

# Document Management, Automation & PDF Tools

## BUYERS GUIDE



# 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.

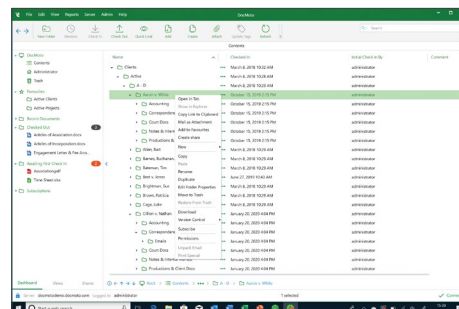
DocMoto's DMS appeals to law firms with 10-500 users. Their sweet spot is firms who use both Mac and Windows PCs and who are not keen on using browser-based systems. Web browsers operate in sandboxes walled off from the operating system without support for drag-and-drop file operations. Browser back 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 [DocMoto](#), 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. [See Figure 1 on page 5.](#)



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

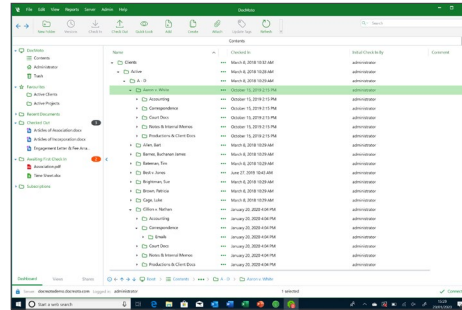
**Recent Developments and Updates:**  
• Originally developed as Mac software, DocMoto now offers a native (.NET) client for Microsoft Windows.

- 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 [selected](#) 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.”

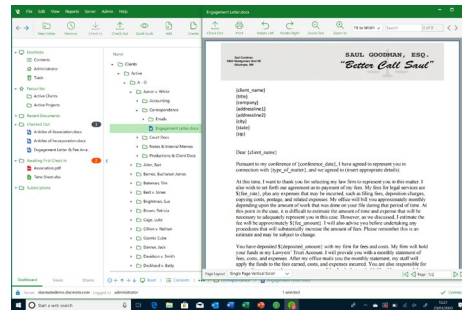
Each user has a Trash bin that acts as a recovery point for deleted files. The Trash contains files deleted by the user regardless of whether the data were in Contents shared with the firm or in the user's home folder.

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 pull-down window. [See Figure 2 on page 5.](#)



### 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. [See Figure 3 on page 5.](#)



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

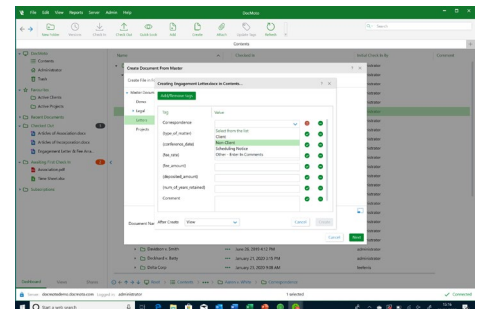
folder where the user created it, so, no worries about where to save or retrieve the data. Furthermore, DocMoto can personalize the templates with firm logos, addresses, salutations and even digital signatures.

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, [Apache OpenOffice](#) and [LibreOffice](#).

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 [version controls](#). 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 [tags](#) such as document type, matter and metadata specific to the doctype. [See Figure 4 on page 5.](#)



“ 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 [colleagues](#), 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 [share](#) 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 [DocMoto](#), 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.

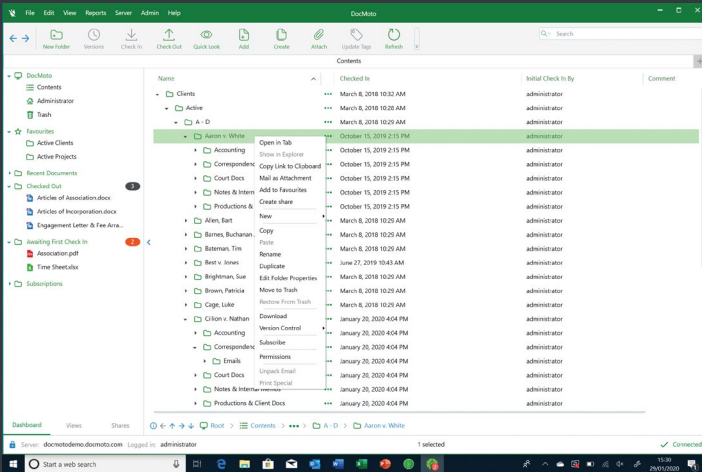
#### Why should you consider DocMoto?

