

# When you stop re-inventing the wheel.

*That's Work Inspired*



## The **PLAN** Solution



netdocuments®



# 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.

### **Margin Notes**

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

Margin Notes 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 Margin Notes, you annotate documents with colleagues in real-time—without changing the original document. This way you can always share the original, untouched version without losing notes.

### **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.





## ndThread

There's no question that legal teams can benefit from instant messaging applications, but it's equally clear that general-purpose apps simply can't meet your strict compliance and security needs—and they don't provide a way to store conversations into a specific matter. ndThread erases these limitations—with an instant messaging solution that's built for lawyers.

ndThread brings all the fast communication, collaboration, and knowledge sharing benefits of mainstream chat into your secure NetDocuments platform—and automatically stores every conversation in your document management system. This eliminates the need to secure and maintain two separate systems, and it makes important information in chat conversations easier to find and use.



### Increase Collaboration and Knowledge Sharing

- **Create a Single Source of Truth**

When matter conversations are stored in a single place, it's easy for everyone to stay in sync or get up to speed. And with everything stored directly in the workspace, your legal team will always be ready to deliver a complete set of documents at a moment's notice.

- **Make Knowledge Sharing Easy**

Your firm's collective brainpower is your most powerful asset. With topical channels that allow everyone to ask questions and stay informed, ndThread provides instant, easy access to all of the brilliant legal minds in your organization without over-burdening their time.

- **Smooth Collaboration Processes**

Sometimes all you need is some quick feedback. ndThread allows users to share a document in a thread and then mark it up within the application—skipping the email and checkout process—without removing the file from the safety of NetDocuments.

### Build a Culture of Collaboration

Every productive collaborative environment starts with fast, frictionless communication. ndThread accelerates the communication process and creates focused avenues for sharing expertise and information across your organization—all while keeping your conversations organized and protected.





## ChatLink for Microsoft Teams

NetDocuments already integrates with Microsoft Office to create a powerful engine for productivity. ChatLink for Microsoft Teams makes the engine even more advanced and complete.

While Teams offers many important benefits, it also presents specific security, compliance, and filing challenges for legal organizations that can increase risks and lower productivity. ChatLink solves these challenges by embedding Teams into NetDocuments and vice versa, so every conversation can be automatically filed into the correct matter file. With ChatLink, your legal team can take full advantage of all the benefits of Teams—without the security risks and concerns.

### Proper Integration Gives You Better Security

- **Don't Sacrifice on Security**

Chat services often don't offer the robust security and governance required to fulfill a lawyer's ethical obligations to protect and maintain client information. ChatLink solves this by filing Teams conversations into NetDocuments, where they can always stay organized and protected.

- **Maintain a Complete Matter File**

With ChatLink, you can connect channels in Teams to your NetDocuments workspaces. This saves your lawyers the time and hassle of categorizing conversations into a matter file. It also gives them the ability to produce a complete new matter file at a moment's notice.

- **Use the Tools You Already Know**

Your organization already has established processes built around Teams, so why disrupt productivity with a new application? ChatLink gives your users the extra organization and security they need without changing how they work.



### The Freedom to Choose

At NetDocuments, we understand that as your legal teams lean into technology, they need the freedom to use the applications that work best for them. That's why we build software that integrates with their favorite applications and works seamlessly in the background to protect all of their information.



## Margin Notes

Complex matters almost always require knowledge and input from a diverse team of experts. All too often, this involves sending documents back-and-forth as email attachments, collecting feedback and input from various experts, and then trying to reconcile and make sense of all the comments, markups, and conflicting edits. It's an inefficient, time-consuming, and error-prone process that prevents you from focusing on client outcomes.

Margin Notes changes your document dynamics—by making it easy for lawyers across your organization to quickly preview, annotate, and markup documents without downloading them, sending them in an email, or modifying the core file. That means with Margin Notes, feedback and collaboration on important documents always stays organized, clear, and actionable—no matter how many people are involved in the process.

### Document Collaboration that Just Makes Sense

- **Maintain Control of Your Documents**

Internal and external reviewers can preview, annotate, and markup documents without downloading the core file. That means you maintain complete control, so you can stop worrying about something slipping into a document by mistake.

- **Keep All Changes on Record**

Legal teams must maintain a record of changes they've made and why they made them. Margin Notes makes that easy and convenient—by automatically storing and preserving every document comment, suggestion, and change.

- **Track Feedback Without the Email Chain**

Few things are more frustrating or counterproductive than sorting through a long email chain that contains countless versions of a document filled with comments, disagreements, and conflicting edits. Margin Notes helps you eliminate those document headaches by giving reviewers the option to reply to each other's margin notes to keep feedback organized and in-context.

### Never Choose Between Feedback and Swift Turnaround

Margin Notes streamlines feedback and review processes by moving conversations and document edits out of email chains. This allows teams to discuss individual areas directly within context of the original document, review and respond to comments more efficiently, and quickly bring new associates up to speed. With Margin Notes, every piece of feedback is easily accessible and organized, so legal teams never have to read through and compare notes from an endless email thread again.



## Tasks

Today, your clients expect more from your lawyers than ever before. At the same time, the matters you work on are steadily becoming more intricate and complex. In this challenging environment, it's all too easy for important work to slip through the cracks or get overlooked.

Tasks will help make sure that never happens—with tools that streamline the management of your complex projects and workflows. With Tasks, you can create custom workflows within workspaces to track activities, measure progress, and manage deadlines from one central location. And because Tasks is embedded directly into the NetDocuments workspace, your teams can both plan and do their work in the same convenient place.



### Keep Your Team in Perfect Sync

- **Get Alerts on Newly Assigned Tasks**

Tasks simplifies and streamlines communications amongst teams by automatically notifying users when they have a new assignment, so you don't have to go out of your way to refresh your to-do list.

- **Track Tasks Across Every Project**

Your staff and administrative teams are spread thin, which means they need a more efficient way to view and track all of their action items in one place. The "My Tasks" view delivers—with a central, organized view of all their assignments across every matter they're working on.

- **Don't Miss a Step**

Legal work is growing more complex, which means there are often multiple action items associated with a single assignment. With the sub-tasks feature in Tasks, you can identify and track multiple steps that need to be completed before a milestone or critical task can be considered complete.

### Never Miss a Step

Tasks provides everyone in your organization—from leaders to support staff—with the tools they need to work almost completely within the safety of NetDocuments. With Tasks, every member of your legal teams can create custom workflows that match the needs of specific matters, make assignments based on expertise, attach documents and create descriptions to add context, and then use comments to communicate and keep everyone up to date. It's everything you need to manage your work from start to finish.



**When you can focus  
on outcomes instead  
of documents.**

*That's Work Inspired*

Now, more than ever, you need tools that eliminate busywork and keep your teams focused on client outcomes and results—by helping them communicate, coordinate document feedback, and manage tasks.

PLAN supports your teams by reducing inbox congestion, opening lines of communication, keeping tasks and assignments organized, and increasing your team's overall efficiency and productivity.

**Give your teams the tools they  
need to *Work Inspired*.**

**Get PLAN today.**

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

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