NetDocuments Browser Extension

User Setup Guide – Microsoft Edge

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Client Advisory Services

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Overview

Microsoft Edge does not offer NetDocuments as a native add-on. Instead, users install the same extension NetDocuments publishes for Google Chrome, using a Microsoft Edge setting that allows extensions from outside the Microsoft Store. The steps below walk through that one-time installation, from opening the extension listing to logging in to NetDocuments for the first time.

Before you begin

Microsoft Edge — any current version.

Your NetDocuments username and password, provided by your firm's NetDocuments administrator.

If you don't yet have NetDocuments credentials, contact your firm's NetDocuments administrator before starting.

Note: Screenshots throughout this guide were captured in a representative test environment. Menu names and button placement may differ slightly depending on your version of Microsoft Edge.

1 Open the Extension Listing and Start Installation

Performed once by each user, on their own computer • Est. time: 1 minute

1. Open Microsoft Edge and go to the NetDocuments extension listing on the Chrome Web Store: NetDocuments — Chrome Web Store.
2. Click **Get**.

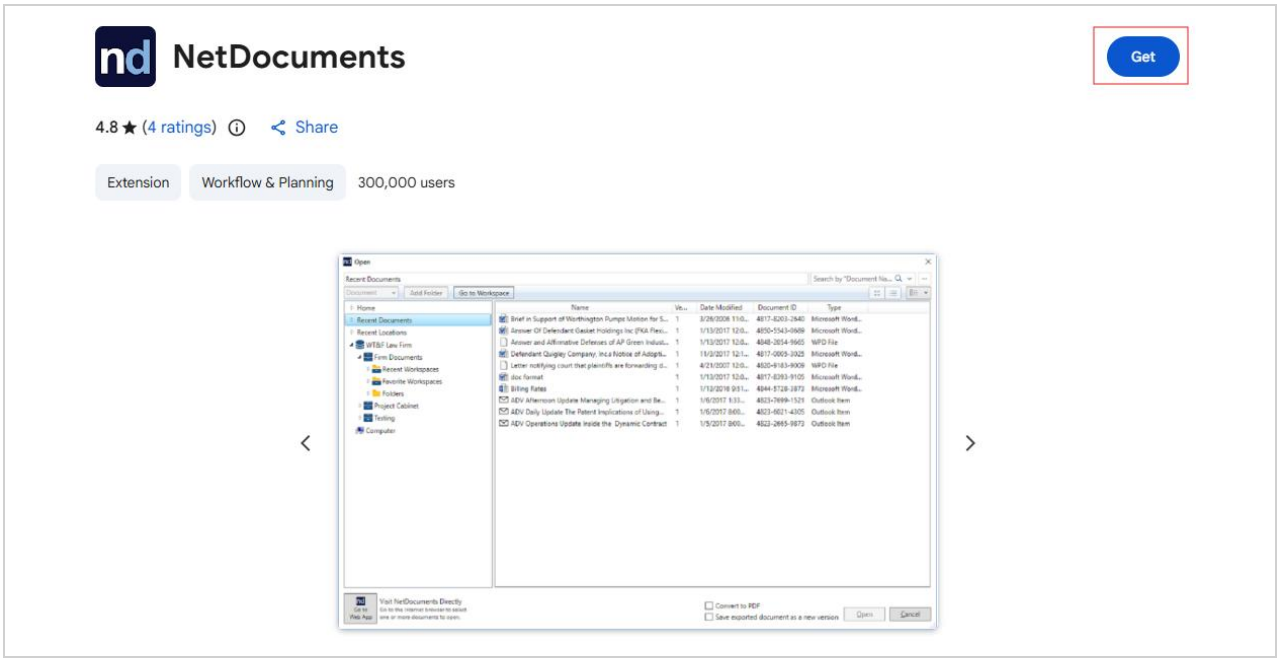

Figure 1. The NetDocuments listing on the Chrome Web Store.

2 Allow Extensions from Other Stores

Performed once per computer • Est. time: 1 minute

1. Edge displays a banner explaining that extensions from the Chrome Web Store can now be added. Click **Allow extensions from other stores**.

