

Top Ten Things to Know

Web Interface Changes in 17.2

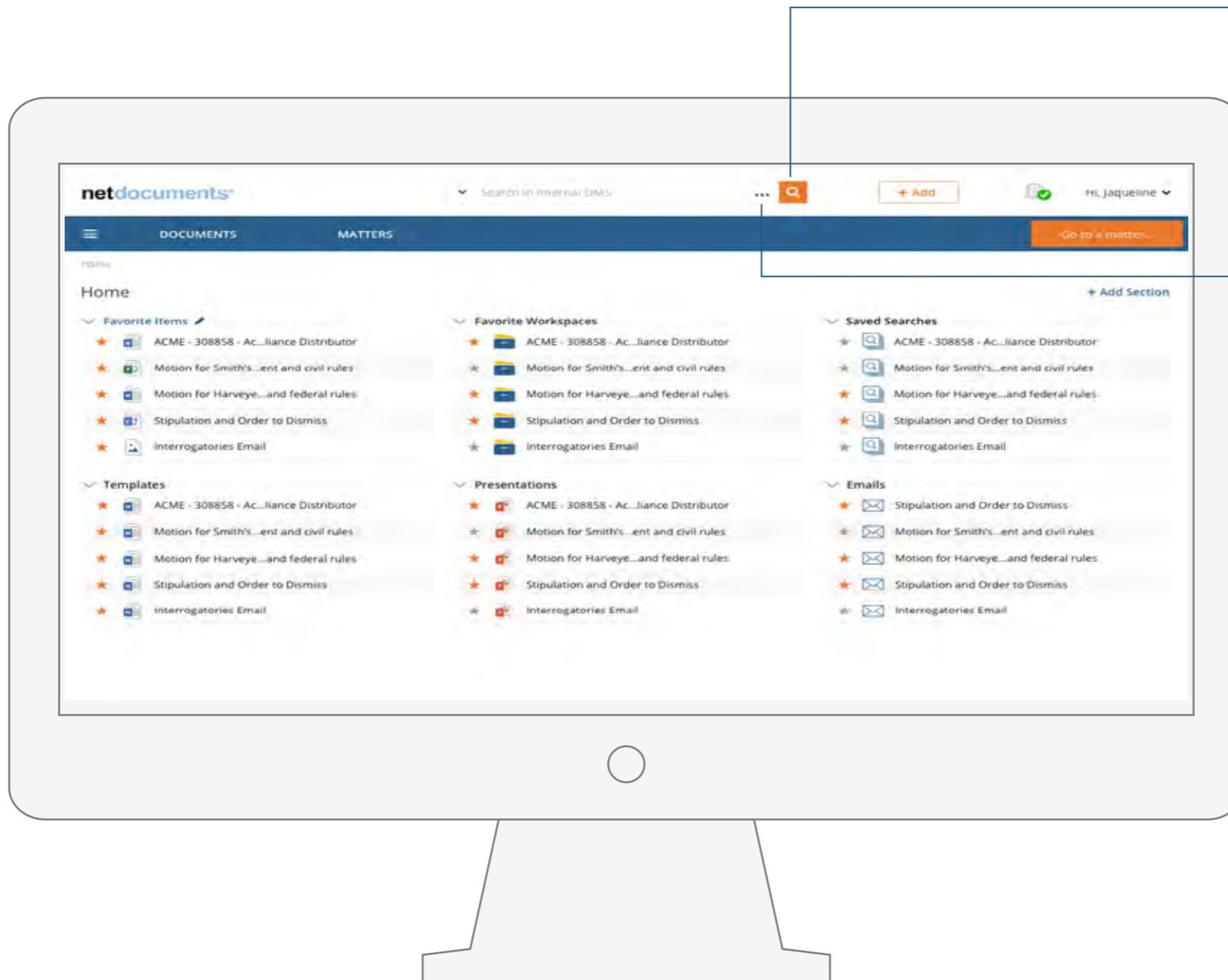
2017

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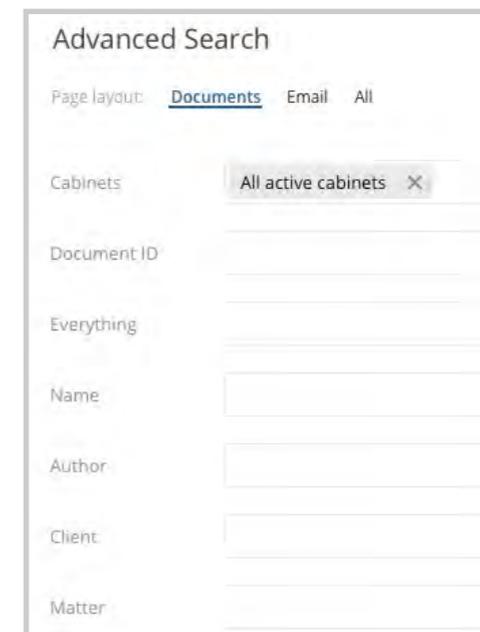
Number 1: Quick Search

Top of mind and top of page



Quick Search is now at the top of the page for fast access to find your important documents.

