

Native Document Management in SimpleLegal

February 2022

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00:01:36.450 --> 00:01:44.520

Kristina Konarski: Alright, so we're going to go ahead and get started, I do just want to first say thank you very much appreciate that you're taking time out of your day today.

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00:01:45.090 --> 00:01:51.780

Kristina Konarski: we're going to have about an hour together to walk through the SimpleLegal native document management system.

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00:01:52.290 --> 00:02:05.160

Kristina Konarski: At the end of today's session, you should have a good sense of the type of capabilities that are available with native document management, as well as you know, some great benefits to using the system within SimpleLegal.

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00:02:09.780 --> 00:02:18.000

Kristina Konarski: Okay, so we're going to just cover a few housekeeping items, as with all SimpleLegal training sessions, we do have all attendees are muted.

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00:02:18.510 --> 00:02:26.580

Kristina Konarski: and ask that you if you have questions feel free to ask those just post them right in that Q amp a window that you see at the bottom of your zoom window.

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00:02:27.270 --> 00:02:42.180

Kristina Konarski: If you do have questions and i'm not able to get to during the session I or my team members will follow up with you, afterwards, and you know we are recording today's session so the webinar slides and the recording will be sent to you, for future reference.

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00:02:45.240 --> 00:02:53.160

Kristina Konarski: So today's agenda we're going to just do kind of a high level overview of native document management system capabilities within SimpleLegal.

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00:02:53.640 --> 00:02:57.360

Kristina Konarski: we'll talk about the key features some key benefits to using it.

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00:02:58.320 --> 00:03:05.310

Kristina Konarski: setup so in the event, you decide, you want to use this just you know what are the different components to document management that you'll want to set up.

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00:03:05.760 --> 00:03:14.550

Kristina Konarski: we'll go into SimpleLegal walk through a couple of different areas, including the settings as well as where you see the files on your matters.

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00:03:15.030 --> 00:03:23.790

Kristina Konarski: And time permitting we'll go through a series of faq document faqs that we have received over time with regards to need a document management.

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00:03:24.090 --> 00:03:31.530

Kristina Konarski: And then the event we don't get to those you know just remember, we will be sending this out to you after the session so you'll have those to go back and reference.

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00:03:33.570 --> 00:03:46.590

Kristina Konarski: Okay, so SimpleLegals native document management system, otherwise known as dms it's really an effective tool for helping legal departments like yours just manage a lot of documents.

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00:03:47.400 --> 00:04:00.150

Kristina Konarski: Those kind of the outcome of that is creating efficiencies having increased productivity and mitigating risk that there is information that you don't have readily available for things that you may have to.

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00:04:00.810 --> 00:04:06.240

Kristina Konarski: You know, things that might be discoverable or things that you may have to have access to to manage your matters.

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00:04:07.620 --> 00:04:16.680

Kristina Konarski: A few ways that made up dms is going to benefit your company is you know really just making it easier to locate your documents.

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00:04:17.100 --> 00:04:24.540

Kristina Konarski: We have full text search capability within SimpleLegal that will work on the matter documents that you import.

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00:04:25.170 --> 00:04:33.330

Kristina Konarski: We have an option to use what's called optical character recognition, also known as ocr and that's what i'll refer to it as throughout the session.

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00:04:33.930 --> 00:04:45.900

Kristina Konarski: But capabilities really better going to make it easy for you to go into the system search for things that you need to have access to within the way of documents and more easily find and locate those records.

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00:04:46.890 --> 00:04:53.940

Kristina Konarski: SimpleLegal, because this is a you know web based product, it is going to give you a central location for your files.

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00:04:54.450 --> 00:04:57.840

Kristina Konarski: You can store all of your matter related files in a single system.

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00:04:58.260 --> 00:05:08.130

Kristina Konarski: And they are accessible to anyone with Internet access, and what I should have also put here is, of course, access to SimpleLegal and access to that particular matter, so it is going to help you.

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00:05:08.700 --> 00:05:15.180

Kristina Konarski: Have a central repository for those documents but also help to enforce permissions around who can access them.

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00:05:16.380 --> 00:05:21.360



Kristina Konarski: going to help remove some of the manual processes that you may have in place, this is really one of those.

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00:05:22.200 --> 00:05:30.150

Kristina Konarski: You know, areas where you're going to be more efficient and mitigate risk is that you know, there may be paper documents that you're receiving.

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00:05:30.840 --> 00:05:40.530

Kristina Konarski: Paper documents that you're managing within your legal department and with paper it's really hard you know you have to have filing cabinets, you have to have you know a lot of.

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00:05:42.240 --> 00:05:47.970

Kristina Konarski: file retention procedures and things of that nature in place to manage paper documents.

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00:05:48.390 --> 00:05:58.050

Kristina Konarski: Having a document management system similar to what SimpleLegal is going to provide you is going to help reduce or eliminate the management of those paper documents again.

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00:05:58.290 --> 00:06:06.420

Kristina Konarski: Making you more efficient increasing productivity and mitigating the risk that something's getting lost or misplaced or is not easy to find.

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00:06:07.290 --> 00:06:18.090

Kristina Konarski: And then finally it's a cost savings on, so it is 100% in the cloud meaning you don't need to have separate servers to house, a document management system.

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00:06:18.720 --> 00:06:31.650

Kristina Konarski: You don't have to have it support to manage and maintain the servers or that document management system and it's also eliminating the need for you to install software for dms on people's computers.

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00:06:35.370 --> 00:06:48.000



Kristina Konarski: So let's talk about some of the key features in SimpleLegal SimpleLegal is made of dms is going to provide you with important document management features, without the need to purchase and implement a separate product.

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00:06:48.570 --> 00:06:52.530

Kristina Konarski: And so the following features are available with SimpleLegal dms.

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00:06:54.510 --> 00:07:00.900

Kristina Konarski: Organizing documents using folders is you know, a really key aspect of a document management system.

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00:07:01.320 --> 00:07:15.810

Kristina Konarski: Within SimpleLegal you can set the folder structure of your documents and files as needed by your organization so you're going to have the control to create those folders create sub folders you can even nest folders within sub folders.

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00:07:16.710 --> 00:07:24.390

Kristina Konarski: there's a lot of capabilities around moving the folders let's say you create one and it really needed to be a level up or underneath another folder.

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00:07:24.690 --> 00:07:36.660

Kristina Konarski: You can rename and delete folders if they're not needed or not working for you and the really nice thing is that you can also download folders to a zip file so maybe you need to take those files offline.

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00:07:37.380 --> 00:07:45.930

Kristina Konarski: You can download an entire folder and it will save it as a zip file it's going to maintain the same file names and you can also.

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00:07:46.860 --> 00:08:02.400

Kristina Konarski: download the entire matter documents, so if you have all of your matter documents within these folders you'll be able to download those and the tree structure that you've set up to organize your your documents within SimpleLegal are going to remain the same inside that zip file.

