephone messages entered by staff or an outsourced service, such as Smith.ai. MyCase supports secure real-time internal chat with staff and communications with clients via secure web portals. The software has a built-in mailbox feature to mirror users' email in the MyCase UI, so users can send and receive mail as if they were in their native email application, and then save messages within MyCase.

Case and Document Management

The *raison d'etre* of an LPM is case management. In MyCase, the function includes unlimited storage for document management and automation along with in-depth time and billing features. Additional aspects include status updates, related contacts, staff assignments, and case communications, such as email, texting, and call logs.

MyCase's document automation works throughout the entire case lifecycle, from lead generation to signing clients to closing cases. Create unlimited templates with merged data fields from MyCase to draft client retainers, memoranda, and court documents. Send retainers to a potential client for signature using the company's built-in eSignature feature. The e-sign function in MyCase supports multiple signers with a firm countersign.

Email an agreement to a client to sign using a drawn signature or text. The e-sign process transforms a Word document to PDF. From there you can insert text and signature fields to complete. When the deal is finalized, it's automatically stored in your firm's case documents.

A user can create documents on their PC in the word processing software of their choice. When they upload it to MyCase, it becomes part of the case record. Open the document to edit, and changes are saved to the cloud with version support. MyCase is currently developing a MyCase Drive that synchronizes desktop documents with cloud-based storage, similar to Microsoft OneDrive and Google Drive (GDriveFS). *See Figure 1 on the previous page*.

Time and Billing

Time tracked on your computer and mobile apps accrues to the time and billing section of the appropriate case to await invoicing. MyCase stores trust and credit balances, time records waiting to be invoiced, expenses, and invoices, and handles payment plans, discounts, and interest charges for late fees.

MyCase supports batch invoicing and the application of trust funds and credit card payments. MyCase Payments supports automated check handling (ACH) and credit card processing. Although there is no extra charge for ACH, there is a processing fee for credit card transactions. *See Figure 2*.

Reporting

Select from many standard reports to detail firm financials, productivity, contacts, and lead information. Financial statements include aged invoices, accounts receivable, fee allocations, case revenue, trust accounts, and electronic payments with credit card fees and payouts. Contact reports display case lists and the applicable statute of limitations. Lead information

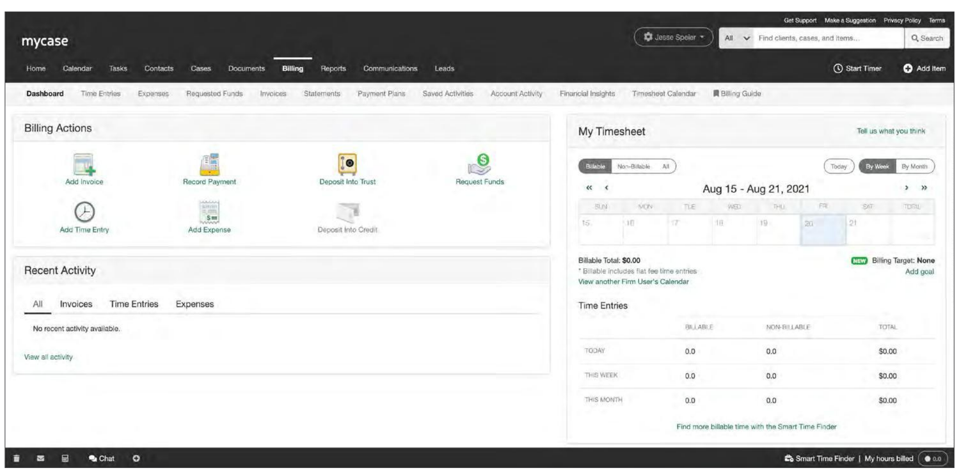

Figure 2: MyCase's time and billing page allows law firms control of their financial health.

> **"MyCase's document automation works throughout the entire case lifecycle, from lead generation to signing clients to closing cases. Create unlimited templates with merged data fields from MyCase to draft client retainers, memoranda, and court documents."**

> **"MyCase stores trust and credit balances, time records waiting to be invoiced, expenses, and invoices, and handles payment plans, discounts, and interest charges for late fees."**

shows their forecasted pipeline value, referral sources, and revenue from consultations.

MyCase is developing custom reporting, which takes standard reports and applies filters for date ranges, client, case, lead attorney, and more. For example, customize a new contact report by selecting columnar data for address and birthdate, and filter them by contact type (lead, client). Export reports to PDF or CSV, save any results to rerun on-demand and refresh the data with just one click. *See Figure 3*.

Integration
MyCase also integrates with software tools used by many law firms. MyCase synchronizes data with Google and Microsoft 365 calendars and integrates with Intuit QuickBooks online, CalendarRules, Mailchimp, DropBox, and Smith.ai. Later this year, the company will add integrations with Zoom to schedule online meetings and LEX Reception for legal call reception and messaging.

Pricing
All features, including lead management, billing, and MyCase Payments, are available for one low price of $49 per user per month billed annually or $59 per user per month billed monthly.

Who is MyCase?
Founded in 2010, California-based MyCase offers small and midsize law firms integrated law practice management software as a service. The company's all-in-one LPM feature set aims to help law firms become more efficient and productive as well as improve the client experience. Led by Chief Executive Officer Jim McGinnis, along with Apax Partners, MyCase continues to grow, innovate its software, and increase its integrations with other legal product offerings. It recently acquired Soluno, a cloud-based accounting system, CASEpeer, law practice management software for personal injury practices, and Woodpecker, Microsoft Word-based legal document automation software. The company has a dedicated development team in San Diego with marketing, sales, and support teams in Santa Barbara.

Why Buy MyCase?
- Anyone in the law firm can find value in MyCase's intuitive interface and easy-to-learn features.
- MyCase keeps all vital case information in a single, organized, cloud-based location, accessible 24x7 from anywhere, anytime, via web and mobile apps.
- The all-in-one legal practice management software manages the entire lifecycle of cases for a predictable monthly subscription—no long-term commitment required.
- MyCase meets customer demands with organic growth, targeted integrations, and strategic acquisitions.

Try MyCase Today!
Start your free MyCase trial today.

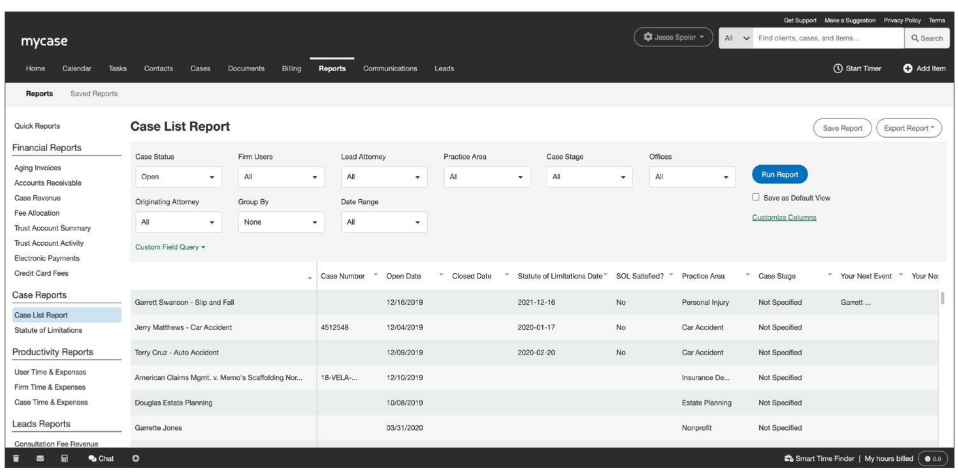

Figure 3: MyCase's standard and customized reporting tools chart paths for law firm productivity and prosperity.

Document Management Systems

iManage

Comprehensive Document and Email Management Enhanced with AI, Security, and Governance

netdocuments

Make Your Law Firm More Productive by Working in (and Never Leaving) NetDocuments

VIQ

VIQ Delivers Technology to Collect, Manage, and Collaborate on Case Intelligence

iManage

Comprehensive Document and Email Management Enhanced with AI, Security, and Governance

> "Legal professionals spend a considerable amount of time in Microsoft Outlook where all the functionality of iManage Work 10 is conveniently available."

Company Name Brand
iManage

Product Name Brands
iManage Work 10, iManage Share, iManage Threat Manager, iManage Contract Intelligence

Latest Developments and Updates
- Access iManage Work 10 for documents and email from Microsoft Teams while maintaining DMS security and version control.
- Add links to iManage documents directly into Microsoft Teams* conversations.
- Protect important legal documents from external and internal threats with iManage Threat Manager.

A Comprehensive Document Solution
Law firms and corporate legal departments require more than a basic folder structure to store documents. They need a comprehensive *information* lifecycle management solution that covers all electronic files and records from inception to disposal. In addition to knowing how to find and search information troves, they need the ability to securely share and collaborate on files with outside users, automate routine workflows, and most importantly, govern and track sensitive corporate work product.

iManage Work 10 is an intuitive cloud-based document and email management system that integrates with iManage Share to securely manage information assets.