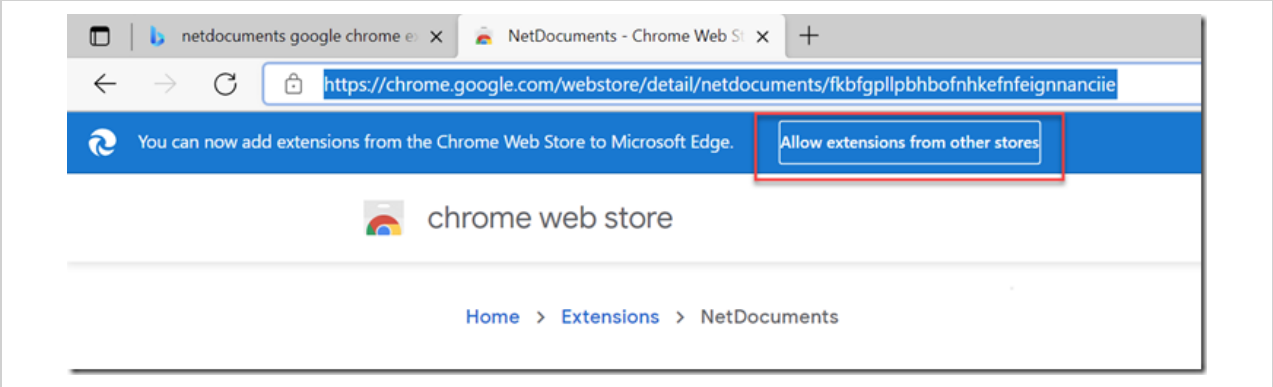

Figure 2. The banner prompting Edge to allow extensions from the Chrome Web Store.

2. In the dialog that appears, click **Allow**.

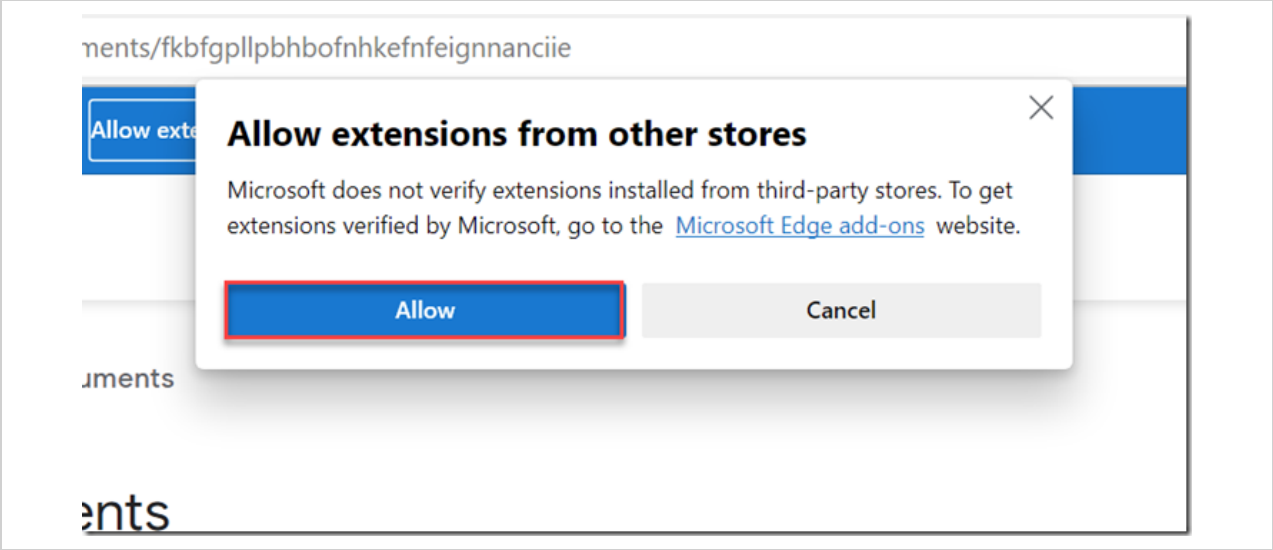

Figure 3. Confirming that Edge should allow extensions installed from outside the Microsoft Store.

Why this step appears

Microsoft Edge blocks extensions from third-party stores, including the Chrome Web Store, by default. Allowing it once lets Edge install the NetDocuments extension in the next step — you won't be asked again on this computer.

3 Add the Extension

Performed once per computer • Est. time: 1 minute

1. Edge displays the permissions the NetDocuments extension requires. Click **Add extension** to confirm the installation.

