ACCELERATE YOUR STRATEGIC ADVANTAGE

by Combining the Power of Practice Management and Document Management Systems

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Contents

INTRODUCTION

Building your law firm tech stack is filled with decisions and endless questions: *Which systems are essential, and which are simply nice to have? Which ones will deliver the greatest ROI? Which can give your firm strategic advantages?*

Among the many tools law firms rely on are solutions for **practice management** and **document management.**

Practice Management (PM) Software	Document Management System (DMS)
Streamline Your Operations PM software helps law firms manage business operations, including case records, contacts, time entry, scheduling and billing in a full solution PM.	**Streamline Your Work Product** A DMS helps lawyers be more productive as they create, edit, review, secure, file and share critical documents and emails — and much more.

PM solutions and DMSs are each powerful tools that can anchor a firm's tech stack, but some midsize firms don't realise the capabilities they are missing by using the document management offered by their PM software. And while many firms utilise both PM and a DMS, they could be realising even more efficiencies and productivity by connecting and integrating these technologies. You can get greater value from both systems, elevate your firm's client services and enable your users to do their very best work.

WHY DO I NEED SOLUTIONS FOR PRACTICE MANAGEMENT AND DOCUMENT MANAGEMENT?

Choosing the right technology for your firm can be a challenge — and, of course, there's no one-size-fits-all solution — but having both a PM and DMS working together can build the strong foundation your practice needs. If you're still on the fence about adding a DMS to your tech stack, here are some common myths to consider.

> **MYTH: Document management is nice to have, but it is not essential for midsize firms.**
> **FACT:** A DMS offers numerous benefits to law firms of any size — and the risks of operating without a DMS should not be discounted.
>
> Document management systems go far beyond organising your firm's files and emails. They boost productivity, empower secure collaboration and make governance and compliance with client security requirements easier, all while helping protect confidential information against data breaches and loss. Predictive email filing and de-duplication ensure nothing gets missed or mis-filed.

MYTH: The document management tools built into my PM are good enough.
FACT: A PM solution might not provide DMS capabilities at the level you need.

It might seem like a good idea to utilise document management functionality in your PM, but the truth is these tools don't provide the full suite of features and capabilities that turn your documents into profitable productivity.

In fact, built-in document management tools may end up *costing* your firm more money if inefficiencies drive users to find workaround solutions. Not only can workarounds hamper productivity, but they can also result in a data loss or breach if users take confidential documents outside the PM solution.

Most document management features inside the PM offer significantly less features and customisations than a full DMS. In addition, PM and DMS integration allows the two systems to work even better together, and nothing beats the uncompromising security built into a DMS created with legal professionals in mind.

MYTH: A DMS is too expensive — we can't fit both systems in the budget.
FACT: The ROI seen when combining both a PM and DMS will make the investment worthwhile.

Without a sophisticated DMS, you have a recipe for inefficiency; confusing or missing document versions; and lost, duplicate or unshared emails that can cost your firm in lost productivity, loss of billable hours or problems from missing information. Meanwhile, the productivity-enhancing features of a DMS can help your team deliver higher-quality work more efficiently, giving your firm a strategic advantage.

It's also worth noting that cloud-based DMS solutions tend to be more budget friendly, thanks to lower cost of ownership, including lower up-front investment, reduced IT and hardware costs, as well as predictable monthly costs compared to on-premises solutions.

CONSUMER FILE STORAGE VS. A LEGAL-SPECIFIC DMS

When midsize firms around the world transitioned to remote work in 2020, they quickly adopted numerous cloud-based technologies to support new work, communication, collaboration and service delivery challenges. But while the move to cloud solutions was necessary, it led many firms to generic tools that do not effectively support the complexities of legal work.

If you have not adopted a legal-specific DMS, you could be missing opportunities for increased productivity while inadvertently opening your firm up to risks. Here are four key areas to consider: cost of operation, information governance abilities, document and email organisation and integrations.

- **COST OF OPERATION:** Some generic cloud applications built for a wide range of professionals often boast an attractive price tag: *free.* Most commercial applications offer free options with limited capabilities that, at face value, seem sufficient for midsize law firms. Unfortunately, "free" comes with additional costs in terms of security, risk and productivity.

