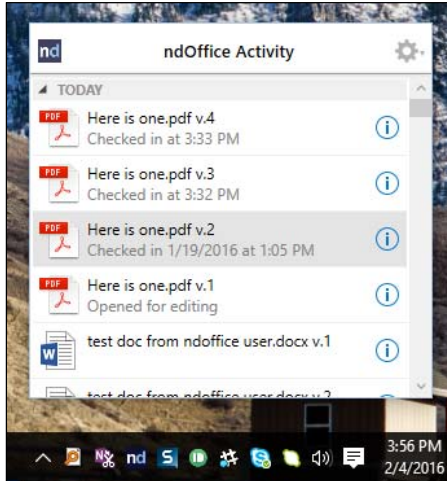


ndOFFICE QUICK REFERENCE GUIDE

Version 1.8.12+

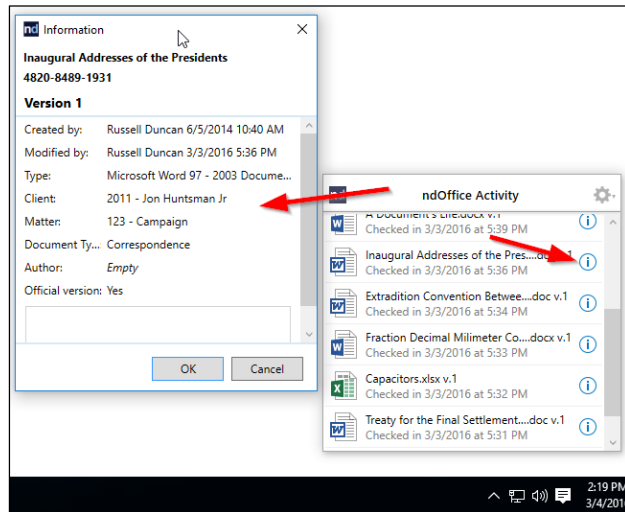
ACTIVITY CENTER

- › This list shows your recent documents from all Office apps.
- › Simply click a document to open it.



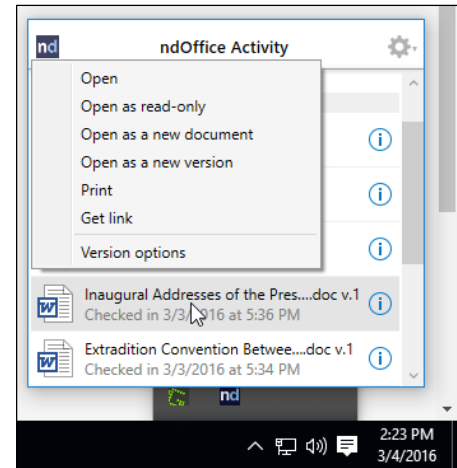
Information Panel

- › Click the Info icon to view a document's details:



Right-Click Menu

- › The right-click menu allows you to open the document in Read-Only Mode, or to open a specific version.
- › Use **Get Link** to copy the document's URL into your Windows clipboard.



Notifications

- › ndOffice uses the built-in Windows notifications.
- › You can adjust your notification settings at Settings > System > Notifications & actions > ndOffice.

OPENING DOCUMENTS

Open a Document

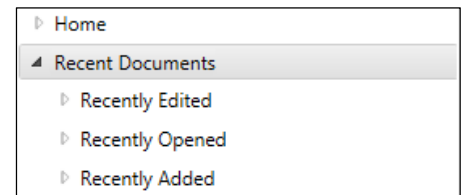
- › In either Word, Excel, or PowerPoint, select **File > Open**.
- › Use the navigation pane to navigate to the desired document, or run a search.
- › Click the document to open it in the current application.
- › To open more than one version of a document at a time, go to Document > Version Options.

Home Page

- › Click or expand **Home** to view items on your Home Page.
- › Open a filing location (workspace, folder, etc.) in the left-hand navigation pane to access documents.
- › Documents you have pinned to your Home Page will display in the right-hand pane.

Recent Documents

- › Click **Recent Documents** to view items you have recently accessed.

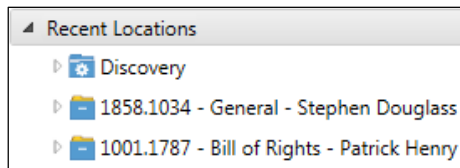


- › Expand **Recent Documents** to see lists that will display the 40 most recently Opened, Edited, or Added documents.

ndOFFICE QUICK REFERENCE GUIDE

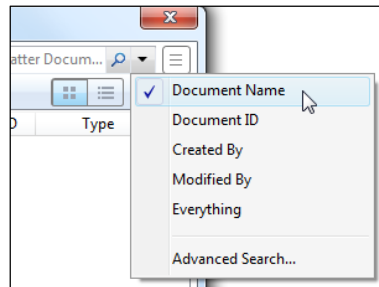
Recent Locations

- › Click **Recent Locations** to view the 10 most recent locations from which you have opened or to which you have saved items.



Searching

- › Select a cabinet in the left navigation pane.
- › Select a search field next to the search box:



- › Enter keywords or phrases in the search box.

