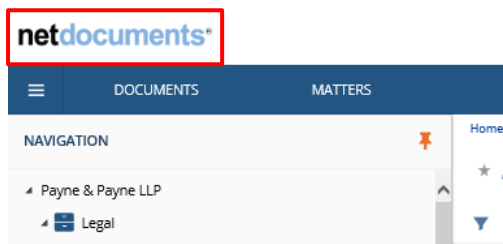


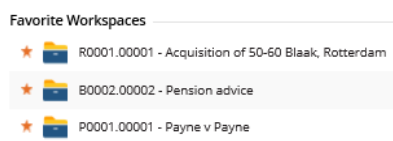
YOUR HOME PAGE

Your Home Page is **personal to you**. You can customise it to display the workspaces, folders, searches and documents you need.

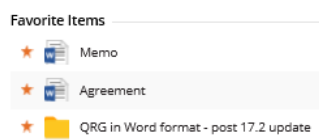
- > To return to your Home Page, click the **NetDocuments Logo** at the top-left of the screen:



- > On the Home Page is a list of workspaces that you have added to **Favorites**. Click a workspace under **Favorite Workspaces** to open it:

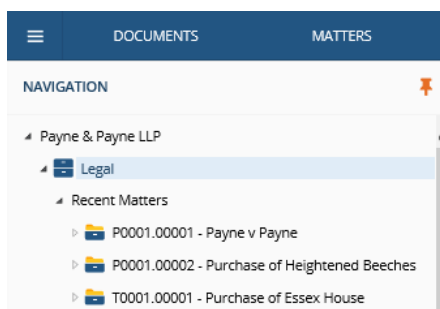


- > On the Home Page is a list of documents, filters, folders and saved searches you have added to **Favorites**. Click an item under **Favorite Items** to open it:



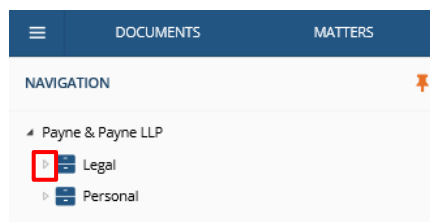
The Navigation Pane

The **Navigation Pane** on the left is used to access **cabinets**, **workspaces** and **folders**:

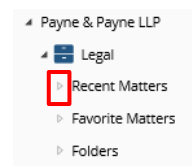


How do I navigate to a workspace?

1. Click the **arrow** to the left of any **cabinet** in the list (**Legal** usually contains client/matter workspaces):



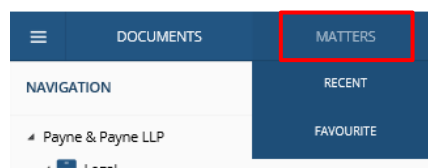
2. Within the cabinet, click the arrow to the left of **Recent Matters** or **Favorite Matters** to display a list of workspaces underneath:



3. Click once on the required workspace to select it and display the contents on the right of the screen.

Your Recent Matters will only populate once you have used NetDocuments to work with at least one workspace

NB - to access **all** recent or favourite matters from any cabinet, click **Matters** along the top of the screen and select **Recent** or **Favourite** from the menu:



How do I search for a workspace?

If the workspace you need is not in your Recent or Favourites lists, you can search for it.

1. Click the **Go to a matter...** button at the top-right of the screen:




2. A search box is displayed. Click the **X** to clear any existing text if necessary. Type in the left-hand section to search by **client**, or the right-hand section to search by **matter**. You can search using numbers, or any part of the client/matter name:

ndWeb – Home Page, Summary and List Views

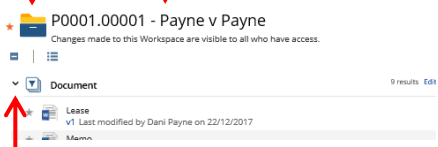
3. Click **Go** to run the search.

Tip - You can also click the **Lookup** button for a detailed workspace search:



4. The contents of the workspace are shown on the right in **Summary View**:

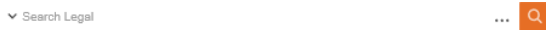
Workspace icon Workspace no./ name



Click **Hide Section Contents** or **Show Section Contents** to display or hide items within a filter

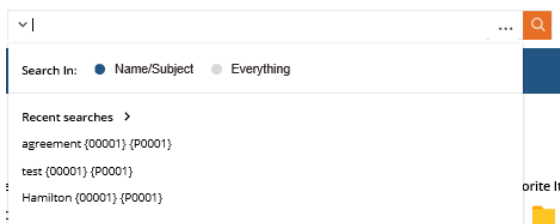
The Simple Search Bar (Top Of Screen)

The **Simple Search Bar** is used to find files and access recent searches:




How do I find a document or e-mail?

