



NETDOCUMENTS

for LEGAL PROFESSIONALS



NETDOCUMENTS

FOR LEGAL PROFESSIONALS

PERSONAL LICENSE

©2019 Affinity Consulting Group LLC

ALL RIGHTS RESERVED. No part of this work covered by the copyright herein may be reproduced or distributed in any form or by any means, except as permitted by U.S. copyright law, without the prior written permission of the copyright owner.

NetDocuments logos are either registered trademarks or trademarks of NetDocuments in the United States and/or other countries. Affinity Consulting Group LLC is an independent entity from NetDocuments and is not affiliated with NetDocuments in any manner.

For training or technology assistance, contact us at Affinity Consulting Group LLC - 614.340.3444 or info@affinityconsulting.com. For permission to use materials from this text or product, submit all requests via email to info@affinityconsulting.com.

This is for your personal use only, you may not distribute, modify, or copy the materials, except for archival or backup purposes, without express permission of the copyright owner.



Invest. Inspire. Empower.

On-Site or Webinar | Customized for YOU | Post-Training Support

TRAINING



- MS Office "What's New"
- Microsoft Word
- Outlook
- Excel
- Adobe Acrobat

- Nuance Power PDF
- Foxit PhantomPDF
- Raise-the-Bar Word
- WordPerfect Transition

TRAINING

Are you getting the most out of your technology investment? Turn your team into software experts and experience unprecedented gains in productivity and efficiency.

At Affinity, we believe that training should be woven into the fabric of a firm's culture—not a one-time event. Our team understands that implementing the right technology is only the first step toward an optimized practice. Realizing your firm's full potential requires an ongoing investment in training.

info@affinityconsulting.com

NETDOCUMENTS FOR LEGAL PROFESSIONALS

TABLE OF CONTENTS

By Paul J. Unger (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”.

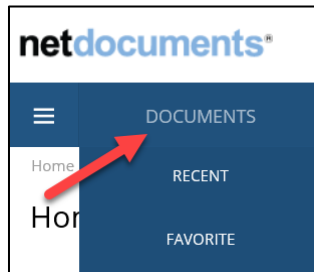


FIGURE 3-1

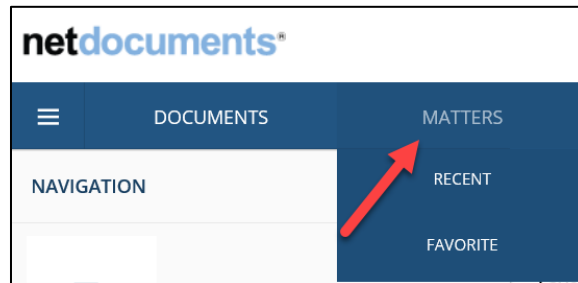


FIGURE 3-2

Left-click on document to open.

Right-click document to see alternative actions:

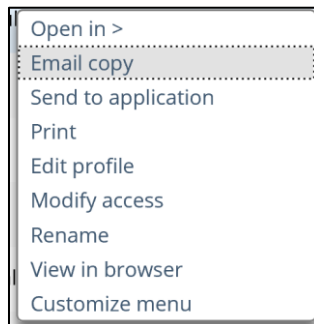


FIGURE 3-3

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

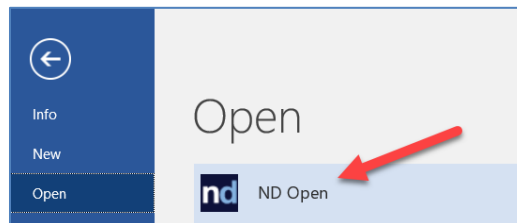


FIGURE 3-4

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

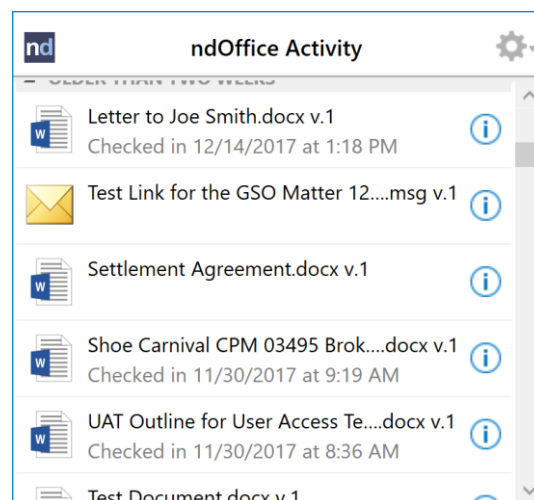


FIGURE 3-6

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.