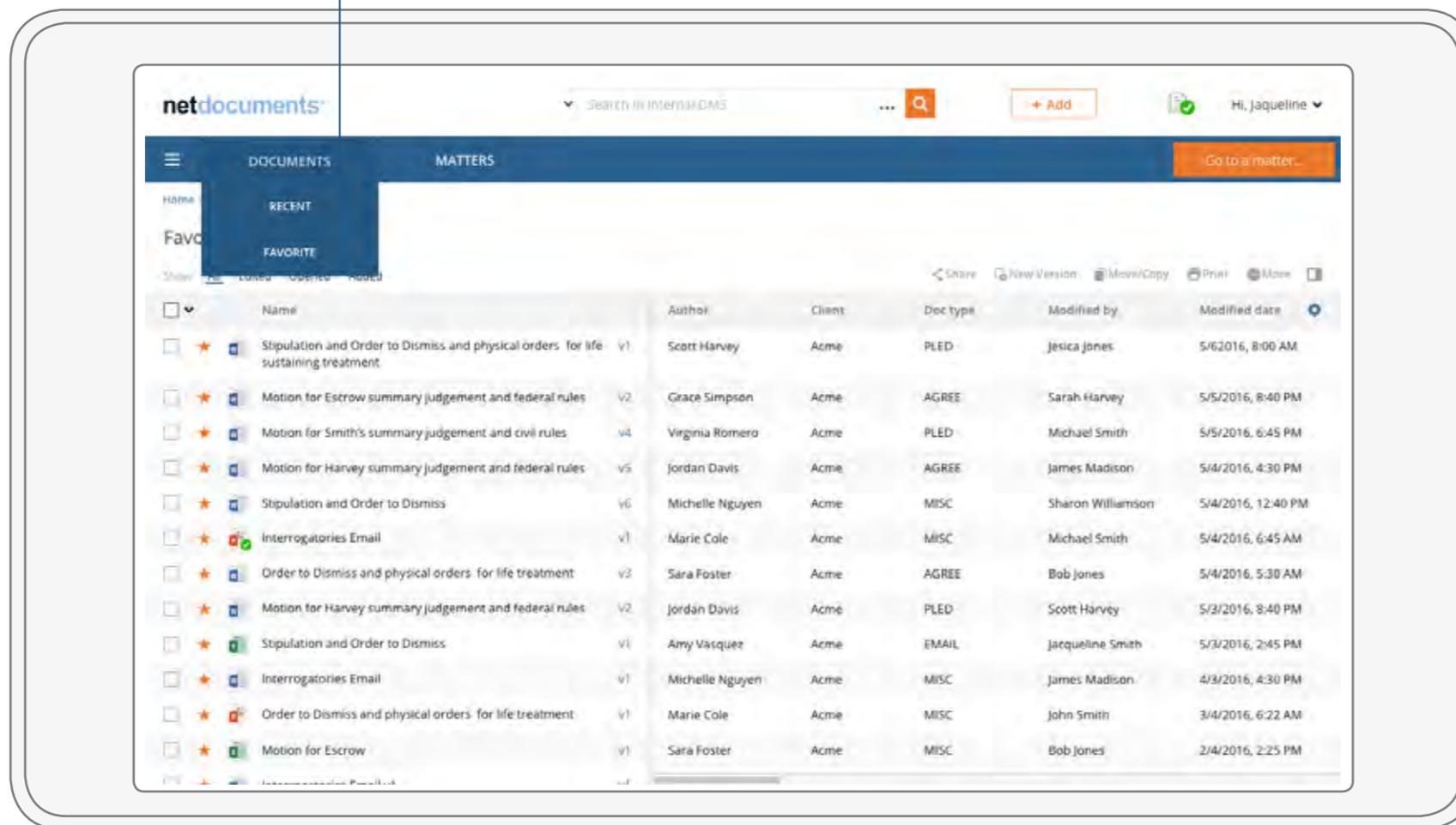
Use the Ellipse button to get to Advanced Search options.



Number 2: Documents Menu

Easy access to Recent documents and a New Favorite documents page

Hover over **Documents** to have one-click access to either your **Recent** or **Favorite** documents.