1. Click into the **Search box** (any grey text already in the Search box will clear):

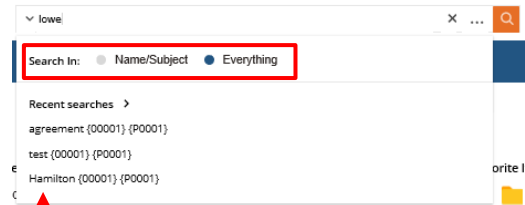


2. Type part of a **document name**, a word/phrase in the **contents**, or the **document number**:




TIP – type phrases in speech marks, e.g. “5 New Rd”


3. Select the **fields** to search in. In the drop-down box, click **Name/Subject** to search these fields only, or click **Everything** to search all fields:



NB – You can also access **Recent Searches** and **Recent Saved Searches** from this drop-down list.

4. Click the magnifying glass icon  to run the search

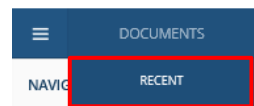
5. Search results are shown on the screen below. Click on a file name to open it.

NB – only the selected cabinet will be searched. To change this and access other search options, click the **Ellipse** button  to display the **Advanced Search Form**

How do I access recent documents/e-mails?

NB – the Recent Documents list will only populate once you have used NetDocuments to work with at least one document/e-mail.

Click **Documents** (top-left), then click **Recent**. This list will include e-mails as well as documents:



VIEWING WORKSPACES

You can view the contents of a workspace in either **Summary View** or **List View**.

When you click on the name of a workspace, it will open in whichever view was selected for the last workspace you opened.

Summary View

Files are grouped into **Filters**, **Folders** and **Saved Searches**.

Click the arrow to expand or collapse the group

Icon and name of the filter, folder or saved search

Click Edit to change group settings e.g. no. of files to display

Click the star to add the file to Favourites and the Home Page. Added items show a yellow star.

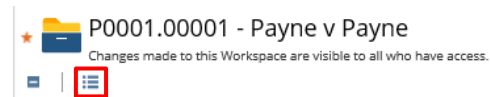
File name

Further document info, e.g. version no.

1. Hover over a document to view **downward chevrons** on the right . Click the chevrons to view a list of actions you can perform on the selected document, e.g. print.
2. At the bottom-right of a group, click **Next next** to view the next set of documents in the group (or **Previous** to return to the previous set).

List View

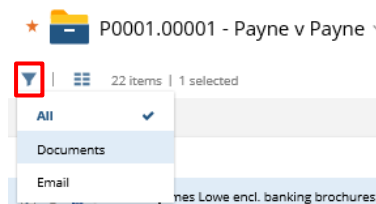
To view the workspace contents as a **list** and not in groups, click **Switch to List View** button underneath the workspace name at the top of the screen:



- In this view the default sort order is by **Last Modified Date**, which shows a chronological view of the content.
- The Switch to List View icon changes to **Switch to Summary View** so you can switch back to the previous view if required .

Display options in List View

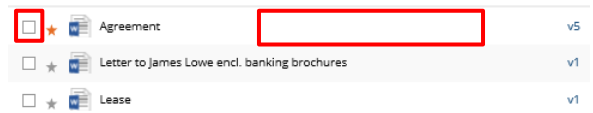
1. To filter the view to show only e-mails or only documents, click the small blue **Filter** button under the workspace name and select the required option from the drop-down menu:



Previewing a document

In List View, instead of opening a document, you can select it and **preview** its contents.

1. To **select** a document, tick the **check-box** to the left of the document name, **OR** click once in the **empty space** to the right of the document name (do not click on the document name):



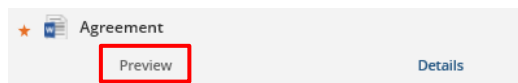
Some document options are shown at the top-right of the screen on the **Power Bar**:




You can click an option or click **More** to access further options.

ndWeb – Home Page, Summary and List Views

- To **preview** the document, click **Preview** at the top of the panel on the right of the screen:

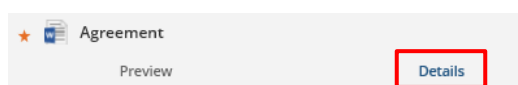


NB – if this panel is not showing, click the  button to display it.

