Induction - refresher

Induction – for people returning to G+T

BUSINESS SYSTEMS TRAINING

Welcome! Now that you're back with us, use this guide to refresh yourself with useful information and timesaving functions to help re-navigate some of our core business systems.

Opening NetDocuments

- open using the shortcut on the Desktop, OR
- click the **ndOffice** icon on the bottom right of the screen > then click the **nd** icon in the popup menu

Home page Favourites

As you use NetDocs, you can easily click on the star and 'favourite' a document, folder or workspace that you regularly access. This will place the item (including a favourite workspace) on your **Home** page for quick access.

- click the GT Logo to quickly return to your Home page.

Your Recent Documents and Workspaces

- available on the blue toolbar (also includes Favourites)

Explanation of Cabinets

Business cabinet (private security/non-billable work)

Operations teams (ITG, HR, Finance) work here. Each legal practice group has a business workspace for non-chargeable work that is relevant to the group ie:

- legal practice groups save non-chargeable work (group meeting minutes, client queries and requests, team updates etc) in their business workspace
- importantly, the business workspace also contains the **Pending folder**. Save docs in this folder if you need to start working on a new matter but are waiting for the matter number to be created. Don't forget to move docs to the new matter workspace and relevant folder when the new matter number is available.

Knowledge Learning + Innovation cabinet

- the Knowledge workspace for each practice group can be found here
- your practice group Knowledge lawyer updates the KLI workspaces
- you can access all KLI workspaces

Matter cabinet

- legal practice groups work here
- repository for matter workspaces
- public unless matter is confidential

Personal cabinet

- your private workspace
- save non-matter related items eg performance reviews, goals etc

Workspaces

Finding a workspace

- click on the relevant cabinet then click on the orange search button (top left) and enter search details

Overview tab

- contains Client name and number

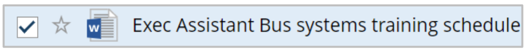
Summary view

- contains Saved searches, Folders + Doctypes
- expand to see items
- right click on an item to see the functions menu
  - view in Web Browser to preview a doc > click Next

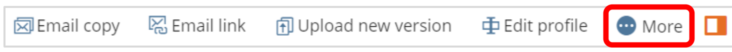
List view

- click on column heading to sort
- filter by docs or emails
- How many documents are in the List? Hover over (eg) '100 + items' to the right of the filter icon for an exact number popup
- untick all ticked items by selecting and then deselecting the checkbox at the top of the list

Power Bar and Document Details panel



Click the checkbox next to a doc to activate the Power Bar and Document Details panel.



Power Bar

More dialog

- select a document in the list then click **More** to see all the functions that can be applied to the document eg Modify access and Move/Copy

> **Time saver:** You can right click on a file in the document list to display the same options as the More button.

Document Details Panel

What	Function
Copy link Copy Link	Copy the live doc link to another doc, OneNote etc
Preview the doc	Display the document contents. Click the Details icon to redisplay Details Panel.
Version Details	See all versions, open any version + click down arrow to view version comments etc
Locations LOCATIONS	Scroll to bottom to find Location of document ie cabinet and folder etc. Handy if you're in Recent Documents and need to visit the workspace/folder

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Searching

- confine your search to the right area by navigating to the relevant cabinet, workspace or folder then enter your search criteria
- NetDocs will search up to **20** subfolders
- too many results? narrow your search by looking to the left at the **Refine** panel options
- use Boolean search operators eg AND, OR, NOT + wildcards eg using 'Test and File'
  - NOT (for example Test NOT File) only finds documents etc with the word Test.
  - AND means find documents etc with both Test and File in each document
  - OR means find documents etc with either Test or File (but not both in the same doc)
  - wildcard: sw?m will find swim, , swum etc or swim* will find swim, swimmer, swimming etc

ndMail

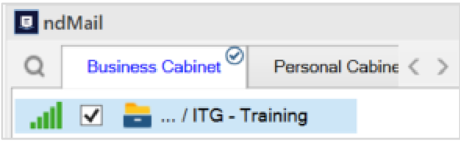
ndMail is the conduit software that files emails to NetDocuments.

Filing – ndMail panel or Location icon

The ndMail panel lists **suggested** filing locations which become more accurate as ndMail 'learns' your filing behaviour.

ndMail panel

In your Outlook Inbox (or Sent Items, folder etc) select the email you want to file, then check to see if the ndMail panel shows the correct location. If so, tick the location checkbox then click **File**

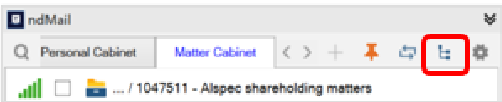


Send and file on the fly

Compose your email as usual. If the location appears in the ndMail panel, tick it and send as usual.

Location icon

To 'manually' navigate to a location, click on the **Navigation** icon to display the NetDocuments navigation tree.

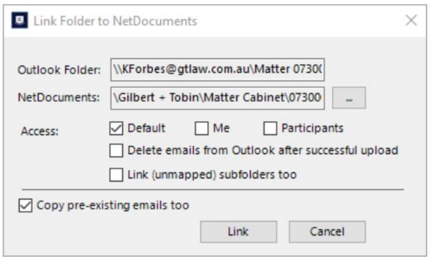


Drag and drop

- Where? On the left beneath the Outlook folder pane
- How? Select the email(s) you wish to file > expand the navigation tree to display the location (but don't click on the location) > drag and drop to copy to the selected location in NetDocuments

Folder mapping – link an Outlook folder to NetDocs

1. Right click on your Outlook personal folder and choose **Map folder to ND**.
2. Navigate to the relevant workspace folder and complete any mandatory fields eg Author, Matter Doc Type (Matter workspaces).
3. Click **OK** then **Link**.



For everything NetDocuments + ndMail

- [NetDocuments user manual]

Intapp time entry

Create a template

If you're manually entering the same data again and again for a particular matter save time by creating a template to quickly populate those fields etc.

1. Click on the **Template** tab > **New** button > complete all the necessary fields.
2. In the **Nickname** field enter a memorable and short name eg for administrative time: **admin** > **Create**.

Applying the template to a time entry

1. In **List** view, create a time entry as usual.
2. In the **Matter** field, enter the nickname **preceded by a full-stop eg .admin**, then complete the rest of the field eg time type and narrative etc.

Teams Calling

Review Microsoft Teams Calling - learn the basics eLearning module for a complete overview.

For all **Team Calling learning materials** see Microsoft Teams Calling

Zoom meeting rooms - Zoom meetings

Sharing your screen contents

- click on **Zoom** app > **Share Screen** > enter code top right of monitor

Book a Zoom video conference

- book the room in Condeco or create a walk-up booking
- invite humans and room to the meeting (or send separate invitations) > add Zoom meeting details > **Send**
- at the time of the meeting tap **Join** on the Controller

For further information on Zoom meeting rooms (including Zoom and Microsoft teams video conferences) see Zoom meeting rooms quick guide

For all learning materials

IT training hub