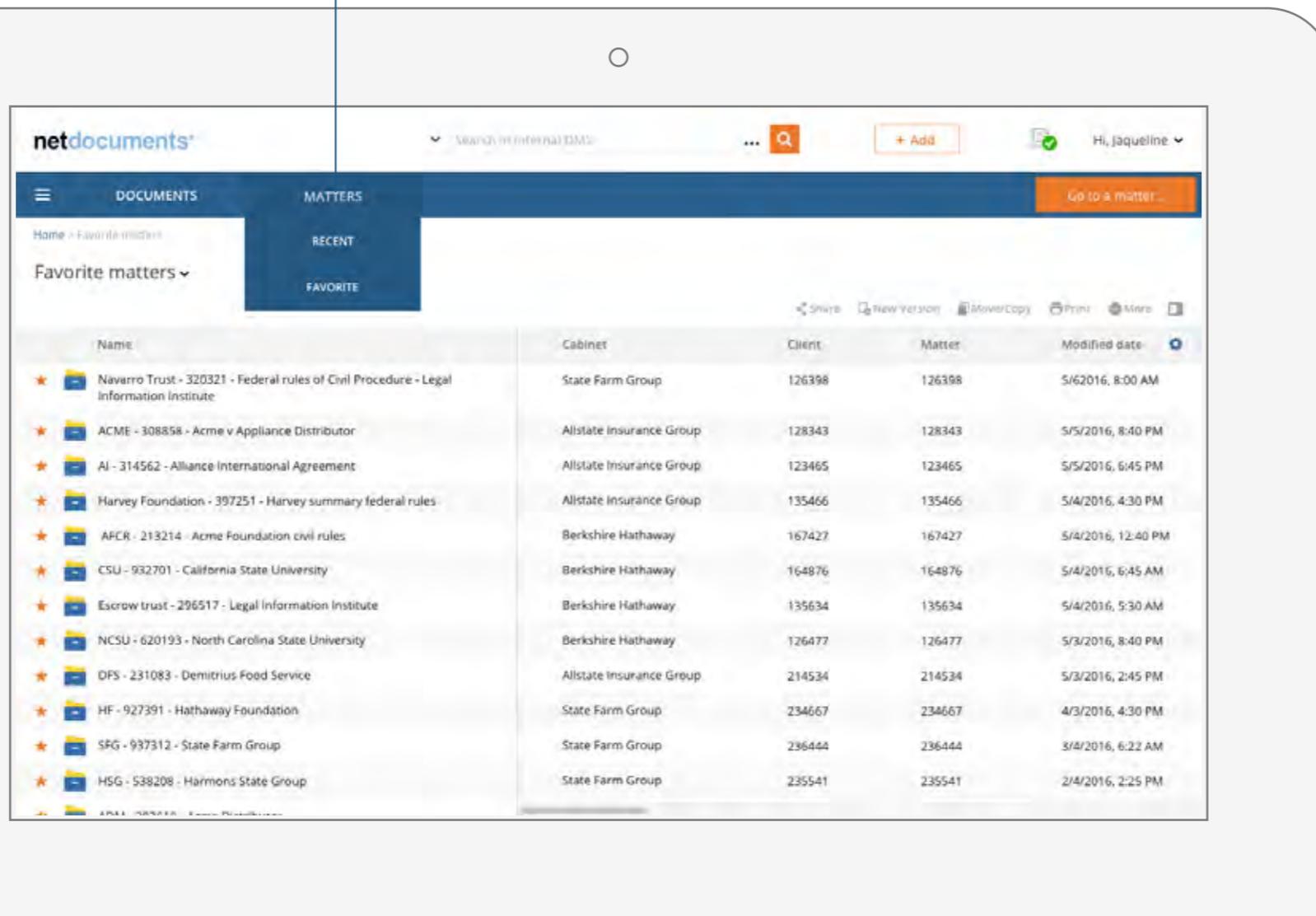


The new **Favorite document** page features a *list view format* of the *favorred documents* on your **Home** page.

Number 3: Matters Menu

New Recent Matters and Favorite Matters pages

Hover over **Matters** to have one-click access to either your **Recent** or **Favorite Matters** pages.



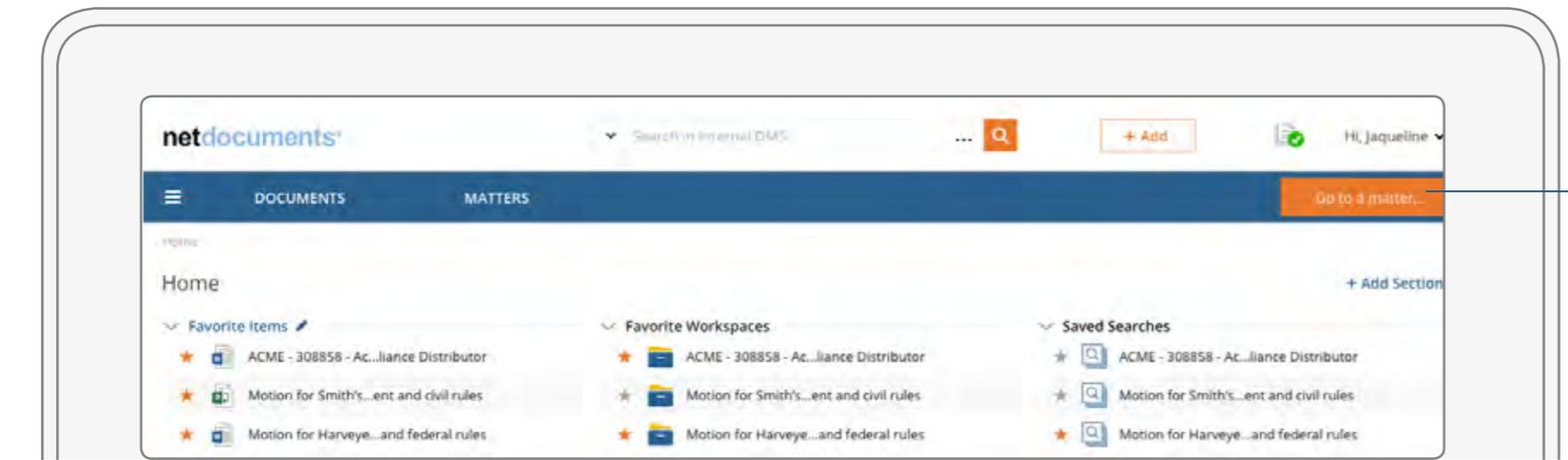
The **Recent Matter** and **Favorite Matter** pages provide a *list view format* of your workspaces.

These pages allow you to *display profile fields, sort your favorites, and interact with multiple workspaces.*