The "freemium" options offered by commercial file storage providers like Dropbox or Box do not provide the data ownership or compliance — and sometimes omit the encryption and back-up features — necessary for legal work. These hidden costs to a firm's security posture hardly ever justify the use of a freemium option.

On the other hand, platforms built specifically for legal work may require per-user costs up front, but provide the task automation, encryption, governance and compliance features specific to legal workflows that can increase productivity and decrease risk, which leads to more revenue.

> **61% of firms only allow "client-controlled shared data" use of hosted consumer storage/ transfer platforms like Dropbox and Box.**
>
> — 2022 ILTA Technology Survey

- **INFORMATION GOVERNANCE:** Perhaps the most important feature of any storage option for a law firm is its ability to govern and maintain documents. Because — while even adequate governance makes it easy to locate content quickly (thus increasing productivity) — poor document governance poses increased risk to both firms and their clients as mismanagement of content makes it easy for information to fall into the wrong hands.

Document management systems for law firms and other storage options built for legal workflows offer tools that make it simple to keep documents in the system. These tools may include in-depth document profiling, ethical walls management, native extranets and data loss prevention to restrict file downloads and other actions.

While commercial-grade options may offer some of these features, they are built with user flexibility in mind and offer numerous loopholes to bypass their governance protocols. Is it any wonder that the 2022 ILTA Technology Survey indicated that a whopping **61% of firms** only allow the use of hosted consumer storage/transfer platforms like **Dropbox and Box for "client-controlled shared data"?**

With any system you select, it is important to ask yourself: If someone were to be let go today and we had this system in place, could I have full confidence they would not have access to any confidential or client files, whether on their machine or in the cloud?

> **Lawyers only complete an average of 2.6 hours of billable work each day.**
>
> — Clio's 2022 Legal Trends Report

● **DOCUMENT AND EMAIL ORGANISATION:** The manual tasks required to file documents and emails can have huge impacts on a firm's ability to meet revenue goals. Indeed, according to the Clio 2022 Legal Trends Report, **lawyers only complete an average of 2.6 hours of billable work each day.** Administrative tasks and email management can take up countless hours — with another survey noting that 48% of a lawyer's time is spent on a mix of administrative and personal education tasks. This lack of billable time can lead to major losses in revenue, as detailed in the recent NetDocuments article, Why Firms are Missing Out on More than $3.6 Million USD in Yearly Revenue — and How to Fix It.

As firms search for new technology, it is critical they find solutions that can automate their most tedious tasks like filing documents and emails into their storage system. Consumer storage options simply do not offer the automation features that eliminate these repetitive tasks and make it easier for lawyers to keep up with their immense workload. In contrast, systems built with legal work in mind, like NetDocuments, automate filing and other work with built-in task management and connections to email systems, Microsoft Office, time and billing tools and more.

● **INTEGRATIONS:** Ultimately, firms are looking for ease of integration within their legal tech stack and having complete document lifecycle workflows is critical to improved productivity and eliminating the chance for errors to occur. User acceptance of change continues to be the top technology annoyance (according to the 2022 ILTA Technology Survey) because many times software is missing key integrations that complicate workflows and do not work with other commonly used tools.

