

Folders vs. Filters vs. Saved Searches

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Workspace Templates

On the workspace template page, Cabinet Administrators have three options for organizing documents within workspaces. Administrators can choose to organize documents into either folders, filters, or Saved Searches:

Workspace Templates

A workspace provides an integrated view of information for a client, matter, project, or other entity. Below you may define one or more cabinet's workspaces. Workspaces are then created automatically using these templates whenever they are accessed by cabinet members. If you create multiple templates you must include a Type column in the lookup table for the profile attribute that workspaces are based on. See the documentation for more details.

Base workspaces on this attribute:

Plural form of attribute name:

Organize documents within workspaces by this attribute:

Automatically create Doc Type Workspace Filters (recommended)

Automatically create Doc Type Saved Searches

Automatically file documents in Doc Type folders

For the best user experience, NetDocuments recommends using filters on workspaces. Each of these are described below, with examples demonstrating the differences between folders and filters. The table at the end of the document compares the features and functionality of each of these organizing containers.

Folder

A folder is a filing location for a document and is identified by a yellow icon. This is where a document “lives.” Folders can be automatically created by NetDocuments (if configured on the workspace template) and can also be manually created by users. When saving documents to NetDocuments, you are not required to save it into a folder.¹

When opening a folder, you will see only the items that have been filed in the folder, regardless of their profile values. A folder can contain items with different profile values.

Home > Law Firm Documents > Client Documents

★ Client Documents ▾

20 items | 1 selected

Email copy Email link Upload new version Edit profile More

<input type="checkbox"/>	Name	Client ↑	Matter	Document Type	Last modified date
<input type="checkbox"/> ★	Motion to Dismiss	v1 1632	1690	Financial	4/7/2016 4:17 PM
<input type="checkbox"/> ★	Proposal	v1 1066	1005	Admin	4/7/2016 4:17 PM
<input type="checkbox"/> ★	Agreement	v1 1011	1678	Agree	9/30/2016 9:55 AM
<input type="checkbox"/> ★	Cover Letter	v1 1002	101	Corr	4/7/2016 4:17 PM

Figure 1 – Documents in a folder with different profile values

¹ If “force filing” is enabled for the cabinet, then workspaces cannot be enabled.

Saved Search

A Saved Search is search criteria that has been saved, so that a user can return to the same search and the content is dynamically updated based on the criteria. It is identified by a red icon. Documents in a Saved Search will share at least one common attribute – usually client/matter, a document type, a date, or a file type.

A Saved Search shows search results for all items that match the search’s criteria regardless of where the documents live. Only items that meet that search criteria will appear in the search.

Home > Law Firm Documents > Documents

★  Documents ▾

17 items | 0 selected

Email copy Email link Upload new version Edit profile More

<input type="checkbox"/>	Name	Client	Matter	Document Type	Last modified date ↑
<input type="checkbox"/> ★ 	Extradition Convention Between the...	v1 1001	1787	Admin	8/23/2001 4:08 PM
<input type="checkbox"/> ★ 	Extradition Convention Between the...	v1 1001	1787	Agree	8/23/2001 4:08 PM
<input type="checkbox"/> ★ 	Extradition Convention Between the...	v1 1001	1787	Bill	8/23/2001 4:08 PM
<input type="checkbox"/> ★ 	Extradition Convention Between the...	v1 1001	1787	Bill	8/23/2001 4:09 PM

Figure 2 – Documents in a Saved Search with similar profile values

Filter

A filter is a search result based on specific criteria and is identified by a blue icon. It is designed to be a hybrid of a folder and a Saved Search. Think of it as a Saved Search to which users can file, so the documents inherit the profile values of the filter, similar to a folder.

When defining a workspace template, filters can be auto-created by the NetDocuments service based on a profile field (such as a Document Type) used in the workspace, or can appear in the workspace when it is first created, regardless if that profile value has been used or not. Filters cannot be manually created by users.

A workspace filter shows search results for all items profiled with that specific profile criteria (both the workspace profile values and the filter profile value), regardless of where the document lives. Only items that meet that search criteria will appear in a filter, and the search criteria for that filter cannot be changed. Other profile values (outside of the ones assigned to the workspace and filter) have no determination as to which filter a document will be displayed.