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00:08:05.340 --> 00:08:16.050

Kristina Konarski: Managing documents is the core functionality that's really going to help you properly maintain your documents so as part of managing your documents, there is of course the upload capability.

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00:08:16.560 --> 00:08:23.250

Kristina Konarski: You can upload up to 10 documents at a time, or if you choose, you can upload a folder that contains up to 10 files.

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00:08:23.730 --> 00:08:38.790

Kristina Konarski: You can use drag and drop capabilities, or you can select from a window to import those files from your network, you can also use categories and labels at the time of upload to help identify what these documents might be related to.

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00:08:40.470 --> 00:08:45.960

Kristina Konarski: You, of course, have the ability to rename delete and download documents that you've put into SimpleLegal.

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00:08:46.560 --> 00:08:57.150

Kristina Konarski: If you are downloading a folder the folder structure will remain, but if you are, you know you also can just download the files individually and not have to take the entire folder structure.

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00:08:58.230 --> 00:09:06.300

Kristina Konarski: You can rename the documents, as I mentioned, if there are documents, maybe you loaded an error or they're no longer needed because they fall outside of your document retention.

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00:09:06.660 --> 00:09:21.450

Kristina Konarski: window, you can delete documents you can move them between folders and SimpleLegal also handle any duplicate files by either overriding those files or allowing you to create a new version within SimpleLegal, so there is version in here.

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00:09:22.260 --> 00:09:28.380

Kristina Konarski: You can edit the document labels and categories as needed throughout the lifecycle of that document within SimpleLegal as well.

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00:09:30.540 --> 00:09:38.880

Kristina Konarski: So let's talk a little bit about version, because I mentioned that is one of the capabilities you'll have as part of your management of your documents.

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00:09:39.510 --> 00:09:44.700

Kristina Konarski: Within SimpleLegal you can track and manage different versions and drafts of the same file.

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00:09:45.360 --> 00:09:50.040

Kristina Konarski: Because, of course, knowing which version of the file you're looking at is always going to be important.

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00:09:50.400 --> 00:09:59.670

Kristina Konarski: You know if you're trying to find which version of a policy is currently enforced or which version of a policy was in use at a particular time, those are things that the SimpleLegal version.

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00:10:00.300 --> 00:10:07.140

Kristina Konarski: feature is going to help you identify it's also, of course, important, if you're working on a collaborative document, maybe.

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00:10:07.530 --> 00:10:11.040

Kristina Konarski: The different TEAM members that are handling the matter in your organization.

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00:10:11.340 --> 00:10:27.030

Kristina Konarski: are working together on a collaborative document you want to keep track of what the latest version is what the prior versions may have been, and of course any documents that have frequent revisions, these are all areas that you can take advantage of version within native dms.

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00:10:28.470 --> 00:10:36.960

Kristina Konarski: So, unlike some dms solutions, though, when it comes to version we don't have an automatic version every time there's an update to the document.

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00:10:37.260 --> 00:10:50.760

Kristina Konarski: We allow our customers to decide when to create a new version, this is going to give you more control for the end user and also is going to help making managing documents, simpler and easier for you to do.

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00:10:52.650 --> 00:11:03.600

Kristina Konarski: Because we do have version in the system, you have the ability to view and download not only the current version of your document but also prior versions that had been loaded to SimpleLegal as well.

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00:11:06.570 --> 00:11:15.810

Kristina Konarski: search and filtering, this is a great use case right for using dms looking for files, making it easier to return results.

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00:11:16.230 --> 00:11:28.770

Kristina Konarski: So, within SimpleLegal you can search files and documents by file name, and you can also search by file content, the results that you see are going to return files that contain that keyword anywhere within the file.

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00:11:30.180 --> 00:11:40.230

Kristina Konarski: The searching is full text search it's not case sensitive So if you have you know you're searching for the word filing and you have it as a lowercase it's not going to prevent those.

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00:11:40.710 --> 00:11:43.470

Kristina Konarski: files coming back where it has it in uppercase.

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00:11:44.130 --> 00:11:54.720

Kristina Konarski: We do also support exact search if you're using double quotes So if you have a phrase that you're looking for and you want to make sure, only those results come back you can do an exact search.

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00:11:55.530 --> 00:12:07.470

Kristina Konarski: And when you get your results, we are going to rank those results by relevance, this is similar to Google search so it's something that is easy to understand, something that we all use in our day to day life is Google.

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00:12:08.130 --> 00:12:13.440

Kristina Konarski: So the the search results will be ranked according to relevance very similar to what we're already used to.

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00:12:14.160 --> 00:12:23.700

Kristina Konarski: Once you have your results you can then filter those results using different criteria, you can filter by date the size of the file categories labels.

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00:12:24.090 --> 00:12:36.450

Kristina Konarski: matter name and even who uploaded the file So if you know Christina loaded a file last week we don't know what it's called you know you can search for files that I may have loaded last week and a particular by a date.

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00:12:41.250 --> 00:12:48.930

Kristina Konarski: So as part of searching and filtering one of the things I mentioned, is that you can use filters called categories to help.

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00:12:49.380 --> 00:13:08.610

Kristina Konarski: identify the specific file that you may be looking for so categories are essentially a classification or a type for a file and examples of that may include things like answers briefs closings contracts disclosures etc.

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00:13:09.810 --> 00:13:20.370

Kristina Konarski: Using categories is going to improve the glance ability of spotting certain kinds of documents easily because you can look for you know, maybe I just want to look for all my documents that are briefs.

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00:13:21.660 --> 00:13:29.820

Kristina Konarski: As I mentioned, you can use these categories as filters which gives you a greater search ability of documents, making it easier to find what you're looking for.

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00:13:30.720 --> 00:13:37.200

Kristina Konarski: SimpleLegal we do provide you a default list of categories out of the box and I will show you those once we log into the system.

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00:13:37.410 --> 00:13:46.980

Kristina Konarski: But you have the opportunity and the ability to go in and Edit delete or add categories as you see fit and to meet your business needs.

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00:13:47.790 --> 00:13:55.500

Kristina Konarski: So that is something, although we will provide you with a default set of categories, you can completely configure that to your needs.

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00:13:56.130 --> 00:14:07.530

Kristina Konarski: But one thing I did want to mention is that categories are a one to one relationship between a document and the categories, so you can only assign one category for each document that you import.

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00:14:09.750 --> 00:14:23.100

Kristina Konarski: understanding that there may be other ways, you want to classify your documents for ease of searching, we have also provided capability called labels, this is one of the features that is going to make it especially easy for you to.

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00:14:23.550 --> 00:14:35.370

Kristina Konarski: Find documents as you're looking for those in the system, these are custom labels that you can create and they can be attached to documents again for organization and categorize categorization purposes.