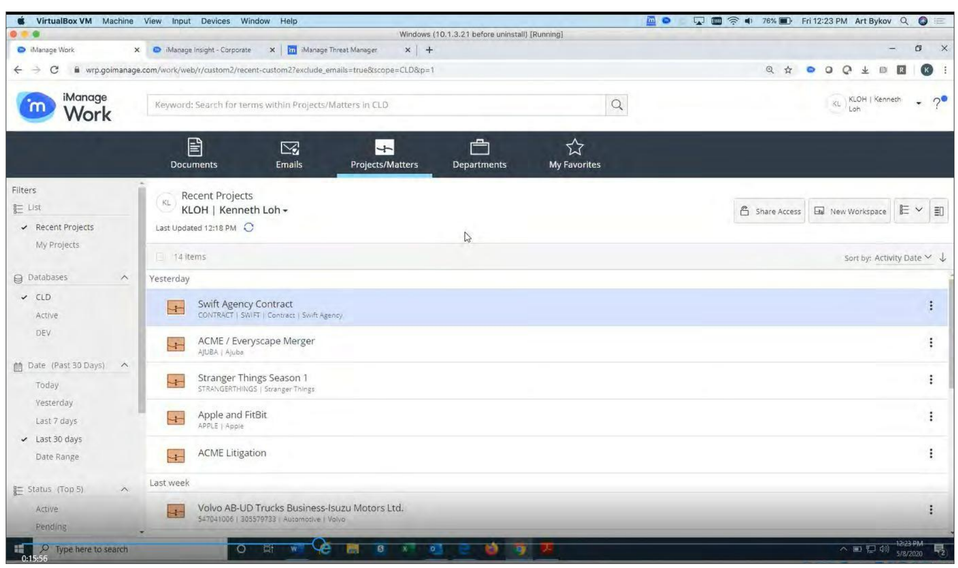

Figure 1: The web-based iManage Work 10 interface offers a list view and a classic grid view for people to pick and choose columns to display. Across the top, various dashboards can be selected to view Documents, Emails, Projects/Matters, Departments, or Favorites. The left panel indicates the available databases or libraries.

* iManage integration with Microsoft Teams is available exclusively to customers on the latest version of iManage Cloud on Azure.

> iManage provides two search options, Personalized and All. The results of a personalized search lists files that you have a prior relationship with.”

The iManage Cloud architecture also supports a suite of security, risk, and governance applications such as the iManage Threat Manager that offers continuous protection of sensitive data from internal and external threats.

Because it’s browser-based, everything is available in iManage Work 10 from multiple platforms including Microsoft Windows, macOS, iOS, and Android. Users are not hampered by the device they choose to use to get their work done.

Managing Your Matters
Since most legal teams work from the concept of a “matter” or a “project,” iManage Work 10 delivers a clean, intuitive, browser-based user interface (UI) to support that workflow structure. *See Figure 1 on the previous page*.

Matters contain folders, subfolders, and shared folders (blue, with a people icon) for external collaboration. Each folder has a default document profile that automatically tags filed documents and inherits characteristics from parent folders to facilitate search and maintain security requirements.

iManage Work 10 can easily integrate with matter, practice, and contract management systems to create matching folders. Configurable project and matter templates can generate consistent matter views and set security and sharing parameters. When users utilize default folder structures and templates, work product becomes easily accessible from within any matter because the storage policies are consistent across the platform.

You Work in Outlook? No Problem!
Legal professionals spend a considerable amount of time in Microsoft Outlook where all the functionality of iManage Work 10 is conveniently available.

Most users set up an extensive array of Outlook folders to store and organize the multitude of messages they send and receive every day, but those folders can’t be accessed or searched by other team members. When you need to file a message and attachment to the iManage platform so that it’s accessible to others, you simply link an Outlook folder to iManage. Then any message you put in that folder can be searched and previewed by others on the team. The iManage Work 10 panel in Outlook can be undocked so you can drag it to a second monitor.

iManage also offers a predictive filing agent that sits atop Outlook. When you select an email, the prediction engine recommends an iManage folder based on your previous filing decisions for similar messages.

Once an email message is filed into an iManage folder, the system displays a green check next to that email in every user’s inbox, so they don’t waste time trying to file duplicate emails. That is all designed to save busy professionals time and mouse clicks, which is one reason iManage is so widely used among legal departments and law firms.

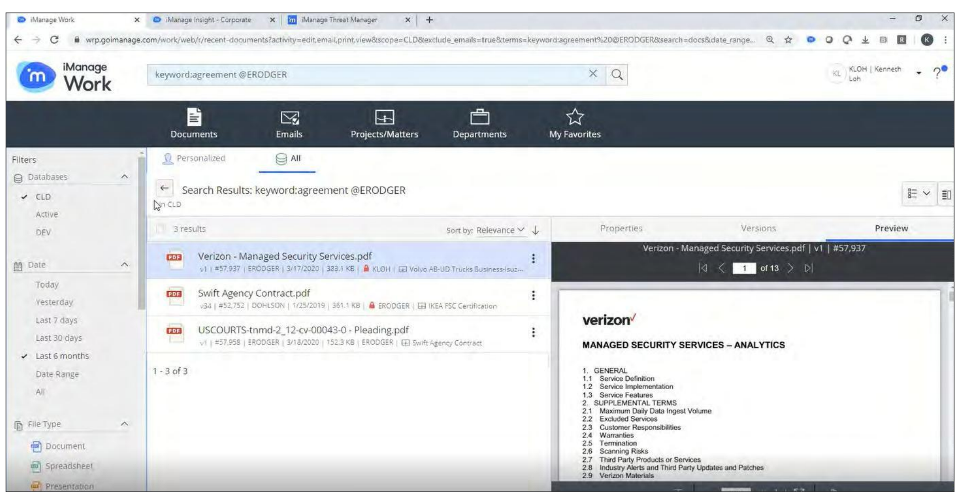

Figure 2: The iManage Work 10 search interface does not require a complex query to find content. Type in keywords and use the available filters in the left panel to narrow results and preview documents or email messages. The same search functionality is available in the Outlook panel.

> "iManage Share allows you to create shared folders in order to easily collaborate on documents with the finance department, human resources, or even outside counsel to assure those files are following your organization's data governance and security policies."

File > Save
If you've created a new document in Microsoft Word, you can save it directly into iManage with the File > Save command. Instead of tortuously and manually navigating multiple levels of folders and subfolders, the iManage dialog box allows you to profile a document with pertinent information such as the relevant matter, version number, etc.

Searching the Single Source of Truth
Search becomes most valuable when all of a company's documents and emails are in a central location—a single source of truth. If you've searched Amazon or Google, you'll be familiar with the general layout of the search window in iManage Work 10. PDF images stored in iManage are automatically scanned with optical character recognition (OCR) technology to search the full text.

iManage's search window is rooted in the context of the Work 10 dashboard and folder structure. Where you are in the system is where you search. Search parameters support full Boolean logic and proximity searching. The system provides two search options, Personalized and All. The results of a personalized search lists files that you have a prior relationship with such as matters and files you reviewed or edited in the past.

To expand a search, switch to the All list to narrow the results with filters in the left panel. Various filters are available depending on the files you're viewing. For example, for documents, you can choose to see "all latest files," "last 7 days," etc. Or for email, you'll see filters such as "top senders." *See Figure 2 on the previous page*.

Share and Share Alike
Due to the sensitive and often confidential information handled by legal professionals, not all iManage users need access to all matters. But you can securely share documents, even with third parties, using iManage Share which is included with iManage Work in most Work bundles. That allows you to create shared folders in order to easily collaborate on documents with the finance department, human resources, or even outside counsel to assure those files are following your organization's data governance and security policies.

iManage Share folders are created with a single mouse click and appear as blue folders inside existing iManage Work 10 projects. Publishing content to those branded cloud folders is a simple drag-and-drop action.

When you attempt to attach a large file to a message in Outlook, iManage Share will suggest sending a secure sharing link instead to reduce the load on your email infrastructure. Your recipient receives a URL they can click to view the secured document. Using the shared link is safer than sending the file as an email attachment because iManage Share is auditable, trackable, and secure. *See Figure 3*.

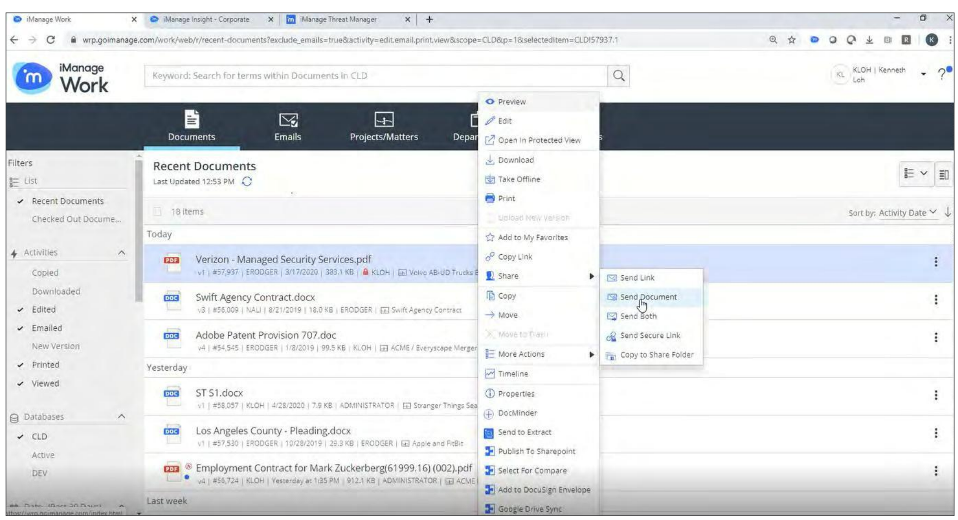

Figure 3: In iManage Work 10, right-click on a document to email the file or share it using a link. To secure content, administrators can disable right-click functions in order to force users to share a link instead of sending an insecure attachment.