<input type="checkbox"/>	Name	Client	Matter	Document Type	Last modified date ↓
<input type="checkbox"/>	★ Extradition Convention Between the...	v1 1001	1787	Admin	4/13/2017 11:33 AM
<input type="checkbox"/>	★ Extradition Convention Between the...	v1 1001	1787	Admin	4/13/2017 11:33 AM
<input type="checkbox"/>	★ The Dual Alliance Between Austria	v1 1001	1787	Admin	4/13/2017 11:33 AM
<input type="checkbox"/>	★ The Nature of Rent	v1 1001	1787	Admin	8/23/2001 4:24 PM

Figure 3 - Documents displayed in a filter with the same profile values

The following examples help to illustrate the differences between folders and filters.

Example 1

Document in a folder outside of the workspace appears in the workspace filter

Figure 4 shows a document that was saved and filed in the Client Documents folder. When it was saved to this folder, it was profiled with Client “1011”, Matter “1678”, and Document Type “Agree”. The Document ID is 4823-0244-0752.

Home > Law Firm Documents > Client Documents

★ Client Documents ▾

20 items | 0 selected

Email copy
 Email link
 Upload new version
 Edit profile
 More

<input type="checkbox"/>	Name	Client	Matter	Document Type	Last modified date ↓	Document ID
<input type="checkbox"/> ★	Agreement	v1 1011	1678	Agree	9/30/2016 9:55 AM	4823-0244-0752
<input type="checkbox"/> ★	Cover Letter	v1 1002	101	Corr	4/7/2016 4:17 PM	4822-0177-7456
<input type="checkbox"/> ★	A Document's Life	v1			4/7/2016 4:17 PM	4811-2803-5632

Figure 4 - Document in a folder

Figure 5 below shows this same document appearing in the workspace 1011.1678 in the “Agreement” document type filter. This is because the document was profiled with client “1011”, matter “1678”, and document type “Agree”, and the “Agreement” filter is displaying search results for all items with those profile values. So even though the document was saved somewhere else, it also appears in the appropriate document type filter.



Figure 5 - Same document appearing in a filter

Example 2

Document appears in folder and filter in the workspace

This example shows a document that is in a folder in a workspace, and also in a filter on the same workspace. The same concepts as in Example 1 apply here. The document lives in a folder because it was saved there. It appears in a filter because it matches the search criteria for that filter.

The screenshot shows a workspace titled "Alan Baldwin - Mather Brothers adv. - 1011.1678". The workspace contains several filters and folders. The "Documents" filter shows four documents, including "Treaty for the Final Settlement of the Claims of the Hudson v1" and "Motion to Dismiss v1". The "Acct" folder also contains the "Treaty for the Final Settlement of the Claims of the Hudson v1" document. The "General" filter shows three documents, including the same "Treaty for the Final Settlement of the Claims of the Hudson v1" document. Red arrows point from the document in the "Acct" folder and the "General" filter to the document in the "Documents" filter, illustrating that the same document appears in both locations.

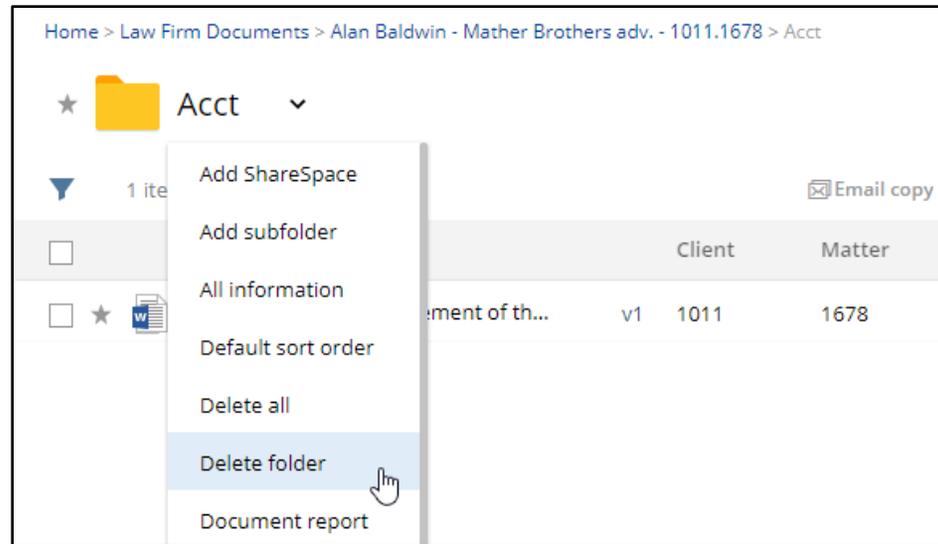
Figure 6 - A document in a folder and filter

Example 3

Deleting a folder but keeping the document in the filter

In this example, let's delete the Acct folder and keep the document.