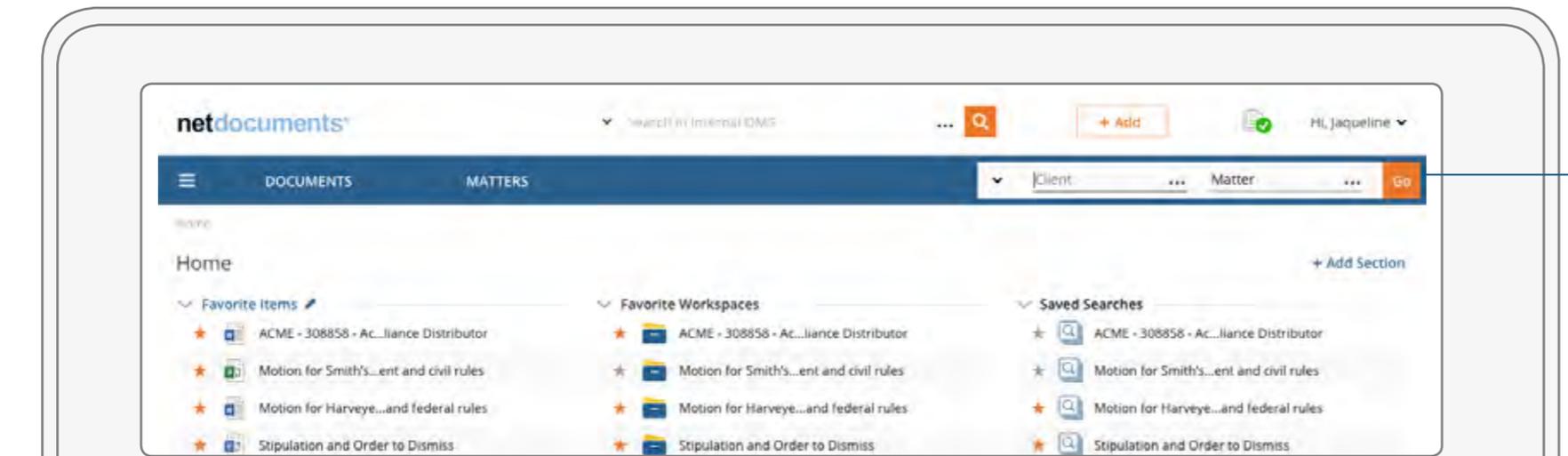
Number 4: Go to a Matter

Your matters matter, so now it's easy to get there

Going directly to a matter is easier or more accessible — and now it's always available.



Select **Go to a matter** and start typing a client or matter number — the type-ahead functionality does the rest.

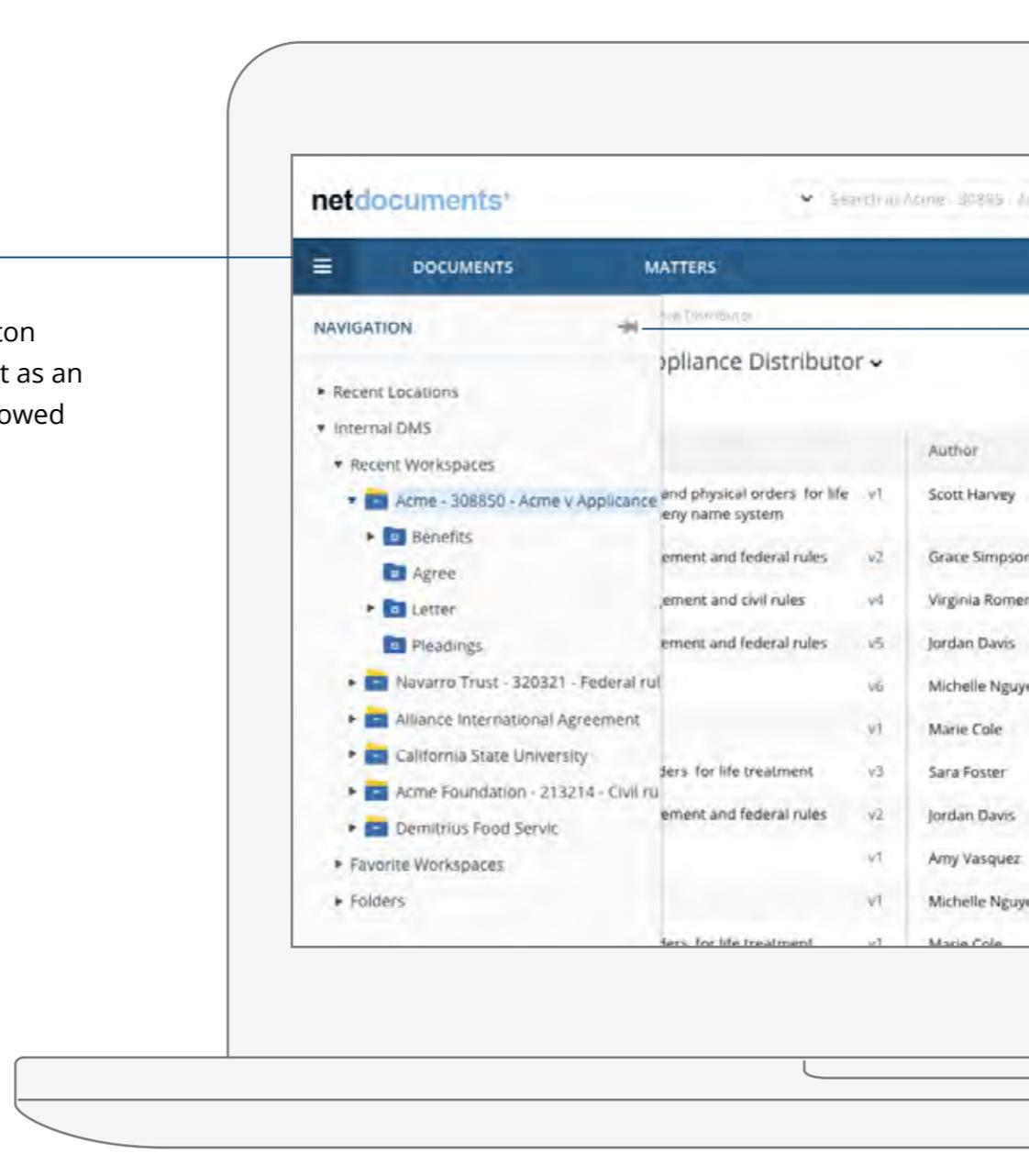


Number 5: Navigation Pane

Now you see it, now you don't

With the new **Navigation** pane as an overlay, your content uses the entire width of the screen and is not reduced by the width of the **Navigation** pane.

Select the  **Navigation** button and the **Navigation** pane pops out as an overlay, so your content isn't narrowed to make room for it.