Who is Posing a Threat?
More and more today, legal professionals are getting pulled into discussions about cyber risk. Modern security threats come increasingly from hackers impersonating employees after stealing their login credentials. That's one reason every document stored in iManage has a history timeline from creation to disposition which supports the necessary security audits.

Anytime someone edits, views, or prints a document, that activity is recorded and added to the history. iManage Threat Manager uses those document histories to build a digital fingerprint of each user and it can use that to help proactively identify active threats or even internal bad actors. It knows, for example, when someone is downloading an unusual volume of content. It also knows when someone who works in IP or Litigation is suddenly looking at content in M&A that is outside the normal behavior for that user. In that way, information stored in iManage becomes some of the best-protected information in the enterprise.

Contract Intelligence
The iManage platform uses artificial intelligence (AI) technology. In addition to search, **Contract Intelligence** is a document classification and extraction engine that uses AI and machine learning to automatically find, classify, and obtain information from large unstructured data sets. For legal departments, Contract Intelligence informs legal professionals of the company obligations and privileges contained in agreements.

Pricing
iManage offers tailored solution packages to meet the specific needs of customers. The core Work and Share products are packaged with additional security products in Essentials, Professional, and Enterprise editions. iManage solutions are sold in a Software-as-a-Service (SaaS) subscription pricing model.

Who is iManage?
Founded in 1995, iManage delivers cloud-based services spanning document and email management, contract intelligence, records management, governance, and security for leading law firms and corporate law departments worldwide. After several mergers and acquisitions, in 2015 the iManage leadership executed a management buyout from HP and the company settled into its headquarters in Chicago, Illinois with approximately 150 employees. Today, iManage has grown to over 800 employees who support more than 2,500 of the largest law firms and more than 1,500 corporate enterprise and legal customers including more than thirty-seven percent of Fortune 100 organizations and seventy-eight percent of Global 100 Law Firms.

Why Should You Consider iManage?
- Manage content and email communications to improve business processes such as contracts and claims in cloud-based matter files.
- Work efficiently outside the business unit with online collaborative workspaces to share content with corporate departments, outside counsel, and legal service providers.
- Apply information governance and security to critical work product without burdening busy legal professionals.
- Use AI-powered search to find previous work products, locate expertise, and gain insight into stored documents and email.

Contact iManage Today!
It's essential to evaluate the capabilities and functionality offered by document management vendors and ensure they align with your legal professionals' specific requirements. Read through these 15-question checklists for evaluating a DMS to help you understand what to look for.
Corporate Legal Departments
Law Firms

netdocuments®

Make Your Law Firm More Productive by Working in (and Never Leaving) NetDocuments

"Users can share documents, email messages, and other files within and outside the organization by either emailing a file to others, sending a secure link to access a file, or setting up a secure workspace or CollabSpace."

Company Name Brand
NetDocuments

Product Name Brand(s)
ChatLink, CollabSpaces, ndSync, ndThread, NetDocuments, NetKnowledge, SetBuilder, Tasks, Highlights

Latest Developments and Updates
- Embedded DocuSign eSignature integration makes sending documents out for signatures easy.
- Built-in optical character recognition (OCR) automatically identifies and renders searchable image-based PDFs.
- Highlights, powered by LexisNexis, extracts citation and entity insights from documents and directly links to research content within LexisNexis.
- Workspace Security Manager simplifies adding security policies, ethical walls, and "need to know" security for matters and workspaces.
- DLP applies data loss prevention (DLP) policies automatically and maps them to Microsoft 365.
- An end-user dashboard displays all user and matter-related activities.
- An analytics package shows NetDocuments' response times, bandwidth availability, geolocation of data requests, and more.

Roadmap
- Task management integration with Microsoft 365 and Outlook calendars.
- ChatLink enhancement to send files in Teams to matter workspaces.
- DLP automation and expansion to stored content.

A Document-Centric Workflow
To maintain the highest efficiency and productivity on client matters, law firms and corporate legal departments should work in a legal-specific document management system (DMS). NetDocuments provides a best-in-class, cloud-native, matter-centric DMS to accomplish complete workflow tasks without ever leaving the platform.

With the NetDocuments DMS, you get a single system of record for your client matters. It is the one place to work on anything related to a matter, including collaboration, sharing, and creating content in CollabSpaces, Threads, and even Microsoft Teams.

> "SetBuilder collects and organizes documents of various file formats and email messages into a zipped file or a single consolidated PDF, complete with a cover page, hyperlinked table of contents, and bookmarks for sharing and collaborating."

The matter workspace centralizes document and email storage and supports custom document views. Users can filter and view their documents and emails in a matter. *See Figure 1*.

A new interactive dashboard allows users to track and analyze DMS activity. Access the dashboard from the spyglass icon in the matter workspace to see a calendar heat map display of all user activity in the DMS and drill down into daily action for greater detail. Apply filters for date ranges and users to identify when top contributors and external contacts interact with matter content.

NetDocuments has seamlessly integrated DocuSign eSignature into its cloud-based platform, making it easy to get a signature with a right-click. The system prompts you to log in to DocuSign and add signers and signature lines in a new browser tab. Then you can email the agreement to third parties and return to NetDocuments, where you can track the signature process. When the record is signed and returned, it is automatically filed in the matter as a new document version.

File Sharing and CollabSpaces with Data Loss Prevention

Users can share documents, email messages, and other files within and outside the organization by either emailing a file to others, sending a secure link to access a file, or setting up a secure workspace or CollabSpace. Users can also drag and drop folders and files into CollabSpaces to share. A firm can prevent file sharing by applying data loss prevention policies to content and data classifications.

A matter workspace can support multiple CollabSpaces as subsets of the matter. Shared content is not replicated but stays in one place, making governance straightforward. Access rights remain consistent with the organization's compliance requirements, and the system tracks and logs all file access and changes. Access controls work as ethical walls, limiting user access to content and matter workspaces.

Using select DLP rules, firms prevent users from attaching DMS content to an email or adding it to a CollabSpace. DLP can prohibit users from modifying, copying, or printing files stored in the DMS. The rules can also prohibit syncing documents with ndSync, which provides local access to the DMS, and can stop users from delivering secure links to documents.

Set secure links to a specific document version or the default version, allowing access to the latest edition. Right-click on a file to create a secure link. The file remains in the matter workspace, where you can set an expiry date and password to access it via web browser and choose to let users view or download it.

CollabSpaces further provides the ability to set up secure client portals, customized deal rooms, and extranets. 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

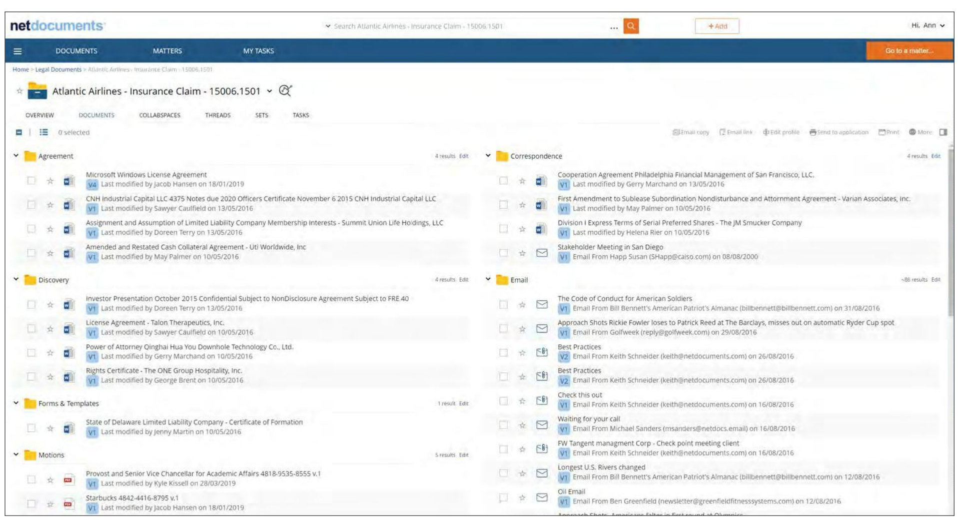

Figure 1: NetDocuments organizes its matter workspace interface in tabs: Documents, Threads, Sets, Tasks, and CollabSpaces, and displays user and matter activity tracking from the spyglass icon atop a matter.