1. Open the folder and select Folder Options > Delete folder



2. When using the Delete Folder option, and there are items in the folder, you will be asked what you want to do with the existing items in the folder:

Delete Folder

Delete documents in this folder
 Unfile documents in this folder

This folder, Acct, will be deleted. Any documents currently filed in this folder will be unfiled from this folder, and will be accessible only through search.

If you are sure that you want to proceed with this action, type the word UNFILE in the following entry field and then click OK.

- If the user chooses “Delete documents in this folder”, then the document(s) will be deleted and will no longer appear in the filter.
- If the user chooses “Unfile documents in this folder”, the document(s) will continue to appear in the filter.

3. Choose the Unfile option then type “unfile” in the text box.

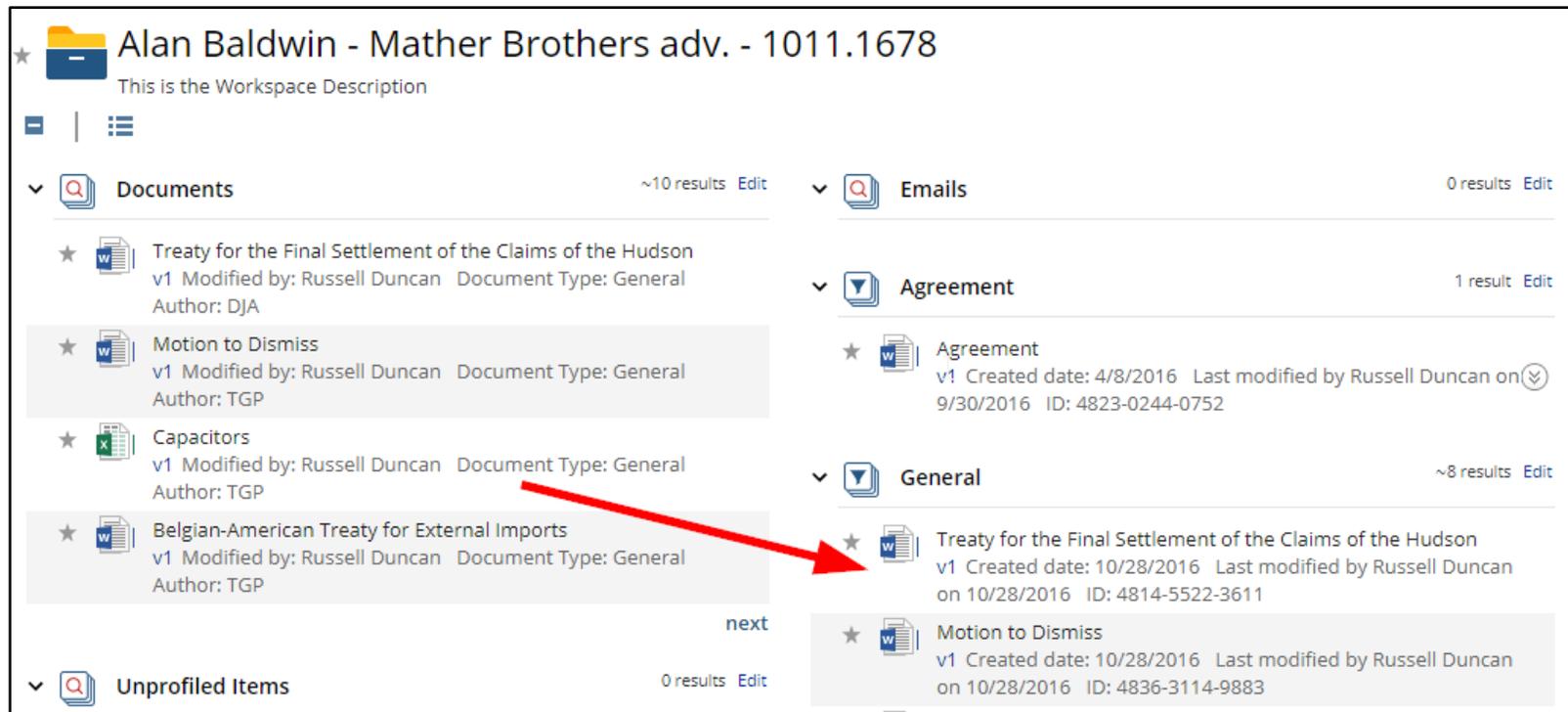


Figure 7 - Deleted the folder but unfiled the document

Notice, in Figure 7, the Acct folder no longer appears. The document still appears in the filter because the documents were unfiled from the Acct folder when it was deleted.