- 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.

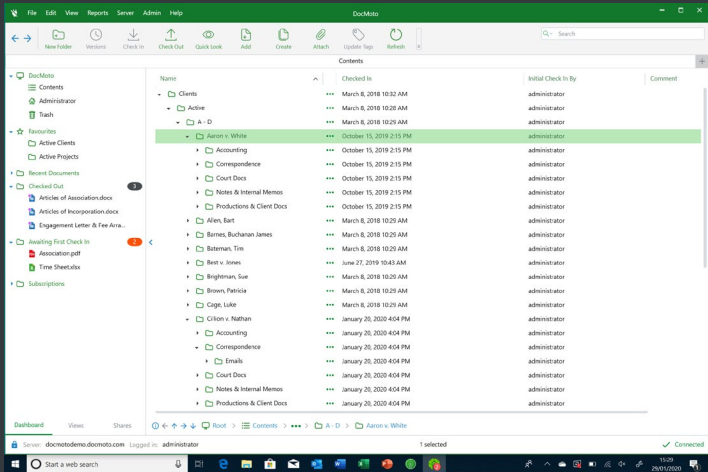
#### Try Out DocMoto For Yourself!

Learn more about how [DocMoto](#) can revolutionize your firm's document and email management. Visit the [DocMoto website](#) today!

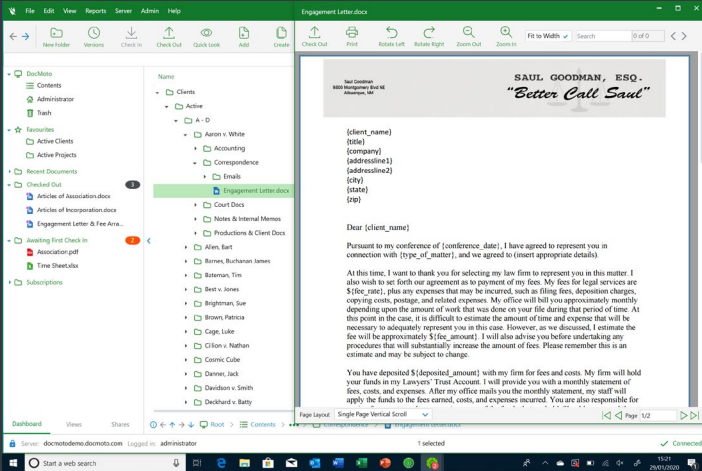




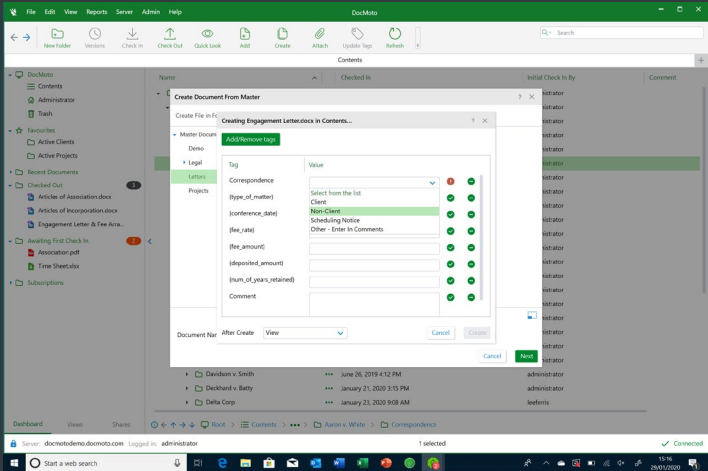
**Figure 1:** DocMoto's Dashboard and full-featured UI resembles a browser with tabbed resources but operates like the macOS Finder or Windows File Explorer. A file menu sits atop the UI to pull down lists of commands. Below the menu, a persistent ribbon shows common commands used in any context or folder.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



**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.



**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.

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