

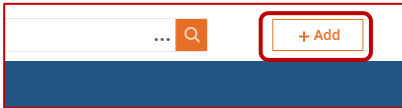
## Creating and Saving a Document

### Introduction

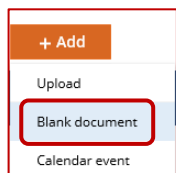
Your firm may have a template management system or a defined process for the creation of documents using templates. If so, please follow those instructions and go to below.

### Creating a new document

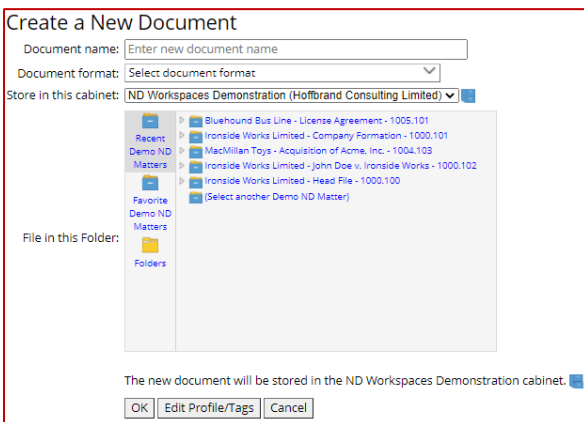
1. In ndWeb, click **+ Add** at the top of the screen, to the right of the Search box:



2. Select **Blank Document** from the menu that displays.



3. The **Create a New Document** screen is displayed:



**Document name** – type a document name (up to 200 characters).

**Document format** – to change the default of Microsoft Word, click the drop-down arrow and select from the list.

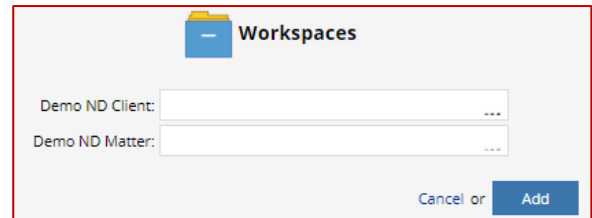
**Store in this cabinet** – click the drop-down arrow to change the cabinet into which your document will be saved.

**File in this folder** – click on the location to which you wish to save.

Click **OK**. The document is saved to the specified location and opened for editing.

### What if the workspace I need isn't shown?

1. In the list of workspaces on the right, scroll down to the bottom of the list and click on **(Select another Demo ND Matter)** (your view will not show **Demo ND**) at the bottom of the Recent Matters list.
2. A pop-up window is displayed. In the **Client Name** box, type in the relevant Client number:



3. Repeat the above step for the **Matter Name** box, using the Matter information.
4. Click **Add** to add the workspace to the **Recent Matters** list.

### How do I search for a workspace?

When using **Select Another Matter** as described above, you can click the **Lookup** button **...** on the Client Name box.

1. In the **Find entries that** field, click the drop-down arrow to change 'begins with' to 'contain':



2. In the empty box to the right, type part of the Client or Matter name, then click the magnifying glass to run the search:



### Saving a new document (Word, Excel or PowerPoint)

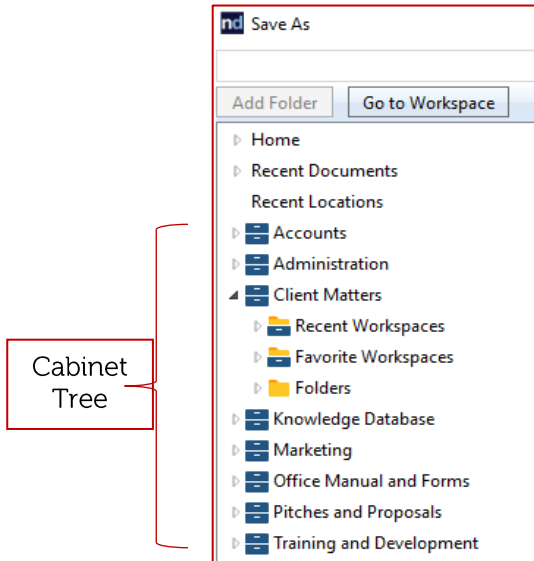
Create the document as normal then save it using Quick Access Toolbar or **File > New and File > ND Save** or the Save button on the Quick Access Toolbar:



## Creating and Saving a Document

### Select where to save your document

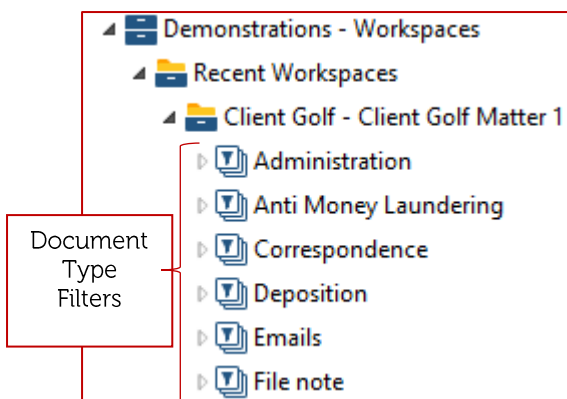
On the left of the **Save As** dialog box is a folder tree that you can use to find a saving location required:



1. Locate the required cabinet, **Client Matters**, **Knowledge Database** and so on. Click the arrow to the left of the cabinet to expand if necessary.
2. Within the cabinet, click the arrow to the left of **Recent Workspaces** to view a list of cabinet workspaces you have recently accessed.

