



# Native Document Management System

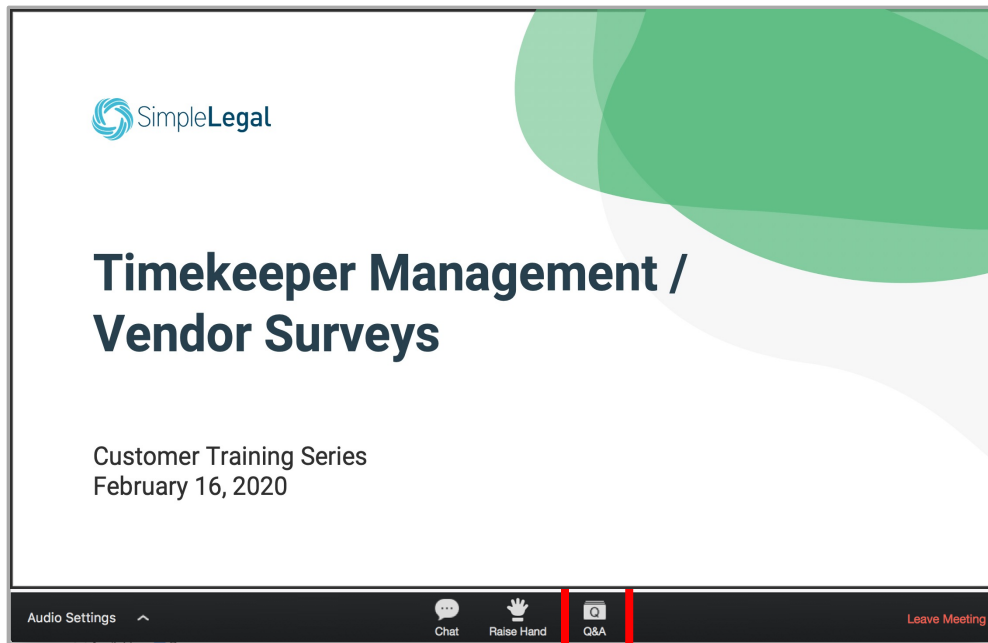
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# A Few Housekeeping Items

- All attendees are muted.
- Please ask questions using the Q&A feature.
- If I do not get to your questions during the session, we will follow up with you afterwards.
- Webinar slides and recording will be sent to you for reference.



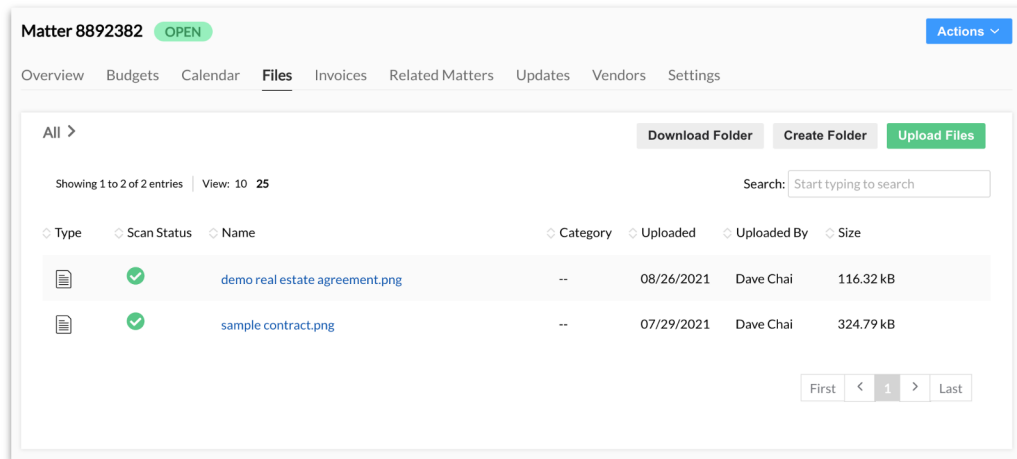
# Agenda

- Native DMS Overview
- Key Features
- Key Benefits
- Setup
- Demo
- FAQs

# SimpleLegal's Native DMS Overview

SimpleLegal's native Document Management System (DMS) provides an effective tool to help legal departments managing a lot of documents to be more efficient, increase productivity, and mitigate risk.

