Document management integrations for Vincent

Written by Sasha Perrin

Many large law firms store their most valuable knowledge inside document management systems, where matter documents, internal work product, and institutional expertise accumulate over time.

The new capability allows lawyers to retrieve documents from widely used repositories including NetDocuments, SharePoint, OneDrive, and Google Drive. Lawyers can browse native folder structures inside Vincent and bring documents directly into their workspace for examination without downloading files locally.

Document management systems serve as the primary knowledge repositories across large law firms. The new integrations allow lawyers to work with documents directly from their firm's document management system while maintaining established governance controls. Security teams maintain the same access permissions and authentication requirements that govern documents within those systems.

"The most important information in a legal matter lives inside a firm's document systems," said John Foreman, Chief Product Officer at Clio. "These integrations allow lawyers to bring those documents directly into Vincent so analysis happens with the full context of the matter. When knowledge and analysis come together in the same workflow, lawyers can move from documents to legal insight much faster."

This release marks the first phase of Clio's effort to connect Vincent with the systems where legal knowledge is created and stored. Document management systems hold the history of a firm's work across matters and practice groups. By enabling direct retrieval from those systems, Vincent allows lawyers to quickly and securely bring relevant matter materials into their analysis without disrupting established document management workflows.

The launch supports Clio's continued investment in the enterprise segment through Clio for Enterprise, the company's division focused on large law firms and corporate legal departments managing legal operations at scale.

About Clio

Clio is the global leader in legal AI, powering legal work across the profession, from law firms of every size to corporate legal teams, government agencies, and courts. Its Intelligent Legal Work Platform unites the business and practice of law, connecting the people, information, and processes behind legal work. Clio's AI brings the context together with legal sources drawn from Clio Library, a growing collection of more than one billion legal documents. Over 400,000 legal professionals in more than 130 countries rely on Clio to run their legal world. Learn more at www.clio.com.