

BUYERS GUIDE



Degal Tech

DocMoto Product Review: Find and access all of your documents, emails and digital files from one easy-to-use interface on a Mac or Windows.

There still seems to be a sine qua non that law firms must choose either Windows or Macs for their computers but that line is blurring in today's world. Lawyers want to use the computing platform they're comfortable with and they don't want to be held back by archaic software requirements. Many law firms today support both Windows and Macs (along with Androids and iPhones) so they need software that seamlessly crosses the aisle. DocMoto skillfully bridges that gap by providing a document management system (DMS) for law firms that meets legal professionals where they work ... regardless of what computer they use.

DocMoto supports a native application (read: software client) for Windows and macOS. Native apps use the same language as the operating system, so they inherently support drag-and-drop operations and can take advantage of other built-in features. On Macs, DocMoto has the look and feel of Finder; on Windows, it's File Explorer.

The DMS features in DocMoto are similar to other providers on the market. DocMoto does an excellent job with version controls and search, which rely on Apache Solr, an open-source enterprise search platform built on Apache Lucene. The DMS also supports folder and document templates for firms to set standard practices so that saving and retrieving documents is uniform across matters and the company does an outstanding job allowing file and folder sharing with external parties.

DocMoto's DMS appeals to law firms with 10-500 users. Their sweet spot is firms who use both Mac and Windows PCs and who are not keen on using browserbased systems. Web browsers operate in sandboxes walled off from the operating system without support for drag-and-drop file operations. Browser back buttons don't return users to their last point of departure and to work with a browser-based DMS, users may need to turn off pop-ups and cookie-blocking. CHL Software, the maker of <u>DocMoto</u>, recently added support for Microsoft Windows 10 but they don't support previous versions of Windows. Who can blame them? Even Microsoft stopped support for Windows 7 and 8 and forged ahead with Windows 10.

DocMoto for Mac and Windows boasts comparable features. This review focuses on the Windows 10 client but the user experience is the same on a Mac.

The DocMoto Interface

DocMoto puts all the DMS features into one simple native app that has the look and feel of a browser but without being dependent upon a web browser! Users can open files in separate tabs, leaving breadcrumbs, and then return to previous work. <u>See Figure 1 on page 5.</u>

the fids they Reports Server	Admin Taly	les les	eMoto		
Americador Uniter Chait o	1 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0				
		Centents	é		
Control. Control.	Norr Constant Constant	Construction C	1017 2,2017 1022400 2,2017 102400 2,017 102400 2,017 102400 2,017 10240 2,017 10240 2,017 10240 2,017 102400 2,017 1000000 2,017 10000000000000000000000000000000000		Connect
Settern Vice Stress	Copyrelate Construction Con	Develoed - Aexay Voise Certral - Aexay Soleche - Aexay Persiklers - Aexay Urpel Inst - Aexay Inst Iperal - Aexay Set Das - Aexay	y 20, 2020 404 PM y 20, 2020 404 PM	almontalan almontalan almontalan almontalan almontalan almontalan almontalan	
Server docretadorea.docreato.com targo	ntin administrator		1 selected		V Come
O Statu and yout	a n e n			8 ~ • 6 • 4	

Using controls in the lower-left panel of the UI, users can change context from the Dashboard to "Views" such as saved searches and Shares which display a list of open shares with colleagues and external partners or adversaries.

Under the DocMoto folder, "Contents" reveals the shared law firm workspace. Beneath that, the current user's home folder provides a private workspace for work in progress before it is made available firmwide. Other folders in the Dashboard include Favorites, Recent Documents and all the user's checked-out files. When files are opened and checked out, they are not available to edit but other users can view the contents.



Help legal professionals in small to midsize law firms and corporate legal departments to find, manage, organize and secure documents and email by client matters.

Company Brand:

CHL Software (Cranham Haig Limited)

Product Name Brands:

DocMoto

Recent Developments and Updates:

- Originally developed as Mac software, DocMoto now offers a native (.NET) client for Microsoft Windows.
- iPad client integrates with the iOS Files app. In effect, the DocMoto repository is available when users access files from another app such as Word or Pages.
- DocMoto has been fully tested to operate on macOS Catalina.
- DocMoto was <u>selected</u> as one of TechnoLawyer's top 25 products of 2019.

