netdocuments[®]

Top Ten Things to Know

Web Interface Changes in 17.2

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2017

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Number 1: Quick Search

Top of mind and top of page



Number 2: Documents Menu

Easy access to Recent documents and a New Favorite documents page

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netdoo	cuments.	v , 3ea	zti IIV I	ntemarDMS		<u>Q</u>	+ Add	🐌 Hi, Jaqueline ❤
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•	Name			Author	Client	Doc type	Modified by	Modified date
A * 6	Stipulation and Order to sustaining treatment	Dismiss and physical orders for life	11	Scott Harvey	Acme	PLED	Jésica jones	5/62016, 8:00 AM
	Motion for Escrow summ	nary judgement and federal rules	¥2.	Grace Simpson	Acme	AGREE	Sarah Harvey	5/5/2016, 8:40 PM
14	Motion for Smith's summ	nary judgement and civil rules	44	Virginia Romero	Acme	PLED	Michael Smith	5/5/2016, 6:45 PM
	Motion for Harvey summ	sary judgement and federal rules	vā	Jordan Davis	Acme	AGREE	James Madison	5/4/2016, 4:30 PM
1. * 1	Stipulation and Order to	Dismiss	46	Michelle Nguyen	Acme	MISC	Sharon Williamson	5/4/2016, 12:40 PM
	Interrogatories Email		vl	Marie Cole	Acme	MISC	Michael Smith	5/4/2016, 6:45 AM
E 🔸 🕯	Order to Dismiss and ph	ysical orders for life treatment	ý3	Sara Foster	Acme	AGREE	Bob Jones	5/4/2016, 5:30 AM
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	Interrogatories Email		ŵ1	Michelle Nguyen	Acme	MISC	James Madison	4/3/2016, 4:30 PM
	Order to Dismiss and ph	vsical orders for life treatment	19	Marie Cole	Acme	MISC	John Smith	3/4/2016, 6:22 AM
	Motion for Escrow		19	Sara Foster	Acme	MISC	Bob Jones	2/4/2016, 2:25 PM

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

Number 3: Matters Menu

New Recent Matters and 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.



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.



Number 6: Power Bar

Increase your efficiency and productivity

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

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	* 0	Motion for Escrow sum	imary judgement and federal rules	v2	Grace Simpson	Acme	AGREE	Sarah Harvey	5/5/2016, 8:40 PM	ope click away — just click More
1	* #	Motion for Smith's sum	mary judgement and civil rules	14	Virginia Romero	Acme	PLED	Michael Smith	5/5/2016, 6:45 PM	Just click away — Just click wore
		Motion for Harvey sum	mary judgement and federal rules	¥5	Jordan Davis	Acme	AGREE	James Madison	5/4/2016, 4:30 PM	
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		Order to Dismiss and p	hysical orders for life treatment	v3	Sara Foster	Acme	AGREE	Bob Jones	5/4/2016, 5:30 AM	
	* 0	Motion for Harvey sum	imary judgement and federal rules	42	Jordan Davis	Acme	PLED	Scott Harvey	5/3/2016; 8:40 PM	
		Stipulation and Order t	to Dismiss	¥1	Amy Vasquez	Acme	EMAIL	Jacqueline Smith	5/3/2016, 2:45 PM	
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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.

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Preview and Details pane appe		Client D	Author		Name	
	Preview Details	Acme Pi	Scott Harvey	er to Dismiss and physical orders for life v1 tthe documeny name system	Stipulation and Order sustaining treatment.	*
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	Maryland Public Information Act Request 2-2Puts ²¹ Information for Members of the General Assembly	Acme M	Michelle Nguyen	er to Dismiss y6	Stipulation and Order	
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	spending in year letter dated Deabler 5, 2009 and received on October 9. Thank you for the additional time to gather responsive recently for mount, the year letter, was ensurement the Mandael Transportation	Acme Ad	Sara Foster	d physical orders for life treatment v3	Order to Dismiss and	*
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	ng: A list of legislators who held non-revenue accounts for any period of	Acme E	Amy Vasquez	er to Dismiss V1	Stipulation and Order	1 *
	time between January 1, 2009 and September 30, 2009. A list of the dates on which any of these accounts were closed from	Acme M	Michelle Nguyen	a vi	Interrogatories Email	1 *
	January 1, 2009 through September 30, 2009.	Acme M	Marie Cole	d physical orders for life treatment v1	Order to Dismiss and	*
	Copies of any records of continuousland derivers and its and any inamber of the Contest Assembly about these non-revenue accounts from August 1, 2009 or.	Acme M	Sara Foster	11	Motion for Escrow	*

Number 8: Add Button

One stop shop for getting items into NetDocuments

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outo	r •			≪ Share □	Blank document Calendar event Discussion	
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or life	v1	Scott Harvey	Acme	PLED	Scanned image	5/62016, 8:00 AM
25	v2	Grace Simpson	Acme	AGREE	Sarah Harvey	5/5/2016, 8:40 PM
	v4	Virginia Romero	Acme	PLED	Michael Smith	5/5/2016, 6:45 PM
ès	v5	Jordan Davis	Acme	AGREE	James Madison	5/4/2016, 4:30 PM
	v6	Michelle Nguyen	Acme	MISC	Sharon Williamson	5/4/2016, 12:40 PM
	v1	Marie Cole	Acme	MISC	Michael Smith	5/4/2016, 6:45 AM
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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

Upload New 🛛 🛨	 Search Acme Foundation - Investor
CABINET _Internal DMS -	Home / _Internal DMS / Acme Foundation - Investor

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.



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!

		Go to a matter	
Home			
Home		+ Add Section	Use Add
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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 centricity, 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.

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