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00:14:36.330 --> 00:14:40.890

Kristina Konarski: Those labels can be used as filters when you're in your search results.

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00:14:41.880 --> 00:14:48.750

Kristina Konarski: You can also use the default set that we've provided within SimpleLegal there's a limited number that we will provide.

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00:14:49.050 --> 00:14:56.970

Kristina Konarski: But you can just like with categories, you can add edit or delete whatever we have provided and supplement that list to meet your company's needs.

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00:14:57.900 --> 00:15:07.680

Kristina Konarski: Labels also can be assigned colors to make it easier to quickly locate something within your list of documents on that matter, and that is something that you can configure as well.

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00:15:08.730 --> 00:15:19.080

Kristina Konarski: Unlike categories, you can have as many labels, as you want when you are uploading a document so if you maybe want to have something set to a label for.

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00:15:19.500 --> 00:15:28.530

Kristina Konarski: sensitive information but also North America that it's a document related to the North America business unit, you know those are examples of how you can use labels.

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00:15:34.110 --> 00:15:41.880

Kristina Konarski: Okay, so I mentioned optical character recognition earlier, this is ocr and that's really what you'll hear it called most often.

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00:15:42.900 --> 00:15:55.020

Kristina Konarski: ocr really improves the reliability of searching for your documents, because all documents, including those image files can be searched using the global search feature which will look at in the system and a little bit.

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00:15:55.800 --> 00:16:02.970

Kristina Konarski: This is a feature that can be toggled on or off so it's not something that you have to use but it's available to you as an extra.

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00:16:04.170 --> 00:16:08.190

Kristina Konarski: You know, safeguard to make sure you're catching key documents at the time you're doing you're searching.

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00:16:09.390 --> 00:16:24.660

Kristina Konarski: It essentially extracts text from images, making them text searchable and allowing that full image character search to occur currently we support ocr on PDF PNG and jpeg files.

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00:16:32.310 --> 00:16:44.040

Kristina Konarski: Another key feature is preview this feature allows you to preview files that have been imported into unbelievable without having to download them first or without having to leave SimpleLegal.

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00:16:44.640 --> 00:16:52.650

Kristina Konarski: This is another feature that can be toggled on or off by you it's something you can choose to use or turn that off, if you prefer not to.

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00:16:53.310 --> 00:17:05.910

Kristina Konarski: It does use Google to generate previews about to 16 different file types so think of file types like word excel PowerPoint PDF documents so up to 16 different file types are supported.

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00:17:07.500 --> 00:17:19.770

Kristina Konarski: I mentioned that this particular feature does use Google and just for reference The document is only sent to Google, so that we can convert it to a preview at the time it's being viewed, but that information is not saved.

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00:17:20.610 --> 00:17:28.020

Kristina Konarski: files do need to be less than 25 megabits for larger files, you can actually download and preview those files offline.

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00:17:32.400 --> 00:17:43.590

Kristina Konarski: OK, so those of you who may be using SimpleLegals outlook add in this is a great integration point between outlook and SimpleLegal.

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00:17:44.130 --> 00:17:50.070

Kristina Konarski: as well, because the outlook add in work seamlessly with our document management system.

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00:17:50.460 --> 00:18:00.990

Kristina Konarski: You can easily save emails and attachments to a matter in SimpleLegal without having to leave outlook and then you can of course use the folder structures and all of the labeling and category.

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00:18:01.260 --> 00:18:09.420

Kristina Konarski: categories within the dms system to make it easier for you to find and filter through those emails and attachments that you may have saved.

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00:18:10.500 --> 00:18:23.940

Kristina Konarski: For those of you who may not have the outlook add in if that's something of interest feel free to contact your SimpleLegal customer success manager, we can, of course, provide you information about that and talk about any next steps if you're interested in looking to implement.

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00:18:26.460 --> 00:18:36.990

Kristina Konarski: And finally virus scanning so we do skin files for viruses or any malware This is to ensure that your data and the system remain safe.

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00:18:37.500 --> 00:18:47.880

Kristina Konarski: If a virus is found in a document that you're trying to upload that document will be quarantined and then your administrator will be notified so that the file can be deleted.

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00:18:52.620 --> 00:19:02.310

Kristina Konarski: Alright, so let's talk about a few of the benefits of using dms and shortly after that we're going to review the settings.

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00:19:04.740 --> 00:19:11.850

Kristina Konarski: So the first benefit of using dms and SimpleLegal is really that it creates a convenient one stop shop for you.

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00:19:13.440 --> 00:19:22.260

Kristina Konarski: you're tracking all of your matters and SimpleLegal and having the ability to also associate your matter files, in SimpleLegal really gives you one place to go.

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00:19:22.950 --> 00:19:33.150

Kristina Konarski: It ensures that your team can access those files at any time, and it means that they don't have to learn a second solution, so a separate software program.

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00:19:33.780 --> 00:19:41.430

Kristina Konarski: You know, to go out have their matter information and SimpleLegal have to go to a completely separate system to get their matter documents.

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00:19:42.090 --> 00:19:54.630

Kristina Konarski: This really does create an integrated solution and a one stop shop for your users and your legal team for how to get all of the matter, information and the matter documents in one place.

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00:19:57.750 --> 00:20:06.810

Kristina Konarski: it's also going to strengthen the knowledge management within your organization, so, as I mentioned before, SimpleLegal is a you know.

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00:20:08.340 --> 00:20:16.530

Kristina Konarski: accessible through the Internet, meaning if your users have access to SimpleLegal and they can log in from anywhere in the world.

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00:20:16.860 --> 00:20:21.450

Kristina Konarski: They are going to have access, which creates a centralized system of record for you.

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00:20:21.840 --> 00:20:32.490

Kristina Konarski: Make sure that the knowledge contained within those documents is available to anyone on the team and really helps in a situation where you may have a team Member who has left the organization.

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00:20:32.790 --> 00:20:48.330

Kristina Konarski: And would typically have kept all of that information, either on a private drive on their computer or maybe it's even in their outlook, which is another great use case for why you may want to look into the outlook add in if dms is an important initiative for your company.

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00:20:51.180 --> 00:20:56.640

Kristina Konarski: it's definitely going to save you on costs costs a standalone document management system can be expensive.

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00:20:57.210 --> 00:21:10.140

Kristina Konarski: You have access to the SimpleLegal native document management system today it's part of your subscription there's no additional cost for you to use it, so it does you know free up the dollars that you might have to spend otherwise on.

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00:21:10.890 --> 00:21:19.290

Kristina Konarski: A standalone document management system and let your attorneys and your legal team spend that money elsewhere where there might be a higher priority.

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00:21:22.410 --> 00:21:31.200

Kristina Konarski: it's secure and safe, so we do use industry standard and security leveraging data encryption, both at rest and in transit.