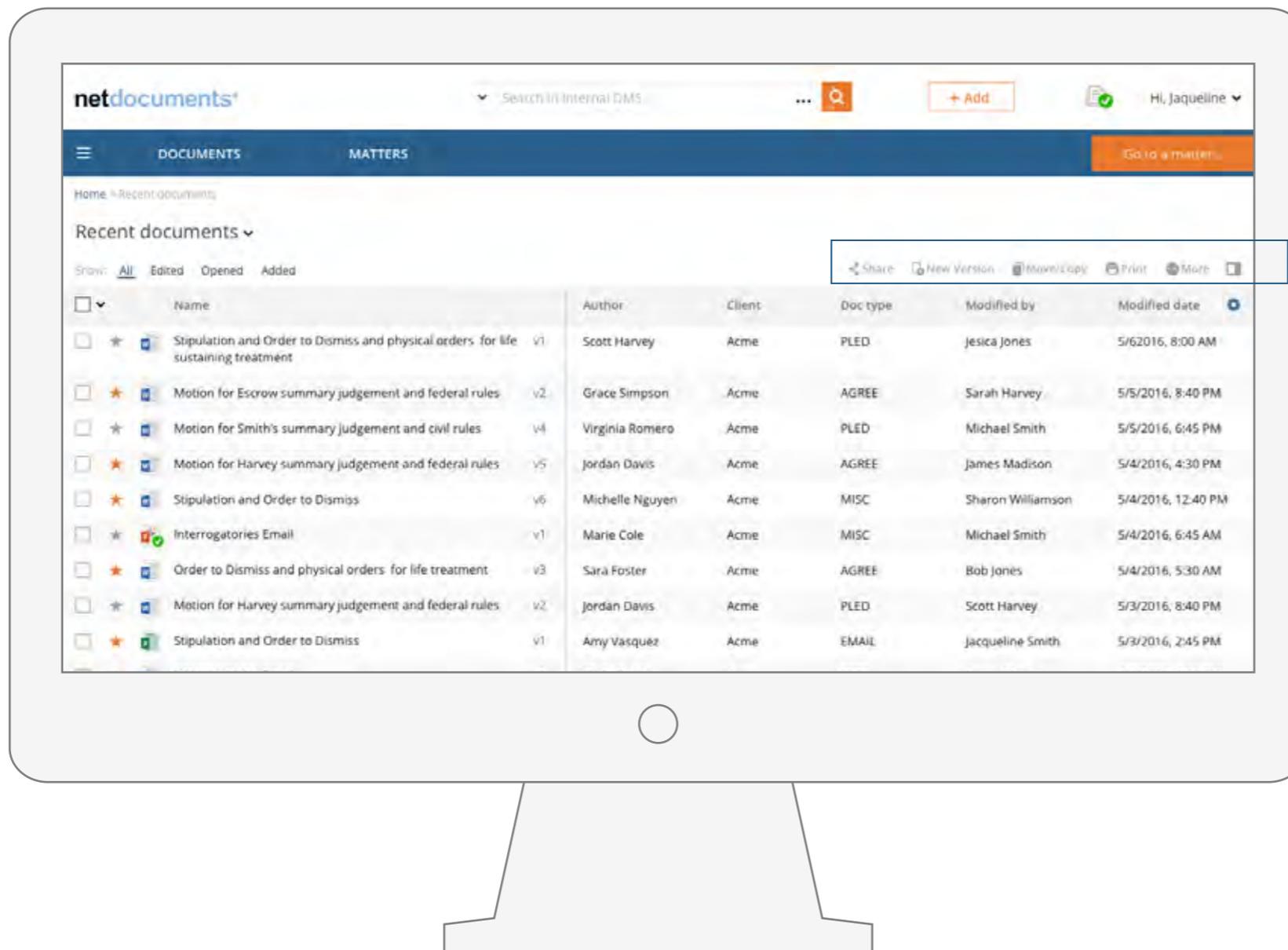


A  **Pin** icon keeps the **Navigation** pane displayed (but remember, this reduces the amount of room for your content).

Number 6: Power Bar

Increase your efficiency and productivity

The **Power Bar** puts your commonly used document options at your fingertips.