Legal professionals prefer working in a single environment where possible. Jumping from application to application for a given workflow can be frustrating and time-consuming, so it can be a game changer having a DMS with features to support document lifecycle workflows that also works with email, Teams, comparison tools and electronic court filing software.
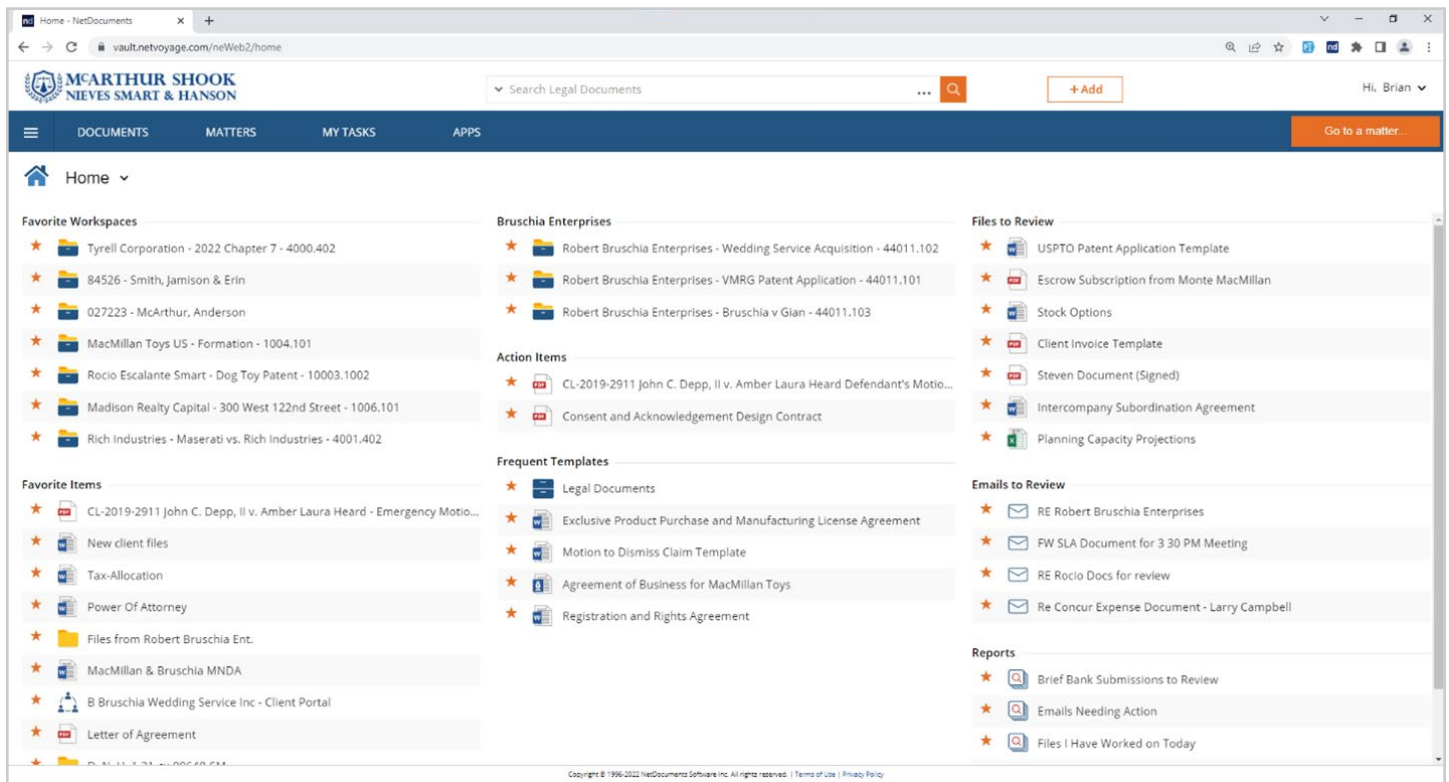
BENEFITS OF INTEGRATED PRACTICE MANAGEMENT AND DOCUMENT MANAGEMENT

Individually, legal practice management and document management platforms offer substantial benefits for midsize law firms. But believe it or not, these two systems are better when connected and used together. Check out the various ways integrated practice management and document management can benefit your firm.

Get the Information You Need Quickly

When you really stop to think about it, how much time do you and your team spend just looking for files, emails and documents each day? A few minutes here or there may seem insignificant, but they break your flow and add up quickly. In fact, it's not uncommon for knowledge workers to spend upward of 30 minutes per day simply *locating* the documents they need to work on. The time spent looking for emails or sifting through duplicate documents and multiple versions is likely even higher.

Document management systems, on the other hand, can dramatically reduce search time and increase productivity. With customisable Home pages, Recent and Favourite Documents lists and advanced search capabilities like natural language processing, filters and Boolean operators, DMS users can quickly and easily track down needed files in the DMS repository.

Another problem as files have gone digital is the proliferation of PDF files that are not in a text-searchable format. The built-in OCR functionality in the DMS will ensure that you are finding *all* relevant files and not just a portion of them.

Integrating a DMS and PM can make the process *even faster* by **linking clients and matters** in the practice management software to their associated folders and workspaces in the DMS. You can even **view documents saved in the DMS repository without leaving your PM interface.**

Streamline Document Creation with Automation

When document management and practice management come together, you get something even more impactful by adding document and workflow automation.

