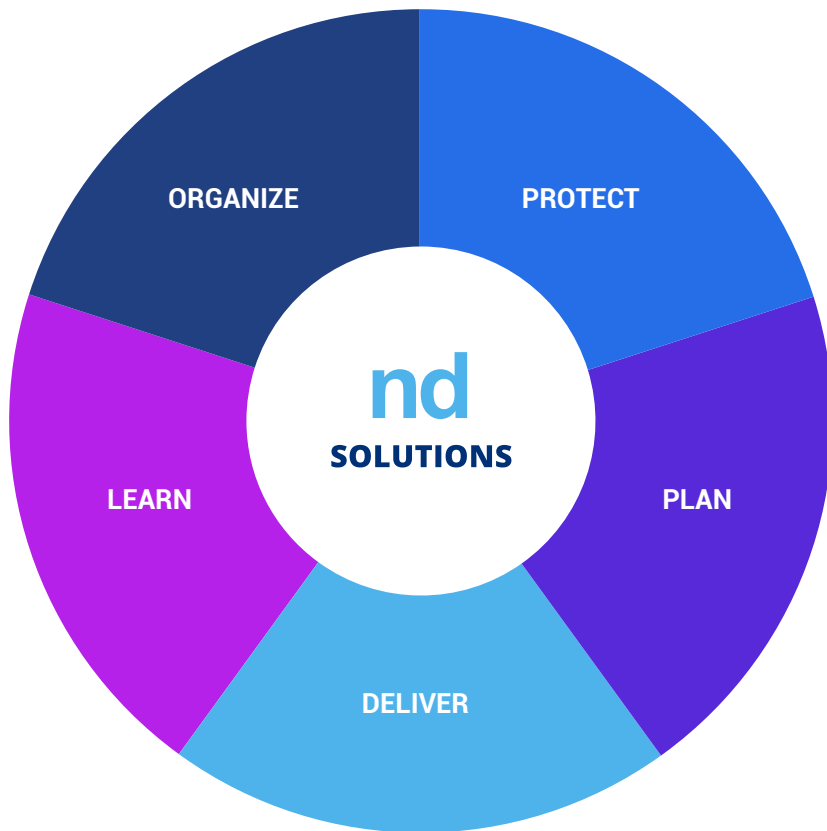




# NETDOCUMENTS SOLUTIONS



netdocuments®



**Imagine a future where your content is always safe, organized, compliant, and available to inspire your best work.**

***NetDocuments is ready to take you there.***

Storing, managing, and protecting millions of documents that are created and shared by thousands of people is never easy. All too often, these unmanaged files become a chaotic, obtrusive, and risky burden on your organization.

NetDocuments changes the equation, with a document and email management platform that removes the barriers and transforms all your documents into an unstoppable 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, gain access to our latest technology, and build a customized solution that perfectly matches your requirements.

Explore the advantages of our ORGANIZE, PROTECT, PLAN, DELIVER, and LEARN solutions and add-ons. Find the right mix for your organization. And start turning all of your documents and content into inspired work.



# ORGANIZE

**ORGANIZE** includes the core capabilities you need to reach new levels of productivity—including document management, email management, and OCR. With ORGANIZE, you can replace generic, inflexible, off-the-shelf document products with a best-in-class, cloud-based solution that is built specifically for the legal profession.

## *Core Technology Includes:*

### **NetDocuments**

**Use the industry's leading cloud-based document management system to increase productivity, collaboration, organization, and security.**

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 unrivaled searchability—all working to make your documents more useful and productive.

### **Optical Character Recognition (OCR)**

**Make your document searches smarter and more efficient by digitizing and indexing content from scanned documents or photos.**

With NetDocuments OCR, you gain the peace of mind that comes from knowing 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 your collective knowledge.

### **ndMail**

**Take control of your inbox and keep all your communications secure and organized.**

ndMail uses predictive filing—powered by artificial intelligence—to make your inbox more collaborative and efficient.

With ndMail, you can file emails quickly and accurately, see emails that other members of your organization have filed, and dramatically reduce the time you spend organizing and sharing emails—all directly from Microsoft Outlook.

### **Microsoft Power Automate**

**Automate time-consuming manual processes 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 NetDocuments repository.

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

## *Add On Technology Options:*

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### **ndSync**

Enable your remote workers with two-way file syncing between NetDocuments content and your users' local machines.