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00:21:31.740 --> 00:21:38.670

Kristina Konarski: As I mentioned before we have virus scanning so we're protecting the system and your data from having any viruses or malware introduced.

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00:21:39.240 --> 00:21:54.570

Kristina Konarski: And there's also to mls and sock to compliance, which does you know further just enforce the security and safety of your data and also of your documents, it will be extremely difficult for any unauthorized access to your files.

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00:21:55.560 --> 00:22:00.660

Kristina Konarski: Basically, based on all of the security and technology that we've wrapped around this tool.

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00:22:03.060 --> 00:22:15.300

Kristina Konarski: And finally, it provides robust governance, so the SimpleLegal document management system it's centered around the matter, which means the documents and the files are uploaded to the matter.

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00:22:15.750 --> 00:22:19.230

Kristina Konarski: They stay with that matter for the life of that that matter.

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00:22:19.740 --> 00:22:37.320

Kristina Konarski: And the same permissions apply So if I have granted three people access to my matter those three individuals will be the only ones that will also be able to see the documents, so we do help you enforce and manage permissions to documents, based on who has access to the matter.

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00:22:41.580 --> 00:22:56.760

Kristina Konarski: Okay, so if you're interested in using SimpleLegal document management system, you can easily use it as it sits on you know with the current configurations, but there are things that you will probably want to set up, you know for yourself, making it more.

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00:22:58.230 --> 00:23:09.510

Kristina Konarski: applicable to your organization and how you need the Ms to work, so the first step is to go to your administration documents settings and it appears as its own link here.

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00:23:11.820 --> 00:23:22.710

Kristina Konarski: You will then have the opportunity to manage your categories remember the categories are a one to one relationship between the document and the category that's defined.

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00:23:23.220 --> 00:23:26.760

Kristina Konarski: So there's a lot of red here i'm just going to walk you through what we're looking at.

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00:23:27.570 --> 00:23:35.940

Kristina Konarski: You will go to administration and, as I mentioned document settings but, once you get to that page, you have a series of tabs along the left.

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00:23:36.390 --> 00:23:48.210

Kristina Konarski: let's start with our document categories so from this page you're going to see a list of all of the document categories that have been deployed to you just by default from SimpleLegal, as I mentioned, there are 23 of those today.

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00:23:49.080 --> 00:24:00.960

Kristina Konarski: You have the ability to see whether or not any of your documents have been linked to that particular category, so in this case, I can see that to Canada to documents are part of the agreement category.

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00:24:02.340 --> 00:24:12.180

Kristina Konarski: If I have categories like answers, and I know i'm not going to need that I can delete that category or I can repurpose it and name it something different, by doing at it.

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00:24:13.620 --> 00:24:23.940

Kristina Konarski: Because you do have the ability to create additional categories, depending on the needs of your organization that list could get longer so you also have the ability to filter.

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00:24:24.300 --> 00:24:34.590

Kristina Konarski: By using your search button here, you can easily say you know show me the category for closings if I were to type that in and my closings category would be brought to my results.

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00:24:35.670 --> 00:24:43.470

Kristina Konarski: You have the ability, finally, to also add categories, so not only do you have the defaults that we provide you with, but you can create your own as well.

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00:24:46.170 --> 00:24:52.350

Kristina Konarski: The next item available to you is your labels and remember labels, you can have a multiple.

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00:24:53.010 --> 00:25:04.170

Kristina Konarski: Many to one relationship between your labels and your document so here what we're looking at is that you will see a list of all of the labels that you have in your SimpleLegal application.

137

00:25:04.770 --> 00:25:14.130

Kristina Konarski: Again, are there any documents that are currently use using those labels, you can delete the label if it's no longer needed or you can edit to rename it.

138

00:25:14.760 --> 00:25:28.950

Kristina Konarski: searching for your labels and then you can also create new ones so very similar to categories, the big difference between the two again categories is a one to one relationship with the document labels, you can have more than one label per document.

139

00:25:31.290 --> 00:25:39.180

Kristina Konarski: There are some settings that we allow customers to define, whether or not they want these to be used in their environments.

140

00:25:39.570 --> 00:25:52.830

Kristina Konarski: The first of which is the preview and the second is the ocr the reason that we give you a toggle for these two settings in particular is because they do use other technologies to help us deliver that service to you.

141

00:25:53.280 --> 00:26:03.570

Kristina Konarski: In the case of preview we use Google, in the case of ocr we use Amazon, so it was totally up to your organization, whether or not you would like to activate these two.

142

00:26:03.930 --> 00:26:17.160

Kristina Konarski: settings if you are, if you prefer not to because there is, you know another vendor that is used to generate the preview and complete the ocr, you have the ability to go in and just toggle those to off.

143

00:26:20.520 --> 00:26:31.920

Kristina Konarski: Under notifications recall that I said, if you have a file that gets uploaded and that file has been identified as one that's infected with a virus or malware.

144

00:26:32.400 --> 00:26:44.640

Kristina Konarski: We are going to notify the administrators that you've you've identified so unlike a lot of features within SimpleLegal, this is not, you know just any system administrator within the system.

145

00:26:45.030 --> 00:26:57.150

Kristina Konarski: we're going to have you specify which admins can go out and receive the notifications these admins will also be the ones that are able to go out and delete any documents that may be in the quarantine.

146

00:26:57.510 --> 00:27:09.060

Kristina Konarski: So here, you can add an admin and you can also remove them so in the event that Dave is no longer supporting this this function, we can remove Dave and add someone in this place if we need to.

147

00:27:11.190 --> 00:27:22.440

Kristina Konarski: And finally, the last tab here is your quarantine files, so if there were any files infected, they would be here and your admin that we just reviewed would go out here and delete those files.

148

00:27:25.500 --> 00:27:31.440

Kristina Konarski: So that's that's the settings but really what you're going to want to pay some attention to as well is.

149

00:27:31.800 --> 00:27:41.520

Kristina Konarski: Once the settings are in place and I start to use document management, where do I find that, and you know what's available to me in my matter based.

150

00:27:41.940 --> 00:27:50.640

Kristina Konarski: dms so here what we're looking at is just a matter you'll notice, there is a tab here called files, and this is where your dms capabilities live.

151

00:27:51.540 --> 00:28:02.220

Kristina Konarski: you'll notice that, for each file, we have a series of actions that you can take the very first one here is to be able to take that document and download it to the local machine.

152

00:28:02.970 --> 00:28:12.120

Kristina Konarski: We have action buttons here as well, for downloading the folder recall I said, if you have folders you can download those you can create a new folder and you can upload files.

153

00:28:16.140 --> 00:28:23.340

Kristina Konarski: When we do that virus check, we will apply a green checkmark to let you know that it has been scanned.

154

00:28:23.880 --> 00:28:34.320

Kristina Konarski: And that no malware was detected if, during the import process, we did identify a problem those documents will not be available to you here.

