MODERN DOCUMENT MANAGEMENT TO ACHIEVE USABILITY AND MOBILITY

Intuitive usability and inherent mobility are key drivers forcing many law firms to reconsider their current document management systems (DMS). Yet many firms are reluctant to take a completely fresh approach to such a mission-critical function. When considering changes, firms often settle for legacy systems that have been used for years, even if such systems have fundamental limitations when it comes to usability and mobility, and require extensive maintenance and back-end fixes to attempt to keep pace with changing client demands and user preferences.

It doesn't have to be that way, as NetDocuments has proven. Alvin Tedjamulia, co-founder of NetDocuments, described our approach this way: "*NetDocuments offers a DMS approach that was built from the ground up utilizing a key patent to manage the security and rights to a document by wrapping the contents in a digital envelope. NetDocuments enables law firms of all sizes to create, secure, manage, access and collaborate on documents and email anywhere, any time, on any device*."

By adopting NetDocuments and shedding legacy approaches, firms can easily, quickly and cost-effectively update their DMS to the way that business is being done through enhanced usability and mobility functionalities. This saves time and boosts responsiveness to clients, attorneys and staff alike.

HISTORY OF DMS

At many law firms, the DMS is one of the most mission-critical software systems. According to Hyperion Research, 90% of law firms use some sort of system-based DMS. Yet despite the wide-spread nature of DMS, Hyperion Research has noted multiple challenges for legal organizations that want to optimize electronic DMS, including: a lack of required functionality the system not being integrated with how users work, challenges finding documents, budget, attorneys not using the system, and the inability to work remotely.

Most DM systems in use today began as on-site software that has attempted to evolve and add functionality as users have become more mobile and tech-savvy. These legacy systems have often failed to keep pace with other technology and user needs. The efforts of legacy solutions to stay relevant have led to cumbersome DMS approaches that suffer from low user adoption rates. This causes multiple problems for law firms, including:

Risk of information leaks
When attorneys and staff shy away from the official DM system, they may turn to free, unsecured services to store and transfer files. This can leave privileged and confidential information vulnerable to deliberate or accidental data leaks.

Loss of knowledge
When attorneys and staff store files outside the firm's central repository, this data may be completely invisible to others. This cripples knowledge management and often requires others within the firm to unknowingly recreate the same work over and over.

Inability to work remotely or bring new offices online
Without an agile, responsive, and intuitive DMS, individual attorneys and staff may find it difficult or even impossible to work from home, when traveling, or at court. Antiquated DMS approaches also make it much more expensive and challenging to bring new offices and users online.

NetDocuments sets itself apart by addressing these issues. Unlike traditional legacy, onsite DMS, since 1999 NetDocuments has allowed firms of all sizes to reduce costs and increase productivity with client, matter and project centric workspaces, enterprise search, built-in disaster recovery and anytime, anywhere, any-device access to their documents. For today's law firms, NetDocuments addresses many pain points around the DMS, including usability and mobility.

Usability

Law firms can spend a great deal of time, effort and money installing and updating their DMS, but that will all be wasted if staff and attorneys do not use the system.

In order to drive adoption rates, users must see how the advantages of a new system outweigh any potential disadvantages of keeping the old system. That is why ease of use and navigation in a DMS are critical. Staff and attorneys will avoid user systems and interfaces that are cumbersome, unappealing, or lack the features they want.

IT staff have their own list of requirements for the DMS. When attorneys and staff fail to adopt the official DMS, it can create additional headaches when IT must attempt to find or clean up files created in unapproved formats. IT staff also must consider how the DMS will integrate with other applications and platforms. Legacy systems that are rarely updated or require significant investments in hardware, time and budget also represent a drag on the technology team.

Mobility

In today's business world, mobility is no longer a nice feature. It's a must-have. According to comScore, smartphone penetration has reached 65.2% of the U.S.

mobile subscriber market. At law firms, mobility extends beyond smartphones to multiple offices and remote workers, although with legacy software, many firm's offices were treated as their own unique entities and silos of information. Establishing or acquiring new locations either required hefty investments in infrastructure or a willingness to allow offices to establish their own systems and software. This is how firms often end up with different versions of the same DMS software, or completely different types of software that don't integrate fully. This approach further perpetuates silos of information across multi-office firms.

The DMS should enable staff and attorneys to access an intuitive mobile web interface that allows users to browse documents, folders, and workspaces in the cloud. It should also allow users to download and upload files and share documents and work securely across devices without requiring cumbersome VPN sign-ins or other remote access tools.