DocMoto supports folder and document templates for firms to set standard practices so that saving and retrieving documents is uniform across matters."

Each user has a Trash bin that acts as a recovery point for deleted files. The Trash contains files deleted by the user regardless of whether the data were in Contents shared with the firm or in the user's home folder.

DocMoto uses templates to create commonly used folders and file structures. When users make a folder for a client or matter, they can select from several configurable designs available from a pulldown window. <u>See Figure 2 on page 5.</u>

AN PO O	000	0 0 0	(B) (m)	
(+) E U J		Mark Louise has Artest V		
		Contents		
• Q Dectrono	Name	A Onded is	Initial Creck In By	Comment
Contents	+ C Ciente	March 8, 2018 10:32 AM	administrator	
Q Administrator	* D Aller	March 8, 2018 1928 AM	administrator	
D party	- DA-P	*** March 8, 2018 10/29 AM	administrator	
terovito	· D Arres a fibble	*** October 15, 2019 215 PM	administrator	
C Athe Gen	 Co Accounting 	*** October 15, 2019 2:15 PM	administrator	
C Alterhoids	 Conception 	October 15, 2019 215 PM	administrator	
Febert Documents	· C Ceut Des	October 13, 2019 2 13 PM	administrator	
C) Owstad Out	 D Autos & Internal Merrars 	October 15, 2019 2 15 PM	administrator	
 Articles of Association door Articles of Inconcention door 	D Productors & Clert Dass	October 15, 2019 2:15 PM	administrator	
Articles of monoporation doox Incoorment Latter do fee Arta.	 C) Alen, Bet 	*** March 8, 2018 19:29 AM	administrator	
-	 Co Barres, Bucharum James 	March 8, 2018 10:29 AM	administrator	
Availing First Check in Availing First Check in	C baterias fin	March 8, 2018 10:29 AM	administrator	
Dire Veriale	· C) Best v. Junes	June 27, 2019 10:40 AM	administrator	
	· D Bightman Sur	March 8, 2018 10:29 AM	administrator	
C Suberghore	 Co Brown, Patricia 	March 8, 2018 1929 AM	administrator	
	 Co Capit Luke 	March 8, 2018 1929 AM	administrator	
	+ Ch Offen v Nathan	January 20, 2020 4:04 PM	administrator	
	· C Autorting	January 20, 2020 4:04 PM	administrator	
	- D Correspondence	January 20, 2020 4:04 PM	administrator	
	· 🖸 Emails	January 20, 2020 4:34 PM	administrator	
	· Ch Cout Door	+++ January 20, 2020-434 PM	administrator	
	Co Notes & Internal Menus	January 20, 2020 4:04 PM	administrator	
	 Productions & Client Doca 	January 20, 2020 4 04 PM	administrator	
Desitional Vest Starts	0++++ 0 feet > (0 (sears) +++	> Co A-0 > Co Association		
a lanar docentrademe.docentra.com La	pped in administrator	1 wieded		🗸 Com
O Start a web search	6 ci 🤮 🖬 🖄 📾		A . • 2 • 4	6 A 1529

The Lifecycle of a Document

In the context of a folder, click "Create" from the Ribbon atop the interface which opens a pop-up where you can create a document in a matter. The dialog box presents document templates created for the matter and folder the user has permission to see and use. For example, a communications folder might have a folder for letters. Letter templates may include retainer letters, fee arrangements, confidentiality agreements, and more. <u>See Figure 3 on page 5.</u>



By starting the life-cycle of a document in DocMoto, the DMS stores the file in the

folder where the user created it, so, no worries about where to save or retrieve the data. Furthermore, DocMoto can personalize the templates with firm logos, addresses, salutations and even digital signatures.

The DocMoto client has a built-in viewer for files. Since DocMoto enjoys a tight integration with the desktop, the client supports any file type recognized by the operating system whether it is macOS or Windows. DocMoto opens files in the user's default editor, either Microsoft Word or Apple Pages. DocMoto supports all Office formats including Microsoft Office, <u>Apache OpenOffice</u> and <u>LibreOffice</u>.

When a user selects a file, navigation controls display in the bottom right panel. Click the information button there (circled letter i) to see file location, properties and metadata. Included in the file properties is the version number of the document.