Note – you can also expand **Favorite Workspaces** to see workspaces you have added to Favorites.

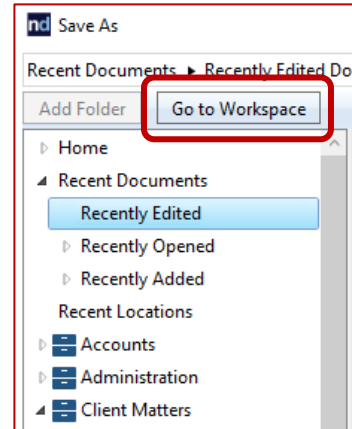
3. When you have found the required workspace, click the arrow on the left of the workspace name to expand it and view the filters (document type) and folders to which you can save your document:



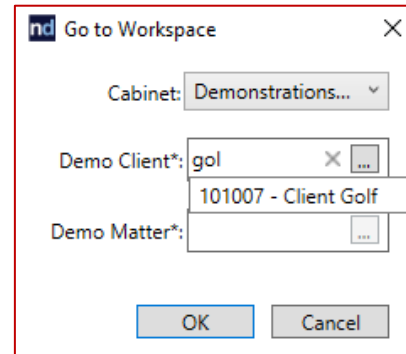
4. Click once on the filter to which you wish to save the document.

What if the workspace I need isn't in my Recent or Favourite Workspaces?

1. Click the **Go to Workspace** button at the top of the Save As dialog box:



2. The **Go to Workspace** window is displayed:



3. Click into the **Client Name** field and type at least the first character of the client's name or number as shown above. More characters might be needed.
4. Select the required client from the drop-down list.
5. Repeat steps 3 and 4 in the **Matter Name** field.
6. Click **OK**.

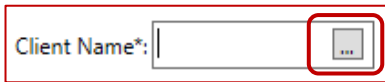
**Note** – depending on the cabinet you are searching in, the fields in the Go to Workspace window may vary. For example, Client Name and Matter Name fields may display in a Client Matters cabinet, but in another cabinet, you may see, for example, Case.

7. The workspace is added to your Recent Workspaces and you can now select it.

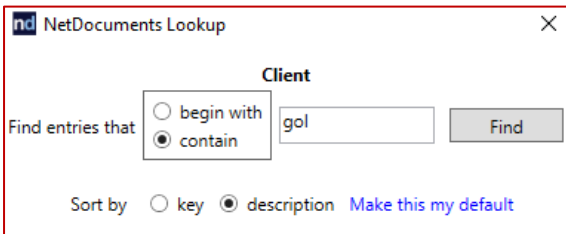
## Creating and Saving a Document

What if I don't know the Client Name or Matter Name details?

1. Click into the **Client Name** or **Matter Name** box, then click the **Lookup** button on the right:

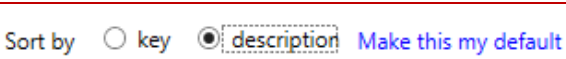


The following window appears:

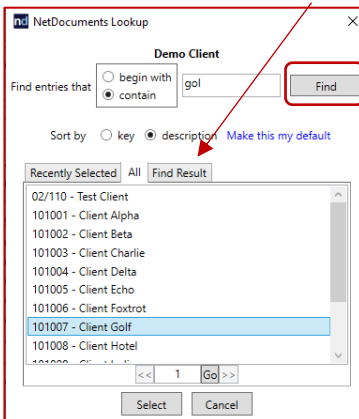


In the **Search** box, type a word or phrase you know is in the Client Name or Matter Name:

2. Click the **contain** radio button to search the entire Client or Matter name.
3. In the **Sort by** section, click **key** to sort the results by the workspace number, or **description** to sort by workspace name:




4. Click the **Find** button. Matching workspaces are displayed underneath the **Find Result** tab:



Double-click the workspace you wish to add or click it once then click the **Select** button (bottom of the Lookup dialog box). The workspace number is now entered in the relevant Client Name or Matter Name box.

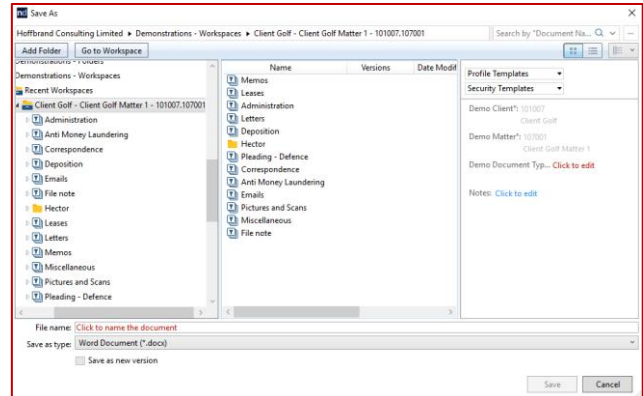
How can I add a workspace to my Favorite Workspaces?