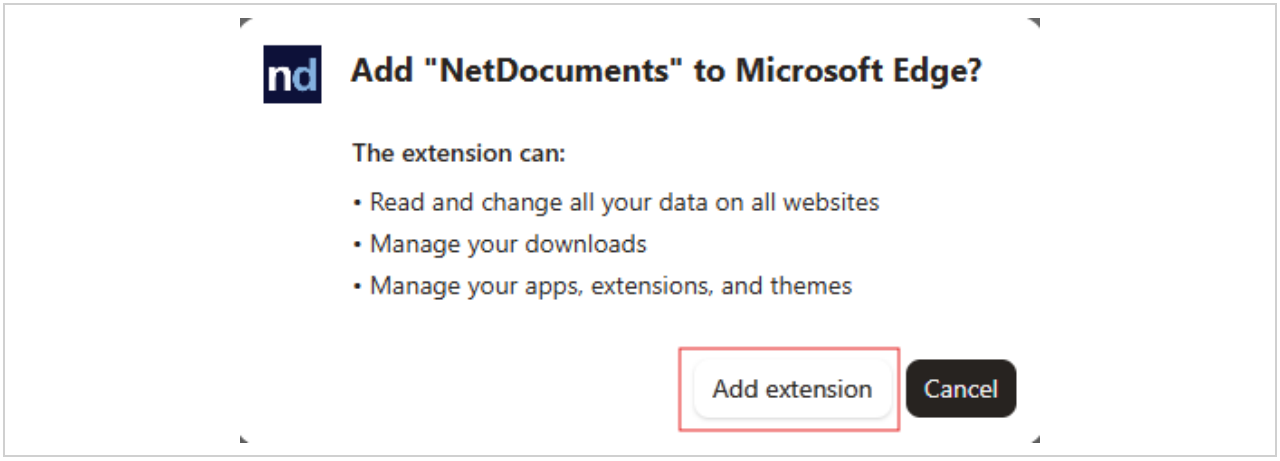

Figure 4. Confirming installation of the NetDocuments extension.

4 Log In to NetDocuments

Performed once by each user • Est. time: 2 minutes

1. Click the NetDocuments (**nd**) icon in the Edge toolbar, then click **Log In**.

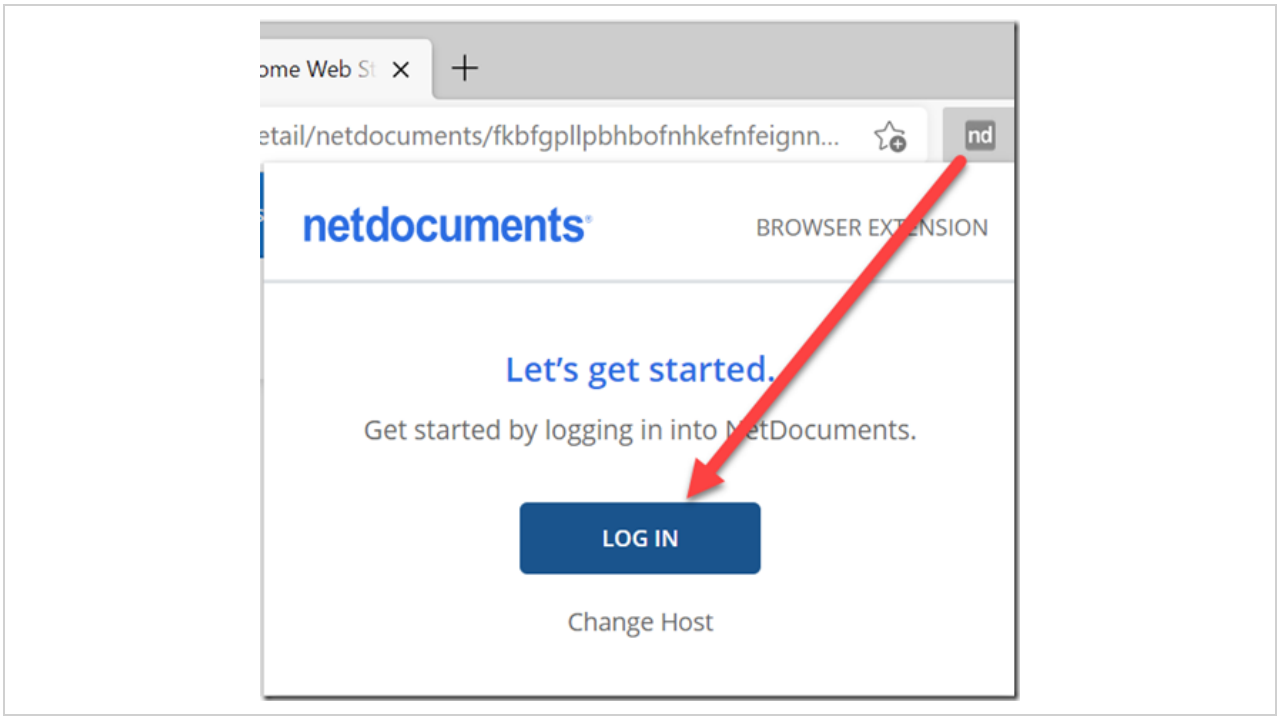

Figure 5. Starting the NetDocuments sign-in from the extension.

2. Enter your NetDocuments username and password when prompted to complete the connection.

Using a custom NetDocuments host?

Firms with a custom NetDocuments environment can click Change Host on the sign-in screen and enter the host name provided by their administrator before logging in.

Support & Next Steps

Once installed, the NetDocuments icon remains in the Edge toolbar for quick access to your firm's repository. If the extension does not appear after installation, or any step above behaves differently than described, please contact OTB Consulting for assistance.

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