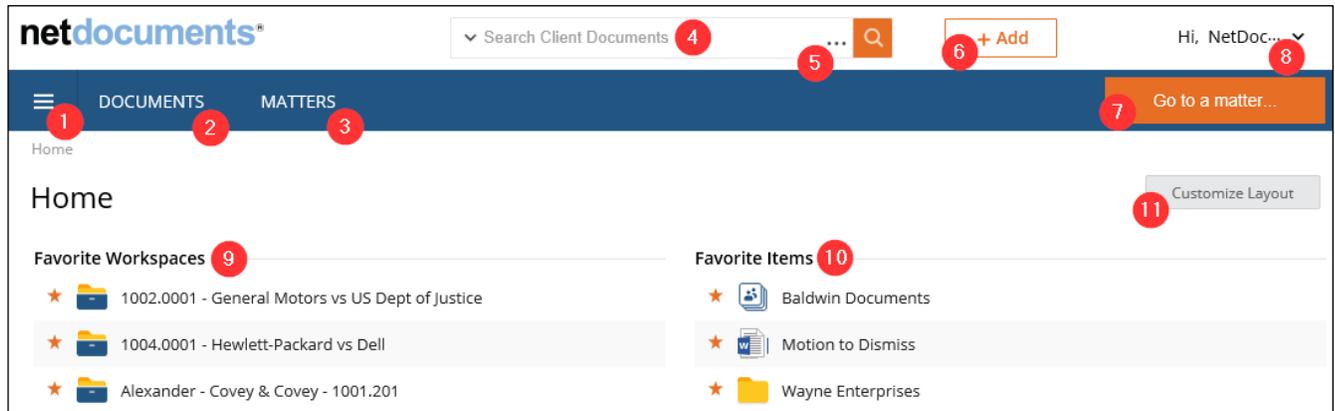


QUICK REFERENCE GUIDE Using Internet Explorer with ActiveX

August 2017



HOMEPAGE LAYOUT

1. Navigation Pane: Locate workspaces and folders
2. Documents: Access your Recent and Favorite Documents
3. Matters: Access your Recent and Favorite Matters (workspaces)
4. Quick Search: Searches all content and profiles in a cabinet
5. Advanced Search: Provides multiple fields for searching
6. Add: Create or import new documents
7. Go to a Matter...: Select a new Matter (workspace)
8. User Profile: Update user account and workstation settings, view online Help, and log out when finished with your session
9. Favorite Workspaces: Recently starred workspaces will appear here
10. Favorite Items: Recently starred items will appear here
11. Customize Layout: Adjust the layout of the sections on your Home Page

LOGGING INTO NETDOCUMENTS

- › Open Internet Explorer and go to <https://vault.netvoyage.com> for the US datacenter or <https://eu.netdocuments.com> for the EU datacenter
- › Go to **Tools > Internet Options > Security**, click the **Trusted Sites** icon, then the **Sites** button and select "Add" to make the page a trusted site
- › Install the ActiveX Control when prompted
- › Enter your username and password

ACCESSING WORKSPACES

- › To access a workspace, type in the number or name of the Matter in the **Go to a Matter...** button
- › You can also select existing workspaces in the Navigation Pane, or by clicking the **Matters** button
- › View up to 40 Recent Matters, and 350 Favorite Matters

ADDING DOCUMENTS

Importing Existing Document

- › Click **Add > Upload**
- › Select one or more existing documents (up to 150)

- › Click the **Open** button
- › Select the destination location in NetDocuments
- › Select **Move** or **Copy**, then click **OK**
- › NOTE: Less than 1 GB per document.

Copy a Document

- › Highlight the document and select **More Options > Move/Copy**
- › Select where you want to file it and click **Copy**
- › Change profile data as needed, then click **Continue**

Create a New Document

- › Click **Add > New** to create a blank document
- › Enter the document name, select document format, location, then click **OK**
- › Edit, save, then close the document

Add a New Version

From the versions dialog:

- › Highlight the version from which you want to start
- › Click **Add Version** on the right
- › Add a description for the new version

LOCATING DOCUMENTS

Documents

- › The 40 most recent documents Opened, Edited, or Added are available on this list.