> "NetDocuments brings matter workspaces to Microsoft Teams, where you can access and manage DMS content without restriction. NetDocuments' ChatLink sends channel posts in Microsoft Teams to ndThread in a corresponding matter workspace."

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. If you allow external users or clients to upload content, they don't need to follow an ingestion process to get documents into a matter for review. Just set up a CollabSpace, set alerts when clients add content, and never leave the DMS.

ndThread Enhances Communication
Most organizations use email to communicate about a matter. However, email can be inefficient, time-consuming, and often 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*.

In a Threads tab, users create posts and receive activity notifications and "@" mentions, like modern social media and communication 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.

Threads become part of a matter's history, making it easy for legal teams to review and remain current with the matter, related documents, and activity that comes via assigned tasks.

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

Build Document Sets and Binders
Legal professionals often create documents from multiple files in tedious and time-consuming processes. Whether they work in M&A, real estate, or criminal law, lawyers and staff make deal bibles, closing binders, trial exhibits, witness packages, electronic court filing packages, and more. SetBuilder collects and organizes documents of various file formats and email messages into a zipped file or a single consolidated PDF, complete with a cover page, hyperlinked table of contents, and bookmarks for sharing and collaborating.

To build a binder, drag and drop files from the DMS, email, local storage, or other location to create a set that presents the files in numerical order. Files dragged to the collection that are not in the DMS get copied to a matter's documents. You can create placeholders for new files and link documents from the DMS to binders. Binders generated with linked documents use the latest versions in the DMS. Otherwise, binders include the version copied to the binder. Preview snapshots of what a PDF binder will look like, and, to avoid starting a new project from scratch, you can clone and modify existing binders.

Task Master
To simplify and enhance your workflows, you don't 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 links to documents from the DMS without making a copy. Review assigned tasks, comments, status, and details, such as due

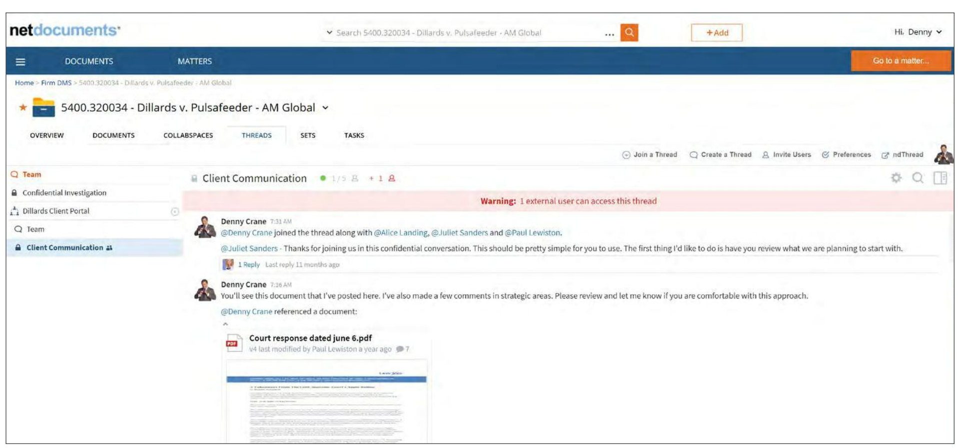

Figure 2: NetDocuments includes an ndThread tab labeled "Threads" in each matter workspace, enabling users to communicate in threads or channels about topics related to a case and link to content in the DMS.

dates and checklists, in list views or 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. Soon, tasks created in NetDocuments will sync with Microsoft 365 and Outlook.

Matter Workspaces in Microsoft Teams and Other Integrations
NetDocuments brings matter workspaces to Microsoft Teams, where you can access and manage DMS content without restriction. NetDocuments' ChatLink sends channel posts in Microsoft Teams to ndThread in a corresponding matter workspace. If a Team is deleted or removed, the communications record remains intact in NetDocuments. Capabilities will soon extend to OneDrive and SharePoint.

A browser plug-in lets you connect websites to NetDocuments to download and upload content directly to and from the DMS, without first downloading files from the DMS to the desktop and then uploading them to a website. The plug-in can also convert documents to PDF format to e-file them with courts. The PDF becomes a new document version, capturing the e-file record.

Firms and legal departments can choose from more than 150 apps in NetDocuments' App Directory. PacerPro integrates with NetDocuments to store and track federal filings in their respective workspaces with custom document profiles using PACER metadata. This also includes the ability to search PACER data, such as for people and case names.

With the newly released NetDocmuents Highlights, powered by LexisNexis, you can conduct searches of metadata, such as attorneys, companies, judges, and case citations within NetDocuments and also use the extracted entity data in Bing, Google, LinkedIn, and LexisNexis searches. Highlights will require an additional subscription, but with it, case signals are automatically pulled from the Shepard's Citation Service and directly linked to the LexisNexis case information. At a glance, you can see whether cases cited in your documents still stand or not.

Besides integrated apps, NetDocuments provides partnerships with leading technology providers like BA Insight. With BA Insight, NetDocuments uses NetKnowledge to connect the DMS with other data repositories, such as file servers and SharePoint. NetKnowledge provides an intelligent federated search experience to find and ingest related content into workspaces.

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 a cloud-native platform where legal professionals do work. More than 3,500 worldwide customers, law firms, corporate legal departments, wealth management firms, and government agencies utilize the cloud-first, cloud-only content management platform to secure, organize, and collaborate on everything that matters to you. The company hired 150 new team members in 2021 and has more than 20 years of experience providing cloud-based content services compliant with more than 38 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?
- Never leave the DMS to manage matters and documents with NetDocuments collaboration and content creation tools.
- Use ndThread 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.
- Improve legal research and knowledge management workflows with Highlights, powered by LexisNexis.

Contact NetDocuments Today!
You never have to leave the NetDocuments DMS to manage matters, tasks, related documents, and email. That's work inspired and fully enabled. **Request a consultation today** to learn more about solutions to ORGANIZE, PLAN, PROTECT, DELIVER, and LEARN.

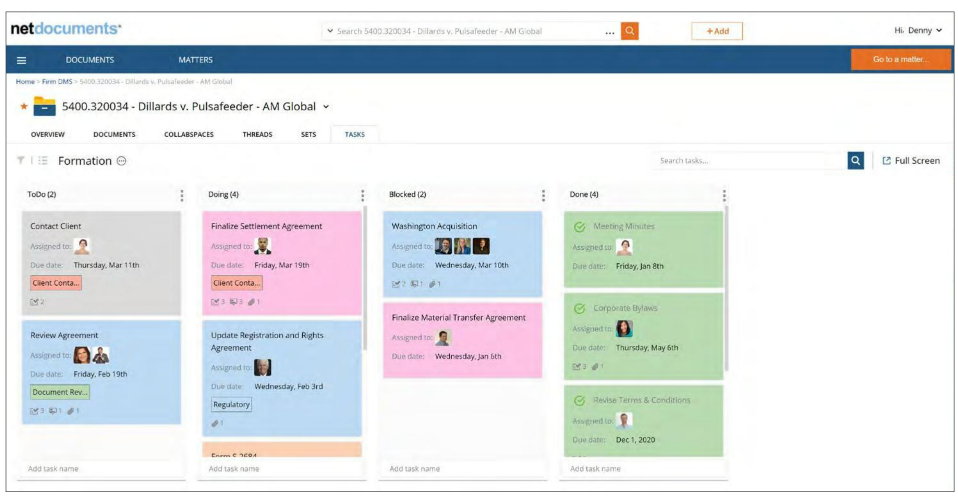

Figure 3: Tasks in NetDocuments can display in the message format, task lists, or Kanban-style boards to quickly review status and track progress.

Key Focuses for 2022: Efficiency, Productivity, Data-Driven Insights & Security

By: Jill Schornack, Vice President of Product, NetDocuments

Jill Schornack is the Vice President of Product at NetDocuments and is instrumental in defining the vision for the organization's portfolio of products, creating product development roadmaps, managing the launch of new solutions, and exploring opportunities to further align, integrate, and grow the portfolio. Her greatest influence on the legal technology space has been providing accessibility to innovation by applying technological advancements to power solutions that enable legal professionals to do their best work. Jill spent 17 years with Thomson Reuters, where she guided law firms and corporate legal departments through many evolutions of technology.

Legal technology teams are continually challenged to adapt to change, do more with less, and improve the ways in which you enable your firm's lawyers and staff to deliver exceptional value to clients. With many firms still supporting hybrid work environments (and many embracing it as the way of the future), an obvious emerging trend this past year has been the rapid adoption of cloud technologies. In ILTA's 2021 Technology Survey, it reported that 41% of firms have a "Cloud with every upgrade" philosophy, and 49% have already adopted or plan in the next 12 months to adopt a cloud document management system (DMS) – that's an increase of over 30% since last year!

With many firms leaving cloud-averse behind and instead thriving with a cloud-first approach, the question becomes "what next?" Law firms must focus on implementing platforms that improve efficiency, elevating efficiency into increased productivity, gaining a competitive advantage through data-driven insights, and moving beyond cyber security to cyber resiliency.