Document templates in the DMS help users avoid repetitive tasks like formatting new documents or time wasted locating previous versions to copy from. In addition, integrated systems can use workspace and document templates to automatically populate matter details from the PM and save the completed file to the correct matter workspace in the DMS. Integration makes creating and organising documents nearly effortless.

When you add automation to the mix, especially no-code or low-code, you are able to create apps in-house for self-service workflows both internally and externally. This allows for the creation of entire document packets without having to hire a developer. No more clumsy, time-consuming "find and replace" routines necessary!

Access Everything from Anywhere

In a PM, everything is digital: contacts, calendars, time, billing, notes and more. All that critical information is at your fingertips, available as you need it. A DMS offers the same kind of anywhere, anytime access for your documents, emails and other files in an organised matter workspace.

With integrated document management and practice management systems, you can easily access information from each system, no matter which one you're currently working in. Just as you can pull data from your PM into document templates, you can also retrieve matter-related documents and emails within the PM workspace. Another advantage is that you can also see different document

versions, review security or user permissions, sort and organise documents and more to help your work move smoothly and efficiently.

Control Permissions and Access

Your practice relies on the steady but secure flow of information between teammates, clients, experts, witnesses and other collaborators. When confidential documents require stronger security, a DMS makes it easy to add extra layers of protection, without making it harder for authorised users to access the data they need.

Your firm can enjoy fluid, on-demand access to critical firm and client information using advanced user access controls based on zero trust or need-to-know principles. You can also quickly and easily establish ethical walls for secure data and matter management within the DMS.

Unfortunately, using a PM with built-in document management tools typically requires all data to be secured at the matter level. That means users who need access to the matter details stored in the PM will also have access to any associated documents. As a result, firms must choose between giving users unnecessary access to confidential information or keeping a second repository for the most important documents. No matter how you slice it, there's a compromise on security or productivity. Alarmingly, **on-premises PMs may allow the user to dig into the operating system and bypass security entirely.**

On the other hand, if your PM and DMS are separate but integrated systems, you can apply more granular access controls within the DMS so that even if a user can access matter details in the PM, they won't automatically have access to all matter-related documents. You can set permissions at the document level to fully customise which documents (if any) a PM user can access, as well as what type of access they have (e.g., edit, share or view-only).

With full control over your documents, you can ensure your users have easy access to all the information they need — and nothing they don't.

Increase Productivity with More Efficient Workflows

When you improve the full document lifecycle by utilising technology, you experience major gains in productivity and reduction in frustration from having to move between multiple systems and shuffle documents around from place to place to get work done. You also ensure that everything gets done right every time, no matter who is completing the task.

With many things in legal practice revolving around documents, it makes a big difference having tools for common document tasks located directly in your DMS. For example, being able to streamline by:

- Pulling content into a document from the PM
- Easily completing online edits
- Instantly sending the document for electronic signature
- And then having it automatically come back to your matter workspace in the DMS

Take it a step further, and you can quickly file the document with state or federal courts or create closing
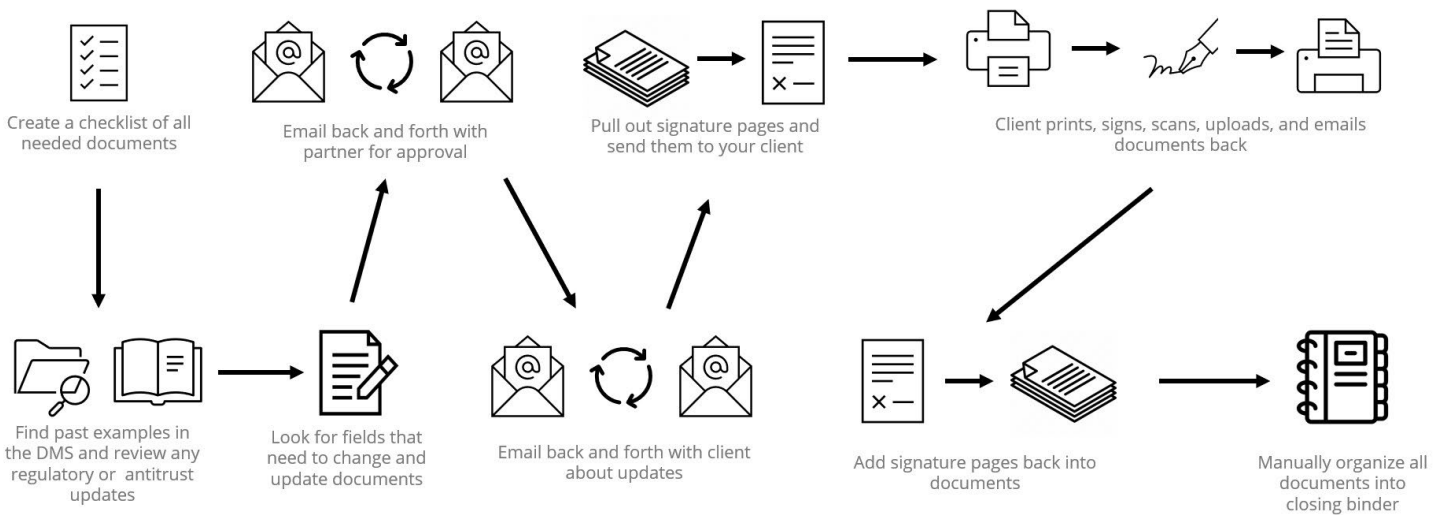
checklists and binders for transactions that reside in and can be securely shared from your DMS. You can also create tasks that are linked to the documents involved to ensure nothing is missed.

