NETDOCUMENTS
FOR LEGAL PROFESSIONALS

Affinity CONSULTING

ALA® Association of Legal Administrators

NETDOCUMENTS

FOR LEGAL PROFESSIONALS

PERSONAL LICENSE

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MEET OUR NETDOCUMENTS EXPERTS

Meet our NetDocuments experts who co-authored this manual.

PAUL UNGER

While most people understand the day-to-day struggle of keeping up with email and managing documents, Paul knows how to tackle the problem better than anyone. Paul's passion is coaching lawyers on managing time, distractions, tasks, emails, and documents efficiently. As the author of Tame the Digital Chaos – A Lawyer's Guide to Time, Task, Email and Distraction Management, Paul is truly an expert on the topic.

Paul's expertise is well-founded from his time practicing law. When Paul isn't coaching lawyers, he teaches CLE classes for attorneys across North America.

RUSSELL DUNCAN

Passionate about document management, Russell knows how important it is to properly deploy a document management system and properly train users. While working for NetDocuments, Russell oversaw training and support for the partner network.

Russell provides clients with an "easy button" - making work easier for everyone.

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BASIC SEARCHING/FINDING

Recent Documents / Recent Matters

There are two major methods of getting to documents in NetDocuments: (1) Navigating to documents and (2) Searching for documents.

Recent or Favorite Documents

Using the Documents menu is one of the easiest ways to access documents, allowing you to easily find a document you recently worked on, or a document that you saved as a "favorite".
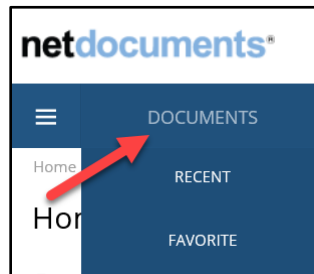

FIGURE 3-1

The Favorite section will show all documents that have been favorited in a single list (in other words, all your Home Page items, minus workspaces and folders).

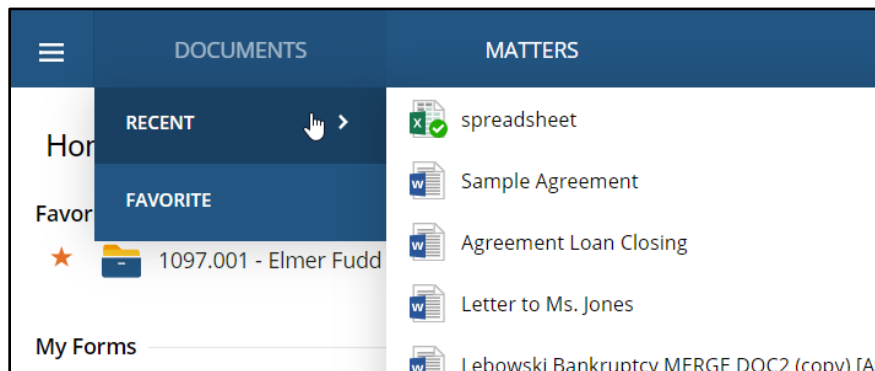The Recent menu allows you to quickly open a recent document by hovering over 'Recent':

FIGURE 3-2

Left-click on a document to open it. Or, left-click 'Recent' to view all Recent Documents in a list view. You can then filter to see recently edited, opened, or added documents:
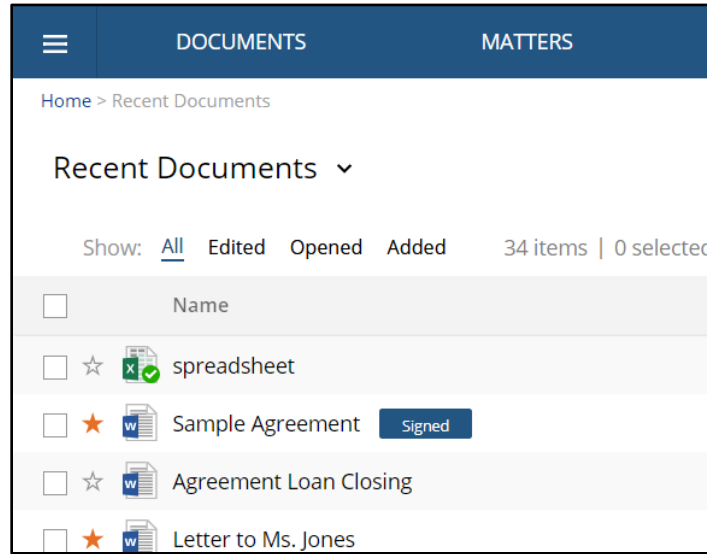

FIGURE 3-3

Recent or Favorite Matters

Use the Matters menu to browse workspaces you have recently visited or favorited, from across all cabinets.
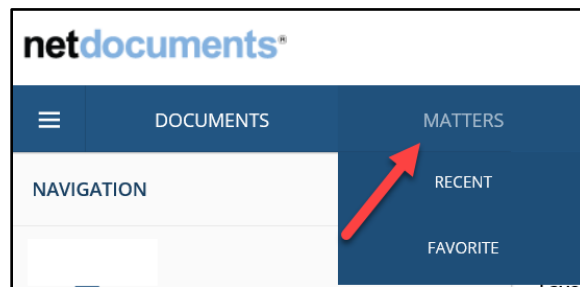

FIGURE 3-4

Opening from Word, Excel, PowerPoint

You can initiate the searching and opening of documents directly from Word, Excel, and PowerPoint as well.
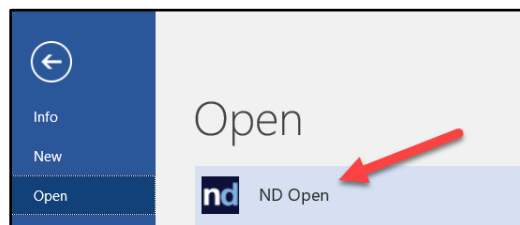
File > Open > ND Open

FIGURE 3-5

Use Navigation Pane to find the document or run a search (see Searching).