How Platforms Improve Efficiency

Not all cloud technology is created equally. Many law firms are exploring the efficiency gains they can achieve by investing in a "platform" approach using cloud-native solutions. Instead of purchasing software adapted from on-premises technology, savvy tech buyers are focusing on solutions born in the cloud that offer benefits from what we call "platformization." Not exactly sure what that is? The criteria for true platformization include:

- **100% Native:** Think about a cloud platform that has robust core technologies and hosts many solutions or applications. Platformization requires that all solutions or applications from a single vendor be 100% native to the platform's technologies, sharing common storage, a common search engine, common security and authentications, and a common user experience, among other commonalities. A true platform will also incorporate extensibility that allows for easy integrations with other products you use daily, providing native access to that same storage, security, etc.
- **One Service in the Cloud:** Organizations are realizing the benefits of the cloud from vendors that provide the experience of a single service running in the cloud. At NetDocuments, we refer to this as platformization. While the service can be segregated, for example into multiple geographies for geo-ware content storage for compliance reasons, or to take advantage of cloud micro-services that are wrapped into the single secure service, the single service and single cloud ensures that any digital asset can be transparently retrieved by any authorized user anywhere in the world. Users no longer need to know where their document is physically located rather the platform presents it as an available resource to them and other authorized users. In addition, the single service means that all clients are working from the same version of the software, and updates happen at the same time. There is no need for a separate compatibility matrix or individual version control.

Apps and integrations can certainly extend the capabilities of a platform, but **applications that operate on the same platform create a seamless user experience that takes less setup and produces faster outcomes**. Salesforce is the ultimate proof point of platformization, and there's no reason this cannot be replicated in the legal space.

Want to get started?

- Create a list of all the systems and applications you currently use for

information management and what functions each system supports.
- Identify all the capabilities you need to manage your workflows optimally. These might include document and email management, optical character recognition, data loss prevention, real-time messaging, task management, secure external sharing, electronic signature, and collaborative capabilities, for example.
- Look for a content management platform with the capabilities you identified that can replace as many of the separate systems and applications as possible you are currently running independently.

From Efficiency to Productivity
In addition to pushing people to the cloud, the new hybrid work environment has challenged organizations to establish new ways of working. Over the last two years, there has been a significant shift to adopting Microsoft Teams and other online communication and messaging software. In fact, the ILTA 2021 Technology Survey shows an increase from 20% of respondents using Microsoft Teams in 2019 to 61% adopting Teams in 2021.

These news ways of working challenge software vendors to create solutions that meet the users where they work. Instead of creating separate lines of communication, organizations are looking for **seamless integrations** with the software they use every day. Productivity tools must work seamlessly with existing Office and email applications while still increasing the efficiency or output of the team.

This universal integration requirement extends to the accessibility of documents from any location, on any device. Gone are the days of accessing work product from a single desktop machine. Documents are edited on iPads or presented from their laptops. Lawyers want to easily send secure document links from their mobile devices while offline at a family function. Vendors must create flexible solutions that provide anywhere, anytime, any device access to these valuable resources.

The final productivity trend we're seeing within the legal technology space is a push for automated workflows. Legal teams want to automate repetitive tasks. From automated document creation to end-to-end approval workflows or document assembly, there is a wide range of use cases and scenarios where technology vendors can improve the lives of our legal teams through flexible, no-code/low-code solutions.

Want to get started?
- Create an inventory of the common applications in use across your organization, standard Office applications (Microsoft 365 or G-Suite), communication tools (Teams, Slack, etc.), and collaboration software (Word Online, SharePoint).
- Identify the various devices and remote access required by your lawyers and staff.
- Develop a list of key tasks and workflows that could be automated to increase productivity or the efficiency of your teams. This will help you identify the right type of solution for your organization.
- Look for technology that seamlessly integrates with the existing tools your team uses every day, provides remote accessibility, and is available across each type of device your team uses.

Tapping into Data-Driven Insights
According to ILTA's 2021 Technology Survey, 57% of law firms are not currently pursuing artificial intelligence (AI) and machine learning (ML) options. And while only a few have experienced the big gains promised by AI and ML, **most firms have identified that their DMS is a treasure trove of data**. Now is the time to tap into the power of AI and ML to **leverage document intelligence** and predictive insights to assist users in making smarter, better, faster decisions.

AI and ML are driving data analytics through predictive modeling, entity extraction, and natural language processing to predict future outcomes and identify potential solutions. Teams need to have the ability to quickly find the documents, data, and insights they need when they need them. Embedded analytics will bring relevant answers directly to users in their working environments.

Law firms are also looking for AI and ML to automate and accelerate the workflows at the heart of their business processes – project management, communication, knowledge management, and collaboration.

With data-driven insights come a competitive advantage. AI and ML take data-driven decision-making to the next level.

Want to get started?
- Ensure you have the architecture in place to support data-driven insights. That means a single platform with visibility across behaviors, actions, and workflows.
- Determine which insights and metrics are key to your business's success and identify the information that should be provided proactively through automation.
- Clean up your existing data, so you're feeding high-quality data into the system and providing the user experience that allows for incorporating new actions into daily workflows.

Beyond Cyber Security to Resiliency
The quick switch to working from home forced many teams to make adjustments on the fly… often while inadvertently exposing the organization to additional security risks. In fact, ILTA's Technology Survey noted "Malware, Virus, and 0-Day threats" reached 25% in 2021, up from 12% reported in 2020. This increase is noteworthy, and it will be interesting to see if threats continue to increase in numbers as malicious actors try to take advantage of remote working environments and technologies, which seemingly make for an easier target than when lawyers and staff were all in the office.

Now that we know, the question isn't *if* your firm will face an attack, but rather *when*, so **firms need to be prepared to recover mission-critical operations *after* an attack**. Capabilities such as rolling back to before an attack took place should be embedded into all of your business-critical technologies.

Want to get started?
- Evaluate how prepared your organization is to counter disruptions of all types, but specifically those related to cyberattacks.
- Consider how quickly you could recover mission-critical functions after an attack.
- Identify what you need in order to recover more quickly.
- Test those solutions regularly to ensure they function the way you anticipate them.

About NetDocuments
NetDocuments is the world's #1 trusted cloud platform where legal professionals do work. Backed by 20+ years of experience in cloud innovation, more than 3,500 law firms, legal teams, and government agencies use the NetDocuments content management solution to secure, organize, and collaborate on everything that matters. Connect with us to learn why 41,000+ professionals switched from our top competitor to NetDocuments in 2021.

VIQ Delivers Technology to Collect, Manage, and Collaborate on Case Intelligence

> “NetScribe, a web-based application, provides access to single and multi-channel audio recordings as well as comprehensive transcription and formatting. A user can capture live court transcripts via stenographer integration to review, format, and edit court hearings.”

Company Name Brand
VIQ Solutions

Product Name Brand (s)
NetScribe™, Lexel, FirstDraft™, CapturePro™, CapturePro™ Mobile (previously MobileMic Pro™), aiAssist™

Latest Developments and Updates

- New Lexel Integration with teleconferencing solutions Zoom, Teams, GoToMeeting, and Email and Calendar.
- Lexel Android/iOS app versions.
- CapturePro Mobile (to be released Q2 2022) will bring the ability to capture audio/video recordings, submit for transcription, and securely edit and share the evidence conveniently within an Android/iOS app.
- NetScribe channel isolation and volume control (available now); real-time editing of web conference calls (coming in June).

Managing Evidentiary Information – Audio, Video, and Transcripts
VIQ provides a powerful toolset for secure and simplified access to accurate records as well as managing evidentiary information for a case, including an easy and efficient way to receive and manage large volumes of audio and video. NetScribe provides access to audio and video transcription services and capabilities, while Lexel gives users a platform to manage all information in a case.

NetScribe, a web-based application, provides access to single and multi-channel audio recordings as well as comprehensive transcription and formatting. A user can capture live court transcripts via CapturePro integration to review, format, and edit court hearings. NetScribe can ingest audio from a segmented format or large audio files. Files are stored in

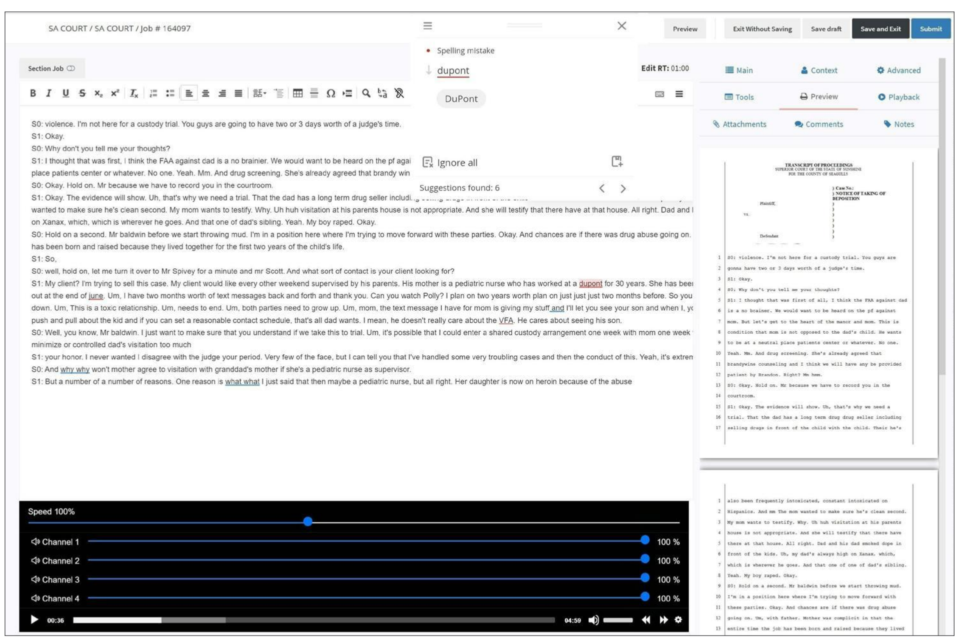

Figure 1: NetScribe is a robust transcription workflow platform utilizing aiAssist functionality to help simplify meeting and case hearing transcription. Editors can isolate a single communication channel to better understand what is being said and by whom.

