Navigating NetDocuments (4 Videos)

Session Description: In this session, users will learn….

**In this session you will learn to:**

* Name the Parts of the Home Page
* Navigate to a workspace using the "Go to a matter-sub-matter" button.
  + Type in the Client Name or Number
  + Use the lookup button
* Navigate to a workspace using the recent workspace list.
* Navigate to a workspace using the favorite workspace feature on the homepage.
* Compose an advanced search
* **Video Topics:**
* **Introduction/Home Page Overview**
  + Name the Parts of the Home Page
* **Searching in NetDocuments**
  + Compose an advanced search
  + Use the Search Ribbon to find documents and emails
* **Navigating to Recent or Favorite Workspaces**
  + Navigate to a workspace using the recent workspace list.
  + Navigate to a workspace using the favorite workspace feature on the homepage
* **Navigating to a Workspace using the Go to a matter-sub-matter button**
  + Navigate to a workspace using the "Go to a matter-sub-matter" button.
    - Type in the Client Name or Number
    - Use the lookup button

Introduction/Home Page Overview

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| **Slide** | **Audio** | **Effects** | **On-Screen** |
| **01** | The Home Page is the landing page for NetDocuments.  The home page has a few standard elements that are universal to everyone but also contains parts that are customizable to fit the individual user. |  |  |
| **02** | The Favorites Area is the most prominent section of the Home Page. It contains links to frequently used and important items and workspaces. Each user can select the items that display on the home page, and organize the items in a way they find useful. | Highlight favorites area |  |
| **03** | The Navigation Bar at the top of the page contains the Navigation Pane button, Documents Menu, Workspace Menu, and Go To Matter buttons. | Highlight Navigation Bar |  |
| **04** | The Navigation Pane is used to access workspaces and the filters and folders within them. Click the icon to open and close the Navigation Pane. | Highlight Navigation Pane |  |
| **05** | The Documents Menu contains two sortable lists of recent and favorite documents.  Hover over the Recent menu to see a list of the 10 most recently edited or opened documents. Or, click on Recent to view the full list of up to 40 recent items.  Click on Favorite to see a sortable list of favorite documents that are also displayed on the Home page. | Highlight Documents Menu  Highlight Recent  Highlight Favorite |  |
| **06** | The Workspaces Menu contains two sortable lists of the recent and favorite workspaces.  Click on Recent to view a list of the last 40 workspaces that have been accessed.  Click on Favorite to view a list of the same favorite workspaces that are displayed on the Home page. | Highlight Workspace Menu  Highlight Recent  Highlight Favorite |  |
| **07** | The Search Ribbon allows users to search for items via a Quick or Advanced Search.  Click in the search bar to do a quick search. A Quick Search is used to search by Doc ID or by keywords and phrases.  Click on the ellipses to open the advanced search. An Advanced Search is used instead of a Simple Search to perform a targeted search using specific search criteria.  Since NetDocs contains millions of documents, it is often more efficient to do an Advanced Search to quickly find what you are looking for. | Highlight Search Ribbon  Highlight ellipses |  |
| **08** | The Add button is used to upload locally saved documents into a Workspace. NetDocuments is integrated with most of the Office Products using ndOffice, so this is not frequently used. | Highlight Add button |  |
| **09** | The Go To Matter button is a way to search for a workspace. Type in the client and matter name or number to go directly to a workspace. | Highlight Go To Matter button |  |

This video is played right away when entering the room. After this video concludes, a prompt will displayed encouraging the user to “explore” the rest of the room and the additional 3 topics/videos.

Searching in NetDocuments

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| **Slide** | **Audio** | **Effects** | **On-Screen** |
| **01** | NetDocs contains millions of Foley documents so knowing how to find documents quickly is very important. |  |  |
| **02** | Using the Doc ID is the fastest and most reliable way to find a document in NetDocuments. Using a Quick Search you can enter the Doc ID in the search ribbon and click the Magnifying glass to view the results. | Highlight Search Bar  4850-2634-1657 |  |
| **03** | Users should use the advanced search when they know information about the document, or type of document, they are looking for, but they do not have an exact document name or ID.  Click the Advanced Search icon on the Search Ribbon.  Select the Page Layout. The default is to search for all file types. Otherwise you can search for email file types like .msg and .eml by choosing Email or specifically exclude those file types using Documents. | Highlight Advanced Search  Highlight Page Layout |  |
| **04** | Enter any and all search criteria. Selecting the layout will change the fields shown. For helpful information on a field, click within the field and read the text displayed to the right.  You are able to use asterisks as wild cards, Boolean operators, and quotation marks in your search.  Click Search. |  |  |
| **05** | The search results will display.  They can be sorted using the column names or narrowed down using the filters. | Highlight Columns |  |
| **06** | File Extension is a popular filter that allows users to search for specific file types like PDF or PowerPoint.  Click Apply to filter any new results.  After performing a search, click the Revise button located above the filtering options to return to the Advanced Search screen. | Highlight Filter Pane |  |
| **07** | Once a search is performed, it can be saved. A Saved Search allows users to see a dynamic list of documents that is updated as documents are updated, based on the search criteria.  Simply put, the saved search updates the list of items in real time. |  |  |
| **08** | You can use this to create a list of all the emails within a workspace from a specific person or email group, a list of every document within 1 or more workspaces with a certain person as the author, or any other list of documents with similar attributes. |  |  |
| **09** | To create a saved search, execute the search and then from the Search Results page, click Search Results Options and Save Search.  Enter a name and choose the Workspace to store the Saved Search, then click OK. | Highlight Save Search |  |

Navigating to Recent or Favorite Workspaces

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| **Slide** | **Audio** | **Effects** | **On-Screen** |
| **01** | Recent and Favorite Workspace menus are fast ways for users to access workspaces in NetDocuments. If a workspace has been recently visited or added as a favorite, users are able to use the Recent and Favorites workspace menus to get to those workspaces quickly.  Click Workspaces and choose Recent. This list will display the last 40 workspaces that have been accessed. Click the workspace name to go directly to the workspace.  Favorite workspaces can be accessed using the Favorites menu or by using the homepage. Click on a workspace name to open the workspace. | Highlight Workspaces Menu  Highlight Recent  Highlight Favorite |  |
| **02** | To save time, a user should mark frequently used workspaces and items as favorites that appear on the home page.  After navigating to the workspace. Click the star icon next to the workspace name. This will turn the star orange which indicates that a shortcut to the item is on the Home Page.  To remove the workspace as a favorite, click the orange star beside the favorite workspace. The star will become gray indicating that it is no longer a favorite. This process works with files, folders, filters, and saved searches. | Highlight the favorite star  Highlight the un-favorite star |  |

Navigating to a Workspace using the Go to a matter-submatter button

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| **Slide** | **Audio** | **Effects** | **On-Screen** |
| **01** | To access a workspace for the first time, use the Go To Matter button.  Click the Go to matter button in the Navigation Bar, enter the 6 – digit Client number and press Tab or Enter, then enter the 4 – digit Matter number and press Enter on your keyboard. | Highlight Go to a Matter Button |  |
| **02** | To navigate to a workspace without using the client matter numbers, enter the client and matter names in the proper fields instead.  If an exact client and matter name isn’t known, use the Lookup Ellipsis.  Click the Go to matter button in the Navigation Bar, click the lookup (...) ellipsis. Enter the partial name of the Client or Matter name.  Choose **Find Entries that contain** then choose **Description**. Click the magnifying glass to search.  Select the proper client or matter from the results. |  |  |