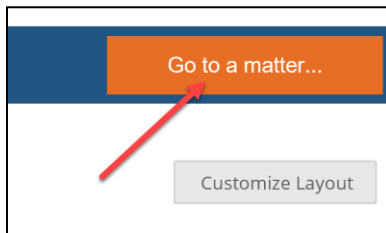


FIGURE 3-7

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.

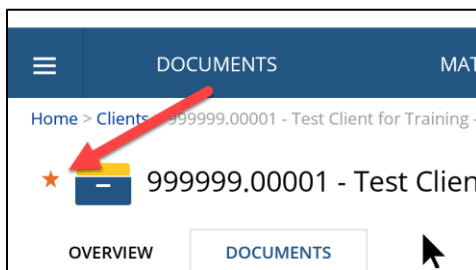


FIGURE 3-8

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.

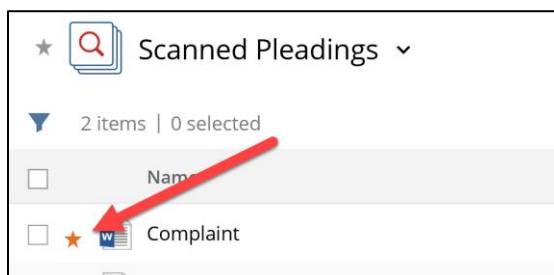


FIGURE 3-9

Basic Searches

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

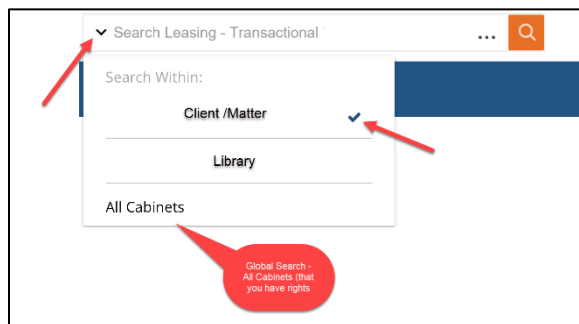


FIGURE 3-10

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).

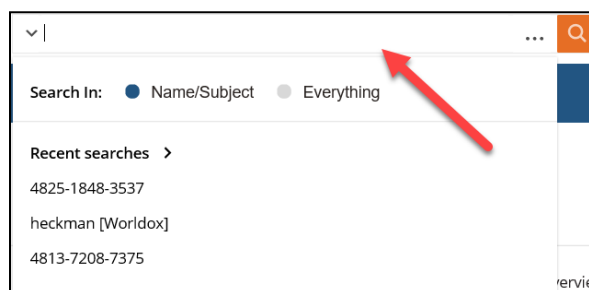


FIGURE 3-11



Invest. Inspire. Empower.

On-Site or Webinar | Customized for YOU | Post-Training Support

TRAINING



- MS Office "What's New"
- Microsoft Word
- Outlook
- Excel
- Adobe Acrobat

- Nuance Power PDF
- Foxit PhantomPDF
- Raise-the-Bar Word
- WordPerfect Transition

TRAINING

Are you getting the most out of your technology investment? Turn your team into software experts and experience unprecedented gains in productivity and efficiency.

At Affinity, we believe that training should be woven into the fabric of a firm's culture—not a one-time event. Our team understands that implementing the right technology is only the first step toward an optimized practice. Realizing your firm's full potential requires an ongoing investment in training.

info@affinityconsulting.com