From the document list view, click the ellipsis to see file actions which includes <u>version</u> <u>controls</u>. From the list of versions presented, choose any two versions to compare them. DocMoto opens the documents in one view with redlined changes or "Tracked Changes" to accept or reject. If users make changes to the compared materials, save the new version of either or both files to the database.

When users create new documents or drag and drop documents into DocMoto, a dialog box opens to profile the file with <u>tags</u> such as document type, matter and metadata specific to the doctype. <u>See Figure 4 on page 5.</u>



Folder templates present a uniform design with consistent folder-naming schemes that make for an uncluttered, understandable and jargon-free interface."

Users can share DocMoto folders with external people by sending them a link via email. An expiration password for the share can be set and other security properties can be chosen." Tags enable DocMoto to search for a document easily. In the search box, start typing a keyword and predictive typing displays options in categories: Tag Name, Filename, Folder Name and Content, etc. Select the item to search from within a category to view the results. You can save search results as a "View" and quickly return to it from the Views option in the lower left-hand panel.

Sharing Files and Folders with Others

Users can easily share DMS files and folders with others internally or outside the law firm. Send a file copy as an email attachment to a recipient. When the recipient edits and returns the file, users drag and drop the edited file into DocMoto to create a new document version. To share documents or folders with <u>colleagues</u>, send them a link to the resource via email. The link displays the resource in DocMoto. Note, however, that DocMoto supports permission-based security, so, users will only see what they're entitled to see.

Users can <u>share</u> folders and subfolders with external people who are in their Office 365 Contacts or who have valid email addresses. Select a folder and pull down the file menu to select "Create Share." Then, choose an expiration date for the share and choose other security properties to password protect the folder and permit users to view and increment document versions and add new files. Finally, send the provided URL via email.

External users access the share, or portal, via the internet using 256-bit AES encryption. Users can view their open shares from the "Shares" button in the lower left-hand panel. DocMoto audits and reports on all activities in the shared folder and provides other standard reports that can be extended on request and downloaded in Excel format.

Law firms license DocMoto for \$50 per user per month plus an added server cost if the firm uses AWS hosting. If the DocMoto server is on premise, there is no server charge. CHL Software provides services around integration in addition to extensive consulting and services for data migration and consolidation.

Integrations, Third-Party and Open-Source Software

The macOS and Windows clients use a plug-in architecture to integrate third-party software such as document comparison. DocMoto makes plugins for Microsoft Outlook and Gmail if users want to work within email software; and the company supports application programming interfaces (API) for clients and the DocMoto server.

The DocMoto DMS runs on an open-source relational database management system (Postgres) on premise or in the Amazon Web Services (AWS) cloud. In the cloud, each customer receives an instance of the database. Using single, not multi-tenant architecture, DocMoto has a leg up on security over other cloud-based DMS providers.

Who is CHL Software?

CHL Software, the maker of <u>DocMoto</u>, is a privately held company based in the regency town of Cheltenham, England and approximately 100 miles west of London. The company supports customers worldwide from its headquarters where it has supplied document and file management to macOS users since 1996.

Why should you consider DocMoto?

- Native client applications support macOS and Windows.
- Client apps have tight integration with the desktop to support drag-and-drop file operations and make direct calls to default editing and email software.
- Automatic document versioning removes uncertainty and duplicity in the UI.
- External folder sharing makes a secure client portal for deal rooms and document review.

Try Out DocMoto For Yourself!

Learn more about how <u>DocMoto</u> can revolutionize your firm's document and email management. Visit the <u>DocMoto website</u> today!



