



NetDocuments

Keep documents organized, safe and compliant while maximizing productivity and collaboration

The document solution for legal firms

One of the key requirements legal firms have is the efficient management of documents and emails. To help them achieve this, we provide the market-leading Cloud document and email management system, NetDocuments.

The preferred choice of hundreds of thousands of professionals worldwide, NetDocuments is used within industries regulated by strict compliance and data security requirements. Organizations who depend on the solution include top 100 global law firms, corporate legal departments and financial institutions.

NetDocuments delivers innovation through a world-class content services platform, but it's not just about the content. Today's law firm needs technology that is easy-to-use, scalable and protected by end-to-end security and encryption.

Storing, managing and protecting millions of documents, that are created and shared by thousands of people, isn't easy. Unmanaged files can become chaotic, obtrusive and a risk to your organization.

NetDocuments removes the barriers and transforms your documents into an efficiency engine for collaboration, productivity, growth and inspired work, without limitations or restrictions.

With five distinct solutions and additional purpose built add-ons, NetDocuments makes it easy to tap into the precise capabilities you need to build a customized document solution that perfectly meets your firm's requirements.

ORGANIZE

ORGANIZE is a market-leading Cloud solution. It delivers the functional capabilities you need to attain new levels of productivity with document and email management and OCR (optical character recognition).

> NetDocuments

NetDocuments provides a reliable and secure way to create, edit, store, locate and collaborate on documents anywhere using any device, so you can stay focused on clients and outcomes. This includes workspaces that are designed around your matters and projects, flexible metadata, document versioning and unrivalled searchability to make documents more useful and productive.

> ndMail

ndMail uses predictive filing that's powered by artificial intelligence. It makes inboxes secure, organized and collaborative. Users can file emails quickly and accurately and see emails that other team members have filed. This provides a dramatic reduction in the time spent organizing and sharing emails, all directly from Microsoft Outlook.

> Optical Character Recognition

OCR makes document searches smarter and more efficient by digitizing and indexing content from scanned documents or photos, providing the assurance that every search will yield complete results. The system works behind the scenes 24/7 to automatically digitize content, so it becomes a fully integrated, easily searchable piece of collective knowledge.



Product >

NetDocuments

- > ORGANIZE
- > PROTECT
- > PLAN
- > DELIVER
- > LEARN

Sector >

Legal

Automation simplifies document management

> Microsoft Power Automate

With this innovative tool, you can create WorkSpaces and CollabSpaces, add users to a repository, create groups, add to a cabinet and more.

Time-consuming manual processes are automated by adding UI flows and robotic process automation to your NetDocuments solution. The NetDocuments Connector for Power Automate provides access to 58 NetDocuments API calls. This allows Power Automate flows to take actions on the workspaces, folders documents, users and groups in your repository.

* ndSync

This additional document technology option enables remote workers by providing two-way file syncing between NetDocuments content and the users' local machine.

PROTECT

PROTECT adds further controls and protections that go beyond NetDocuments' native, award-winning security capabilities. This includes sophisticated classification and policy tools that guard against the unauthorised exfiltration and use of content, as well as advanced reporting capabilities.

Together, these controls provide a flexible and robust document security framework, while reducing the risks of unintentional or malicious internal data breaches and leaks.

> Data Loss Prevention (DLP)

To keep sensitive data and documents safe from unauthorized use, NetDocuments DLP allows you to classify content and create and enforce policies. These elements control user actions and prevent documents from leaving the security of NetDocuments.

> Workspace Security Manager (WSM)

To streamline and simplify security policy management, WSM makes it easy to create, edit and apply security policies to the content in your workspaces. It allows firms to build and manage ethical walls or limited access security environments.

* FlexStore and FlexStore Pro

These additional options enable your firm to manage and control where content is stored, so it stays closer to the people who need it.

FlexStore gives firms control over the physical location of data by facilitating geo-aware content storage through a single, convenient user interface. FlexStore Pro adds near-site content encryption and decryption, so you can accelerate the delivery of secure content to users around the world.

> Customer Managed Encryption Keys (CMEK)

NetDocuments offers three layers of encryption via three cryptography keys, so you can secure both your documents and the keys that protect those documents. The standard NetDocuments service includes the first two layers of encryption. CMEK adds the third layer, which provides dual-custody control and gives you the ability to apply encryption at the client or matter level.

PLAN

PLAN focuses your people and information on achieving results. This includes convenient, easy-to-use tools that coordinate teams and tasks, provide real-time team communication, facilitate task management through checklists and workflows and deliver collaborative document annotation and overlays to simplify findings.

