

Document Management Essentials for Law Firms



Documentation forms the core of every legal case, from photos and emails to briefs and depositions. Keeping that information organized, secure and searchable not only improves efficiency but also minimizes the chance for malpractice. For law firms, effective document management is critical to success.

Consider the repercussions of misplacing a critical email or file, for example. Or imagine the effect of a security breach on an active case. The fallout could be disastrous for both your legal firm and for your clients. Implementing the right document management solution protects your organization and delivers powerful tools for collaboration.

Vital Document Management Features

With every minute billable and every note potentially important, legal firms need more than a simple virtual filing cabinet. The right document management system not only organizes files but also includes tools to help attorneys use that information more productively. Look for the following features as you choose the right solution for your firm.

- Management of both email and traditional documents – A documentation management solution is incomplete that does not index emails as well as documents and images. While often considered more informal, emails can still constitute enforceable contracts.
- Cloud-based for accessibility – Moving to the cloud simplifies collaboration and ensures that the legal team can access all documentation related to the case from any location. Cloud-based systems also offer scalability, keeping pace with your case load.
- Matter-centricity and powerful search capabilities – All documents and emails related to a client and case are organized together and easily retrieved with a single search.
- Collaboration tools with audit trail – Multiple team members working on the same case can collaborate on a single document. The system should keep a log of changes made and allow the ability to retrieve previous versions of a document.



Security and Compliance

Law firms cannot afford to take a lackadaisical approach to information security and regulatory compliance. A [multi-layered security strategy](#) protects customer privacy and preserves data integrity. For instance, documentation management must include comprehensive logs of document access and changes.

In addition, a quality system provides the ability to enforce policies surrounding data loss prevention and appropriate sharing of sensitive information. This helps to ensure that the firm conforms to [data compliance](#) regulations such as HIPAA and GDPR, as applicable for the case at hand.

Office 365 Shines at Document Management for Law Firms

Over 155 million business users depend on Microsoft Office to create documents and spreadsheets, read email and deliver presentations. With [Office 365 for Business](#) and SharePoint, Microsoft delivers

2015 | 2013 | 2012 Microsoft
Partner of the Year



Inc. 500 || **5000**
2016 | 2015 | 2014 | 2013 | 2012 | 2011 | 2010



ShoreTel Sky
Partner of the Year

powerful document management capabilities. The well-known collaboration features of Office 365 are just the beginning.

For example, SharePoint Document Sets represents one of several effective options for organizing documents related to a single case or client. Among other features, Document Sets allow you to develop and assign custom workflows and specify case-level metadata.

Microsoft also offers robust security tools. Like other document management systems, SharePoint provides for audit trails and permissions. In addition, your firm can define policies for document retention and assign document labels to protect sensitive data from inappropriate sharing. Microsoft even offers predefined filters to smooth the way to regulatory compliance.



Adding Expertise to the Team

With potentially thousands of documents related to each individual case, the tasks of legal [document management and eDiscovery](#) can prove as daunting as they are essential. Solutions like Office 365 offer powerful capabilities for collaboration and indexing of documents, while ensuring that documents are both accessible and secure.

Getting the most out of the options available requires a degree of expertise not available at every organization. Fortunately, the Legal Managed IT experts at eMazzanti bring proven experience in both [law firms and Office 365](#). Whether you want to move to the cloud or take advantage of advanced documentation management features in Office 365, we can help.