NETDOCUMENTS FOR MAC

FOR LEGAL PROFESSIONALS

Affinity INSIGHT

NETDOCUMENTS

FOR MAC USERS

PERSONAL LICENSE

Version 3.01

MEET OUR NETDOCUMENTS EXPERTS

Meet our NetDocuments experts who co-authored this manual.

PAUL UNGER

While most people understand the day-to-day struggle of keeping up with email and managing documents, Paul knows how to tackle the problem better than anyone. Paul's passion is coaching lawyers on managing time, distractions, tasks, emails, and documents efficiently. As the author of Tame the Digital Chaos – A Lawyer's Guide to Time, Task, Email and Distraction Management, Paul is truly an expert on the topic.

Paul's expertise is well-founded from his time practicing law. When Paul isn't coaching lawyers, he teaches CLE classes for attorneys across North America.

JEFF KRAUSE

Few people understand corporate legal departments' document management needs as well as Jeff. Jeff not only specializes in consulting with corporate legal departments on their document management needs, he also consults on workflow design and efficiency.

RUSSELL DUNCAN

Passionate about document management, Russell knows how important it is to properly deploy a document management system and properly train users. While working for NetDocuments, Russell oversaw training and support for the partner network.

Russell provides clients with an "easy button" - making work easier for everyone.

NETDOCUMENTS FOR LEGAL PROFESSIONALS
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CHAPTER 4
BASIC FINDING, OPENING & SAVING

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".
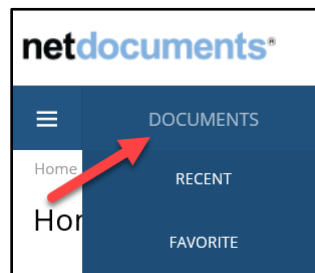
FIGURE 4-1
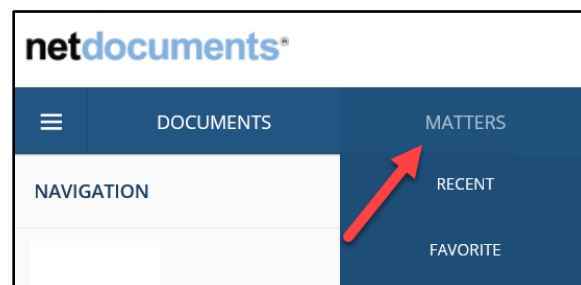
FIGURE 4-2

Left-click on document to open.

Right-click document to see alternative actions:
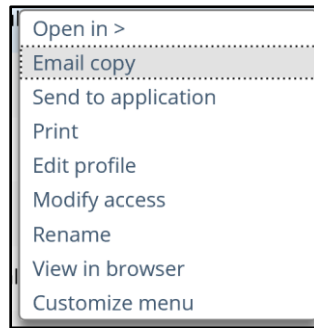
FIGURE 4-3

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.

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 name, this label may change.
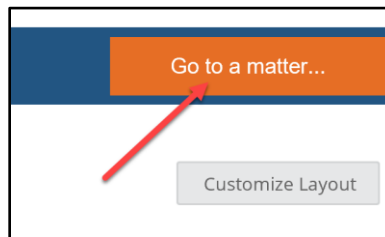
FIGURE 4-4

Tag Matter as a Favorites

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

FIGURE 4-5

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.
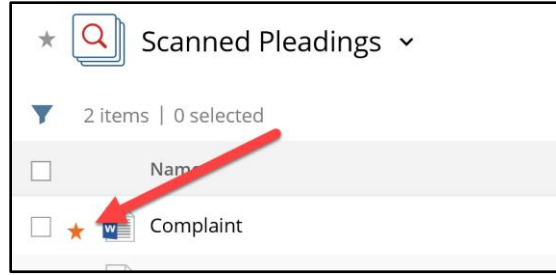
FIGURE 4-6

Basic Searches

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

FIGURE 4-7

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).
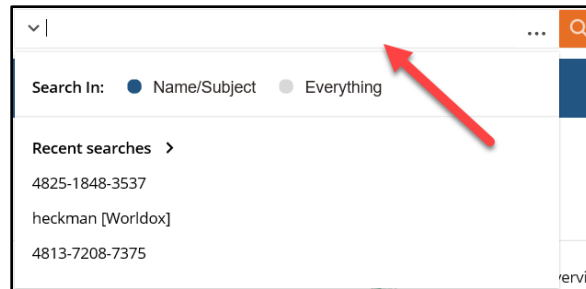
FIGURE 4-8