$\boldsymbol{\leftarrow \Rightarrow } \begin{array}{ c c c c c } & \textcircled{\bigcirc} & \underbrace{\bigcirc} & \underbrace{\downarrow} \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & \\ & & & & \\ & & & & \\ & $		ch Update Tags Refresh a	Q.Y. Search
		Contents	+
Dockloto E Contexts Administrator Trash fancuntas Active Clients	Name ^ - Clients - • Clients -	Clecked Is March 8, 2018 1023 AM March 8, 2018 1023 AM March 8, 2018 1029 AM March 8, 2018 1029 AM Gother 15, 2019 215 PM Other 15, 2019 215 PM	hilial Check In By Comment administrator administrator administrator administrator
Active Projects Active Projects Constant Documents Constant Out Articles of Association.docx Articles of Incorporation.docx Constant Letter & Fee Area.	Corresponders Copy Lisk to Clabbad Copy Lisk to Clabbad Notes & Intern Notes & Intern Notes & Intern Add to Farwardes Notes, Bart New	October 15, 2019 21:5 PM March 8, 2018 10:25 AM	administrator administrator administrator administrator administrator
	Copy Barnes Buchanan Batemas Tim Basis Batemas Tim Basis Basis Basis Anna Basis Basis Anna Basis Basis Anna Basis Basis Anna Basis Anna Basis Anna Basis Dana Patricia More to Tash Dana Lake Basis Anna Basis Anna Basis Dana Lake Basis Anna Basis Anna Basis Dana Basis Anna Bas	 March, 2018 10:25 AM March, 2018 10:25 AM June 27, 2019 10:45 AM March 6, 2018 10:25 AM March 6, 2018 10:25 AM March 60, 2018 10:25 AM 	administrator administrator administrator administrator administrator
	Cons Nation Consolid Consolid Consolid Corresponder	Marcury 20, 2020 464 PM January 20, 2020 464 PM	administrator administrator administrator administrator administrator administrator
Dashboard Views Shares	• \bigcirc Productions & Client Docs $\bigcirc \leftarrow \uparrow \Rightarrow \psi \bigcirc$ Root $\Rightarrow \equiv Contents \Rightarrow \dots \Rightarrow \bigcirc$	••• January 20, 2020 4:04 PM	administrator
O Start a web search	J 🗆 🤤 🖬 🏦 😒 🦉	M 📲 🧶 🛞 🔞	ポ へ 🛎 🗟 💵 点 4・ チ 1500

Figure 1: DocMoto's Dashboard and full-featured UI resembles a browser with tabbed resources but operates like the macOS Finder or Windows File Explorer. A file menu sits atop the UI to pull down lists of commands. Below the menu, a persistent ribbon shows common commands used in any context or folder. Users can drag and drop files and emails from the desktop and from apps to DocMoto.

¥ File Edit View Reports Server A	idmin Help		Q Search	>
← → ▲ S 坐 New Folder Versions Check in	Check Out Quick Look Add Create	Atlach Update Tags Refresh ®		
		Contents		
DocMoto Contents Administrator	Name Clients Clients	Checked In March 8, 2018 10:32 AM March 8, 2018 10:20 AM	Initial Check In By administrator administrator	Comment
Trash 1	* C A-D	••• March 8, 2018 10:29 AM	administrator	
🕈 🏠 Favourites	Ci Aron v. White	October 15, 2019 2:15 PM	administrator	
Active Clients	Calcounting	••• October 15, 2019 2:15 PM	administrator	
C Active Projects	Correspondence	··· October 15, 2019 2:15 PM	administrator	
Recent Documents	Court Decs	··· October 15, 2019 2:15 PM	administrator	
Checked Out	Notes & Internal Memos	••• October 15, 2019 2:15 PM	administrator	
Articles of Association.docx	Productions & Client Docs	··· October 15, 2019 2:15 PM	administrator	
Articles of Incorporation.docx Engagement Letter & Fee Arra	Alien, Bart	March 8, 2018 10:29 AM	administrator	
	 Barnes, Buchanan James 	••• March 8, 2018 10:29 AM	administrator	
Awaiting First Check In Association.pdf	 Bateman, Tim 	••• March 8, 2018 10:29 AM	administrator	
Time Sheetulsx	 Best v. Jones 	••• June 27, 2019 10:43 AM	administrator	
	 Brightman, Sue 	+++ March 8, 2018 10:29 AM	administrator	
Subscriptions	 Brown, Patricia 	••• March 8, 2018 10:29 AM	administrator	
	 Cage, Luke 	••• March 8, 2018 10:29 AM	administrator	
	 Cilion v. Nathan 	+++ January 20, 2020 4:04 PM	administrator	
	 C Accounting 	+++ January 20, 2020 4:04 PM	administrator	
	- 🗅 Correspondence	+++ January 20, 2020 4:04 PM	administrator	
	+ 🗅 Emails	January 20, 2020 4:04 PM	administrator	
	Court Decs	January 20, 2020 4:04 PM	administrator	
	 C Notes & Internal Memos 	••• January 20, 2020 4:04 PM	administrator	
	Productions & Client Docs	••• January 20, 2020 4:04 PM	administrator	
Dashboard Views Shares	$\bigcirc \leftarrow \uparrow \Rightarrow \psi \ \bigtriangledown Root \ \Rightarrow \boxplus Contents \ \Rightarrow \cdots$	> 🖸 A - D > 🙆 Aaron v. White		
Server: docmotodemo.docmoto.com Logge	d in: administrator	1 selected		✓ Connect
G Start a web search	J 🗄 😑 📑 🔒 😭	😆 🛲 🛤 🔒 🛞 🚳	\$ ^ ≜ ⊠ ■ Æ 4	af 15:29 29/01/2020

Figure 2: Folder templates present a uniform design with consistent folder-naming schemes that make for an uncluttered, understandable and jargon-free interface. Administrators create folder templates with the Template Manager. Columns displayed in list views in the right panel change depending on folder context. Users can configure folder views with no coding.

💥 File Edit View Reports Server Admin Help		Engagement Letter.docx		
← → Bare Folder Versions Check in		Check Out Print Rotate Left Rotate Right Zoom Out	Example 200min Fit to Width V Search	< >
DocMoto E Contents Administrator Trah	Name - D Clients - D Active	Sau Coolman Bibb Sungapane Rid M Alsergen, Mr	SAUL GOODMAN, ESQ. "Better Call Saul"	
Sarcuittes Active Clients Active Origins Recent Documents Orecland Out Arcicle of Association doce		(client_name) (totie) (company) (addressine1) (addressine2) (city) (state) (zp)		
Aristica of hosponsion.notex Cognome Cited & Te Ariza. Anarcong Dirst Citeds in Anarcontompol Tens Detectule Subscriptions		also wish to set forth our agreement as to per per- sifice rate, plus any expresses that may be tra- copying cests, postage, and related expresses depending upon the amount of work that was this point in the case, it is difficult to estimat mecesary to adequated represent you in this fee will be approximately \$[fre_amount]. I procedures that will abustantially increase the estimate and may be subject to change.	greed to (innert appropriate detaih)). group law firm to represent you in this matter. I ment of my fees My fees for legal services are neurord, such as filing frest, deposition charges, My office will be you approximately monthly done on your file during that period of time. At the lamount of time and expense that will be the lamount of time and expense that will be will also advise you before undertaking any e amount of fees. Please remember this is an	
Dashboard Views Shares (0 ← ♠ -	Danner, Jack Danied, Jack Danidon v. Smith Deckhard v. Batty	your funds in my Lawyers' Trust Account. I fees, costs, and expenses. After my office ma	ith my firm for fees and costs. My firm will hold will provide you with a monthly statement of anils you the monthly statement, my staff will expenses incurred. You are also responsible for $ \triangleleft \ \ P_{P0} t_{1/2}$	Þ
Bashboard Views Shares Server: docmotodermo.docmoto.com Legge O Start a web search		1 selected	老 4 后 1 回 4 4 4 4	✓ Connec 15:21 x01/2020 ₹

Figure 3: DocMoto lives up to its name with document automation. From within a folder, users create documents from templates that incorporate data specific to the matter in context and metadata tags for the document type.



Figure 4: When users create or drag and drop files into DocMoto, a dialog box opens to tag the document with metadata which facilitates searching for the document. Different metadata fields are automatically filled or presented for completion depending on the folder context where the file originates.

Thank you for reading, let's keep in touch!

We appreciate the time you spent learning more about the eDiscovery options available to your law firm. New products, feature updates and announcements happen throughout the year. So, to help you stay informed we have expanded the eDiscovery Buyers Guide to include additional online resources. Follow us on the channels below for more free education, and special offers!

V Subscribe to our Vimeo Channel: <u>eDiscovery Buyers Guide</u>



Follow us on Twitter: @eDiscoveryBuyer



Like us on Facebook: eDiscoveryBuyersGuide

Follow us on LinkedIn: <u>LTP LinkedIn</u>



The eDiscovery Buyers Guide is supported by vendor sponsorships. The products and services selected for the guide are done a author's discretion. Reviews are also written to reflect the opinion of the author. Each product or service must first be selected for guide, then incited for inclusion before sponsorship is requested. Additionally, emerging technology who do not have funding to pa ponsorship are included based on the level of value they offer to law firms. All sponsorship proceeds go towards the costs assoc the the y for

legaltechpublishing.com