155

00:28:34.590 --> 00:28:40.920

Kristina Konarski: They are instead going to be in the quarantine for your admin to delete so just you know know that this is sort of a.

156

00:28:41.250 --> 00:28:48.780

Kristina Konarski: Confidence check for you that when the document was uploaded it did complete that cycle to go through the virus scanning and you're good to go.

157

00:28:49.680 --> 00:29:08.580

Kristina Konarski: The other actions that are available at the document level are to rename that document, you can edit the labels and the category move the document add a new version look at the version, history or you can delete that document so there's quite a bit of capability here.

158

00:29:09.960 --> 00:29:14.640

Kristina Konarski: At the top of your SimpleLegal application, you have your global search function.

159

00:29:15.000 --> 00:29:23.820

Kristina Konarski: And you'll notice that you know i've been talking a lot about using categories and labels and keywords to find and quickly locate the documents that you're looking for.

160

00:29:24.300 --> 00:29:37.110

Kristina Konarski: This is where you're going to go if you want to quickly find a document on your global search, there is an option called matter files and you will select that and then put in the keyword or keywords that you want to use for searching.

161

00:29:38.130 --> 00:29:45.210

Kristina Konarski: What will happen is your results will come back once you've hit search and you'll see here, we had our keywords set to real estate agreement.

162

00:29:45.720 --> 00:29:59.550

Kristina Konarski: I had a document come back real estate agreement is in all of the title but it's also in the text of the document so it's identifying for us that it is a full text search not just have the title, but also have the content.

163

00:30:01.530 --> 00:30:19.950

Kristina Konarski: you'll notice here at the top of my results if I had had a long list of documents here that match that criteria I could then further use my filters to get to the exact document or documents that i'm looking for by date size category label the matter itself or who uploaded it.

164

00:30:22.440 --> 00:30:33.930

Kristina Konarski: Okay let's spend the remaining time in SimpleLegal bear with me while I get in there, real quick okay so first, we are going to take a look at the setup.

165

00:30:34.920 --> 00:30:42.540

Kristina Konarski: If you want to start using SimpleLegals dms or if you're using that already but want to start configuring it to meet your specific business needs.

166

00:30:42.810 --> 00:30:59.220

Kristina Konarski: you're going to go to administration and then you will see a link for document settings right here, when I click into my document settings This is just like the slides we reviewed together, you have a series of tabs and the first tab here is your categories.

167

00:31:00.660 --> 00:31:08.730

Kristina Konarski: As I mentioned, we have about 23 categories that we provide to you, by default, you can sort this list.

168

00:31:09.270 --> 00:31:18.240

Kristina Konarski: You can sort related documents so here's where you're going to identify whether or not any of these categories are currently being used to help locate.

169

00:31:18.960 --> 00:31:28.500

Kristina Konarski: Particular documents and then over to i'm just going to restart this over to the right for each of those categories, you have the ability to delete.

170

00:31:28.800 --> 00:31:37.410

Kristina Konarski: If it's not something that you're planning to use might as well, keep it clean, or you can edit when I edit it just simply means I can rename the category.

171

00:31:39.060 --> 00:31:47.940

Kristina Konarski: What I wanted to show you as well, though, is let's let's go ahead and add a category is very simple very straightforward, you have your ad category button at the top.

172

00:31:49.140 --> 00:31:53.190

Kristina Konarski: And let's just add a new category for depositions.

173

00:31:56.490 --> 00:32:08.310

Kristina Konarski: And if I want to find my new category within my list I can use my filter so here's my filtering it's a great way to be able to whittle that list down to something that you're looking for specifically.

174

00:32:10.470 --> 00:32:15.960

Kristina Konarski: and recall, this is a one to one relationship between the document and the category.

175

00:32:17.040 --> 00:32:20.220

Kristina Konarski: let's look at document labels, perhaps there is a label.

176

00:32:20.580 --> 00:32:35.850

Kristina Konarski: That you want to be able to assign you'll notice that we have some in here, for you know it's a sensitive document it's confidential, maybe it's administrative or related to a MIA vs USA versus a pack So these are different ways, you can create your labels.

177

00:32:36.270 --> 00:32:41.670

Kristina Konarski: Completely configurable to meet your business needs and all of the same concepts apply.

178

00:32:42.300 --> 00:32:54.840

Kristina Konarski: We do have the information available to you, so if you needed to know you know how many documents may be associated to my administrative label, I can tell that I currently have 43 documents in there, or maybe I have.

179

00:32:55.590 --> 00:33:07.260

Kristina Konarski: I have a class action going on and I currently have 23 documents related to that particular class action I can't access those documents from here, but I could certainly use my global search to start to find those.

180

00:33:08.790 --> 00:33:13.890

Kristina Konarski: Just like with my categories, I can delete or I can edit the name of the category.

181

00:33:14.430 --> 00:33:27.660

Kristina Konarski: But what's different here is, you also can select a label colors so that when you're looking at a list of documents, it might be easier to jump out to change the label color you just click on the box and you could then select a different color.

182

00:33:29.430 --> 00:33:43.620

Kristina Konarski: So that's totally configurable for your preferences, when you add a new label you're asked to provide a name so maybe I have tax documents, I want to be able to track and i'm just going to put a blue color on that save.

183

00:33:44.340 --> 00:33:50.640

Kristina Konarski: And now I can see it in my list here's my newly added one or I can of course use my filters to search.

184

00:33:52.440 --> 00:34:08.310

Kristina Konarski: One thing I do want to mention for both categories and labels, if there are any documents that are related, you are not able to delete it because it is being used for your documents and you would have to remove that label from the documents before you could delete the label.

185

00:34:10.680 --> 00:34:17.070

Kristina Konarski: document preferences is where you will go to toggle on or off the preview and the ocr capabilities.

186

00:34:17.490 --> 00:34:25.350

Kristina Konarski: You will notice here in this particular environment because i'm not in a production environment i'm in a sandbox environment, so our ocr is not activated here.

187

00:34:25.620 --> 00:34:35.280

Kristina Konarski: But if you are looking in your production, environment and want to toggle on or off those features, you would just go to your document management settings document preferences.

188

00:34:36.990 --> 00:34:55.110

Kristina Konarski: Under notifications, this is where you're going to identify those individuals those admins who should be notified in the event that a file has been loaded with a virus or malware I can do a couple of different things here, I can add a new administrator so in here i'm going to add myself.

189

00:34:57.300 --> 00:35:09.840

Kristina Konarski: So the system is going to let you select from a list of users who've been added, and maybe I don't you know because i'm going to start managing this now I don't need grace to get those notifications it's just noise in her inbox so I can delete.