- Locate Records – Easily locate records using full-text search and Optical Character Recognition (OCR) capabilities
- Central Location for Files – Store matter-related files in a single system accessible to anyone with internet access
- Remove Manual Process – Leverage power of DMS to reduce/eliminate the management of paper documents
- Cloud Document Management – 100% in the cloud removing the need to manage and maintain servers, reduce IT support, and eliminate need to install software on people's computers



# Key Features

## Organize Folders

- Create folders/ sub-folders
- Move, rename, and delete folders
- Download folders to a ZIP file

## Manage Documents

- Upload up to 10 documents at a time
- Rename, delete, and download documents
- Move documents between folders

## Versioning

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

## Search & Filtering

- Full-text search (title and content)
- Ranks search results by relevance
- Filter results by date, size, category, label, matter, and uploaded by
- OCR

## Categories

- Add, edit, or delete categories
- Assign to documents
- Filter by categories

## Labels

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

# Key Features

## Virus Scan

- Ensures data and systems remain safe
- Notifies admin and quarantines document if virus found
- Quarantined documents may be deleted

## Preview Files

- Toggle feature on/off
- Preview documents without opening them
- Supports 16 different file types

## Optical Character Recognition (OCR)

- Toggle feature on/off
- Full-image character search (supports pdf, png, and jpeg files)
- Extracts text from images making them text searchable

## Outlook Compatible

- Works seamlessly with SimpleLegal's Outlook integration
- Save emails and attachments to a matter without leaving Outlook

# Key Benefits



## Convenient One-stop Shop

SimpleLegal's DMS provides a centralized system of record, ensuring documents and files (and the knowledge they contain) aren't lost when a team member leaves the company, especially when paired with SimpleLegal's Outlook add-in.



## Save On Costs

SimpleLegal uses the industry standard in security, leveraging data encryption at rest and in transit, virus scan for all uploads, TLS, and SOC 2, making it extremely difficult for unauthorized access to files, without adding extra work for busy attorneys.



## Provides Robust Governance



## Strengthen Knowledge Management

All of your matter files are easily accessible within one system, so your team can access them any time, from anywhere. Never worry about uploading files into multiple systems or incorrect document versions again! You don't have to vet, purchase, implement, learn, then integrate a second solution – it's a built-in, streamlined workflow that's easy for your team to adopt.

A standalone DMS is expensive, and SimpleLegal's combined offering helps minimize technology costs, providing the legal department more leeway and opportunity to spend their budget on other priority items.