Plan is ready to reduce your inbox congestion, keep lines of communication open and active, streamline workflows and make users more efficient and productive.

> ndThread

Take advantage of secure, real-time chat capabilities that help eliminate inbox clutter and reduce the need for email filing.

ndThread is a chat messaging client that's designed specifically for legal organizations. It provides a secure, governable and convenient way to chat, share and comment on files, individually or within a group. The result is improved collaboration and a reduction in email overload.

> ChatLink

To maintain security and governance, your real-time messaging, collaboration and document management systems need to be connected. ChatLink connects collaboration tools by integrating your NetDocuments platform directly with Microsoft Teams.

> Margin Notes

Save time by streamlining your document processes. Margin Notes simplifies document reviews by making it easy to quickly preview, annotate and mark up documents without ever needing to download the files to your desktop.

You can use Margin Notes to annotate files with your colleagues in real-time, and take advantage of findings to quickly navigate through people, places, companies and more.

You can trust our experience

> A Platinum Partner, the highest status within NetDocuments' partner program and their only global platinum partner worldwide

> Accredited by NetDocuments in the delivery, training and support of the platform

> 25+ years experience in delivering and supporting market-leading document management solutions

> Able to advise on your document strategy and deliver implementation, regardless of whether you are considering a new document solution or replacing your current platform

Secure, intuitive document collaboration

> Tasks

Tasks provides you with the tools to build, and manage, customized workflows within workspaces to track and progress team member activities from one convenient location.

The information you add to Tasks is fully secured, just like any other file in NetDocuments. You can also perform searches, link to other content and share Tasks information with colleagues.

DELIVER

DELIVER provides everything you need to safely organize, package and share content with clients, customers, outside counsel and other internal and external groups.

With DELIVER, you can create secure, sharable workspaces that are similar to extranets or deal rooms. Users can compile and organize content and collaborate on document sets without worrying about security or governance.

It's an efficient way to create and maintain a single source of truth for cases and projects, streamline governance and reduce the time and costs associated with compiling documents.

* CollabSpaces

This additional option allows law firms to collaborate with clients intuitively and securely. It makes it easy to safely share the content in your NetDocuments system with external users, without transferring it to a third-party file sharing service or extranet.

Clients and colleagues can easily access and collaborate on content immediately, without extra time or training. CollabSpaces also lets you invite an unlimited number of external clients and colleagues, so you never have to worry about licensing restrictions.

* SetBuilder

Quickly organize documents into sets or binders and securely distribute compiled content to the relevant people.

SetBuilder brings standardized processes, streamlined workflows and fast service delivery to document compiling and distribution. With SetBuilder, you'll never spend hours in a closing room physically labeling and compiling printed documents. As a result, organizations that use SetBuilder experience dramatic reductions in the hard costs associated with closings, saving an average of nearly \$1,200 per transaction.



Realize the full potential of your investment

LEARN

Transform all of your content into a single, intelligent and fully searchable source of truth. LEARN provides faster, easier and safer access to the information your teams depend on. Using it, your firm will gain a deeper, more actionable understanding of your documents and how people use them.

> Analytics

Analytics provides data analysis and visualization tools that firms use to gain important insights. It can offer the information needed to help improve user behaviour, shape business outcomes and get more value from your NetDocuments investment.

Using Analytics, you can quickly identify who is using NetDocuments the most, or not at all, to reward top contributors and encourage increased participation. You can see how your teams are working together and find areas for improvement and training.

You can also use Analytics to monitor the performance of your entire NetDocuments system, to identify problem areas and maximize your ROI.

* NetKnowledge

Powered by BA Insight, NetKnowledge offers an additional option that allows users to save time, boost productivity and streamline workflows. It replaces the slow, frustrating process of searching through different systems and applications individually with one intuitive, fast and safe search experience.

Using NetKnowledge, firms can create a single, federated source of truth that includes all of the documents, ideas, policies and other essential information stored in different systems across your organization.

Workflows are simplified by making NetDocuments a part of your enterprise search solution without requiring you to repeatedly download and index required content.

NetKnowledge respects existing data access restrictions put in place at the source of the data. This makes sure that searches only return information to the people who are specifically authorized to see it.

We are ready to help

- > A NetDocuments certified training team that can deliver tailored onsite, remote or online training programs in a way that suits your business
- > ISO accredited support team is available 24/7/365
- > Working with additional partners whose applications can be integrated with NetDocuments, either at initial implementation or as your document strategy develops



To find out more about NetDocuments
please speak to your
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