190

00:35:12.660 --> 00:35:30.000

Kristina Konarski: So that's how you can set your notifications and manage who receives those and then finally here's your quarantine files area, so if I do have any files that are quarantine fortunately we don't have any in this environment, I can go in, as an as the admin and delete those files.

191

00:35:33.210 --> 00:35:54.060

Kristina Konarski: Alright, so that's pretty much as simple as it is to set up your categories your labels and your preferences within SimpleLegal for your dms capabilities let's go ahead and just take a look at a matter, so I am going to use my global search to find the matter that I want.

192

00:35:56.250 --> 00:35:58.170

Kristina Konarski: it's right at the top, my patent matter.

193

00:35:59.850 --> 00:36:09.900

Kristina Konarski: And you'll notice on the top of my matter I have my tabs we're going to spend today focused on our files tab this is your dms within SimpleLegal.

194

00:36:10.980 --> 00:36:25.200

Kristina Konarski: Because it is matter based you're only going to have this capability under the matters so it's not something that you set up on a vendor or you set up on other objects within the system This truly is matter based dms.

195

00:36:26.070 --> 00:36:36.930

Kristina Konarski: So here let's go ahead and just do a few things, as I mentioned, you have some action buttons available, we can see that you know, this is my my training matter, I have some folder setup already.

196

00:36:37.440 --> 00:36:48.120

Kristina Konarski: And I can go in and just start to look at the details of these or I can create a new folder let's do that, so I want to create a new folder and I just click on my create folder button.

197

00:36:49.140 --> 00:36:51.420

Kristina Konarski: we're going to put filings.

198

00:36:53.400 --> 00:37:06.840

Kristina Konarski: And I now have a new folder on this page there's a few different things, I can see, I can see the type of object that i'm looking at if you see a folder here, it is a folder structure, if you see a document.

199

00:37:07.440 --> 00:37:20.880

Kristina Konarski: icon it means you're looking at a document, we will see one of those in a moment and it'll make it a little bit more clear the skin status, this is where you will see your Green checkmark again because i'm in a training sandbox I don't actually have that.

200

00:37:21.990 --> 00:37:25.080

Kristina Konarski: feature enabled so we're just going to.

201

00:37:26.310 --> 00:37:32.460

Kristina Konarski: Remember, and remind you that you will see a green checkmark here once your document has completed that process.

202

00:37:33.600 --> 00:37:48.480

Kristina Konarski: The name of the file or the folder the category, so this links back that one to one relationship right if it was an answer or brief or communication this is part of your search criteria and part of your view.

203

00:37:49.020 --> 00:38:06.330

Kristina Konarski: We can see when that file was uploaded or when the it was created, who took that action was it, you know created or uploaded by Christina or David if it is a folder we're going to show you in the size column, how many items are contained within that folder.

204

00:38:07.410 --> 00:38:16.620

Kristina Konarski: let's just click into one of these folders if it is a document and you'll notice, here is my my icon for a document, so I can tell the type of object i'm looking at.

205

00:38:17.160 --> 00:38:20.910

Kristina Konarski: And if it is a document we're going to tell you the actual size of the document.

206

00:38:21.750 --> 00:38:29.940

Kristina Konarski: So let's just go back you can use your trail of breadcrumbs, so to speak at the top of your window here to get back to the prior can.

207

00:38:30.660 --> 00:38:48.060

Kristina Konarski: Take your steps backwards, but let's go ahead and do a couple of things I created a folder called filings and I want to create another folder because I want to have a folder called North America, and I want to track my North America filings.

208

00:38:49.800 --> 00:38:51.030

Kristina Konarski: So a couple of things here.

209

00:38:52.830 --> 00:38:57.780

Kristina Konarski: Because these are actually related to filings I should have put it under the filings folder.

210

00:38:58.590 --> 00:39:08.190

Kristina Konarski: So I can easily take care of that by using my actions over to the right which if I click on that little circle, with three dots It gives me the option to rename my folder.

211

00:39:08.640 --> 00:39:20.820

Kristina Konarski: I can move it or I can delete it in this case we're going to choose to move it we want North America to appear under our filings folder we're starting to build out our structure and we're starting to nest some folders within each other.

212

00:39:21.390 --> 00:39:35.250

Kristina Konarski: I select the folder I want it to be a part of, and when I click move you'll notice it's no longer there and I can see this filing folder now has one item in it, if I click on that and go look inside here's our North America folder.

213

00:39:37.530 --> 00:39:41.910

Kristina Konarski: So if I wanted to upload some files to this particular folder.

214

00:39:42.150 --> 00:39:52.650

Kristina Konarski: let's go ahead and click on it, so we now know our breadcrumb we were previously looking at all documents, but now we're in the filing folder and, within that folder where we are in our North America folder.

215

00:39:53.280 --> 00:40:05.160

Kristina Konarski: i'm going to upload some files and you'll see here, I can click here to select those files or I can drag and drop I think most people are going to want to drag and drop so let's just look at.

216

00:40:06.480 --> 00:40:14.430

Kristina Konarski: That capability, I can select and drag them right in and you'll see that I now have the two files I selected.

217

00:40:15.420 --> 00:40:34.260

Kristina Konarski: I can identify at the time of upload the category and the labels, this is optional, so maybe for this one we're going to say this is communications and this one is complaints i'm going to leave my, this is a confidential document and this one is administrative.

218

00:40:35.340 --> 00:40:36.660

Kristina Konarski: When I click on upload.

219

00:40:37.920 --> 00:40:48.330

Kristina Konarski: it's going to give us a progress report and a couple of things just to know, we do have a maximum size per file of 250 250 megabytes.

220

00:40:48.990 --> 00:40:51.780

Kristina Konarski: You can upload up to 10 files, at the same time.

221

00:40:52.410 --> 00:40:59.580

Kristina Konarski: And let's say if you were to try to load a file that has an exact match on a founding that already exists.

222

00:40:59.850 --> 00:41:10.620

Kristina Konarski: The system is actually going to recognize that and will prompt you to version that document or to skip uploading that particular document so we're doing all of those validation at the time of the upload.

223

00:41:12.630 --> 00:41:19.980

Kristina Konarski: Now i've clicked done, and in my North America folder I now have the documents that I was looking to upload.

224

00:41:21.750 --> 00:41:28.890

Kristina Konarski: At the time I uploaded those I did identify that this was a confidential document and this one is administrative.

225

00:41:29.220 --> 00:41:37.230

Kristina Konarski: Maybe they were both supposed to be confidential and I need to add a label here, so it is it administrative document, but it is also confidential.

226

00:41:37.830 --> 00:41:51.990

Kristina Konarski: At the left at the right hand side of my record I have, the more button, and this is where, in that PowerPoint we looked at here all the actions available to me I can rename this file if I choose to want to say.