Previous



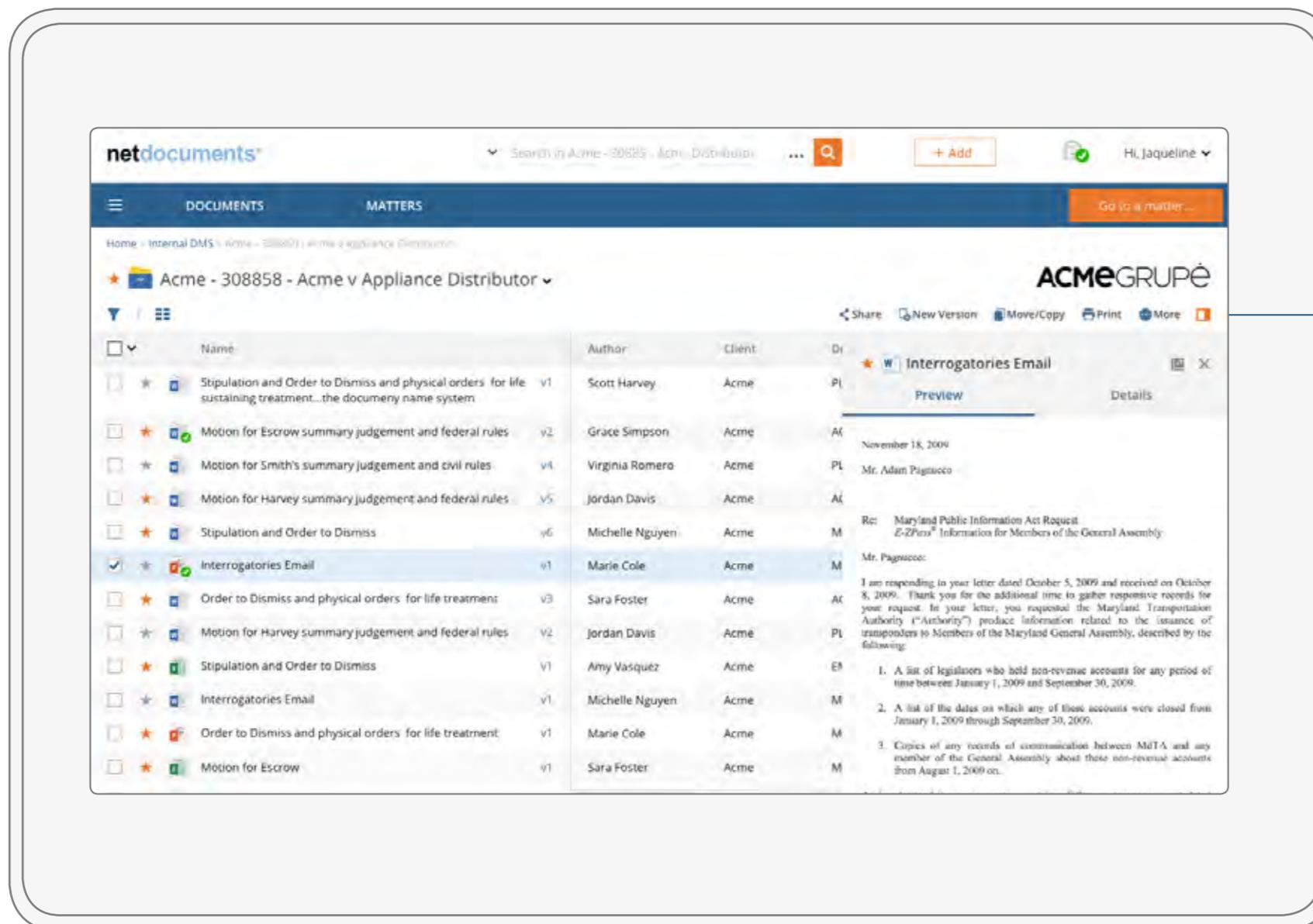
Take action on your documents with the new **Power Bar**.

The other options are still only one click away — just click **More**.

Number 7: Preview and Details Pane

Available when you need it, hidden when you don't

Similar to the **Navigation** pane on the left, the **Preview and Details** pane on the right is now an overlay, so your content can have all the room it needs.

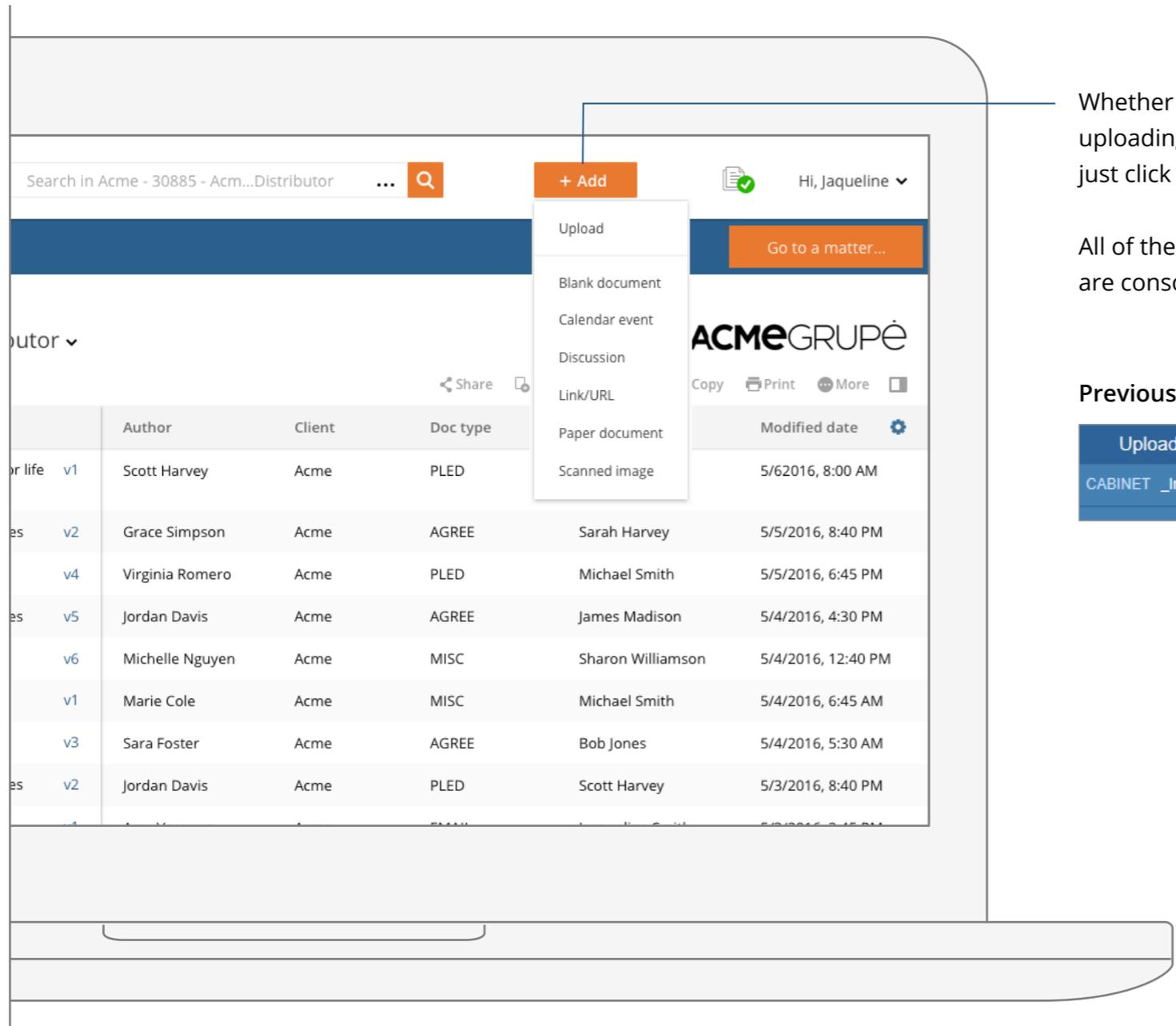


Click the  Pane toggle and the **Preview and Details** pane appears.