With the right tools, firms won't have to worry about juggling deadlines or someone dropping the ball, as the tools enable both accountability and productivity, as well as reduce risk.

Here are examples of a traditional workflow and then how a DMS with powerful integrations can transform the experience.

Traditional Transactional Workflow

Numerous manual steps, poor productivity, lack of visibility, disparate data sources

Create a checklist of all needed documents

Email back and forth with partner for approval

Pull out signature pages and send them to your client

Client prints, signs, scans, uploads, and emails documents back

Find past examples in the DMS and review any regulatory or antitrust updates

Look for fields that need to change and update documents

Email back and forth with client about updates

Add signature pages back into documents

Manually organize all documents into closing binder

The NetDocuments Transactional Workflow

Increased speed and efficiency, greater oversight, secure and centralized data
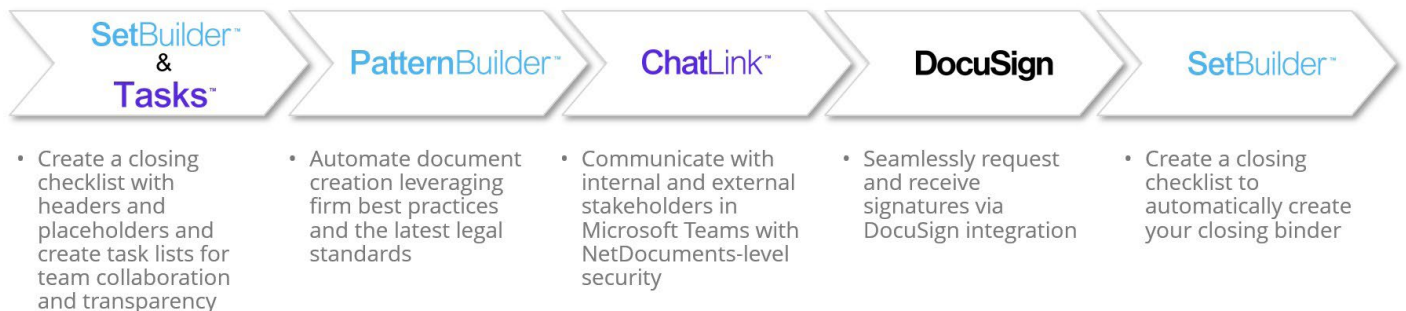
SetBuilder™ & Tasks™
- Create a closing checklist with headers and placeholders and create task lists for team collaboration and transparency

PatternBuilder™
- Automate document creation leveraging firm best practices and the latest legal standards

ChatLink™
- Communicate with internal and external stakeholders in Microsoft Teams with NetDocuments-level security

DocuSign
- Seamlessly request and receive signatures via DocuSign integration

SetBuilder™
- Create a closing checklist to automatically create your closing binder

that take you away from more important work are done by the software. Your lower-end services can be built into apps presented via hyperlinks for clients or staff to complete.