Encouraging User Adoption

For law firms, their IT staff and technology committees, changing the DMS is a major undertaking and should be approached thoughtfully.

At many firms, identifying the business case can present the most compelling arguments for considering a DMS project. A system that is both highly usable and inherently mobile will pay for itself through increased adoption rates and the greater ability to capture billable hours. The right system should also allow for a lighter IT footprint, which will free staff to focus on more important issues and long-term strategies.

To remain competitive, law firms need to take the opportunity to move to a platform that will encourage user adoption through an intuitive interface, and aid in developing the technology landscape that will attract and retain new talent.

The Client Experience

Over the last 15 years, NetDocuments has enabled firms to strategically leverage their technology to ultimately service their clients better and more efficiently.

For example, NetDocuments' mobility features have allowed the firm of Jackson Lewis to expand and add new offices while maintaining a consistent DMS. With NetDocuments, Jackson Lewis has acquired additional firms while utilizing a single platform under the enterprise DM umbrella.

At Nixon Peabody, which has 1,500 NetDocuments users across 16 offices, technology is a key enabler to delivering legal services efficiently, according to Mike Green, CIO. *"If you think about how technology has changed even over last few years, being able to keep pace with that change, being able to integrate new and innovative solutions into our delivery model, is what our clients expect*," he said. "*Content in law firms is growing*

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at almost uncontrollable rates. As we look forward and are thinking in terms of how our clients are going to want us to deliver services and how our attorneys are going to need to work, we recognized we needed a little bit more agility in terms of a platform to meet those needs."

Through an extensive, year-long due diligence process, the firm explored whether NetDocuments could meet its high-level objectives, including content structure, best-in-class security and better mobility. "*Through that effort, we concluded very clearly that NetDocuments was that platform we wanted to move forward with,*" he said.

By adopting similar approaches and mindsets, law firms can turn the DMS into a true knowledge management system, be more responsive to clients, and allow attorneys and staff true mobility. With NetDocuments, firms can move confidently into the future.

What Sets NetDocuments Apart

Unlike many of today's document management systems, NetDocuments was born on the Web as a true cloud-based DMS. NetDocuments was created on the vision that cloud computing would be the superior model for delivering document management software to the enterprise. Through over a decade of growth, NetDocuments is currently used by thousands of businesses across the globe, accessing NetDocuments' US and EU datacenters that manage more than 1 billion documents and emails.

Among NetDocuments features:

Email Management

NetDocuments Email Management Service (EMS) allows users to intelligently save, file and manage emails through a seamless integration with Microsoft Outlook. Emails are dragged or tagged to native Outlook folders, and a copy is then sent to the matter, client or project-centric workspace in NetDocuments, organizing documents, emails, attachments and other content into a single location.

Predictive Filing with EMS Profiler

File emails with predictive client, matter, or project tagging, even for outgoing messages. For those who prefer not to drag and drop, filing can also be done without Outlook folders. EMS Profiler

ADMINISTRATIVE FEATURES TO KEEP YOU ORGANIZED & SAVE TIME

displays profiling/metadata fields on the Outlook menu from which a pre-defined list of clients, matters or projects can be selected. Taking it even further, it will even populate the client name, matter or project, based on NetDocuments intelligently remembering previous emails to or from a particular sender. EMS Profiler also provides Send & File functionality for the profiling of outgoing messages.

Internal Collaboration

Working together as a company or a team, and across departments, has never been easier. NetDocuments has a suite of collaboration features that enable documents to be accessed, edited, shared, and organized throughout the entire organization. Content is organized into collaborative workspaces based on customizable metadata tags. The workspace is then accessed by all the individuals and groups that have the appropriate security rights.

Document Delivery

Delivering a secured link to a document enables users to select one or multiple documents and generate a direct access URL that can be sent to anyone.
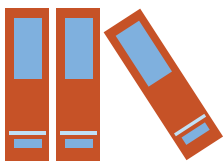
Extranets

On a deeper level of collaboration, NetDocuments extranet feature allows users to grant access to clients and other third parties by allocating cabinets, workspaces and folders with the full functionality of the service.

ShareSpaces

The ShareSpace feature allows unlimited secure digital rooms to share content.

Native iPad and iPhone apps

NetDocuments allows users the freedom to access and work on documents anywhere. With any Internet connection, users can easily login to all their documents and create, edit, share, and collaborate with others. Documents and emails are full-text searchable and can be organized into folders based on clients or projects. NetDocuments also provides the peace of mind knowing work is backed up and secured in world-class datacenters.