Viewing Document Details

You can access detailed information about a document by viewing it in the **Details Pane**.

- Select the document, then click **Details** at the top of the panel on the right of the screen:

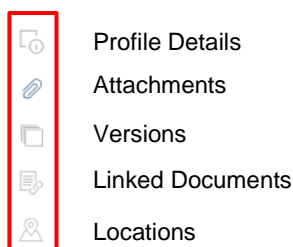


- The **name** of the selected document is shown at the top-right, above the words **Preview** and **Details**.

If the **star** next to the document name is **yellow**, the document has been added to your **Favorites**. If not, you can click the star to add it if required:



The Details Pane is split into **5 sections**; **Profile Details**, **Attachments**, **Versions**, **Linked Documents** and **Locations**. You can access these sections by scrolling down the panel, or by clicking the icons on the left-hand side:

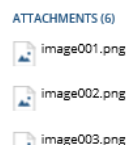


1. Profile Details:

Created by:	Dani Payne 22/12/2017 19:18
Modified by:	Dani Payne 30/12/2017 13:09
Type:	Microsoft Word (.docx)
Size:	1252 KB

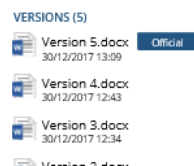
This is basic information about the document such as who created/modified it and when, what type of document it is, the client/matter details, document and version numbers etc.

2. Attachments:



If you are viewing an e-mail in the Details Pane, any attachments are listed here. Each one is a **link** that can be clicked to access the attachment.

3. Versions:



All versions of the selected document are listed here. Click any version in the list to open it. To perform any other action such as adding or deleting a version, marking a version as official etc. click the **Options** button on the right of this section to open the **Versions** window:

Options...

4. Linked Documents:

If two or more documents are relevant to each other, they can be **linked**. Any linked documents are shown here.

5. Locations:

LOCATIONS	
URL:	https://eu.netdocuments.com/neWeb2/goid.aspx?id=4
Email:	4125-6495-1311@mail.eu.netdocuments.com
Cabinet:	Legal
Workspace:	P0001.00001 - Payne v Payne

This is information on the location/s of the selected document:

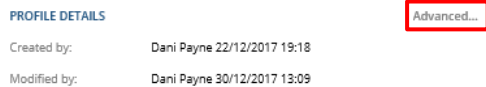
URL and Email – click either of these links to copy the location link to the clipboard (click **Yes** if a prompt appears asking if you allow the Clipboard access).

Cabinet and Workspace – click the name of the cabinet or workspace to open and view it.

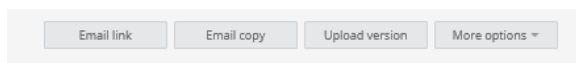
ndWeb – Home Page, Summary and List Views

Advanced Options

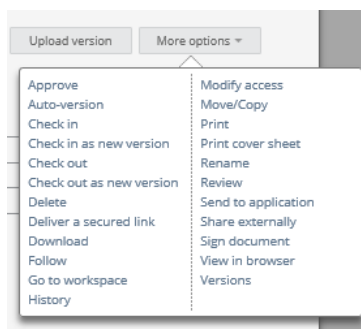
1. At the top-right of the **Details Pane**, click the **Advanced** button:



2. The **Advanced Options** dialog box for the selected document is displayed. You can use any of the four buttons in this dialog box to access further options:

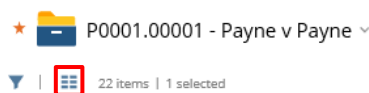


- 2.1. **Email link** – click to e-mail someone a link to the original document. The recipient must be a NetDocuments user.
- 2.2. **Email copy** – click to e-mail someone a copy of the document. The recipient does not have to use NetDocuments to be able to view the document.
- 2.3. **Upload version** – click to select a locally saved document (e.g. on your Desktop) and import it as a new version of the selected document.
- 2.4. **More options** – click to view a menu of actions that you can perform on the selected document:



Returning to Summary View

Click **Switch to Summary View** underneath the workspace name:



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Group (Filter, Folder Or Saved Search) View

To view one particular **group** (filter, folder or saved search) in more detail, you can open the group and view it on a separate screen:

1. Click once on the **filter**, **folder** or **search heading**:



2. The group opens on a separate screen.
3. This view works in the same way as **List View** – please see above for further details.

To return to the workspace view, click the **name of the workspace** in the **filepath** along the top of the screen above the group heading:

