

Legal Files

Streamlining Case and Matter Management

Organizations as diverse as government departments, private law firms, insurance companies, and universities share a commonality—the need for a centralized database. Typically, the important data required for contracts, claims, HR, and other legal matters are locked in siloed systems, obstructing users from consolidating or tracking information. The single-user, file management tools often prevent legal and legal-adjacent departments from taking a collaborative approach to their cases.

For over three decades, Legal Files, a legal software company, has solved these challenges through its collaboration-friendly and highly integrable case and matter management program. It streamlines administrative, legal, and management activities by giving users centralized visibility over their files and the ability to track progress.

A hub of all key information, Legal Files helps users experience the benefits of an updated, modern file tracking program without losing their historical data while migrating systems. It is developed using decades' worth of feedback from customers, recognizing software capabilities important to them for managing the legal data of their cases and matters.

“Legal Files consolidates project factors like contacts, e-mail, file progress, and documents into manageable, collaborative containers that allow users to see the bigger picture,” says Matt Ryan, senior consultant and training manager at Legal Files.

Users can access a management dashboard to view their files and related data, such as involved staff, progress, and other details. Entries can be filtered and grouped by criteria like department,



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Senior Consultant & Training Manager

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staffing, and allocation. Filters for importance, difficulty, and urgency levels allow offices to have control over prioritizing matters.

At the beginning of every partnership, Legal Files goes through a requirements gathering stage where it analyzes the customer's current data management system, the challenges it faces, and its goals.

Customers can start their database anew or opt for a data conversion to import their legacy database into Legal Files' system. Based on these factors, it matches the software to their needs by customizing filters and features while bearing in mind the varied workflow in different verticals.

Once the software is configured, it enters a user acceptance testing phase where customers are taught about the system's process flow, its features, and how to use it through practical demonstrations, online or offline. Post-launch, Legal Files continues to hold workshops, Q&A sessions, and follow-ups for answering additional queries.

It opposes a “one-size-fits-all” philosophy and is highly customizable, allowing users to add new items and categories even after launch. It retains a simple user interface and program workflow, empowering non-technical users to set up and use it without IT intervention.

Legal Files came to the rescue of a city government in the U.S. which struggled with its manual process for document maintenance and tracking. Add to the mix a staffing shortage, and the customer was experiencing a significant challenge to create summaries and status reports of their weekly and monthly case progress.

Legal Files identified each team's requirements, and the similarities and differences in their 26 practice areas. It configured the software to display shared windows with similar information across matters. It also created pop-up notifications for the staff based on the file's lifecycle. The results satisfied the teams and their IT department, which could now support a centralized system.

Equipped with the flexibility of custom software at the cost of an off-the-shelf program, Legal Files undoubtedly is a leading provider of case and matter management systems. Legal professionals and others looking for an easy way to collaborate on, organize, and view their files can end their search with Legal Files. 