



NetDocuments®

NetDocuments® supports your law practice with document management software to create, secure, manage, access, and collaborate on documents and email anywhere, anytime, on any device.

It features world-class security, compliance, and disaster recovery. Plus **Netdocuments®** document management software is scalable. That means that whether you have a large practice or are practicing solo, **NetDocuments®** will fit your document management needs.

NetDocuments® supports your law practice with:

- Document Management
- Permissions and Restrictions
- Email Management
- Compliance and Security
- Mobility
- Collaboration
- **Document Management**
- The cloud-based **NetDocuments®** platform is designed to help your law practice reduce costs and increase productivity with the client, matter, project-centric workspaces, enterprise search, built-in disaster recovery, and anytime, anywhere, any-device access to your documents.
- Law firms use it to create, edit, share and collaborate with others. It gives you the tools to organize documents into folders based on clients or projects, search the content of your documents (Word, Excel, PowerPoint, PDF's, and email), secure and backup your data.

- **NetDocuments®** cloud computing eliminates the barriers and costs of on-premise hardware, system software, out-of-date software, and business continuity risks.
- Telephones, electricity, and E-commerce are all cloud services. Your law practice's documents and the technology-driven processes to support them are now delivered as services in the cloud. **NetDocuments®** features (next tab):
- **Organization:** Organize documents across cabinets, tags, folders, or workspaces across the firm's global repository
- **Enterprise Search:** Search across cabinets or the entire repository with full-text enterprise search, including search analysis, metadata, phrase, and proximity searching that supports Boolean operators, lemmatization, and spell checking
- **Document Work:** Create, edit, and collaborate on documents with full version control, locking, and rights provisioning
- **Permissions and Restrictions:** Customize user access, grant or restrict access and edit rights to individuals or user groups at the cabinet, folder, metadata, or document level
- **Integrations:** Seamlessly integrate with Microsoft Office and Adobe to open, save, and edit documents
- **Lifecycle and Retention:** Customize document lifecycle and retention policies, litigation hold, and imaging services
- **Alerts:** Receive automatic notifications for documents and folders you follow
- **Document History:** View document audit trails, track activity by user, date, time, and action
- **Approvals:** Stamp documents with your approval to support workflow
- **Integrations:** Integrate your document work with many of your other third-party applications

Email Management

NetDocuments® Email Management Service (EMS) allows you to intelligently save, file, and manage emails through seamless integration with Microsoft Outlook.

In **NetDocuments**, you have the ability to organize documents, emails, attachments, and other content into a single location. Emails can be dragged or tagged to native Outlook folders. A copy is then sent to the matter, client, or project-centric workspace in NetDocuments. Email management tools include:

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- **Drag and Drop:** Drag, drop, and synchronize emails
- **Predictive Tagging:** Streamline document retrieval by using predictive metadata tagging based on previous client, matter, or project selections
- **Search:** Supports email-specific search
- **Recent Email Tracking:** Use “My Email” to view recently sent or received emails
- **Mobile Access:** File and view with mobile devices or Outlook Web Access (OWA)
- **Native File Format:** Messages are kept in native .msg files
- **MAPI-compliant:** MAPI-compliant email system for outgoing emails initiated within NetDocuments®
- **Auto-prompt:** Receive Auto-prompts to file outgoing messages

Security and Compliance

NetDocuments® delivers world-class security, compliance, privacy, and availability for documents and emails. With **NetDocuments®** your law practice’s digital assets are protected and encrypted in transit and at rest across private, redundant, and federally regulated datacenters.

Built from the ground up, **NetDocuments®** is a proprietary software designed with a key patent to manage the security and rights to a document by wrapping the contents in a digital envelope. Similar to a physical envelope, the wrapped digital object is able to maintain access rights, account information, metadata, and any other information relating to a document at the document level. Key security and compliance features include:

- **Data Encryption:** Files are encrypted in transit and at rest
- **Patented Security:** Embedded permissions and ethical wall rules support obfuscated digital envelopes
- **Authentication:** Two-factor authentication with RSA, SecurID or a digital certificate as well as Active Directory integration
- **Background Checks:** Employee checks performed for financial, criminal, ID, Terrorism watch list
- **Security:** Access rights, permissions, and ethical walls based on users, and groups
- **Network Security:** Dual redundant firewalls, network IPS, layer 7 IPS, DOS prevention, and penetration tests

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- **Annual Service Organization Controls (SOC):** 2 audits based on standards set by the AICPA
- **SEC and FINRA Compliance:** SEC rule 17a and 204 compliant, in addition to third-party downloader addendum and WORM (write once, read many) storage.
- **HIPAA Compliance:** Full compliance with the Health Insurance Portability and Accountability Act of 1996 for privacy, security, and breach notification rules
- **Data Randomization:** Files are randomized across 1.6 million directory node networks
- **Physical Security:** 24x7 armed guards, perimeter defense, and video surveillance
- **Separation of Duties:** Segregated duties and access across hardware operators, O/S personnel, software engineers, and support staff
- **VPN & Active Directory Controls:** Prohibits removable media from accessing document storage, two-factor VPN access authentication

Mobility

With **NetDocuments® mobility**, team members in multiple offices, as well as those working remotely, can access, manage and collaborate on content.

Security and disaster recovery are built into all editions of NetDocuments® including mobile devices. Mobility features include:

- **Mobility:** Full mobile functionality with apps for iPad and iPhone
- **Browse:** View, documents, folders, and workspaces from anywhere, anytime, on any device via our mobile web interface
- **Portability:** Carry your documents, folders, and workspaces with you
- **Use:** Open, view, and edit documents in your favorite document productivity apps
- **Compliance:** WebDAV (Web Distributed Authoring and Versioning) compliant for immediate integrations with other WebDAV apps
- **Upload and Download:** Upload files from other apps
- **Access:** Access your most recent documents and search full text to locate documents
- **Photos:** Upload photos

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- **Share:** Share documents with others via email
- **Synchronize:** Use Android FolderSync to sync files while working mobile

Collaboration

NetDocuments® features a rich set of tools to support collaborative work with individuals inside and outside your law practice.

When you need to work together as a team, and across departments, **NetDocuments®** suite of collaboration features enable document access, editing, sharing, and organization.

Customizable metadata tags organize content into collaborative workspaces. Workspaces can be accessed by team members and groups with appropriate security rights. Features to support collaboration include:

- **Direct Links:** Notify team members with direct document links
- **Document Approval:** Set approval standards
- **Version Control:** Auto-versioning and version locking
- **Audit Trail:** Tracks document history and audit trail
- **Document Delivery:** Deliver a secured link to a document, select one or multiple documents, generate a direct access URL, set an optional password, lock the shared version, grant or restrict download, set an automatic expiration date for the URL

ShareSpaces: Create room for ongoing collaboration with individuals outside your law practice. Features include:

- Unlimited secure digital rooms to share content
- Accounts for individuals accessing the Share Space
- Customizable security rights and permissions for access
- Document Categories to organize documents
- Secure discussion threads
- Auto notifications when content is added or edited
- Ability to customize with your unique logo

For more detailed information about Netdocuments®, specific features, or how it can help your law practice, please call 914-738-9148

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