

## Features List

### Workspaces

- Metadata/profile based workspaces for Clients, Matters or Projects. Workspaces are shared pages aggregating information for hundreds of thousands of client matters or projects for scalability and organization
- On demand auto creation of workspaces based on predefined template(s)
- Automatic organization of documents in workspaces based on document type
- Workspace selector for quick selection and access
- My workspaces list up to 300 and Recent Workspaces list up to 40
- Save documents to workspaces and folders in workspaces (with profile inheritance)
- Easy external sharing tool on workspaces (ShareSpaces)
- View other web site sources within a workspace

### Cabinets and Folders

- Physical content storage. Folder or workspace (or both) organizational based
- Folder and subfolders
- Expandable Navigational pane for cabinet and folder navigation
- Drag and Drop from folder to folder
- Easy Cabinet setup, user management, customization and control, and administrator delegation
- Create filters (folder/search-based hybrid), and saved searches as organizational containers/entities
- Copy/Move documents and folders
- Document sorting based on customizable metadata information
- Archival (WORM) storage cabinets available (for SEC compliance and other purposes)

### Personal Home Page

- User-defined home page for managing shortcuts to content
- Create custom sections allowing up to three columns
- Drag and Drop from one section to another

### Personal Recent Documents

- User's Recent Documents for quick access to 40 most recently opened, recently edited & recently added

### Metadata - Profiling

- Unlimited number can be created
- Free text, date or comments field options
- Validation fields with customized lookup tables
- Required – non-required options
- Able to trigger document level access rights/permissions based on metadata value
- User defined profile templates



## Search

- Microsoft FAST Search Engine evolving to Solr technology in 2012
- Full text search
- Simple Search page accessible across all pages (one line that searches profile attributes and full text)
- Advanced Search page (searches specific profile/metadata fields)
- Last Updated Monday, June 18, 2012
- Phrase and proximity searching
- Find Similar
- Alternate word forms
- Unicode support (70+ languages)
- Special email search page
- Drill down by Topics, Company names, People, Locations, Email addresses and Dates
- Entity extraction
- Built-in viewer that highlights search results
- Snippets on search results page
- Search term(s) spell checker
- Save searches as an organizational container (similar to a folder)
- Search enforces security access rights
- Add NetDocuments Search to the Browser search field (e.g. IE search box)

## Document Creation and Editing

- Upload high number of documents (100+) at a time from upload page
- With Internet Explorer, creation of documents from within ND interface
- Microsoft Office apps (and WordPerfect) integration – File Menu New, Open, Save, SaveAs, and Compare (requires Internet Explorer ActiveX)
- Drag and Drop from Workstation to upload page, folder import and check in existing document. Feature dependent upon latest browser releases.
- Concurrency control management – e.g. check in/out control
- Online editing (Google Docs and Microsoft Office Online – 2nd half 2012)
- Mass document/folder import/export software utilities available
- Rename, delete, print
- Each document has a unique URL for easy copy/paste
- Each document has a unique ID (can be placed as a footer within document using MS Office integrations)

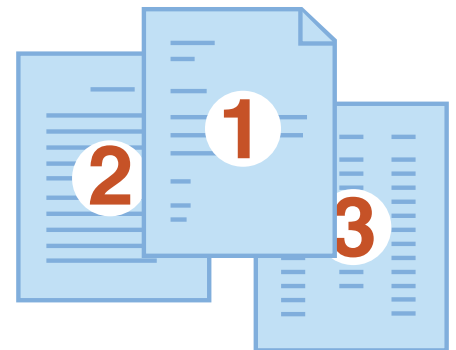
## Versioning

- Unlimited versions
- Optional Auto versioning (creates a new version with every revision)
- “Lock” versions

## Email Management Service (EMS)

- Email copies and links from within ND using MS Outlook or ND email service
- Insert and Save MS Outlook emails from within Outlook (multi-select supported)
- Each ND folder has a unique email address

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- Outgoing email footer customization (e.g. disclaimers)
- Each document has a unique email address for updating as new version or copying metadata
- Drag and drop to folders within Outlook (e.g. “My Matters folders”)
- Matter folders are actual Exchange folders, so users can drag and drop to matter folders in OWA and on mobile phones / handhelds
- View Workspaces from within Outlook
- Search emails stored in NetDocuments from Outlook
- Optional stubbing of email copies in Exchange
- Alternative way to profile emails in Outlook – EMS Profiler tool bar
- Predictive profiling with EMS Profiler tool bar
- Send & File functionality with predictive filing
- Browse NetDocuments to attach copy of a document(s) to an email

## Mobility

- Apple iOS app available for free on App Store – iPhone and iPad with Open in and WebDAV integrations with third party apps
- Good Technology (MDM) integration with iOS app
- Android devices - FolderSync app integration for folder synchronization
- ND2 interface for all other mobile and non-supported browser access

## General Application Features

- Supports Internet Explorer (IE), Chrome, Firefox and Safari browsers. Additional functionality with IE ActiveX for dynamic check in and additional features.
- HTML viewer supports all popular file types
- User-customizable right click menu
- User-Customizable display format
- Link documents
- Automated login with Active Directory
- User activity reporting
- Document history / audit trail
- Multiple import and export options (low or high volume, folder uploads)
- Email link or copy of document
- Digital Signatures
- International date support

## Architecture and Security

- Two USA data centers with different operational and natural disaster patterns; and two EU data centers
- SAS 70 and now SSAE 16 (SOC2) certified and compliant
- SEC 17-a, and HIPAA compliant for digital recordkeeping requirements.
- No persistent storage of users passwords
- Authentication sessions timeout is 90 minutes if user is inactive.
- Active Directory single sign on
- Built-in disaster recovery with replication for documents, databases, index and directory
- Local Document Service - Local on-premise copy of all content, metadata and security
- Retention policies and purging

## Collaboration



## Compliance



- Workstation “Echoing” caching recent content on the local workstation.  
Can be controlled by ND administrators to allow/not allow per IP address
- Centralized repository for all content; single database for all offices
- Direct Internet pipes to large cities in the world
- Dynamic site acceleration for optimal performance
- SSL-128 encryption for contents in transit
- AES-256 encryption with private and public keys for contents at rest
- Daily auto snapshots for all documents for 30 days
- Document, folder, workspace and cabinet level access rights/permissions (view, edit, share, administrator)
- Exclusion access rights offering “ethical wall” security
- Profile/metadata access rights security
- Security templates can be created per user
- Good Technology (MDM) integration with iOS app
- Android devices - FolderSync app integration for folder synchronization
- ND2 interface for all other mobile and non-supported browser access
- User group creation and management for security enforcement
- Administration deleted items control

## Internal and External Collaboration

- Global sharing with access rights
- Global directory/password management
- Folder organization for large extranets
- Extranet “Home” page
- Extranet branding
- ShareSpaces – quick and easy external sharing without burdening IT
- Email notifications
- Automatic Alerts - Follow
- Document approvals
- Threaded discussions
- Concurrency control for collaboration with external users
- Easy document delivery (Summer 2012)

## Third-party integrations (Key sample list)

- Integration with time and billing systems for automatic update of profile validation tables
- CRM: Salesforce.com and Redtail integrations
- RSA SecurID for two factor authentication
- Three main comparison products – Workshare, DocsCorp and Litera
- eCopy , Omtool, HP Desktop scanners for scanning integrations
- IntApp integrations
- SharePoint (basic Web Part support and use of ND SOAP API for integration)
- SOAP APIs available with REST APIs to be supported in 2nd half 2012



**FEATURES**  
TO KEEP YOU **ORGANIZED**



**SAVE TIME**