Advanced Search

- › Click to use advanced searching features.
- › Use any combination of fields to narrow your search:

Search within 'Matter Documents' cabinet

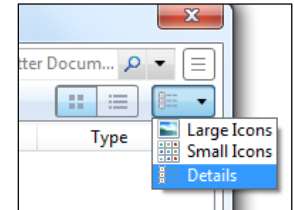
Document Name	<input type="text"/>
Document ID	<input type="text"/>
Client	<input type="text"/>
Matter	<input type="text"/>
Document Type	<input type="text"/>
Author	<input type="text"/>
Comments	<input type="text"/>
Created By	<input type="text"/>
Created Date	<input type="text"/> - <input type="text"/>
Modified By	<input type="text"/>
Modified Date	<input type="text"/> - <input type="text"/>

Clear Search Cancel

- › Go to NetDocuments Online for more searching features, such as searching for deleted items and email messages.

Display Views

- › Select how you wish to display items in the right pane.



- › When viewing a workspace, you can switch between the summary view or the list view.

SAVING DOCUMENTS

To access ndOffice **Save** functions, go to **File > Save As** in either Word, Excel, or PowerPoint.

Create New Document

- › Open Word (or Excel or PowerPoint) and create your document.
- › Go to **File > Save**.
- › Select a NetDocuments location, or simply select a cabinet and complete the document's profile.
- › Continue editing or close your document.

File name: Letter

Save as type: Word Document (*.docx)

Save as new version Description Official version

Profile ▼

Client*: 1001 Matter*: 1787 Document Type*: [Click to edit](#)

Save as a New Version

- › With your Word document open, select **Save As**.
- › By default, the **Save as new version** and **Official version** boxes will be checked.
- › Enter a description for the new version, then click **OK**.
- › Continue editing, save, then close your document.

File name: Laws of War - General Treaties

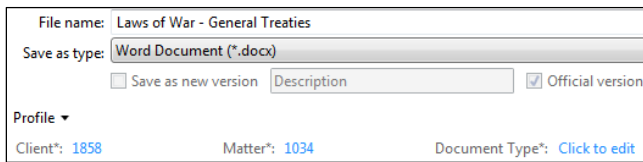
Save as type: Word Document (*.docx)

Save as new version Description Official version

ndOFFICE QUICK REFERENCE GUIDE

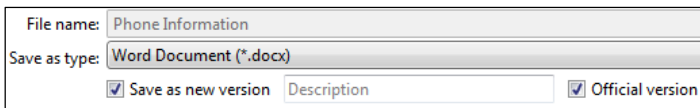
Save as a New Document (Copy)

- › With your Word document open, select **Save As**.
- › Uncheck the **Save as new version** option.
- › Select a new NetDocuments location.
- › Complete the profile, if applicable.
- › Continue editing or close your document.



Save as New Version of Existing Document

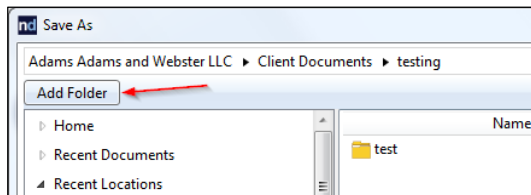
- › Open a local document, new document, or an email attachment.
- › Go to **File > Save As**.
- › Select an existing document in NetDocuments.
- › Enter a description for the new version, then click **OK**.
- › Continue editing or close your document.



NOTE: Saving your document while you edit it will commit your changes to the NetDocuments Service.

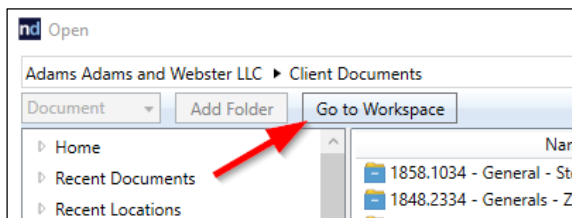
Add Folder

- › Click **Add Folder** to add a new folder:



Add Workspace

- › Click **Go to Workspace** to add a workspace to your Recent or Favorites list:



MANAGING EMAIL MESSAGES

ndOffice includes an add-in to perform **Attach** and **Save** functions from within Outlook.

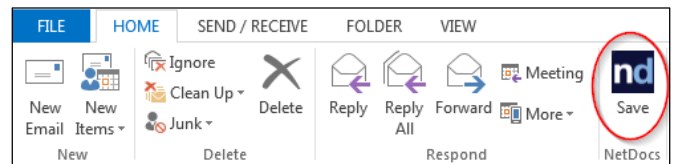
Attach File

- › Similar to the Open dialog, use the **Attach File** button to attach a copy of one or more documents to an email.
- › Select one or more documents at a time or repeat the step to attach additional documents.
- › To email a copy of a document outside your firm select the **Attachment** option.
- › For use inside your firm, use the **Insert as Link** option.

