



Save Time With

DOCUMENT MANAGEMENT AND GENERATION AUTOMATION

Learn more about selecting the best doc management and doc generation tools for your law firm.



Gain Time with Doc Management and Generation Automation

Attorneys' time is a precious commodity. It's a waste of time to search for documents or recreate transactional documents from scratch.

How do you maximize the time attorneys spend on matters that need their expertise and minimize the time spent on administrative or repetitive tasks?

Document management software, simply, helps law firms organize their documents. But, it's more complex than that. Not only does a document management system store your information, but it provides a way for you to search and index your files and share data with other authorized users. Better document management systems can manage versions of documents, integrate with your email system, and allow remote access. Many are intuitive to use so they require little training.

Document generation software does just what its name implies: It automates document generation, which keeps attorneys from having to reinvent the wheel every time they create a contract or other transactional document.

Because law firms have particular security needs, many document management and document generation applications are built specifically for the legal profession. These big five brands of document management and document generation software have different features and strengths.

Document Management

1. iManage

iManage is better for large law firms because it can be hosted in the cloud or on-site and requires maintenance by trained IT professionals. iManage has the advantage of being well integrated with Microsoft Office. That provides ease of use and further streamlines time spent on filing emails or documents into the system.

2. Worldox



Worldox also integrates with Microsoft Office, and it is an appropriate choice for law firms of all sizes. It has a central document control system, which means that information from multiple databases can be combined for greater time-savings.

3. MetaJure

MetaJure also can be used by any size law firm. One of its advantages is automatic integration of all documents (including image-based documents, such as PDFs).

Document Generation

4. HotDocs

Users who want to create a transactional legal document, such as a will or contract, interact with a HotDocs template to input information specific to a case or matter, which increases accuracy.

5. ProDocs

ProDoc generates transactional legal documents by asking questions specific to each situation. It also allows users to further customize documents if necessary.

Questions to ask

Selecting the right document management and document generation software for your firm is of the utmost importance. Here are just a few questions to ask to make sure you get the best software for your needs:

- Is the application hosted on-premise or in the cloud? Does the cloud provider have experience assisting law firms with your legal and business applications?
- Do you need on-site or on-call IT people to manage the system? Can it be easily installed or must it be completely customized?
- Was the software built specifically for use by those in the legal profession? Does it include standards of security that will keep your law firm from breaking privilege?
- How would you prefer that the document management application structure its organization? By project? By matter? By work group? In some other way?



- How intuitive is the software? Does it require extensive training, or is it simple for users to get on board?
- Does the application allow for offline access? For access across multiple devices?
- Does the software use multiple databases or is the data housed centrally?

If you need assistance determining which type of software has the features you need, or if you would like help integrating new applications with your existing system, Legal Workspace’s application support specialists can help. You can take advantage of Legal Workspace’s Software as a Service licensing model for certain document management or document generation applications. Legal Workspace can also move existing licenses for software to its cloud environment.

Document management and document generation software can act as time-savers—but law firms must put in time up-front to select the program that will work best for their specific needs.

Legal Workspace is a pioneer in cloud-based work environments and data storage designed specifically for law firms. Learn more at legal-workspace.com.