227

00:41:58.830 --> 00:42:14.910

Kristina Konarski: So it's worthwhile to mention, you cannot rename the file at the time you're uploading it, but you can rename the file after it has been imported into SimpleLegal so I have now renamed my file, but I also want to add another label, so that we know this is a confidential.

228

00:42:16.680 --> 00:42:28.200

Kristina Konarski: This is a confidential document i'm going to click on my actions edit my category, and I am going to i'm sorry I want my label, I want to edit my label.

229

00:42:30.600 --> 00:42:40.500

Kristina Konarski: bear with me, I appreciate your patience and we are also going to select confidential so you'll notice, I have the ability to select as many of these as I need to okay.

230

00:42:43.800 --> 00:42:45.360

Kristina Konarski: Alright, so.

231

00:42:46.440 --> 00:42:52.020

Kristina Konarski: Now that we know we can use the action buttons to rename edit the labels and the categories.

232

00:42:52.470 --> 00:43:03.000

Kristina Konarski: We can move the as maybe this file in particular shouldn't have been part of North America, maybe this is actually related to all of my filings let's move this particular document.

233

00:43:03.540 --> 00:43:11.190

Kristina Konarski: back up to the filings folder it's in the North America folder right now but it's really applicable to all filing so we're going to move it up a level.

234

00:43:11.820 --> 00:43:25.230

Kristina Konarski: I just select it and click move now under North America, I just have my one document when I follow my breadcrumbs back to my filings I now have my North America folder as well as my document that I have just moved.

235

00:43:27.930 --> 00:43:52.050

Kristina Konarski: Okay, so um a couple of things that I wanted to also show you let's say that you wanted to rename your folders in this case I have my North America folder and maybe I just want to rename filings to patent patent filings I can go back any level that I need to go, and I can rename.

236

00:43:57.180 --> 00:44:06.960

Kristina Konarski: This is not going to change the fact that I have files that are saved to that particular folder, it is only going to rename that folder OK.

237

00:44:07.440 --> 00:44:15.810

Kristina Konarski: Now let's click into our analysis folder for just a moment because I did just want to show you here, you know you can easily identify that there are multiple communications.

238

00:44:16.680 --> 00:44:32.220

Kristina Konarski: categories that can be used within the same folder I can sort on any of these columns to see you know what are my largest files who uploaded, the most recent file when was the most recent file loaded and what was it so all of these things are sortable.

239

00:44:34.080 --> 00:44:39.960

Kristina Konarski: And this is all just an easy way for you to start to manage and track the files on your documents.

240

00:44:40.500 --> 00:44:50.730

Kristina Konarski: And here is our patent filings This is where we were previously, this is a good example of how within your folders you may have different types, so I have folders and documents in the same place.

241

00:44:52.440 --> 00:45:06.390

Kristina Konarski: All right, the one other thing I did want to show you before we look at searching is if I wanted to import a new version of this document, maybe i've gone in i've made some changes to it and I need to get the latest version and SimpleLegal.

242

00:45:06.870 --> 00:45:17.040

Kristina Konarski: I can go on to my action, and I can click the action to add a new version, when I do that i'm going to be prompted to select that new version okay.

243

00:45:17.670 --> 00:45:21.330

Kristina Konarski: The other thing that you can do here is, you can see the version history.

244

00:45:21.870 --> 00:45:36.390

Kristina Konarski: When I look at this it's telling me that I am looking at the current version, no other versions have been uploaded I can then also download this current version, or any prior versions that may be in the system to my personal drive.

245

00:45:40.380 --> 00:45:46.050

Kristina Konarski: Okay let's go ahead and just show the history.

246

00:45:51.090 --> 00:46:09.900

Kristina Konarski: If I go up to my my search we're going to spend some time talking about the searching and this is the kind of final component of dms so we've talked about how to create folders how to upload documents, if you want it to download a folder structure, maybe I want to download my artifacts.

247

00:46:11.070 --> 00:46:16.920

Kristina Konarski: folder I can select it I can hit download folder and it's going to give me the ability to do that.

248

00:46:18.360 --> 00:46:22.980

Kristina Konarski: It has now downloaded this and it is opening it in a zip file.

249

00:46:25.260 --> 00:46:30.930

Kristina Konarski: So you will have access to see all of that information but let's go ahead and actually search.

250

00:46:32.670 --> 00:46:39.060

Kristina Konarski: i'm going to go to my global search select matter files because remember we're searching files that are loaded on the matter.

251

00:46:39.840 --> 00:46:51.750

Kristina Konarski: we're going to search for our keywords in the files that I uploaded today, I know that I had the words native dms, so I am just going to put in my keywords native dms.

252

00:46:55.740 --> 00:47:03.810

Kristina Konarski: When my results come back, we now see that I have three documents here and you'll notice training one was my initial.

253

00:47:04.470 --> 00:47:14.610

Kristina Konarski: document, but then I renamed it and I had a second version okay within the search results, you can see that native dms appeared.

254

00:47:15.030 --> 00:47:21.690

Kristina Konarski: In some cases in the title and other cases, it was in the content of the file itself, so this is just kind of.

255

00:47:22.680 --> 00:47:36.390

Kristina Konarski: Reinforcing that the search that we're doing is not just looking at the title, it is also looking at the content of the file itself within the information that comes back you can see that you have the file name.

256

00:47:37.650 --> 00:47:48.780

Kristina Konarski: The file location, so if I want to now figure out how do I get to this final now that I found it I can click right into the document I can click the path to bring me to that matter.

257

00:47:50.040 --> 00:47:59.640

Kristina Konarski: And I can also see when it was last modified and who was the last person to upload that particular document so it's going to give you quite a bit of information here.

258

00:48:00.300 --> 00:48:17.100

Kristina Konarski: you'll notice also that I have my labels here's my label of confidential, this was a sensitive document, and I can go ahead and further filter using my categories and my labels, maybe I just want to pull back those that were confidential.

259

00:48:18.870 --> 00:48:35.640

Kristina Konarski: So this is how you can start to use your labels enter categories to help you whittle down the results and find those particular documents you're looking for and again once you go into that document you find your result you can then open that file.

260

00:48:37.740 --> 00:48:44.850

Kristina Konarski: And you can get to that file the matter itself by clicking on the link below breadcrumb and I know how to get to that fine.

261

00:48:46.830 --> 00:48:52.440

Kristina Konarski: Okay, so let's go ahead and go back into our PowerPoint for a moment.

262

00:48:54.720 --> 00:49:02.850

Kristina Konarski: I mentioned that if we have some time I wanted to review some frequently asked questions about native document management within SimpleLegal.

263

00:49:03.630 --> 00:49:09.870

Kristina Konarski: So, quite often we do get asked the question on if you can open the documents within the application and Edit them.

264

00:49:10.470 --> 00:49:14.670

Kristina Konarski: So you can preview the document, if you have that preference turned on.