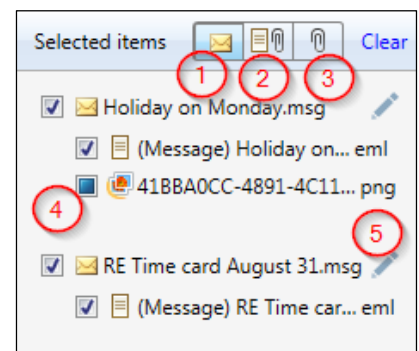


Save an Email Message

- › Select one or more messages, then click **Save**.



- › The **Save** dialog allows you to file multiple emails (and their attachments) to multiple locations:
- › Select all msg files (#1)
- › Separate the body from the attachments (#2)
- › Save only attachments (#3)
- › Or, manually select the desired items using the checkboxes (#4)
- › Rename the msg file before saving (#5)

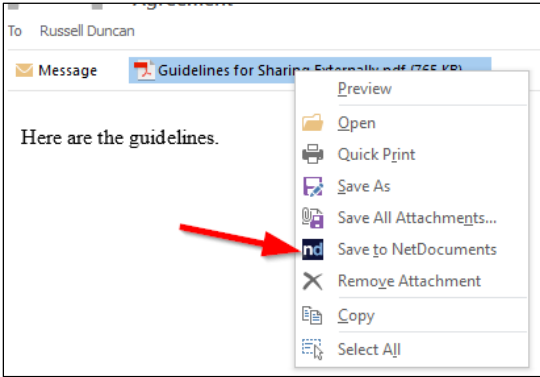


- › Rename the msg file before saving (#5)
- › Select a location. You can save multiple messages to multiple locations before clicking **Save and Close**.
- › Click **Save**.

ndOFFICE QUICK REFERENCE GUIDE

Save an Email Attachment

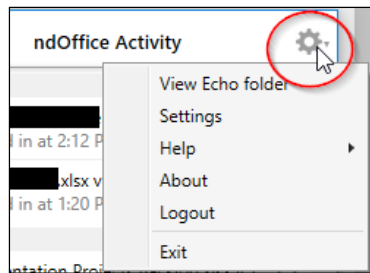
- › Right-click on an attachment to save it to NetDocuments:



SETTINGS & HELP

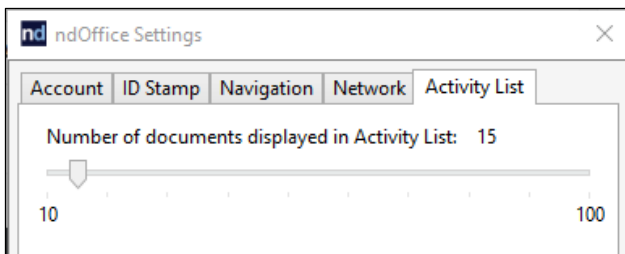
Settings

- › ndOffice settings are available from the Activity List:



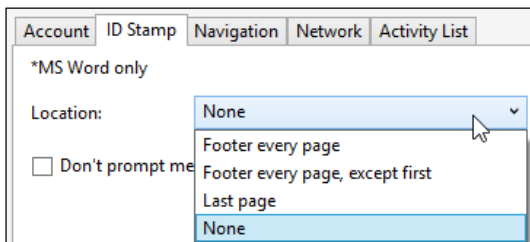
Activity List Settings

- › Choose the number of items to display in your Activity List:



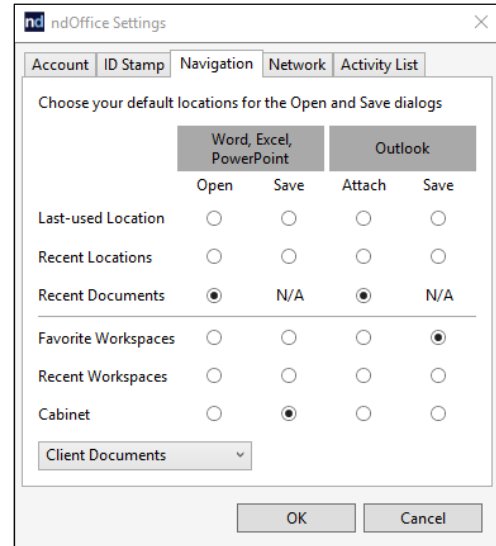
Document ID Settings

- › Choose a location for the Document ID when using Word.



Navigation Settings

- › Settings also includes an option to set the default navigation location for the Open and Save dialogs:



- › To profile documents without selecting a location, select the cabinet option (shown above), then simply complete the profile fields when saving.

Account Settings

- › Enable or disable automatic updates.
- › Or, you can manually check for updates any time.

Echo Folder

- › ndOffice includes a local cache of your most recent documents. This “echo” location can be found at [C:\Users\.](C:\Users\<username>\ND Office Echo\VAULT-username)
- › A subfolder called **backup** is where documents can be recovered if a document save was not successful.

Help & Support

- › Access the NetDocuments online Help by clicking on the [Help](https://support.netdocuments.com) link or visit the NetDocuments Support site at <https://support.netdocuments.com>.
- › We encourage you to go to <https://support.netdocuments.com> to subscribe to service status updates.
- › Have a great suggestion for an enhancement? Go to <https://support.netdocuments.com>.