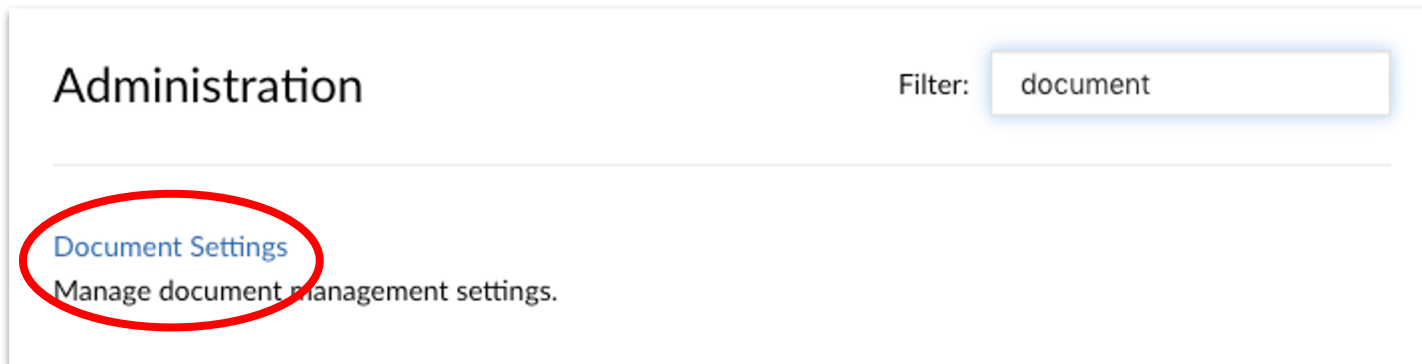


## Secure and Safe

SimpleLegal's DMS is centered around a matter. This means the documents and files uploaded to a matter, stay within that matter, and applies the matter's permissions to the documents to strictly manage access.

# Setup: Where to Manage Settings

1. Go to administration settings (Administration/Document Settings)





# Setup: Managing Categories

## 2. Create and manage categories (Administration/Document Settings)

Navigate  
DMS  
settings

Click to add a new category.  
Modal pops up where you  
can enter category name.  
(max character 50)

List of all  
your  
document  
categories

Document Management Settings

Document Categories

Document Labels

Document Preferences



Notifications

Quarantined Files

### Manage Document Categories

Showing 1 to 23 of 23 entries | View: 10 25 50 100

Search:

Name	Related documents	
Agreements	2	 
Answers	----	
Briefs	----	
Closings	1	

Add Category

# of documents  
using category

Filter categories to  
find them quicker

Edit a  
category

Delete a  
category

# Setup: Managing Labels

## 3. Create and manage labels (Administration/Document Settings)

Click to add a new label. Modal pops up where you can enter label name and assign a label color. (max character 50)

Filter labels to find them quicker.

Edit a label.

Delete a label.

# of documents using label

List of all your document labels.

Document Management Settings

Document Categories

Document Labels

Document Preferences

Notifications

Quarantined Files

Manage Document Labels

Showing 1 to 1 of 1 entry | View: 10 25 50 100

Search: Start typing to search

Name

Related documents

Court Filings 2

First < 1 > Last

Add Label

SimpleLegal

# Setup: Managing Document Preview and OCR

## 4. Turn preview off/on (Administration/Document Preferences)

Toggle  
Document  
Preview and OCR  
off or on.

Document Management Settings

Document Categories	<b>Document Preferences</b>
Document Labels	<b>SimpleLegal Document Preview</b>
<b>Document Preferences</b>	<div>SimpleLegal uses Google to allow you to easily preview documents with supported extensions such as: .pdf, .doc, .docx, .xls, .xlsx, .ppt, .pptx. The document is only sent to Google to be converted to a preview when it is viewed.</div> <div><input checked="" type="checkbox"/></div>
Notifications	<b>SimpleLegal OCR</b>
Quarantined Files	<div>SimpleLegal uses Amazon to automatically extract text, handwriting and data from image files with supported extensions such as: pdf, jpeg, png.</div> <div><input checked="" type="checkbox"/></div>

# Setup: Notifications

5. Choose which admins are notified when there are infected files.  
(Administration/Notifications)

Document Management Settings

Document Categories

Document Labels

Document Preferences

**Notifications**


Quarantined Files

### Manage Notifications

Choose who receives notifications when uploaded files are infected

Showing 1 to 2 of 2 entries | View: 10 25 50 100

Search:

Admin Name	Email Address	Added on	
Dave Chai	david.chai+cloc1@simplelegal.com	2022-01-10T10:15:22.736427	
Karen Moor	karen+cloc1@simplelegal.com	2022-01-10T10:15:36.191744	

First < 1 > Last

**Add Admin**

Add admins who should receive notifications when infected files are found

Remove admin

# Quarantined Files

## Document Management Settings

Document Categories

Document Labels

Document  
Preferences

Notifications

Quarantined Files

### Manage Quarantined Files

Showing 0 entries | View: 10 **25** 50 100

Search:

No results found.