265

00:49:15.030 --> 00:49:27.720

Kristina Konarski: But to edit those you have to download them make the edits and then re upload them to SimpleLegal and then of course you can choose to have them uploaded as a second or third version whatever you could have that version control.

266

00:49:29.640 --> 00:49:35.400



Kristina Konarski: If you integrate via outlook, do you have access to the documents to attach them to outgoing emails.

267

00:49:35.970 --> 00:49:54.570

Kristina Konarski: So as of right now the functionality and the integration between outlook and SimpleLegal dms is a one way, so you can save emails and attachments to SimpleLegal but, at this time, the functionality to pull documents from SimpleLegal and attach them to an outlook email is not yet supported.

268

00:49:56.130 --> 00:50:01.080

Kristina Konarski: How does the version control work and how does SimpleLegal know this is a new version.

269

00:50:01.740 --> 00:50:07.200

Kristina Konarski: So the version control occurs when you re upload a file, in place of an existing version.

270

00:50:07.470 --> 00:50:16.290

Kristina Konarski: We do keep a history of each version, and you can download those prior versions so as you if you recall, when I went and I clicked on the version history.

271

00:50:16.590 --> 00:50:26.250

Kristina Konarski: We were able to see that we were looking at the current version, if there had been others, we would see those also as options and we could have opened or downloaded those prior versions.

272

00:50:28.170 --> 00:50:38.280

Kristina Konarski: Please describe your native document management components search capabilities, do we support full full full text search of documents so absolutely.

273

00:50:38.730 --> 00:50:54.300

Kristina Konarski: We do support full text search on the titles and the content and as of later last year, we also added in the ability to do ocr searching on scan files and the results are ranked by relevance so that's exactly what we looked at together when we were.

274

00:50:55.590 --> 00:51:04.590

Kristina Konarski: searching for our native dms documents within the DEMO site, so you have seen that kind of firsthand and that's how that will work in your application as well.

275

00:51:06.150 --> 00:51:17.040

Kristina Konarski: Does your system have the ability to generate standard documents such as an engagement letter so at this time SimpleLegal does not provide capability to draft documents.

276

00:51:17.550 --> 00:51:25.500

Kristina Konarski: Or to generate documents, however, we do have a partner company called X dropped and they do have functionality that can support that.

277

00:51:25.800 --> 00:51:35.040

Kristina Konarski: If that's something that you're interested in, or would like to pursue just let your customer success manager know and we can help you set up a call to discuss that further.

278

00:51:36.330 --> 00:51:45.690

Kristina Konarski: And finally, can default folder structures be added to matter templates so at this time, you do create your folder structures on each individual matter.

279

00:51:46.290 --> 00:51:55.920

Kristina Konarski: it's not currently possible to say for this matter template we always want our file structure to be xyz it is something that you will do on a matter by matter base.

280

00:51:59.940 --> 00:52:04.620

Kristina Konarski: Okay, a few things I did just want to point out, with regards to ocr and how that works.

281

00:52:05.730 --> 00:52:13.050

Kristina Konarski: And this is again i've put in these slides mostly for your reference, as you start to use these features and to reference back.

282

00:52:13.560 --> 00:52:27.240

Kristina Konarski: But the accepted file formats for ocr are jpg or PNG and PDF there are some file size limits so for jpeg and PNG there's a 10 megabyte size limit and PDF have 500 limit.

283

00:52:28.980 --> 00:52:35.160

Kristina Konarski: There are some page limits for pdfs which are referred referenced here maximum number of pages is 3000.

284

00:52:35.760 --> 00:52:46.500

Kristina Konarski: And this gets pretty technical so i'm not going to go through all the details of this but know that if you choose to use ocr this is available information available to you, within the context of the slides that will be sending you.

285

00:52:48.480 --> 00:53:02.490

Kristina Konarski: We do use Amazon tech strapped to do the conversion of these jpg or PNG and PDF files, and so the text alignment is horizontal within the document vertical texts alignment is not supported.

286

00:53:03.510 --> 00:53:12.120

Kristina Konarski: We do, because we are using Amazon text draft based support English, French, German, Italian, Portuguese and Spanish.

287

00:53:12.900 --> 00:53:28.650

Kristina Konarski: So that is something that you know we can support as well, if you have documents that you want to put into SimpleLegal that our image files and are in a different language, we can support, using the Amazon text strapped capabilities multiple languages.

288

00:53:30.660 --> 00:53:45.510

Kristina Konarski: There is character size minimum height is 15 pixels character type is handwritten and printed characters so know that if you have handwritten notes that is also something that the ocr can convert from image.

289

00:53:46.200 --> 00:53:55.380

Kristina Konarski: Which is, which is pretty cool and of course it's going to work best on handwriting that is legible if it's not you, you know, there could be some.

290

00:53:56.190 --> 00:54:05.940

Kristina Konarski: Translations that maybe a little off just based on the handwriting and then characters Amazon to extract the text, all of these characters within.

291

00:54:07.620 --> 00:54:15.660

Kristina Konarski: The conversion process, so it is really full capability and should work a great deal with all of your documents.

292

00:54:17.790 --> 00:54:20.070

Kristina Konarski: Okay, any questions for today.

293

00:54:25.830 --> 00:54:37.770

Kristina Konarski: Alright well i'm not seeing anything come up in the chat box so just a quick reminder on your resources, you always have access to the SimpleLegal resource Center for commonly asked questions.

294

00:54:38.160 --> 00:54:43.380

Kristina Konarski: and also the SimpleLegal support team which you can contact at help at SimpleLegal COM.

295

00:54:43.800 --> 00:54:52.830

Kristina Konarski: We do have a lot of articles in the resource Center about native dms, so I would encourage you, if you have additional questions, following the call today.

296

00:54:53.430 --> 00:55:02.490

Kristina Konarski: Or if you just want to look at that and explore it a little bit more in your own the resource Center is a great place to go, you can just keyword search for dms or document management.

297

00:55:04.770 --> 00:55:08.580

Kristina Konarski: Your vendors do not currently have access to this particular tool.

298

00:55:08.850 --> 00:55:17.640



Kristina Konarski: However, just a reminder, if you do have other things that you are hearing from your vendors on or they have questions about how to submit their timekeepers or how to submit their invoices.

299

00:55:17.910 --> 00:55:31.740

Kristina Konarski: We do also have a support team and a resource Center for your vendors, so this is information that you can share with them, if you are getting calls that you know, we would be in a in a better place to support those questions.

300

00:55:33.960 --> 00:55:39.120

Kristina Konarski: All right and just Finally I just one more time I do appreciate the time that you spent with me today.

301

00:55:39.510 --> 00:55:50.970

Kristina Konarski: and, hopefully, you have gotten something out of this and we'll have a new tool that you can start taking advantage of and SimpleLegal any questions feel free to contact us we're happy to help you implement Thank you and have a great day.