Single-click on document to open.

To see versions, right-click on the document > versions.

Activity Center

The Activity Center shows recent documents that you have touched from all programs. Access the activity center by right-clicking on the ndOffice icon in the system tray (lower right-hand corner of screen).
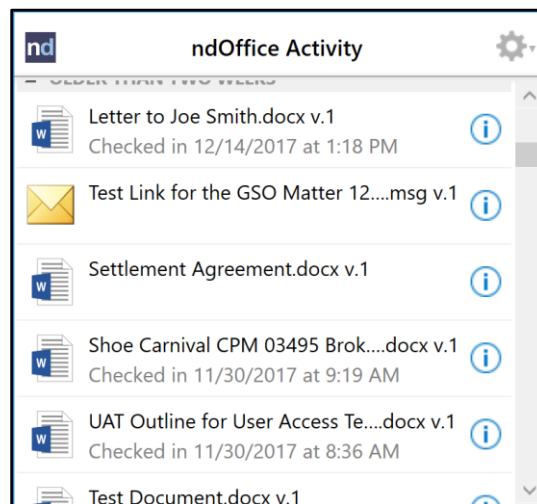

FIGURE 3-6

FIGURE 3-7

Left-click on a document to open it. Right-click to get alternative open options (open read-only, specific version, rename, print, get link, etc.). Click on the ⓘ to view a document's details/metadata.

Methods of Searching

Search and Display All Docs in a Matter

To go to all the documents in a matter, select Go to Matter (upper right-area of home screen). Depending on the cabinet name, this label may change.
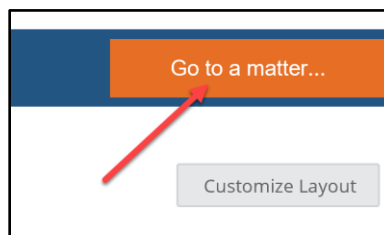

FIGURE 3-8

Tag Matter as a Favorites

Once you get to the desired matter (above), remember that you may want to tag the matter as a Favorite if it is an active matter of yours, so it shows up on your Home Page.
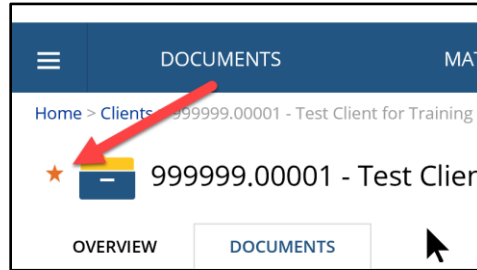

FIGURE 3-8

Tag a Document as a Favorites

Once you get to a document within a matter or a search result, you may want to tag the document as a Favorite, so it shows up on your Home Page.
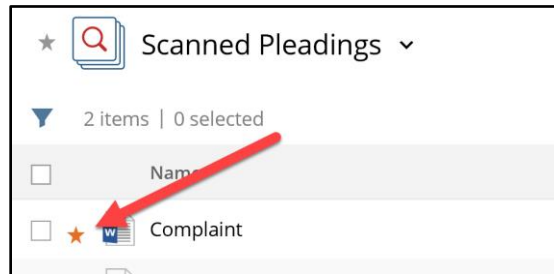

FIGURE 3-9

Basic Searches

Select the drop-down arrow in the Quick Search field (top-center) to select the desired cabinet to search.
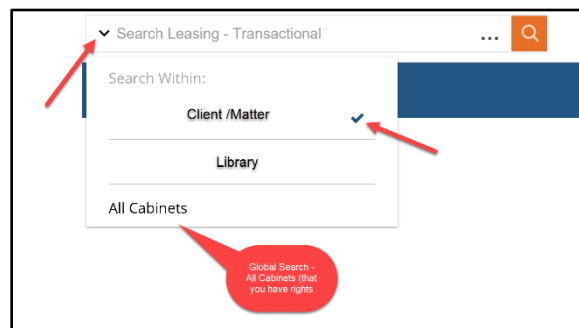

FIGURE 3-10

Type the search term(s) in the Quick Search field. Select if you want to search **Name/Subject** (titles) or **Everything** (text within the doc).
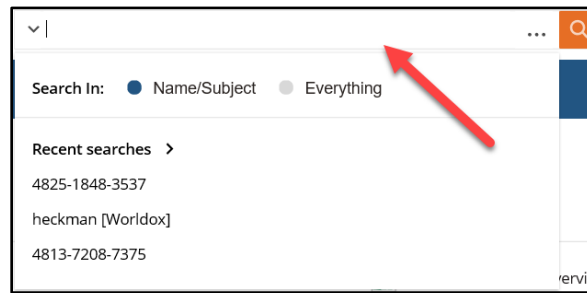

FIGURE 3-11