

Document management

Easily organize, search, and reference important matter documents in one system

Considering the number of documents that a corporate legal department governs, it's critical to have an effective document management system to be more efficient, increase productivity, and mitigate risk. SimpleLegal's built-in document management provides important features that make managing matter related documents and files easy – all from within one system.






Matter Options

Allocations Permissions Reviewers Status Invoices Notes Updates P

All

Down

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Type	Scan Status	Name	Category	Uploaded
	--	Affidavits	--	05/06/20
	--	Agreements	--	05/06/20
	--	Discovery	--	05/06/20
	--	Due Diligence	--	05/06/20
	--	Non-Disclosure Agreements	--	05/06/20
	--	Proposals	--	05/06/20

A comprehensive solution that delivers immediate value

Busy legal departments need technology that works for them, not the other way around. That's why it's critical that a document management system (DMS) delivers immediate benefits rather than become just another thing the legal team has to learn and (maybe) use.

Here's how SimpleLegal's DMS helps corporate legal teams across the world:

One-stop shop

Conveniently embedded into the SimpleLegal solution, legal teams can easily access matter files from a single source – at any time, from anywhere. Plus, robust search capability with Optical Character Recognition (OCR) means in-house attorneys are able to quickly locate the exact text and image files they're looking for. Say 'goodbye' to jumping from system to system!

Knowledge continuity

As a central system of record, SimpleLegal ensures documents, images, and files (and the knowledge they contain) aren't lost when a team member leaves.

Cost savings

SimpleLegal's embedded offering eliminates the cost of additional technology and associated onboarding, allowing legal departments to invest in other priority initiatives.

Safe & secure

Leveraging the industry standard in security, such as data encryption at-rest and in-transit (TLS), virus scan for uploads, and SOC 2 audits, files are secured without adding extra work for busy attorneys.

Robust governance

All documents and files uploaded to a matter will adopt the matter's permissions, strictly controlling who can see and edit files.

Improve processes & streamline critical matter information sharing

SimpleLegal's DMS goes beyond just storing matter documents and files. It offers important document management features that help to increase productivity, improve processes, and streamline information sharing with key stakeholders.

Key features provide quick access to information when it's needed:

Manage documents

- Rename, delete, and download documents
- Move documents between folders
- Assign labels and categories

Organize folders

- Create sub-folders
- Move, rename, and delete folders

Search & filtering

- Search the entire document (title and content)
- Search results ranked by relevance
- Sort and filter options to refine results

Optical Character Recognition (OCR)

- Full-image character search (supports pdf, png, and jpeg files)
- Refines search results to include keywords inside of digitized images
- Readily discoverable files improve knowledge sharing and easy collaboration

Preview files

- Preview documents without opening them
- 16 different file types supported

Versioning

- Choose to create a new version of a document on-demand
- View and download prior document versions

Labels

- Add, edit, or delete labels
- Assign colors to labels
- Filter by label

Categories

- Add, edit, or delete categories
- Filter by categories

Outlook compatible!

SimpleLegal's DMS and Outlook integration work seamlessly together so users can save emails and attachments to a matter without leaving Outlook.

Featured DMS integrations

If your department already leverages a standalone document management system, SimpleLegal has multiple options to integrate, including standard integrations with iManage and Box, as well as a robust API. Contact us to determine which integration method is best for your department.



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