# PROTECT

**PROTECT** adds additional controls and protections that go beyond NetDocuments' native, award-winning security capabilities. This includes sophisticated classification and policy tools that guard against the unauthorized exfiltration and use of content, as well as advanced reporting capabilities. Together, these additional controls provide a flexible and robust document security framework, while **reducing the risks** of unintentional or malicious internal data breaches and leaks.



## **Core Technology Includes:**

### **Data Loss Prevention (DLP)**

**Keep all of your sensitive data and documents safe from unauthorized use.**

NetDocuments DLP allows you to classify content, create and enforce policies that control user actions, and prevent documents from leaving the security of NetDocuments.

### **Workspace Security Manager (WSM)**

**Streamline and simplify security policy management.**

WSM makes it easy for the right people to create, edit, and apply security policies to the content in your workspaces—so you can build and manage ethical walls or need-to-know security environments.

## **Add On Technology Options:**

### **FlexStore and FlexStore Pro**

**Manage and control where your content is stored, so it stays closer to the people who need it.**

FlexStore gives you control over the physical location of your 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)**

**Fulfill your ethical and professional obligation to protect the information you hold.**

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 getting 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 and other tasks.

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

## **Core Technology Includes:**

### **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 with a group, so you can improve collaboration and reduce email overload.

### **ChatLink**

**Connect your collaboration tools to improve productivity without sacrificing governance or security.**

To maintain security and governance, your real-time messaging, collaboration, and document management systems need to be connected.

ChatLink provides that connection—by integrating your NetDocuments platform with Microsoft Teams.

### **SmartView**

**Save time by streamlining your document processes.**

SmartView 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.

With SmartView, 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.

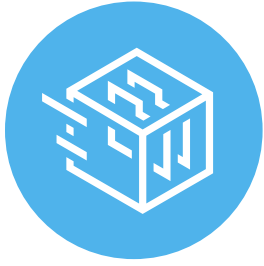
### **Tasks**

**Manage complex projects and workflows more efficiently.**

With Tasks, you can build customized workflows within workspaces to track team members' activities and progress 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 Task 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 (similar to extranets or deal rooms), 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 of compiling documents.



## ***Add On Technology Options:***

### **CollabSpaces**

**Share and collaborate intuitively, securely, and in a way that brings you and your customers' worlds closer together.**

CollabSpaces makes it easy to securely share the content in your NetDocuments system with external users—without transferring it to a third-party file sharing service or extranet.

Because CollabSpaces is so intuitive and easy to use, clients and colleagues can 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 everyone who needs it.**

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 \$1,500 per transaction.



LEARN

**LEARN** makes your documents as intelligent as your people—by turning all of your content into a single, intelligent and fully searchable source of truth. With the growing family of LEARN products, you can provide faster, easier and safer access to the information your teams depend on, gain a deeper, more actionable understanding of your documents and how people use them, and make your content an even more productive and intelligent engine for your growth and success.

***Core Technology Includes:***

**Analytics**

**Gain the insights you need to help improve user behavior, shape business outcomes, and get more value from your NetDocuments investment.**

Analytics provides data analysis and visualization tools you can use to turn a wealth of user activity, system performance, and team collaboration data into deep insights that will unlock the full potential of your NetDocuments solution. With Analytics, you can

quickly identify who is using NetDocuments the most (or not at all), reward top contributors, and encourage increased participation. You can see how your teams are working together and find areas for improvement and training. And you can monitor the performance of your entire NetDocuments system, so you can address problem areas and maximize your ROI.

***Add On Technology Options:***

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**NetKnowledge (powered by BA Insight)**

**Save time, boost productivity, and streamline workflows by expanding and unifying your enterprise search.**

NetKnowledge replaces the slow, frustrating process of searching through different systems and applications individually with one fast, safe, and familiar search experience. With NetKnowledge, you 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. NetKnowledge also simplifies workflows by making NetDocuments part of your enterprise search solution without requiring you to repeatedly download and index content. And it respects existing data access restrictions put in place at the source of the data, making sure searches only return information that people are authorized to see.







**Organize your documents, keep them safe and compliant, and maximize your productivity and collaboration.**

To learn more, visit [www.NetDocuments.com](http://www.NetDocuments.com) or call (866) 638-3627.

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NetDocuments is the leading cloud-based document and email management provider for over 2,850 customers worldwide. Learn how you can work from anywhere, just as you would in the office, while securing your most sensitive information.

**netdocuments®**