Searching within a Workspace

- › Access a workspace
- › Search for documents in the workspace by entering keywords or phrases in the simple search box. This searches across all available fields, including full-text.

 ... 

Advanced Search

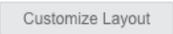
- › Click 
- › Use more values and fields to narrow your search
- › Search by date range
- › Search by file extension or file type

Home Page

- › Click **Home** to go to your Home Page
- › Any item in NetDocuments can be added to your Home Page sections for quicker access
- › You can organize items on your Home Page by dragging and dropping them between sections

Note: To add items to your home page, click the star next to the item

Adding New Sections on the Home Page

- › Click 
- › Click **Create a Personal Section**, name it, and drag and drop it to where it should appear on your home page
- › Once finished, click the **Save Changes**
- › Items on your home page, including sections, can be rearranged by dragging and dropping

COMMON DOCUMENT OPTIONS

Accessing Document Options

- › On a list view, check the box or highlight the document, then use **More** on the right.
- › Right-click the document name to access more options. To modify the menu, select **Customize Menu**.



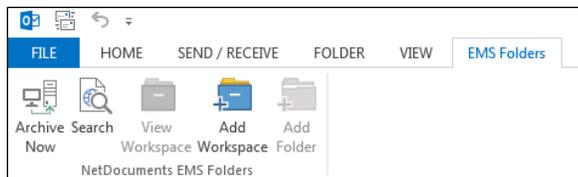
- **Email Link:** Email a link to others who already have access to this item
- **Email Copy:** Send document(s) as an attachment to an email
- **Follow:** Receive an email when an item is modified by another user
- **History:** View a history of document activities
- **Move/Copy:** Move or copy a document within NetDocuments
- **Rename:** Rename a document
- **Deliver a Secure Link:** Create and send a secure link to a document to an outside party.

QUICK REFERENCE GUIDE Outlook EMS add-ins

ADDING EMAIL MESSAGES

Using EMS Folders

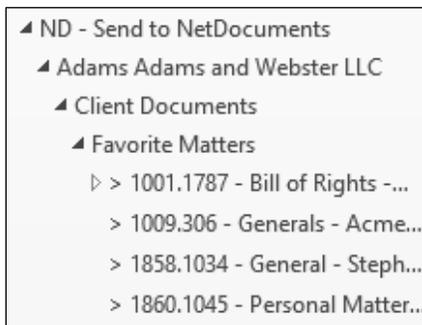
- › In your Outlook, you will see the following tab:



- › You will also see a new Outlook folder:



- › Under this folder, you will find folders like these.



- › To file an Email into EMS, drag to the subfolders marked with > under the folder structure listed above.
- › Automatic archiving occurs every hour if you do not click the **ND Archive Now** button.
- › Click the **ND Archive Now** button and email filed in the EMS folders will be moved to NetDocuments.
- › Another folder is set by your Administrator and may or may not appear:



- › If you have the folder shown above, a copy of the email will also be filed under this folder tree.
- › To refresh the folder tree, click the parent folder to open it.

Using EMS Profiler

- › In your Outlook, you will see the following toolbar:

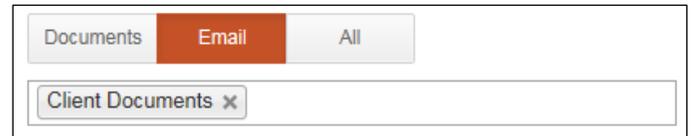


- › To profile and save an email, select one or more emails, assign profile information, then click the **ND File** button.
- › Click the **ND Send & File** button when sending an email to file outgoing email into NetDocuments.



Locating Email Messages

- › The **Advanced Search** page can be used to search email by selecting the **Email** tab at the top.



? HELP

Access the NetDocuments online Help by clicking on the **Help** link under your user profile or visit the NetDocuments user community at <http://support.netdocuments.com>.

Service Interruptions

We encourage you to go to <http://support.netdocuments.com> to subscribe to service status updates.

💡 IDEA BANK

Have a great suggestion for an enhancement? Go to <http://support.netdocuments.com>.