Infected files will  
be quarantined  
here

# DMS on a matter

The screenshot displays the SimpleLegal web application interface. At the top, a blue header bar contains the SimpleLegal logo, a dropdown menu set to 'Invoices', a search bar with the placeholder text 'Search for invoices, matters, vendors...', and a user profile icon. A left sidebar contains a vertical stack of icons for navigation. The main content area shows the 'Matter 8892382' page, which is marked as 'OPEN'. Below the matter name are tabs for 'Overview', 'Budgets', 'Calendar', 'Files' (which is selected), 'Invoices', 'Related Matters', 'Updates', 'Vendors', and 'Settings'. The 'Files' tab displays a list of documents. At the top of the file list are buttons for 'Download Folder', 'Create Folder', and 'Upload Files'. Below these are filters for 'All >', 'Showing 1 to 2 of 2 entries', and 'View: 10 25'. A search bar is also present. The file list has columns for 'Type', 'Scan Status', 'Name', 'Category', 'Uploaded', 'Uploaded By', and 'Size'. Two files are listed: 'demo real estate agreement.png' (116.32 kB) and 'sample contract.png' (324.79 kB). Each file row has a download icon and a more options icon. A red arrow points from the text 'Users can download documents to their local machine' to the download icon of the first file. At the bottom of the page, there is a footer with copyright information, social media links, and a 'Help' button.

SimpleLegal

Invoices Search for invoices, matters, vendors...

<< Return to Matters

Matter 8892382 OPEN Actions

Overview Budgets Calendar Files Invoices Related Matters Updates Vendors Settings

All > Download Folder Create Folder Upload Files

Showing 1 to 2 of 2 entries View: 10 25 Search: Start typing to search

Type	Scan Status	Name	Category	Uploaded	Uploaded By	Size
	✓	demo real estate agreement.png	Agreements	08/26/2021	Dave Chai	116.32 kB
	✓	sample contract.png	Contracts	07/29/2021	Dave Chai	324.79 kB

First < 1 > Last

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Users can download documents to their local machine

# DMS on a matter

Green check means no malware was found.

If malware is found, file will move to quarantine automatically

Exposes more options:

- Rename file
- Edit labels & category
- Move file
- Add new version
- See versions
- Delete file

SimpleLegal Invoices Search for invoices, matters, vendors...

<< Return to Matters

Matter 8892382 OPEN Actions

Overview Budgets Calendar Files Invoices Related Matters Updates Vendors Settings

All > Download Folder Create Folder Upload Files

Showing 1 to 2 of 2 entries View: 10 25 Search: Start typing to search

Type	Name	Category	Uploaded	Uploaded By	Size
No malware detected.	demo real estate agreement.png	Agreements	08/26/2021	Dave Chai	116.32 kB
	sample contract.png	Contracts	07/29/2021	Dave Chai	

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# DMS on a matter

DMS leverages global search function.

Just be sure to set the search to "Matter Files"

The screenshot displays the SimpleLegal DMS interface. At the top, a blue header bar contains the SimpleLegal logo, a dropdown menu set to 'Matter Files', and a search bar with the placeholder text 'Search for invoices, matters, vendors...'. A red arrow points from the text 'DMS leverages global search function.' to the search bar. Below the header, a sidebar on the left shows a navigation menu with icons for Home, Folder, People, Document, Clock, Dollar, Gear, and Help. The main content area is titled 'Matter 8892' and includes tabs for Overview, Bills, Files, Invoices, Related Matters, Updates, Vendors, and Settings. The 'Files' tab is active, showing a list of files. A dropdown menu is open, highlighting 'Matter Files' with a checkmark. Other options in the menu include Invoices, Matters, Vendors, Contacts, Timekeepers, Vendor Files, and Legal Entities. The file list shows two items: 'demo real estate agreement.png' and 'sample contract.png', both with green checkmarks in the 'Scan Status' column. The table has columns for Type, Scan Status, Name, Category, Uploaded, Uploaded By, and Size. At the bottom of the interface, there is a footer with copyright information, social media links, and a 'Help' button.

