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**www.netdocuments.com**

This product was launched in 1999 and has been primarily focused on law firms and financial services organizations. The vendor claims to be custodian for over 100 million documents. NetDocuments is beginning to target the accounting firm marketplace, with 20 firms currently using the system. There is no direct integration with tax or accounting software out of the box.

## Core Product Features & Functions

NetDocuments' interface is very intuitive and easy to work in. The file storage is based on a collapsible folder list along the left side of the screen. As an alternative to viewing a document hit list, you can set up and access documents through a workspace. The pre-defined templates for organizing documents within a client workspace provide a dashboard of all the files associated with the client.

A comprehensive audit trail of all activity related to a document is maintained, as well as user login history and email notifications history. OCR functionality is not included with the system at this time; but the vendor plans to add server-based OCR later this year. 4

## Integration

You can create a new document or file from within NetDocuments by selecting the source application software and the folder in which you want to store the file. An integrated workflow module is not available, but many of the vendor's clients have interfaced NetDocuments with Metastorm, an industry-leading workflow automation system. The document viewer supports 80 different file formats.

The integration with MS Office applications is one of the best I've seen.

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URL to access a binder of documents published to their portal account. Documents can be moved from the DMS database to the portal via drag and drop. 5

## System Management

Document security is set at the folder level using VESA — view, edit, share, administer — as alternative permission levels. A unique feature is the ability to apply a footer with a unique document ID on each document. When you use the File|Save As command, you have the option to store individual versions of the document.

A full document retention management module is included. A retention policy can be set up based on any combination of metadata values. A report can be generated at any time to list out documents that are scheduled for purging. The system is stored in redundant data centers and can provide restoration of any document stored in the last 30 days within five minutes. You also have the option to set up a local (on-premise) backup server. 4.5

## Summary & Pricing

NetDocuments is a well designed, easy-to-use web-hosted solution. Therefore, it is a system that you should be able to deploy fairly quickly. I would like to see more direct integration with accounting and tax software to make it a more complete solution for the typical tax and accounting firm. The pricing model is attractive at \$20 per user, per month. A \$30 per user, per month option provides more ability to customize the document properties along with stronger administrative features.

**2010 Overall Rating 4.5**

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