Comparison Table

Functionality	 Folders²	 Filters	 Saved Searches
Access inheritance	<p>Documents filed to a folder can inherit the folder's access.³</p> <p>Documents filed to a folder will inherit the folder's profile.</p>	<p>Documents can be filed to a filter, inheriting the filter's access and profile values.</p>	<p>Contents do not inherit the Saved Search's access nor profile values.</p>
External Users	<p>Auto-created folders inherit the workspace's access, minus external entities.</p>	<p>Auto-created filters inherit the workspace's access, minus external entities.</p>	<p>Auto-created Saved Searches inherit the workspace's access, minus external entities.</p>
Filing	<p>Documents can be displayed in more than one folder at a time using Advanced Filing.</p>	<p>Documents can be filed to a filter. These documents inherit the filter's profile.</p>	<p>Cannot "file" items to a Saved Search (it doesn't appear as a location when importing items).</p>
Profiling	<p>Documents can be profiled to an organizing folder when imported.</p> <p>Documents can be re-profiled to another auto-organizing folder on the same workspace, but remain in the original folder too.</p> <p>Items in folders can be re-profiled to other workspaces, where they may appear under a filter or Saved Search, but they remain in the first workspace's folder too.</p> <p>If a folder's name and profile matches a Document Type value, then that folder behaves as if it were auto-created.</p>	<p>Documents can be profiled to a filter using the organizing attribute (such as Document Type).</p>	<p>Documents can be profiled to match a Saved Search's criteria (usually using the organizing attribute, such as Document Type).</p>

² There are slight differences between 1) static custom folders, 2) static template folders, and 3) auto-created organizing folders.

³ Folder Access inheritance can be enabled or disabled on the Cabinet Administration page.

<p>Auto-creation</p>	<p>Folders can be auto-created on a workspace as items are filed/profiled to the workspace.</p> <p>Static folders can also be custom created on a workspace template or manually created on a workspace (not recommended).⁴</p> <p>If a folder's name matches a Document Type value, then that folder behaves as if it were auto-created.</p>	<p>Filters can be auto-created on a workspace as items are filed/profiled to the workspace.</p> <p>Filters can only be based on an organizing attribute (such as Document Type). Filters can be pre-defined on a template, but cannot be manually created on a workspace.</p>	<p>Saved Searches can be auto-created on a workspace as items are filed/profiled to the workspace.</p> <p>Saved Searches can be custom created on a workspace template (for Documents, Emails, etc.) or manually created on a workspace.</p>
<p>Contents</p>	<p>Contents are displayed in a folder until manually moved out of the folder. Re-profiling contents will not move them out of the folder.</p>	<p>Contents are dynamically updated based on the filter's search criteria.</p>	<p>Contents are dynamically updated based on the Saved Search's criteria.</p>
<p>Profile attributes</p>	<p>A folder's profile can be changed. If changed, new items filed to it will inherit the new profile, but will not automatically create a folder or filter if one does not already exist.</p> <p>Changing a folder's profile will not affect existing items filed to it.</p> <p>Documents filed to a folder will inherit the folder's profile values.</p>	<p>A filter's profile cannot be changed.</p>	<p>A Saved Search's profile can be changed, but it does not affect its contents or criteria.</p>
<p>Searching</p>	<p>Users can search within a folder.</p> <p>Folders can be returned in search results.</p>	<p>Users can search within a filter.</p> <p>Filters cannot be returned in search results.</p>	<p>Users can search within a Saved Search.</p> <p>Saved Searches can be returned in search results.</p>

⁴ See KB article [205212620](#) for more information.

Renaming	Folders can be renamed, but the name of the folder must match the Document Type in order to auto-file items into it.	Filters cannot be renamed (based on metadata such as the Document Type).	Saved Searches can be renamed.
Subfolders	Folders can have subfolders (not recommended).	Filters cannot have subfolders.	Saved Searches cannot have subfolders.
Exporting	Using the Mass Export Tool, items in folders will be exported when exporting a workspace.	Using the Mass Export Tool, items in filters will be exported when exporting a workspace.	Using the Mass Export Tool, items under Saved Searches will not be exported when exporting a workspace.
Deletion	<p>If you delete a workspace, any custom folders and their subfolders on that workspace will be deleted and the documents inside will be un-filed.</p> <p>If auto-created folders are used on the workspace, documents will be re-filed according to the organizing attribute.</p>	If you delete a filter, its contents are not deleted.	If you delete a Saved Search, its contents are not deleted.