Click to watch how you can automate your expertise with NetDocuments' PatternBuilder

Using an automation tool custom-built for legal ensures all the complex options and logic you need are included. The resulting packets of documents can either be presented to the client as self-service tools and/or saved to workspaces in the DMS for review and consultation with the client prior to finalisation.

You can automate as much or as little of the process as you feel comfortable with and use your forms, templates and expertise to make it rock solid. And with low-code/no-code tools, you can align automation with your existing workflow without having to hire a developer.

Secure Your Data and Protect Against Loss

Losing or exposing confidential data is not something your firm wants to deal with, whether it happens accidentally or maliciously. Operating without a DMS leaves your documents dangerously exposed to risk. PM-based document components lack the rigorous security protocols needed to protect a law firm's documents and data.

Integrating a DMS with your practice management solution provides stronger protection for your most confidential information while still enabling collaboration when needed. With the DMS's more granular user permissions, you can restrict access on a need-to-know basis and help prevent confidential documents from getting into the wrong hands.

In addition, your DMS can also help protect your firm and prevent data loss with robust built-in security, plus additional safeguards like document-level encryption, multifactor authentication (MFA) and data loss prevention (DLP), which provide greater protection against ransomware and malicious actors. For highly confidential documents, you can even prevent certain user actions like document sharing or printing.

Together, these features help ensure your files — and your firm — stay secure.

> Your DMS can provide **robust built-in security** plus safeguards like document-level encryption, multifactor authentication (MFA) and data loss prevention (DLP), which provide greater **protection against ransomware and malicious actors.** You can also prevent actions like document sharing or printing.

Keep Track of Time with Fewer Clicks

Tracking time is a common challenge, but when you integrate your practice management and document management solutions, logging time is just a click away.

For example, when the DMS is connected directly to your PM solution, you can quickly add entries for time spent drafting, finalising or reviewing documents associated with a matter. All it takes is a couple of clicks for timekeepers to confirm suggested time entries from the document history and efficiently log hours to the right matter and client.

Simplify with a Single System of Record

Operating without a legal DMS is risky business for a law firm. Even if your PM solution offers built-in document management tools, your users may be forced to work outside the tool to access the features they need. The result? Documents stashed in multiple places across the firm, confusing and conflicting document versions and no easy way to get a clear sense of what is happening on a matter. In short, you're wasting time and introducing a level of uncertainty (and risk) that is unnecessary.

> **A DMS makes it easy to share, edit, review, annotate and discuss documents securely — all without the challenges of local copies, untracked changes, version conflicts, etc.**

Substantive information exists not only in documents, but also in your emails. Having a quick and easy way to file them with the matter, so that the entire team has access at all times, is essential. Not only that, but you need the entire digital file in one place for archiving purposes. Information governance is impossible without these basic requirements. When the same email is sent to multiple people, you want to a retain a single copy for tracking and efficiency.

On the other hand, if your DMS is the single system of record for any documents and emails your firm has created, as well as every document your firm has received, you can go to that single source and find what you need with confidence every time.

Collaborate with Internal and External Stakeholders

Digital collaboration is essential for keeping business moving forward. You need tools that empower your team to share and collaborate both easily and safely with people whether they are inside or outside your firm, including clients, co-counsel, opposing counsel, experts and other groups.

Both a PM and DMS have tools to make collaboration smoother without cluttering up your email inbox. But a DMS makes it easy to share, edit, review, annotate and discuss documents securely — all without the challenges of local copies, untracked changes, version conflicts, etc. As conversations move from email to platforms like Microsoft Teams and Slack, a DMS can make securely sharing files with a group much easier.

Integrate with Your Tech Stack

Practice and document management aren't the only systems your team relies on day to day. Fortunately, both a PM and DMS integrate with a variety of other products, such as time and billing software, project management solutions, electronic signature and filing platforms, contract management tools, Microsoft Office, Adobe Acrobat and many more.

A fully integrated tech stack means less manual work for your team, fewer copies of documents floating around, more consistent information across tools, less bouncing between platforms and enhanced productivity. When you optimise your technology and workflows, it means less work for your team. Your software applications do the heavy lifting, so you can get back to focusing on clients.

Keep Operations Organised — and Clients Happy

All the benefits of integrating a PM and DMS can give your firm a strategic advantage as users are empowered to find what they need quickly and confidently. Not only does a well-organised firm waste less time due to disorganisation (a win for billable hours!), but it can also help your team deliver superior client service because everything is always right at your fingertips.