SimpleLegal

Matter Files Search for invoices, matters, vendors...

<< Return to Matter

**Matter 8892**

Overview Bills Files Invoices Related Matters Updates Vendors Settings

Download Folder Create Folder Upload Files

Showing 1 to 25

Search: Start typing to search

Type	Scan Status	Name	Category	Uploaded	Uploaded By	Size
	✓	demo real estate agreement.png	Agreements	08/26/2021	Dave Chai	116.32 kB
	✓	sample contract.png	Contracts	07/29/2021	Dave Chai	324.79 kB

First < 1 > Last

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Help



# DMS on a matter

Search will look at file title and content (full-text search).

OCR results will show up here (if any).

The screenshot displays the SimpleLegal web application interface. At the top, a blue header bar contains the SimpleLegal logo, a dropdown menu set to 'Matter Files', a search bar with the text 'real estate agreement', and user profile icons. A vertical sidebar on the left contains various navigation icons. The main content area is titled 'Search Results' and shows 'Matter Files (1)'. Below this, there are filter buttons for 'Date', 'Size', 'Category', 'Label', 'Matter', and 'Uploaded By', along with a 'Clear All Filters' link. The search results indicate '1 results for real estate agreement' and list a file named 'demo real estate agreement.png'. Below the filename, it shows 'Matter 8892382 · Agreements' and a snippet of text: 'State of Texas Rev. 133C8FD REAL ESTATE PURCHASE AGREEMENT This Real Estate Purchase Agreement (this'. The last modified date and user are listed as 'Last Modified 08/26/2021 by Dave Chai · 116.32 kB'. A red arrow points from the text 'OCR results will show up here (if any)' to the search results area. The footer contains copyright information, social media links, and a 'Help' button.

SimpleLegal

Matter Files real estate agreement

Search Results

Matter Files (1)

Date Size Category Label Matter Uploaded By [Clear All Filters](#)

1 results for real estate agreement

[demo real estate agreement.png](#)

Matter 8892382 · Agreements

State of Texas Rev. 133C8FD **REAL ESTATE PURCHASE AGREEMENT** This Real Estate Purchase Agreement (this

Last Modified 08/26/2021 by Dave Chai · 116.32 kB

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**Demo**

# Native DMS FAQs

1. Can we open the docs within the application and edit them?
  - a. You can preview the document but to edit them, you need to download, make the edits, then re-upload.
2. If we integrate via Outlook, do we have access to the docs to attach them to outgoing emails?
  - a. At this time, this functionality is not supported. You can only save emails and attachments to SimpleLegal.
3. How does the version control work? How does SL know this is a new version?
  - a. Version control occurs when you re-upload a file in place of an existing version. We keep a history of each version and you can download prior versions.
4. Please describe your native document management component's search capabilities. Do they support full-text search of documents?
  - a. We support full-text search (titles and content) as well as Optical Character Recognition (OCR) for scanned files. Results are also ranked by relevance.
5. Does your system have the ability to generate standard documents, such as an engagement letter? If so, please describe the capabilities.
  - a. No, SimpleLegal doesn't. However, this can be done using AXDRAFT.
6. Can default folder structures can be added to Matter templates?
  - a. No, this functionality is not supported.

# OCR FAQs

Questions	Answers
Accepted File formats?	JPEG, PNG and PDF (does not support TIFF).
File Size Limits?	JPEG and PNG files have a 10MB size limit. PDF files have a 500MB limit.
PDF Specific Limits?	The maximum number of pages is 3,000, the maximum height and width is 40 inches and 2880 points. PDFs cannot be password protected. PDFs cannot contain JPEG 2000 formatted images.
Text Alignment?	Text can be text aligned horizontally within the document. Amazon Textract does not support vertical text alignment within the document.
Languages?	Amazon Textract supports English, French, German, Italian, Portuguese and Spanish text detection. Amazon Textract will not return the language detected in its output.