> While reviewing a transcript, users can listen to audio, make annotations, highlight words or paragraphs, and make notes and tags designated as public or private. Users can add facts, tasks, or even send messages to the team or an individual user, enabling efficient collaboration.”

> Each organization can customize its Lexel environment and integrate with other applications like Relativity, Case CATalyst, Microsoft 365, or Dropbox for cloud document storage, or work with VIQ for custom integrations.”

segments enabling multiple transcribers to work on the same project.

Transcripts are automatically generated in FirstDraft using speech recognition technology, aiAssist. VIQ can provide formatted, verbatim transcripts if a firm does not have in-house transcribers or editors.

Once a draft is received, an editor can use several intuitive, integrated tools to edit a transcript. There is a powerful spell checker that aids a user in correcting grammar and spelling in a document. A speaker feature allows an editor to identify multiple speakers once, and the system will automatically identify the speakers throughout the entire document.

One of the most significant features of NetScribe is its multi-channel audio capabilities. Editors can control the volume, isolate, and mute channels to distinguish between speakers. The result is a more comprehensive and accurate transcription. *See Figure 1 on the previous page*.

You can preview a document as it is married to a delivery template where formatting happens, like line spacing, numbers, and case headers, and see the text as one document. When the transcription is finalized, the system seamlessly reintegrates the segments into complete and accurate documents. You can access keyboard shortcuts or use a foot-pedal to manage the playback. Import Microsoft Word shortcut lists to help streamline and drive efficiency.

Lexel – Manage and Collaborate Securely
VIQ has partnered with Lexel, a cloud-based case management and collaboration tool providing users with a workspace to organize case documents and transcripts from meetings or hearings. A firm can manage access and control how users interact with the application through role-based permissions. Each organization can customize its Lexel environment and integrate with other applications like Relativity, Case CATalyst, Microsoft 365, or Dropbox for cloud document storage, or work with VIQ for custom integrations.

Team members have their own workspace or dashboard, called My Cases. A user can customize it by adding cases they are working on, represented by cards, and using drag and drop to organize them. Each card has the case name, number of documents, transcripts, and users, and identifies the current phase in the workflow, notifications, and messages. Customize workflow phase names and colors based on the EDRM stages, specific firm workflows, or other criteria. Users can generate a report of their cases, listed by the workflow phase. *See Figure 2*.

Transcript Management
The primary transcript screen shows the transcript in the center pane, a menu bar across the top with links to tasks, facts, messenger, search, and reports, and additional information in the right-side panel. While reviewing a transcript, users can listen to audio, make annotations, highlight words or paragraphs, and make notes and tags designated as public or private. Users can add facts, tasks, or even send messages to the team or an individual user, enabling efficient collaboration.

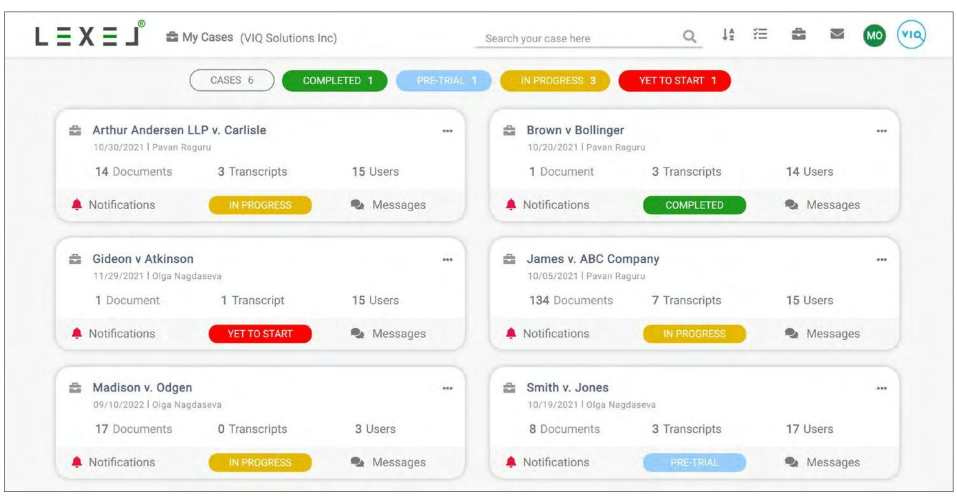

Figure 2: The Lexel Dashboard shows case cards, with each card showing the phase of litigation, number of users, transcripts, documents, and more. Click on the notifications or messages to access collaborative information.

Lexel enables users to import documents directly from their desktop or a cloud repository to their cases. Similar to transcripts, documents have markup features. They can be annotated, highlighted, tagged, and more, and users can implement color coding for tags and highlights. The system shows who made each annotation by initials or profile picture, so it is easy to see how your team interacts with the documents. Additionally, documents can be bundled together, providing benefits for meeting or deposition prep.

Additional Collaboration

Click on the Present Documents button from Lexel's left-side icons to access a presentation feature to share documents in a meeting or present evidence in a courtroom. A screen opens, indicating the users available in a case to select the document bundle you wish to share. Role-based permissions provide access to those invited to the meeting and allow them to interact with the document. *See Figure 3*.

Click on Tasks from the menu bar to see a sortable list of tasks for each case. Reports can be generated for markups done in the case. For example, create an annotation report for all documents in the case, filtered by tags and who created them. Similarly, generate reports for tags, notes, hyperlinks, and quick marks.

Security

VIQ Solutions has received the FBI-approved Criminal Justice Information System (CJIS) ACE Readiness Seal for its solution suite supporting onsite and remote workforces. The seal was awarded after completing a rigorous audit and evaluation. The audit reviewed systems, policies, and procedures and concluded VIQ Solutions demonstrated the required competencies in managing all aspects of the security policy.

Pricing

VIQ pricing varies by product and service. Both Lexel and FirstDraft have monthly user-based pricing, while NetScribe has a tiered enterprise model. VIQ will help find the best pricing for each client.

Who is VIQ?

VIQ Solutions is a global provider of secure, AI-driven, digital voice and video capture technology and transcription services. Founded in 2004, and headquartered in Mississauga, Ontario, VIQ offers a seamless and comprehensive solution suite that delivers intelligent automation, enhanced with human review, to drive change in the way content is captured, secured, and transformed into actionable information.

The AI technology and service platforms are implemented in the most rigid security environments to support the criminal justice, legal, insurance, government, corporate finance, media, and transcription service provider markets. Clients can improve the quality and accessibility of evidence, easily identify predictive insights, and achieve digital transformation faster and at a lower cost. Connect with VIQ on LinkedIn.

Why Buy VIQ Products?

- Secure: all data and information are secured while in transit and at rest, and the VIQ team is bound to strict confidentiality agreements and protocols.
- Intuitive: the online portals and user-friendly interfaces simplify information transfer, enabling users to remain in complete control of their content throughout the entire workflow.
- Trusted Partner: VIQ solutions has processed over 20 million minutes of recorded, multi-speaker, multi-channel audio and video, and transcribed 40 million pages of secure, industry-specific evidence documentation, creating accessible and actionable information.

Learn About VIQ Today!

Contact VIQ experts for more information or to schedule a demo!

