

Preventative Measures

The following instructions are for using NetDocuments in the office, on a home computer or laptop with or without Citrix.

For best results, use Internet Explorer 11. If your personal computer has Windows 10 with Microsoft Edge, you can still download Internet Explorer 11.

The following instructions will not work with other browsers, e.g., Edge, Firefox, Chrome, etc.

NetDocuments is a global document service that is available to you anywhere an Internet connection is available. But what if you suddenly lose that connection or your computer crashes? Have you lost everything? Can you still work with documents?

YES!

No, you have not lost everything, and yes, you can continue to work with your documents. If your computer crashes and all of your documents have been stored on NetDocuments, nothing will be lost.

Echoing – Enabled

When you login to NetDocuments and open documents, each document is also downloaded directly to the **Echo** folder on the hard drive of your computer. When opening the document, your document's native application, such as Microsoft Word, is automatically invoked and the document is opened from the **Echo location**. You are working off of your hard drive at this point.

As you work on your document, the changes you save are going to this (local) location. When you save the document and close out of it (checking it in), the document is uploaded to NetDocuments.

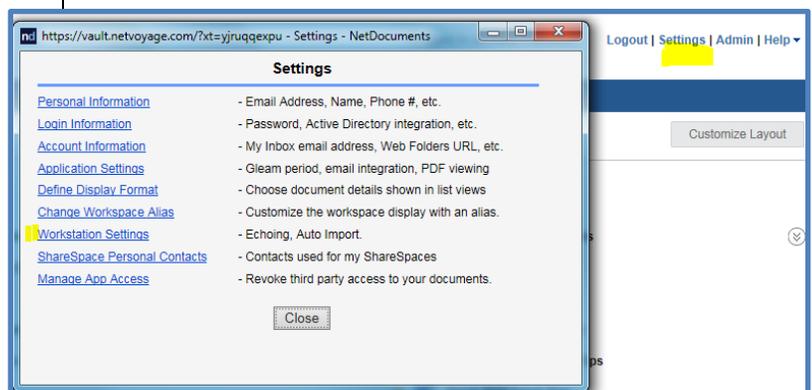
Echoing is already enabled on your office PC and on Citrix -- **45** days of documents are stored in the echo folder on your computer and on Citrix.

For Home Computers

If you access NetDocuments through your personal laptop or home computer, we strongly suggest that you enable **Echoing** on that device. To do so, log into NetDocuments on your personal computer at:

https://vault.netvoyage.com with your **full email address and firm password**.

Go to Settings | Workstation Settings and check to Enable Echoing on this workstation, and change the default number of days to 45.



1. Choose the option to **Auto import documents as soon as they are placed into the auto import folder**.
2. As always, save your document often.

If Internet Connection Is Dropped

For All Computers, Office and Home

Don't Panic. Suddenly, your Internet connection is dropped for a short period of time. Here are your working steps:

1. When you are working on documents from NetDocs, they are automatically downloaded to the **C drive** of your computer to the **Echo Directory**. This is true whether you are in the office or at home.
2. Continue to work on your documents in the respective application and save them as often as you normally would. Remember that these documents are in the Echo folder locally, so you can continue working on them from there as long as the Internet is down. (Note that

this is the way you work anyway, even when the Internet is working and whether or not you use NetDocuments).

3. When you are done with your edits, save and close the documents as you would normally. Remember, the documents are in your Echo folder on your local computer, and so they can be checked in.

4. If you are working from home and have Auto Import enabled, they will check in automatically, but you will want to verify this.

After an Internet interruption, make sure any documents you were working on are "checked in."

Recovering Recently Edited Documents Due to a Computer Failure

If your computer freezes, there is one of two paths you can take. If you had saved your most recent edits locally just prior to the computer crashing while you had the document open, then choose option 1. If you had not saved your most recent edits locally just prior to your computer or application freezing, then follow option 2.

Option #1 – You Saved Your Recent Edits Before the Application Froze

1. If the document is not open, go to the **Echo** folder to access the document (see instructions below).
2. Continue working on and saving your document.
3. The documents in the Echo will resync, but depending on the timing, check documents back in if they show as being checked out.

Option #2 – Recent Edits Were Not Saved Before the Application Froze

1. Reboot your computer.
2. Launch the application you were in at the time of the crash.
3. Word generally saves recent edits automatically in their temporary locations in case of a crash. The application will likely prompt you to recover the document with the most recent edits.

Once recovered on your PC, the document can be uploaded as a new version of the online document OR you can choose to check it in and overwrite the existing online document. If you have difficulty recovering the document, please contact Help.

Creating New Documents without an Internet Connection

When you do not have an Internet connection, but you want to create documents that will later be saved to NetDocuments, you can save the document locally and **Upload** the document later. Open the application such as Microsoft Word and start a new document.

- Do a local save (to your Desktop or Documents).
- Make sure your documents are checked in. Confirm Auto Upload, or right click on the NetDocs icon in the system tray and choose **Check In Closed Docs**.

To Work on Pre-Existing Documents

Documents can be accessed from the Echo Folder, but it is recommended that you copy them out of the Echo Folder and edit in a different location. They can later be uploaded to overwrite the original copy in NetDocuments.

Accessing the Echo Folder

All office computers, as well as Citrix, retain 45 days of the last documents that were worked on. To locate those documents, from the right side of the taskbar, in the System Tray, **right** click the **ND** icon and then **View Echo folder**. To open any of the documents in the Echo folder, double-click on the document to launch the application. Once the internet connection is restored the documents in the Echo folder will be resynced to the documents in the NetDocuments repository.

