

How MacRoberts simplified software management with DocsCorp

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About MacRoberts

MacRoberts is a leading Scottish commercial law firm with a history that can be traced back over 150 years. Internally, it is a firm committed to information security and business continuity. It is certified ISO 27001 and ISO 22301 compliant, putting the protection of client data at the very heart of the organization.

Simpler software deployment to remote users

In 2020, MacRoberts, like many other firms, closed its offices in response to the COVID-19 global pandemic and pivoted to remote working. The job of **Graham Thoms**, CIO, and his team was to ensure staff had reliable access to their software applications at home. Some firms do this via virtual private network (VPN) technology, but DocsCorp applications can be deployed and updated through central configuration management from a cloud-located drive – in this case OneDrive. This means administrators can make changes to the settings, or upgrade to the latest version, just once in a central location. Then, the changes will automatically be deployed to every user in the organization when they next restart or open their application. The settings are also cached, which means the ability to fully operate when there is poor or no network connection.

“Software deployment via our own cloud central configuration was crucial for our transition to remote working,” explained Graham. The firm uses the full desktop suite of applications, which includes pdfDocs, compareDocs, and cleanDocs. “The ability of the software to work anywhere, without the need for VPN technology, was absolutely key for us. It’s allowed us to make the applications run as fast as they possibly can, but in a controlled manner.”

Rationalizing PDF applications

At one point, MacRoberts had several PDF applications to meet the needs of different users and departments. “When I started at the firm,” Graham explained, “I had to figure out which one gave the greatest benefit to most people.” When evaluating which would be the right fit firm-wide, Graham and his team prioritized the end-users’ experience.



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Legal supplier management and support

One of the applications they were using was pdfDocs, and it was ultimately what the firm chose as its all-purpose PDF editor and bundler. "With pdfDocs, their work could be done efficiently, and in a way that made sense," Graham said. "In other words, if the user wants to apply stationery to a document, pdfDocs does that with one click. What more could you want than that?"

Reducing paper use

Staff use pdfDocs to redact sensitive information and prepare legal documents for e-filing with the Courts. According to Service Desk Supervisor, **Craig Valentine**, the ability to create PDF binders, like Closing Books, is going a long way to cutting down on printing. And when staff can do this work digitally, it saves the firm from having to purchase multiple printers for staff to use while they work from home.

Skipping the printer hasn't affected the quality of the final documents, either. "The great thing about pdfDocs is, when we apply corporate stationery, the aesthetics are correct," Graham said. "If we add an electronic signature to the document, it looks the same as if we printed it and did a wet-ink signature.

We do have manual processes, but it's about how you can make them as efficient as possible. pdfDocs takes a lot of the backbone out of those manual tasks."

Information security software strategies

MacRoberts is a firm that has information security at the core of its operations. It is certified ISO 27001 compliant – the international standard for information security.

The firm saw that human error was a significant contributor to data breaches generally and looked for a way to manage the risk. Ultimately, it implemented cleanDocs to help staff to always send the right information to the right people.

"Information security is the responsibility of an individual at the end of the day," explained Graham. "And the way that cleanDocs operates is to give the sender a choice. That's why we chose cleanDocs. It gives the person sending the email a clear view of the internal and external parties that the email is going to, and the inherent risks."

"We're really trying to work efficiently and keep information security at the heart of what we do. Because if you don't have that, the trust isn't won with the client, and legal work is all about establishing trust."

MacRoberts is also using cleanDocs' email recipient checking

technology to thwart impersonation attacks. "With cleanDocs, users say 'hang on a minute, how come it says my reply is going to an external party when this person is internal?'"

Now, cleanDocs is a firm-standard for every user. "You cannot have a MacRoberts email account without having cleanDocs on your PC."

Better legal document comparison

In terms of document comparison, Graham explained the firm was at a point where it needed a change. "We were using Microsoft Word filters for comparison, which was decent. But we needed more." Microsoft Word's basic comparison feature is typically not suited to analyzing the kinds of sophisticated legal documents firms work with. MacRoberts switched to compareDocs to make sure staff were seeing every change.

compareDocs integrates with the firm's document management system, iManage, making it easy to compare versions and save Comparison Reports into the relevant folders. It's also helping staff work efficiently thanks to fast review cycles and flexible report formats.

Supplier management and software support

For MacRoberts, using DocsCorp firm-wide helped to rationalize its supplier management.

"Rationalization is about consolidating the number of vendors that you work with," Graham commented. "And getting the most that you can out of what you have.

What we get from DocsCorp are three applications that work together very well and add efficiency. It's the combination of the applications that makes it work."

Rationalizing the number of suppliers also simplifies product support, as Craig explained. "Because I'm supporting three separate applications in the same family, I go to one source for support. It's a straight email or a call to DocsCorp, explaining the problems we're having."

Our support goes beyond just troubleshooting. Our product teams base most new features and enhancements on client feedback.

"The critical thing is that you listen to us when you build features into the applications," Graham said. "There's an understanding of what we need, and the final product is ultimately shaped for the client's use."