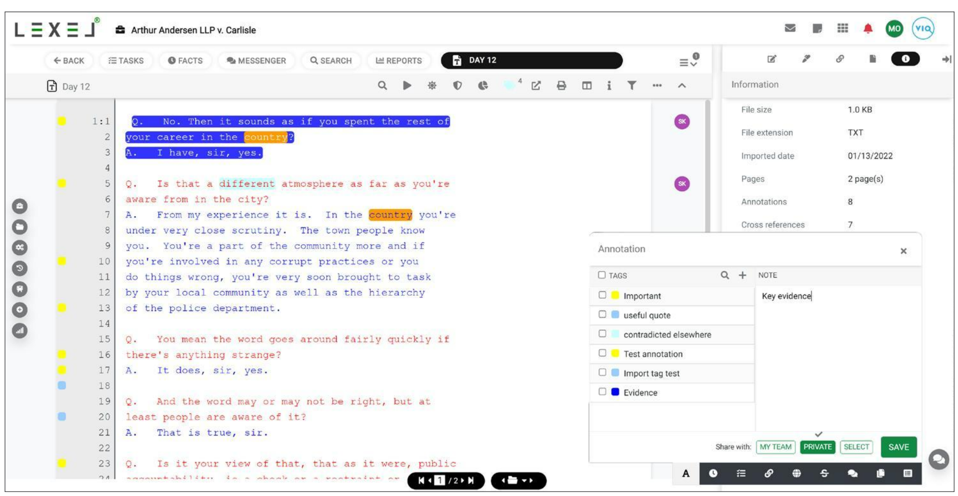

Figure 3: Transcripts and documents have similar markup features that include highlighting, annotating, tagging, and more.

Document Styling

DocStyle

Specialty Tools for Managing and Easily Applying Styles in Microsoft Word in Order to Control Text and Paragraph Formatting with an Added Bonus of Accurate PDF-to-Word Conversion

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> "DocStyle helps law firms and corporate legal departments to design and maintain proper document formatting using Microsoft Word."

Company Name Brand
DocStyle, LLC

Product Name Brands
DocStyle Ribbon, DocStyle Desktop

Latest Developments and Updates

- Style all body paragraphs in one click.
- Manage and apply custom style sets for automatic styling of documents using firm styles.
- Report and validate cross references in numbered paragraphs.
- Check for and review defined terms across multiple documents.

Documents Built with Style
Microsoft Word incorporates a tremendously efficient method for managing text formatting and layout using styles to establish the design options for document text and paragraphs. Unfortunately, many legal professionals never use them. Most risk ignoring Word's styles and instead choose to manually and laboriously reformat text line by line for tedious hours while consuming time that would be better spent on research and writing.

DocStyle helps law firms and corporate legal departments to design and maintain proper document formatting using Microsoft Word. Its software manages styles and numbering so legal professionals can focus on the content and let DocStyle do the logistical heavy lifting. The software also imports PDF text into Word docs and converts PDF files into properly formatted Word files at no extra charge.

To get started, you need Microsoft Word installed on a Windows 10 desktop but it can run on a virtual machine as well. DocStyle's productivity software runs best in the full-featured version of Office 2016 (32 or 64-bit) or later installed on a desktop.

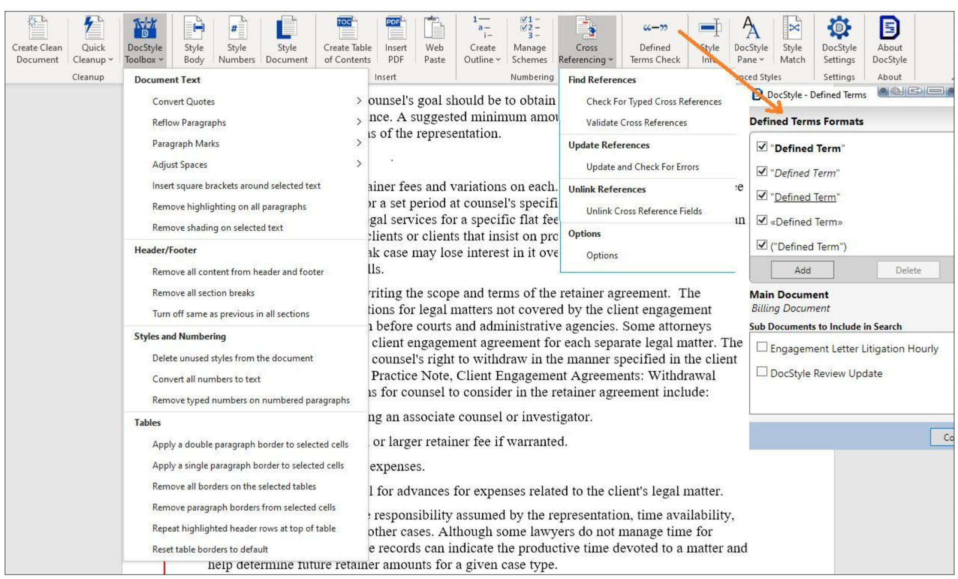

Figure 1: The DocStyle Ribbon in Microsoft Word includes all the tools you need in order to style your documents in one add-in without separate programs including the ability to validate cross references and analyze defined terms in one or more linked documents.

"When you apply the Create Clean Document function, DocStyle moves the text to a new document container and removes all styles."

While Word online lacks many features found in the desktop version, DocStyle is still an available option to format a document online. You can then use OneDrive, SharePoint, and Teams to share and collaborate on documents designed and shaped with DocStyle.

DocStyle comes in two parts: 1) the Ribbon; and 2) the Desktop App. The DocStyle Ribbon (version 2.2.3) installs as a Microsoft Word add-in and the Desktop App (version 2.0.4) is a stand-alone software application in Windows.

The DocStyle Ribbon

The DocStyle Ribbon in Microsoft Word makes all the tools you need available in order to clear text formatting and create document styles in one place. *See Figure 1 on the previous page*.

Although you can clear formatting in Word as you manually go through a document, you can click the Create Clean Document icon in the DocStyle Ribbon to create a brand-new clean copy, moving the text to a new document container and removing all styles. If you open an existing document that contains comments, revisions, headers, footers, hidden characters, and inconsistent numbering, the Create Clean Document box will allow you to remove blank paragraph marks, tab stops, comments, and any track changes so that you can start with a full, clean version of your document. *See Figure 2*.

Short of creating a squeaky-clean document, you can select Quick Cleanup from the ribbon to make global changes to fonts, paragraph justification, line spacing, and spacing before and after paragraphs. You can also analyze numbering to find inconsistent numbering or formatting and then convert all numbered paragraphs to text.

The Automatic Styles group lets you automatically style body and number paragraphs in an entire document. You can

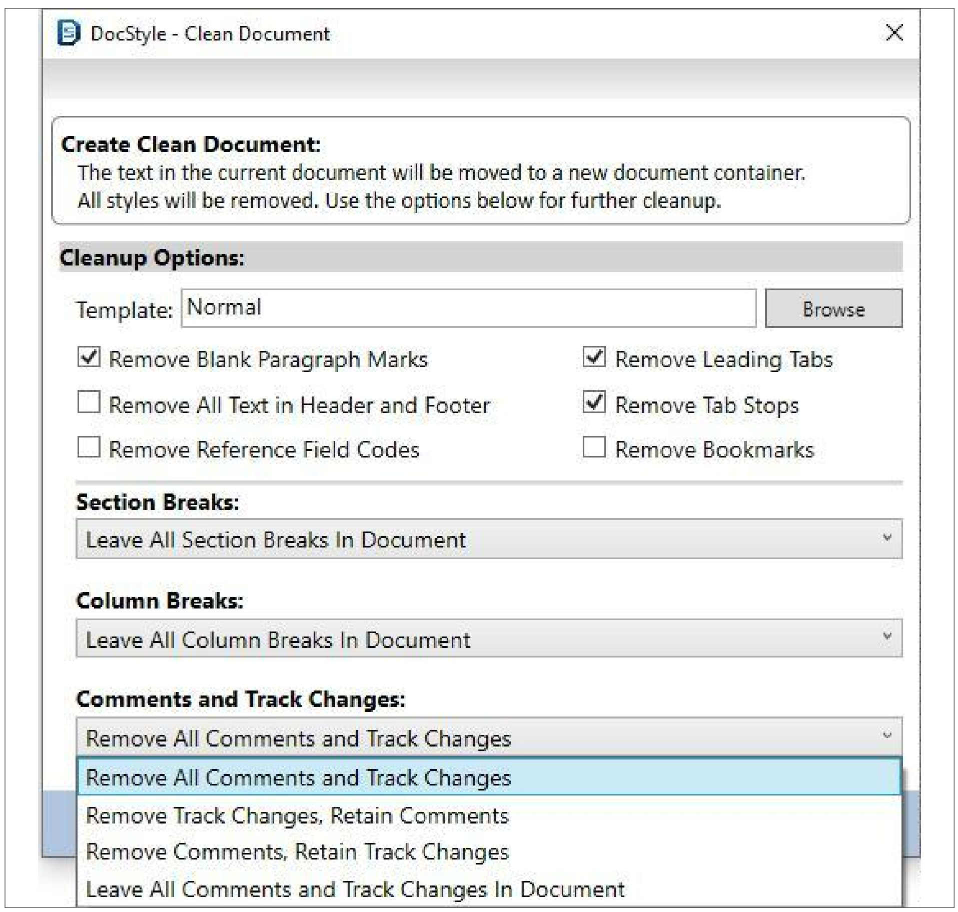

Figure 2: DocStyle's Create Clean Document function from the ribbon creates a new clean document when you need to start fresh with an existing Word document or one converted from a PDF file.

simply change the names before applying a style or update the style based on a previous layout such as your firm's standard template. With either option, DocStyle examines the document formatting and finds headings, levels, and lists (bullets and numbered) where the selected style needs to be applied. It can fully style a complete outline number scheme and consider manual numbering, footnotes, and tables of contents and then labels them accordingly to use the correct style. DocStyle automatically generates a table of contents from a field code and not static text or links.