With your documents, emails and practice data organised, integrated and in sync, your team can quickly find answers to client questions and keep the work moving forward. And with happier, more satisfied clients, you can count on better client retention and more referrals.

BEST FEATURES TO LEVERAGE IN YOUR PM VS. DMS

It makes sense for midsize firms to use a PM solution to manage business operations, contacts, time entry, scheduling or even billing. But there are many functions that are better handled by a DMS.

Practice Management	Document Management
Calendar synchronisation Client intake Contact management (CRM) Basic document and email storage Basic file sharing Task management Timekeeping Billing	Advanced document and email storage Client and third-party CollabSpaces Document generation Document automation and assembly Enterprise search Granular security and ethical wall options Organised matter or project workspaces Single system of record Secure, simplified file sharing Robust, yet easy to use, search and filtering Version control

Better document storage to support a single system of record and information. One of the largest killers of efficiency in legal practices is the amount of time it takes to find and gather documents. This is especially true for firms resisting the digital age. By using a DMS for law firms, you can create a single system of record for every matter flowing through your firm. Having anywhere access to everything they're working on, fee earners will be able to find what they need quickly and spend less time searching through files.

Powerful enterprise search. If you have multiple data systems that you'd like to search across at one time, enterprise search can be added to your DMS. Even without enterprise search, with powerful DMS features like OCR, dynamic tagging and metadata, full text searching and filtering, you can quickly and easily retrieve documents.

Document automation and assembly. Document automation and assembly solutions built into the DMS help law firms improve productivity and efficiency by automating their expertise to produce simple to complex legal document packets.

Anytime, anywhere, any device access. Cloud-based document management offers increased accessibility with anytime, anywhere, any device access for you and your team when they're on the go.

Controlled document access with ethical walls and access rights. Manage security and governance for your workspaces, protect sensitive data within the organisation, inform external parties of your compliance and share content without sacrificing governance.

Advanced version control features. Protect against data loss and avoid confusion with external stakeholders when reviewing and editing documents. With advanced version control, you can create major versions of documents for external review (e.g., v1, v2, v3) and leverage minor sub-versions of the document (e.g., v1.1, v1.2, v1.3) when small adjustments are being made across multiple internal users for seamless internal collaboration.

Real-time messaging. Enable better collaboration and communication with your team. Gain the advantages of a chat messaging tool that's designed to meet the unique requirements of legal organisations.

Integrations with Microsoft 365 and Teams as well as other tools you already use. Fully integrate your existing mission-critical software with the most robust legal document and email management platform on the market for a complete practice management solution.

Matter and project workspaces to improve efficiency and productivity. Your DMS supports a matter-centric workspace — all documents and emails are associated with a matter and stored in the same place and organised to suit the way you work. To further streamline, you can create matter templates containing specific folder structures for the different types of matters in your practice. This reduces the time needed to find a specific document and eliminates potential confusion about where a document is located, who has it or how to get to it.

CASE STUDY: FUTURE-PROOFING THEIR BUSINESS WITH FIRST-CLASS PARTNERSHIPS

Magrath Sheldrick LLP has a successful business immigration practice and is a major force in immigration and employment law. Their diverse client base includes some of the world's leading businesses, private individuals, employers and senior executives from around the globe. The firm had been using an all-in-one practice management suite for years, but over time they realised that "it was okay at everything, but it wasn't particularly outstanding at anything," explained Magrath's IT Director, Nick Doughty.

> ## "The solution itself is great. It does everything that we were hoping for and more."
>
> — Nick Doughty, IT Director at Magrath Sheldrick LLP

While it may have been simpler to switch to another PM and replace everything in one go, Magrath Sheldrick wanted to ensure they were set up for long-term success with the best solution for each part of the firm. This allowed them to take a more modular approach to their tech stack as part of their risk management strategy and "cherry-pick the best-in-breed systems and find the best solution for each part of the firm," said Nick.

In the process of choosing a DMS, Nick recognised the importance of ensuring a smooth transition between their PM and DMS. He noted, "It was very important that we could marry up the two systems and make sure they spoke to each other." The fact that NetDocuments would seamlessly link to their existing PM was vital.