When finished, click the  Pane toggle to close it.

Number 8: Add Button

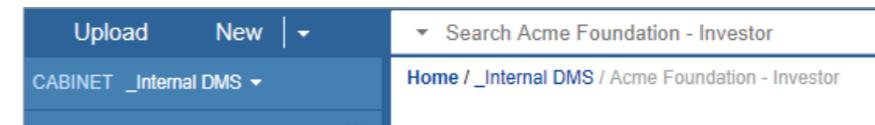
One stop shop for getting items into NetDocuments



Whether creating a new document or uploading documents into NetDocuments, just click the **+ Add** button.

All of the options for placing items in NetDocuments are consolidated into this single button.

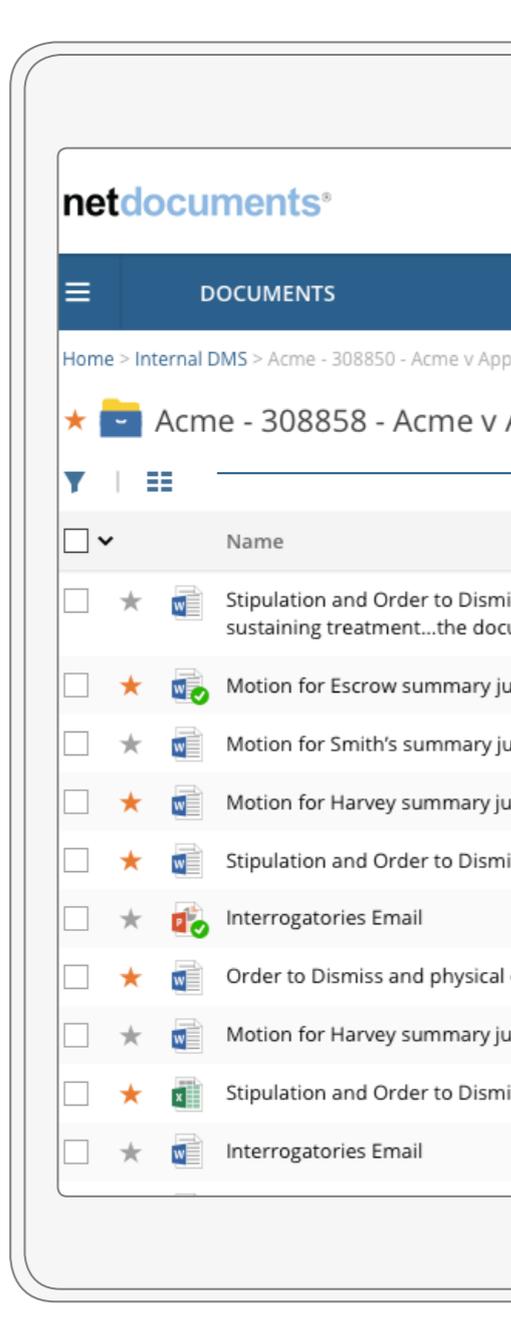
Previous



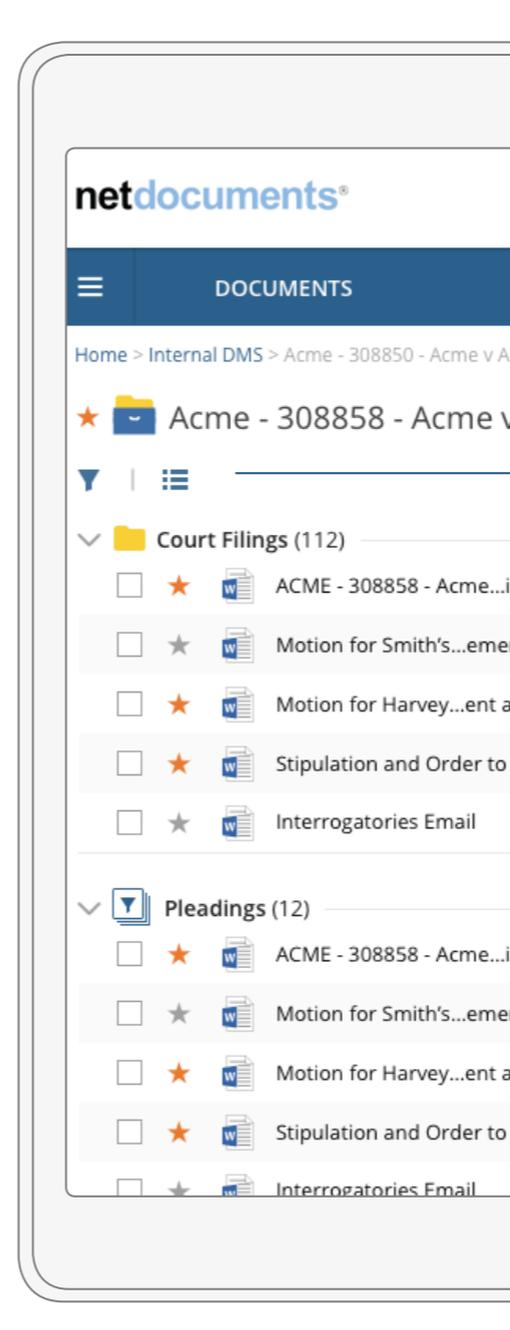
Number 9: List and Summary View

You say list view, I say summary view – let's just toggle!