Opening Files for Review and Editing

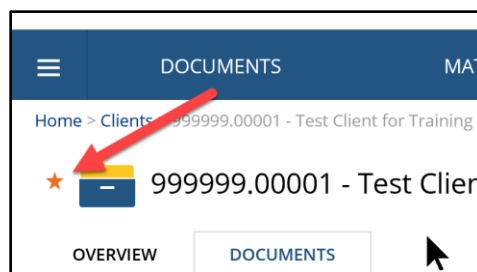As a Mac user, you will always open previously saved documents *from the browser interface.* In other words, locate the desired computer file (Word, PDF, etc.) within NetDocuments in your browser and then Open the file. With the advent of ndClick, upon single left-clicking the file (or right-clicking and selecting **Open**), NetDocuments will (1) automatically check-out the document, (2) download it to your Mac, and (3) open the needed program. Mac users do not have ndOffice, so you cannot initiate the opening of a computer file from Word, Excel, PowerPoint or Acrobat.

Find or navigate to the desired file. Select **Open In**.
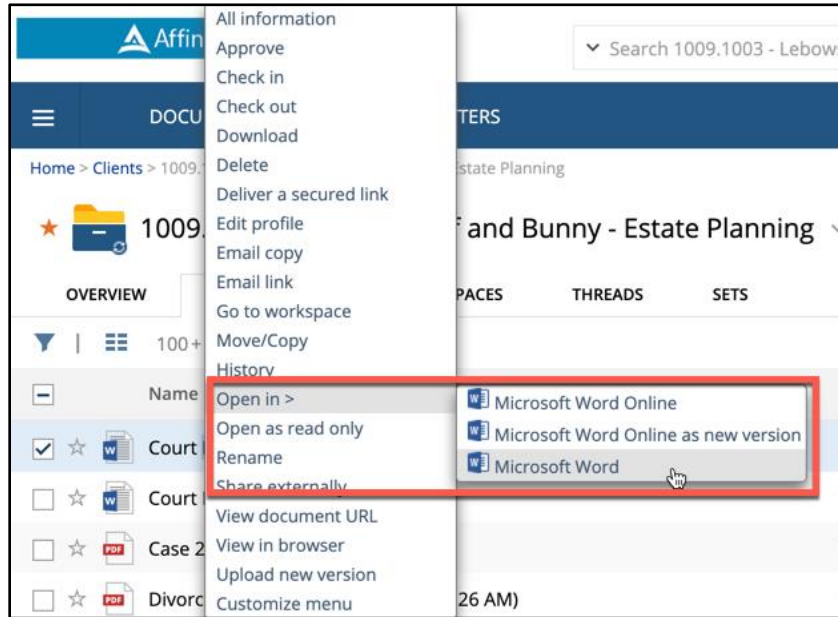
FIGURE 4-9

Select the desired program.

Modify the document as needed.

To Save the document and overwrite the existing document, select File > Save (or Ctrl – S) and then close the file.

If you opened the document in Word, Excel or PowerPoint Online (the browser version of those programs), the best way to save, close & check-in the document is to select the file name from the title bar and click on the NetDocuments folder as seen here:

FIGURE 4-10

To Save the document as a new document (in that matter or a different matter), there is a much more streamlined method of opening the file. See next section called **Saving an Existing Document as a New File**.

To Save the document as a **Version,** see the chapter called **Versioning**, below.

Opening and Saving Existing Doc As New Doc
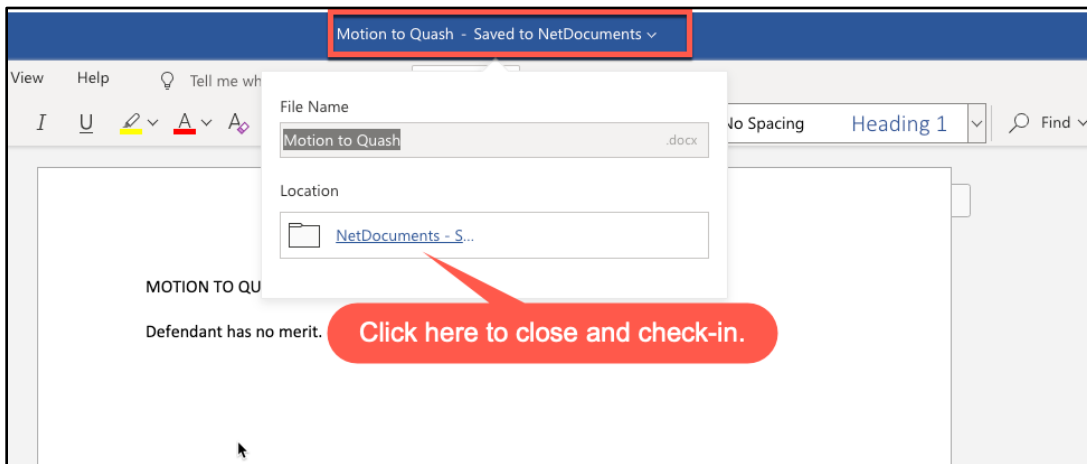
As a Mac user right now, if you want to create a new file from an existing document, you cannot open the source document the typical way (File > Open) and hit File > Save As. Instead, you will open the file a special way:

1. Find or navigate to the desired source document.

2. Right-click and select Move/Copy.[1] You may also check the document and go to **More Options** > **Move/Copy.**
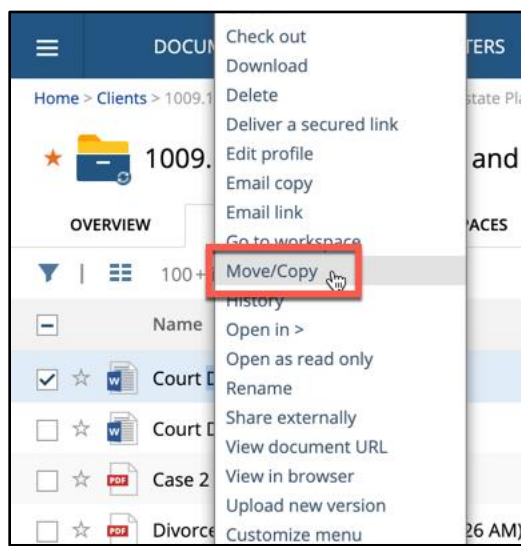

FIGURE 4-11

Select the desired matter/workspace and then **COPY**.

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[1] Soon you will be able to select **Open as New Copy**, but until then, we must use Move/Copy.

Give the documents a name, select **Open the New Document**, and select **OK**.
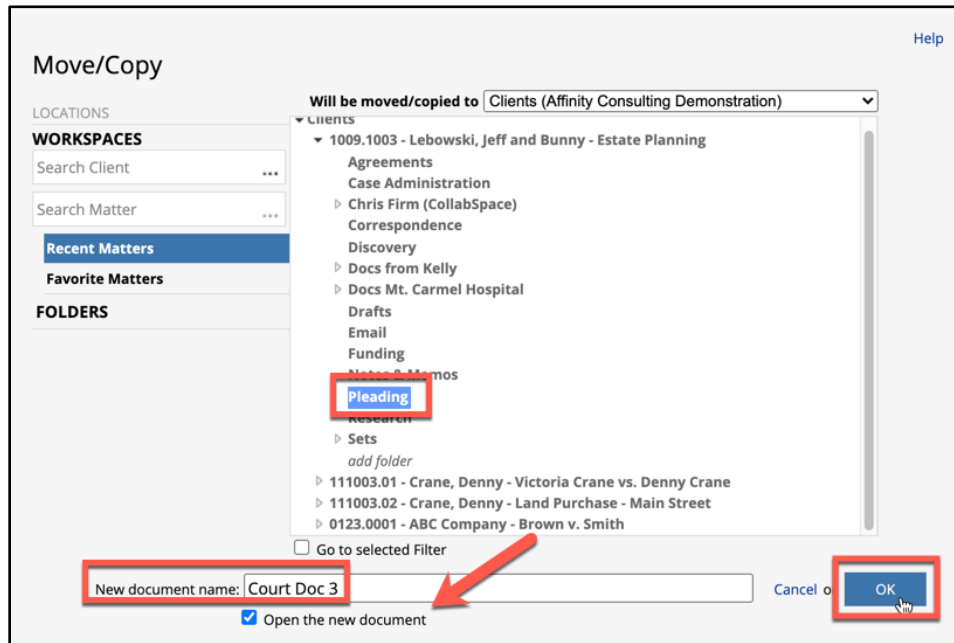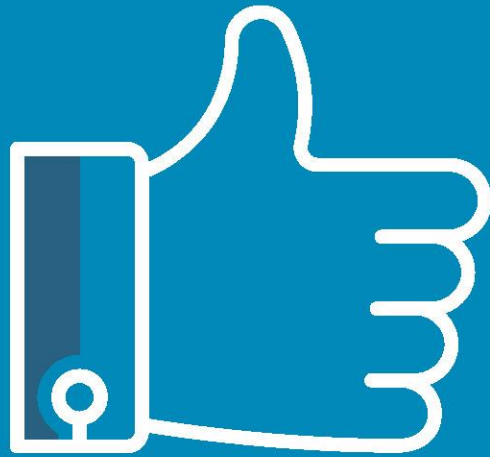

FIGURE 4-12

Complete the needed and appropriate profile information (author, comments, etc.) and hit **Continue**. The document will then be duplicated with the correct profile information and then Open for your editing.

Essentially, you are pre-profiling/saving the document and then editing it.

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