DocStyle uses an intelligent formatting recognition engine to identify styles in documents and detects numerous parts to apply Word styles and custom formatting used at your firm. It detects section breaks, multilevel list numbering and text numbering, tables, nested tables, exhibits, schedules, and even headers, footers, and footnotes—not just text added to the bottom of a page.

You can check for cross reference errors and validate them in a document in one click. A dialogue box compares cross references in the text to numbered articles, paragraphs, and sections. If you have other numbered styles, such as clauses and indexes, you can add the prefixes in the cross reference options. However, the more you add, the longer it will take to analyze. *See Figure 3*.

In the left panel, unlinked references display in red, linked references in green, and unfound references in red with "Error!" You can also check for typed references and DocStyle allows you to connect them to a numbered paragraph. You can filter the left panel by linked, unlinked, and flagged references for long documents. The right panel filters by numbered paragraphs and the bookmarked reference number. DocStyle can also identify cross references to bookmarks.

In the Advanced Styles group, you have ultimate control for styling one or more paragraphs. DocStyle groups similarly styled paragraphs and when the Style Match panel is open, you can navigate to a paragraph and see it directly in the document's context. *See Figure 4 on the next page*.

Highlight a paragraph in a document and it is identified in a group in the left panel, Style By Format. You can apply a different style to the paragraph, or all paragraphs in the group, using the available template or you can browse for a firm template and select a style to apply in the current document.

DocStyle settings determine the number of functions or icons available on the ribbon. Users can customize the ribbon, or an administrator can restrict ribbon functions in Windows registry settings and deploy them via group policies. Administrators can use the same method to set the location of default templates for users to select and automatically style body and numbered paragraphs throughout a document.

With the DocStyle Ribbon, you can copy text on the web and insert it into a Word document and it is stripped of web formatting. You can also insert select pages of a PDF into your document as either text or an image. That's hard to beat but DocStyle goes one better. When you install the DocStyle Desktop Software, you get a full-blown PDF-to-Word conversion engine too!

The DocStyle Desktop Application
For our experiment in using the DocStyle Desktop Application, we selected a printed PDF and opted to use Word's built-in styles to insert section breaks as needed and to detect headers, footers, and footnotes. We then chose automatic numbering, opted to generate a table of contents, and opened the output document upon completion. DocStyle applied the default Word style during the conversion, regenerated the contents table, and did an excellent job on detecting and converting footnotes.

You can use Word's built-in styles or your firm's custom formatting in converting PDF files to Word. If desired, you can leave a manual table of contents and leave numbers as text. Note that the conversion does not detect endnotes but adds them as plain text to the end of the document.

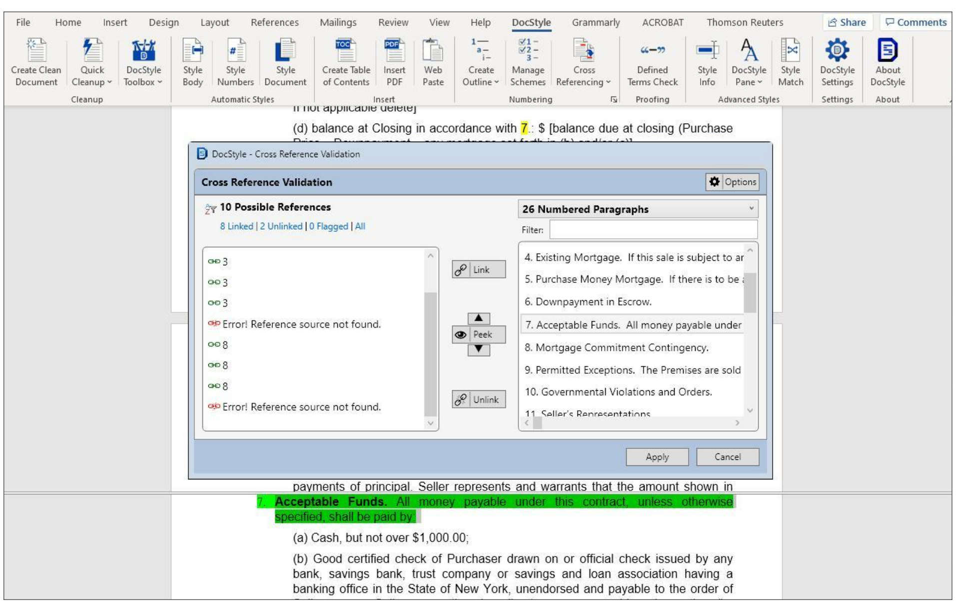

Figure 3: DocStyle's Cross Reference Validation identifies linked and unlinked references to numbered paragraphs. The Peek function makes the dialog box transparent in order to see the underlying text.

> "The DocStyle desktop application is standalone software that does not require Microsoft Office to accurately and seamlessly convert PDF files to editable Microsoft Word documents."

The DocStyle Desktop application is stand-alone software that does not require Microsoft Office. Besides PDF text, it uses optical character recognition (OCR) on image-based PDFs powered by Google Cloud OCR.

DocStyle integrates with Worldox GX4 and there were no issues using the ribbon and desktop on a local machine and storing and using the output in Microsoft Word, SharePoint, and OneDrive online. Next year, the company plans on bolstering its application programming interface (API) and developing a software development kit (SDK) for its large law firm and enterprise clients.

Pricing

DocStyle's subscription licensing starts with the Standard Edition at $29 per user per month (paid annually) for up to ten users. The Enterprise Edition costs $39 per user per month (paid annually) for more than ten users. The Enterprise Edition includes all the features discussed in this review and more plus Remote Desktop Protocol support, Citrix compatibility, and premium support. Both editions apply to unlimited documents and the ability to convert PDFs to Word.

Who is DocStyle?

Based in Miami, Florida, DocStyle's eponymous software is laser focused on solving challenging problems in using and automating document styles in Microsoft Word. Since 2018, cofounders Christopher Cangero and Adrian Bailey have developed and distributed DocStyle to large law firms and corporate legal departments so that they have a fundamental understanding of how to draft documents properly and distribute templates to users. DocStyle is in a growth mode and is looking to augment its desktop software with a cloud-based service.

Why You Should Consider DocStyle

- Automatically detect styles and numbering schemes in Microsoft Word and apply firm styles to numerous paragraphs in one click.
- Use firm templates and styles with custom names and apply them to other documents.
- Convert PDF files with native Word or custom styles and import selected pages into existing documents or create new ones.
- Moderately priced subscriptions come with all-inclusive features and no à la carte pricing for individual tools.

Contact DocStyle Today!

Try DocStyle in your own environment! Please visit www.docstyle.net to watch short feature introduction videos and request a free trial of DocStyle today!

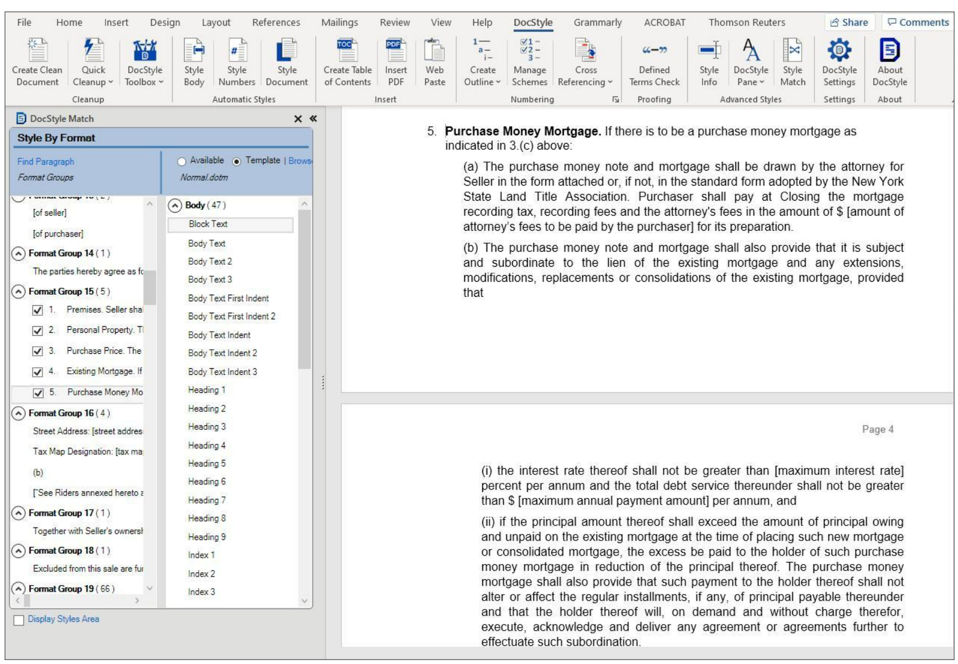

Figure 4: DocStyle Match groups all paragraphs into format groups. You can assign a style to the format group and simultaneously style all the paragraphs in the group.

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