# OCR FAQs (contd.)

Questions	Answers
Character Size?	The minimum height for text to be detected is 15 pixels. At 150 DPI, this would be the same as 8 point font.
Character Type?	Amazon Textract supports both handwritten and printed character recognition.
Characters?	<p>Amazon Textract detects the following characters:</p> <ul style="list-style-type: none"><li>•a-z</li><li>•A-Z</li><li>•0-9</li><li>•ä Ä ö Ö ü Ü ç Ç é É â Â ê Ê î ï ô Ô û Û à À è È ù Ù ë Ë ì Ì ü Ü á Á é É í Í ó Ó ú Ú ü Ü ñ Ñ ì ò Ò ã Ã õ Ö</li><li>•!"#\$%&amp;'()*+,-./:;=?@[\\]^_`{ }~&gt;&lt;°€£¥₹₺ₛ₼ı€£¥₹øØœœ©®™§¹²³'</li></ul>

**Questions?**

# Resources: Your Team

## Two Ways to Get Help

- Resource Center on SimpleLegal for answers to commonly asked questions
- Support Team [help@simplelegal.com](mailto:help@simplelegal.com)

The screenshot displays the SimpleLegal Invoices dashboard. At the top, a blue header bar contains the SimpleLegal logo, a dropdown menu set to 'Invoices', and a search bar with the placeholder text 'Search for invoices, matters, vendors...'. Below the header, a summary section shows four key metrics in green boxes: 50 Received (\$397,447), 0 Not Approvable (\$0), 1 On Hold (\$2,040), and 22 Approved (\$657,538). The main section is titled 'Open Invoices' and features a tabbed interface with 'Needs My Approval' selected. A filter dropdown shows '25 invoices' and a search filter box. The table below lists three invoices with columns for Date, Invoice, Matter, Vendor, Status, and Amount. Each invoice has an 'Approve' button and a 'Reject' button. The footer includes navigation links for 'Previous', '1', and 'Next', along with a chat icon. Copyright information and links for Privacy Policy, Security Policy, and Terms of Service are also present.

Date	Invoice	Matter	Vendor	Status	Amount
10/10/18	Invoice 867-5309	Contracts (College Board) Intelligent Invoice workflo...	Boston Legal	Approve Reject	\$3,151.50
10/8/18	DEMO1	Contracts (College Board) contract work	Boston Legal	Approve Reject	\$10,900.00
6/23/17	5663187	Contracts (College Board) contracts	Boston Legal	Approve Reject	\$17,000.00

# Resources: Vendors / Law Firms

## Two Ways to Get Help

- Resource Center on CounselGO for answers to commonly asked questions
- For CounselGO support please email [help@counselgo.com](mailto:help@counselgo.com)

The screenshot displays the CounselGO by SimpleLegal web application interface. The top navigation bar is red and includes the CounselGO logo, the text "CounselGO by SimpleLegal", and links for "Boston Legal" and "Clockworks, Inc.". On the right of the top bar are a "New Invoice" button and a user profile for "Audrey Mason". Below the top bar is a secondary navigation bar with links for "Submitted Invoices", "Invoice Drafts", and "Saved LEDES". A left-hand sidebar contains icons for "Clients", "Invoices", "Matters", "Budgets", "Timekeepers", and "Resource Center". The main content area shows three summary cards: "11 Open Invoices", "1 Rejected Invoices", and "1 Approved/Paid Invoices". Below these is the "Invoices List" section, which has a red header. It displays "All Invoices (13)" with filter tabs for "all", "open", "rejected", and "closed". There is a "Show 25 entries" dropdown and a search box. A table of invoices is shown below, with columns for Date, Number, Subject, Currency, Total, Status, and Status Date.

	Date	Number	Subject	Currency	Total	Status	Status Date
AM	10/11/18	DEMO 2	demo rate violation	USD	13,100.00	Received	10/11/18
AM	10/10/18	Invoice 867-5309	Intelligent Invoice Workflow Flagging	USD	3,151.50	Received	10/15/18



**Thank you!**