



# NETDOCUMENTS

for LEGAL PROFESSIONALS



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## FOR LEGAL PROFESSIONALS

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[\*\*info@affinityconsulting.com\*\*](mailto:info@affinityconsulting.com)

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## TABLE OF CONTENTS

By Paul J. Unger ([punger@affinityconsulting.com](mailto:punger@affinityconsulting.com))

### 1 GETTING STARTED

First-Time Logging Into NetDocs From Your Browser .....	1
First-Time Logging Into ndOffice.....	1

### 2 INTRODUCTION TO THE HOME PAGE

Customize Home Page Layout .....	2
----------------------------------	---

### 3 BASIC SEARCHING/FINDING

Recent Documents / Recent Matters .....	4
Activity Center .....	5
Methods of Searching.....	6

### 4 ADVANCED SEARCHES

Primer on Boolean & Advanced Searching.....	8
---------------------------------------------	---

### 5 SAVING DOCUMENTS

Saving a New Document.....	11
Basic Versioning.....	12

### 6 EMAIL MANAGEMENT

Saving Received Emails Using ndSave .....	13
ndMail Add-On (Predictice Filing).....	14
Working with Attachments.....	16

# 3 BASIC SEARCHING/FINDING

For a brief video tutorial in Affinity University on searching (Basic and Advanced) within NetDocuments, click [HERE](#).

## 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/Matters

Using Favorites is one of the easiest ways to access documents, and works perfectly if it is a recent document, or a document that is tagged as a “favorite”.

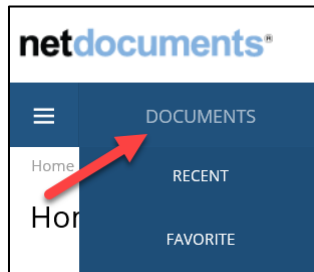


FIGURE 3-1

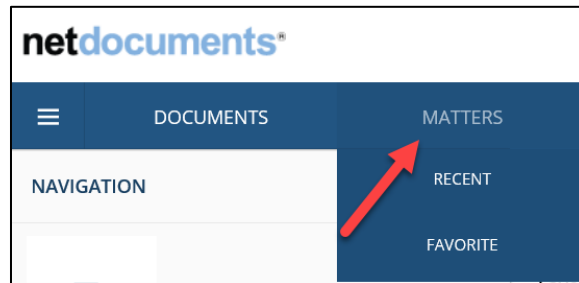


FIGURE 3-2

**Left-click** on document to open.

**Right-click** document to see alternative actions:

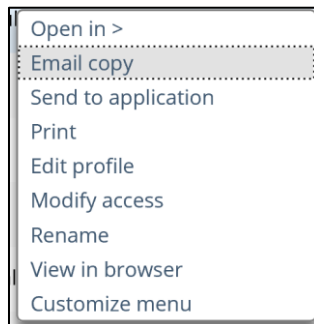


FIGURE 3-3

Select **Customize menu** to add other options to your right-click menu (like **Versions, Delete**, etc.). You will drag and drop them into the column to make them available choices.

### Opening from Word, Excel, PowerPoint

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

1. File > Open > ND Open

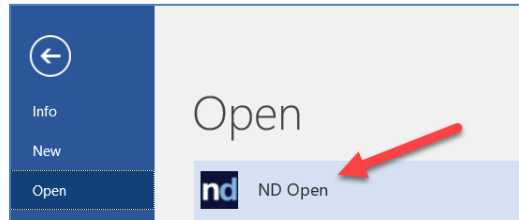


FIGURE 3-4

2. Use Navigation Pane to find the document or run a search (see Searching).
3. Single-click on document to open.
4. 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 3-5

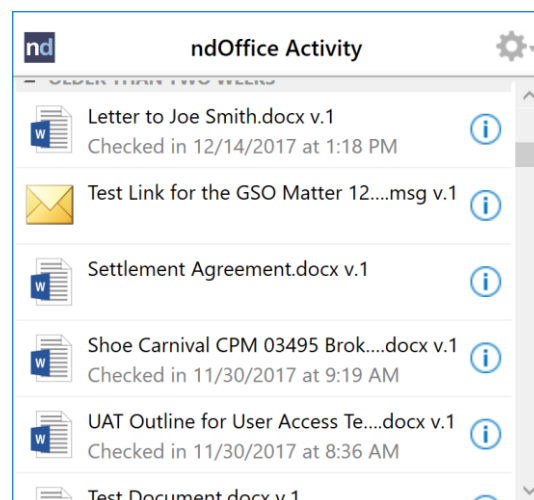


FIGURE 3-6

Click 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 **i** 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, this label may change.

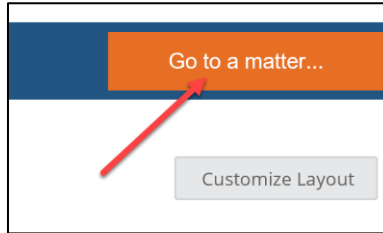


FIGURE 3-7

### Tag Matter as a Favorites

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

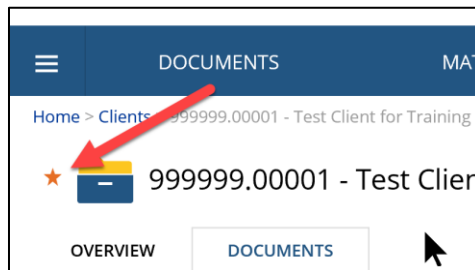


FIGURE 3-8

### 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.

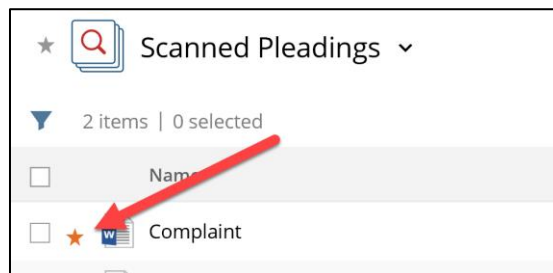


FIGURE 3-9

## Basic Searches

Select the drop-down arrow in the Quick Search field (top-center) to change the 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).

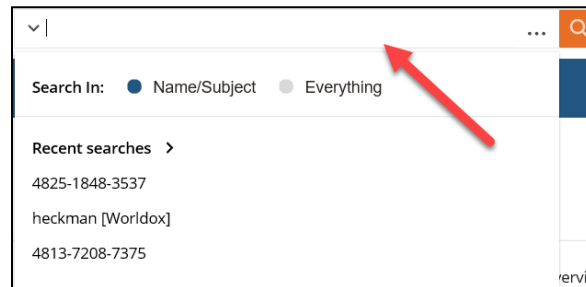


FIGURE 3-11





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