It's easy toggling between the **List View** and **Summary View**.



In List View, click the  Summary View toggle.



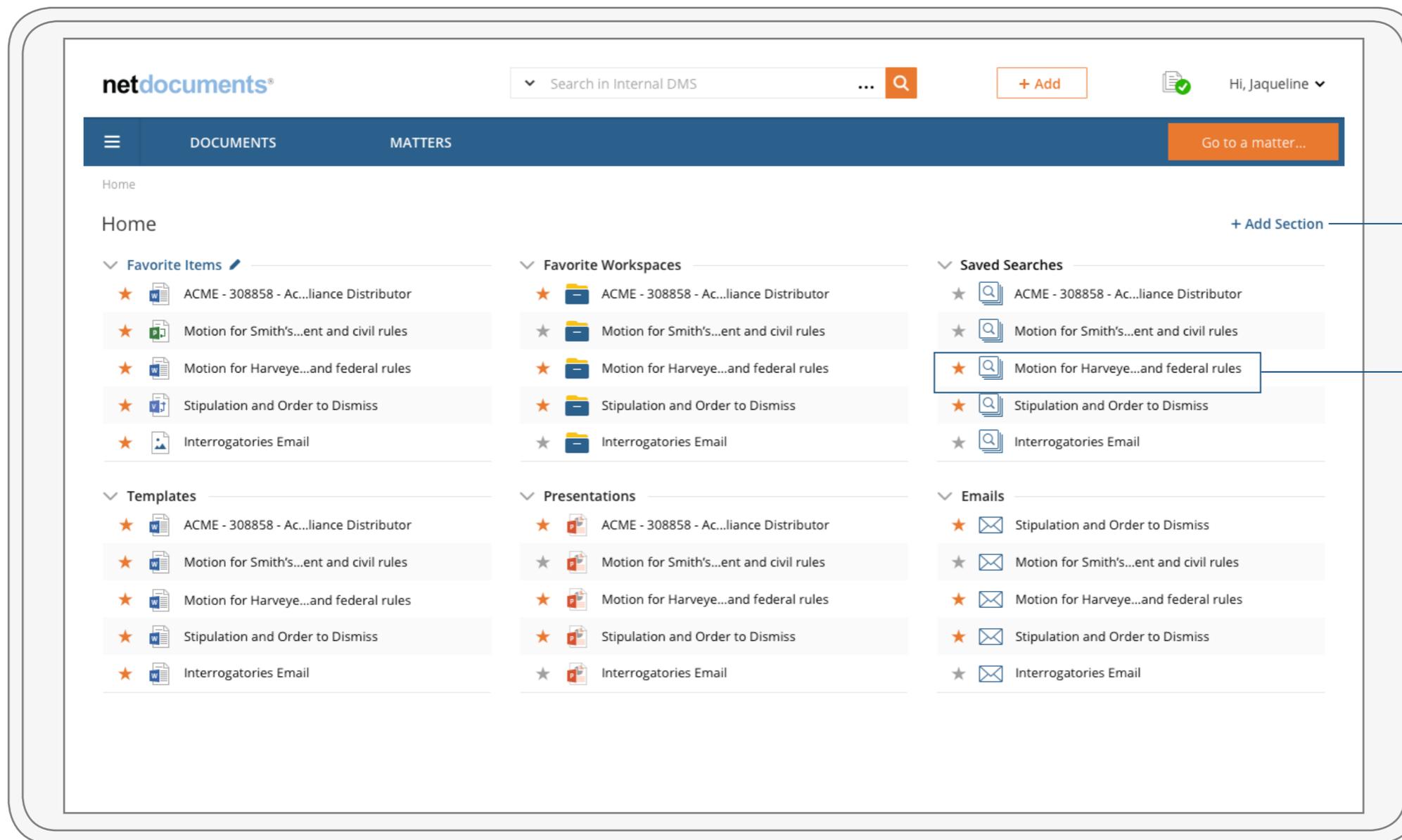
In Summary View, click the  List View toggle.

Number 10: Home Page

A Home Run – Your Home page scores with a new modern look

The **Home** page has more visible options for customizing and moving things around, giving you that home field advantage.

Hit it out of the ballpark with an organized home page!



Use **Add Section** to organize your content.

Drag and drop items right where you want them.

About NetDocuments

NetDocuments is the trusted cloud-computing platform for document and email management, which includes encrypted key management technology. With access through a web interface and Microsoft Office 365 products integration, entities enjoy the power and simplicity of built-in disaster recovery, matter centrality, enterprise search, mobility, records management, and collaboration.

Founded in 1999, with thousands of users across 140 countries, and offices located in the US, UK, and Australia, NetDocuments serves entities with high data security requirements, such as law firms, financial institutions, and insurance industries. As one of the first cloud-based companies to deliver Software as a Service (SaaS), NetDocuments keeps your organization up-to-date with compliance requirements.

NetDocuments Software, Inc. makes every effort to ensure this document is up-to-date. However, when it comes to user experience and design—it's never done. It is our job to help you evolve without disrupting your daily work. NetDocuments phases the innovative technology updates with continuous quality and usability refinements, which can result in product descriptions and functionality changing without notice. Contact a NetDocuments Sales Representative for the latest product information.



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