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DOCUMENT MANAGEMENT, ASSEMBLY & PDF TOOLS

BUYER'S GUIDE: 2022 EDITION

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

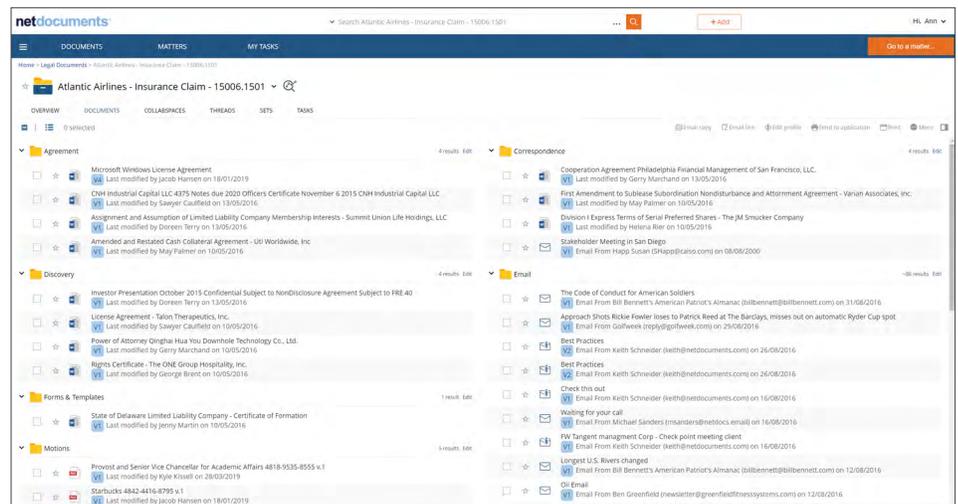


Figure 1: NetDocuments organizes its matter workspace interface in tabs: Documents, Threads, Sets, Tasks, and CollabSpaces, and displays user and matter activity tracking from the spyglass icon atop a matter.

“ 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

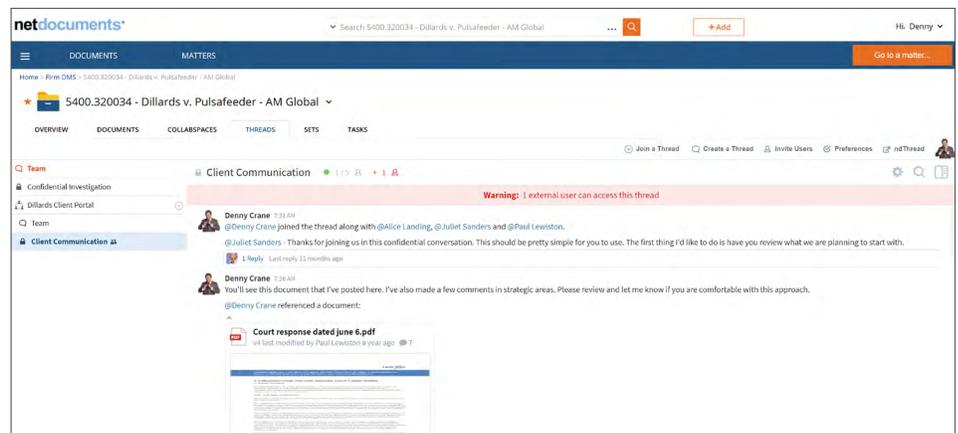


Figure 2: NetDocuments includes an ndThread tab labeled “Threads” in each matter workspace, enabling users to communicate in threads or channels about topics related to a case and link to content in the DMS.

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 NetDocuments 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.

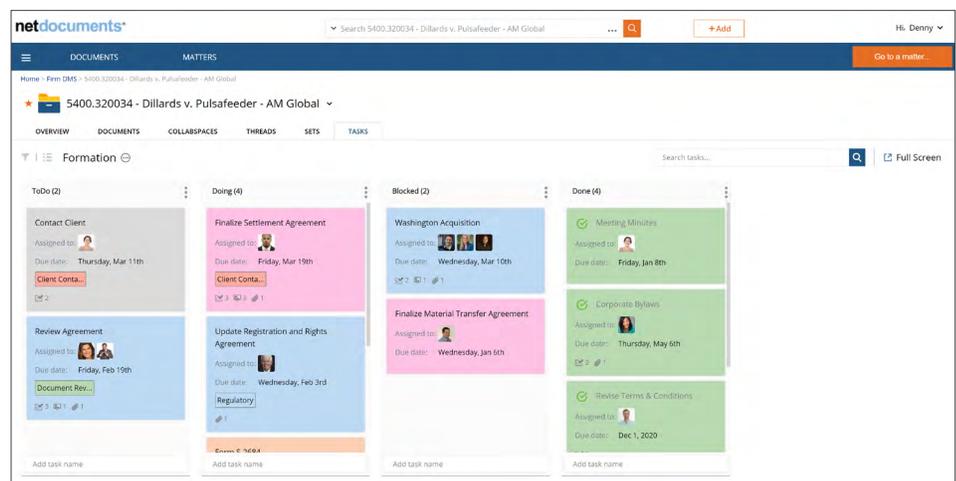


Figure 3: Tasks in NetDocuments can display in the message format, task lists, or Kanban-style boards to quickly review status and track progress.

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 new 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.

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