A Trustworthy Partner
Above all, the firm placed a high priority on the team behind the tool. In several conversations with potential suppliers, Nick "felt like they were exaggerating their services, and there was a bit of mudslinging." And while NetDocuments offered numerous other benefits to the firm as a robust, fairly priced solution, he noted, "I think that trust was the most important thing for us. That's really the main reason we went in with NetDocuments."

The platform's security infrastructure played an important role in the decision as well.
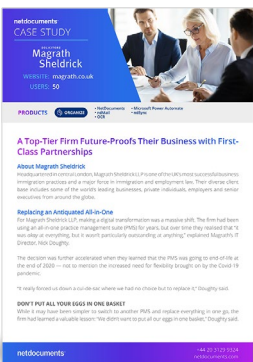
"Our data is our most valuable asset, and if we're going to entrust you with it we need to have very strong confidence that you're managing our data responsibly and securing it," Nick said. "It's clear that NetDocuments has the provisions in place to make sure our data is safeguarded and always going to be there when we need it."

Want to know more about their experience and implementation?

Access the complete case study

BETTER TOGETHER: CREATE SYNERGY BETWEEN YOUR PM AND DMS

The combination of practice management and document management yields more than the sum of each system's parts. You can get more value from your PM because of your DMS, and vice versa — and that synergy is something you can leverage to take your practice to the next level.

Together, PM and DMS solutions combine to enable you to optimise and even automate many time-consuming and mundane processes, increase productivity and create cost efficiency for your firm while increasing your security posture. This winning technology combo can even help your team improve client service and gain a strategic advantage over the competition.

Ready to explore the advantages your firm can experience with Practice Management plus a powerful DMS?

Register for our upcoming webinar

About NetDocuments

NetDocuments is the world's #1 trusted cloud-based document management and productivity platform that helps legal professionals do their best work. Backed by over 20 years of experience in cloud innovation, NetDocuments supports 3,700+ law firms, corporate legal departments and public sector entities with solutions that drive better user experiences and business outcomes. NetDocuments offers a complete end-to-end platform for document and email organisation and management, including award-winning security and research capabilities, robust collaboration and search technologies, seamless integrations with other tools professionals use daily and much more.

Visit netdocuments.com to learn more today.

About Advanced

With over 22,000+ global customers and 2,700 employees, our business software creates positive change. We provide Enterprise Resource Planning (ERP), People Management and vertical market software solutions that help our customers to shine in their field of expertise. P4W is a single, smart solution that provides the highest levels of functional efficiency. By combining powerful legal technology with market-leading integrations, it offers a tailored structure that can meet all of your individual business and administrative requirements. Learn more at oneadvanced.com.

Glossary

Boolean Search: Combining words and phrases using the terms AND, OR or NOT (known as Boolean operators) to limit, broaden or define your search

Data Loss Prevention (DLP): The practice of detecting and preventing data breaches, exfiltration or unwanted destruction of sensitive data

De-Duplication: The process of comparing electronic records based on their content and characteristics and removing duplicate records from the data set so that only one instance remains

Document Management System (DMS): A computerised system used to store, share, track and manage files or documents

Encryption: A computing process that encodes plaintext/cleartext (unencrypted, human-readable data) into ciphertext (encrypted data) that is only accessible to parties with the right key to "unlock" the data

Enterprise Search: The practice of making content from multiple organisational sources, such as databases and intranets, searchable from a single location

Ethical Walls: A screening mechanism to protect clients by avoiding conflicts of interest and limiting disclosure of information to certain individuals

Integration: The act of bringing together disparate components into a single system that functions as one

Metadata: A set of data that describes and gives information about other data

Multifactor Authentication: A security technology that requires multiple methods of authentication from independent categories of credentials to gain access to a system or data

Natural Language Processing: The ability of a computer program to understand human language as it is spoken and written

Optical Character Recognition (OCR): The electronic or mechanical conversion of images of typed, handwritten or printed text into machine-encoded text to enable searchability

Practice Management Software: A computerised system used to automate and streamline a practice's administrative and billing functions

Predictive Filing: Suggested and automatic filing of sent and received emails based on where other similar emails have been saved

System of Record: An information storage system that is the authoritative source

Tagging: The attaching of electronic markers or labels to data to improve searchability

Toggle Tax: Time wasted switching between applications