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(866) 638-3627 / (866) NET-DOCS

[www.NetDocuments.com](http://www.NetDocuments.com)

From the [May 2013 review](#) of Document Management systems.

### **Best Firm Fit**

- Firms whose practice includes a legal practice or financial services, which are core markets for NetDocuments , or firms who require SEC, FINRA compliance or Write Once Read Many (WORM) storage and two-factor authentication for extra security
- Organizations who are comfortable designing and implementing a document management system with a very flexible indexing system

### **Strengths**

- Program is completely % cloud-based and accessible from any internet enabled device. There is also an option for additional raw data backup to a local server.
- Easy to use browser interface and direct integration MS Office, Adobe, Outlook, and scanners.
- Built-in portal allows instant posting of documents for secure electronic delivery and ongoing client collaboration.
- High degree of flexibility in configuring the index fields for this application, and includes tools for connecting pick lists to outside applications where supported by the other app's publisher.
- Two-factor authentication with RSA token available in the Professional and Professional+ editions of the product

### **Potential Limitations**

- Templates are not available to help users configure metadata and other

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The application has been on the market for 15 years, and has good integration with Microsoft Office, especially Outlook, where users can drag and drop e-mails and documents directly into Outlook folders which store the item in NetDocuments. Users can also drag and drop files from Windows Explorer directly into the application, as well as upload information one file at a time.

NetDocuments supports version control, and also maintains a separate daily snapshot of every document for each of the last 30 days. Data can be downloaded to your local computer or server, and the software maintains an XML file with all of the index fields and metadata on each file.

Administrators can create rule-based policies for file retention periods, and more than one policy can be applied to a document. Every two months, NetDocuments prepares a listing of documents which have met the criteria for longest applicable retention period which are now eligible for purging.

Barcode scanning is available, along with an integrated scanning utility. An optional cloud-based imaging service captures the text of documents using optical character recognition software, and also provides image enhancement (deskew/despeckle).

NetDocuments is associated with legal giant LexisNexis, and encrypts all of the data while in transit and at rest, and has implemented security procedures to prevent any single employee from having access to client documents. The application has strong security features, including a detailed audit trail which logs all activity by user and IP address. NetDocuments offers three plans (Basic, Professional and Professional+) which allow users to secure data with an RSA two-factor authentication token.

NetDocuments also supports compliance with a wide range of sophisticated requirements, including litigation hold, many SEC requirements for broker/dealers and investment advisors, as well as the option to store data in a WORM (write once,

read many times) cabinet. All defective drives are securely erased and destroyed in

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require a minimum of two users, and organizations using the Professional or Professional + editions receive a 10% discount for paying annually. All plans include 10GB of base storage, plus 1GB per user (2GB per user with the Professional + edition).

## 2013 Ratings:

NetDocuments	
Core Product Functions/Features	4.0
Document Workflow	3.5
Document Control	4.75
Special Features	4.25
Overall Rating	4.0

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