1. In the relevant cabinet, open the workspace and click  to the left of the client name.



### Enter document details

In the right-hand column of the **Save As** dialog box, enter further document information into the **profile fields** in the right-hand column:



The profile fields are colour coded:

- Green** – required field that is complete.
- Red** – required field that is not complete.
- Blue** – optional field or pre-completed field.

1. **File name** – enter a document name (up to 1,000 characters). You cannot use \ / : \* ? " < > | in the document name.
2. **Save as type** – if required, click the drop-down arrow to select a different document type to save the document as, for example PDF.
3. **Client Name, Matter Name and Practice Area** – these fields should already be completed using data from the workspace chosen in Steps 1, 2 and 3 above. The **Client Name, Matter Name** and numbers are displayed together with the **Practice Area**.

**Tip** – if you are looking up a Matter for a specific client, you can click the **All** tab to view all the matters for the selected client.

Searching will ignore upper- or lower-case characters.

4. Select the **Document Type** from the centre column.
5. **Notes** – click to enter further information about the document (up to 60,000 characters), for example from where the document originally came.

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### Save the document

1. Click the **Save** button (bottom-right). The document is saved to the selected workspace.
2. The document is allocated the next available unique 12-digit reference number, which is shown with the document name and version number 1 in the Title bar at the top of the document.

Tip - to save changes to the document under the same version number, click the Save Button in the Quick Access Toolbar or press **File > Save**.

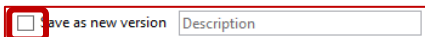


### Saving a copy

1. Open the document you wish to make a copy of and then select **Save As** from the Quick Access Toolbar or **File > Save As**.



2. In the **Save As** dialog box, ndOffice assumes you wish to save a new version of the document. Click the **Save as new version** checkbox to deselect it and remove the tick:



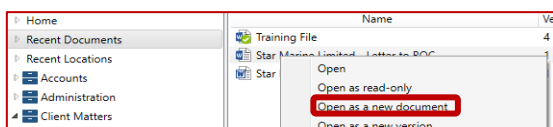
3. Select a location for the copy of the document, then enter the document name and other details as described above in the **Creating a Document using ndOffice** paragraph.
4. Click the **Save** button. The copy of the document is saved and then opened on screen, and the original is closed.

### Creating a copy of a document from the Open dialog box

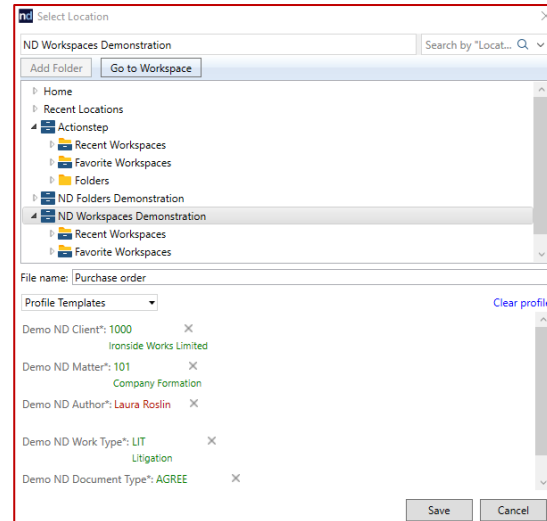
1. Click the **Open** button in the Quick Access Toolbar or press **File > Open** to view the **Open** dialog box.



2. Navigate to, or search for the document for which you wish to create a copy.
3. Right-click the on the document name and select **Open as a new document**:



4. The **Select Location** window is displayed:




By default, the location for your new document is the same as the original document from where you are copying. If required, select a new location for your copy.

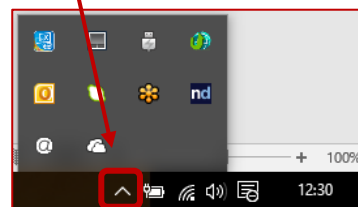
5. The Profile fields are automatically populated with the Client Name, Matter Name, Practice Area and Document Type details (taken from the workspace details). Complete any other profile fields as required.
6. Ensure all the fields are green and click the **Save** button. The new document is created and opened on screen for editing.

### Using the ndOffice Activity Centre to create new document/copies

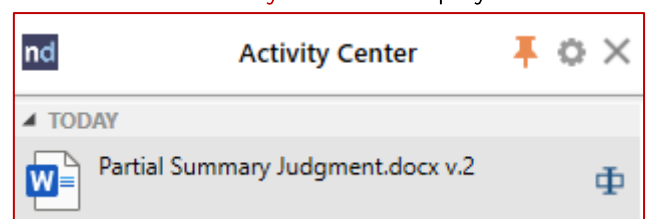
You can access up to 100 of your Recent Documents from the **ndOffice Activity Centre**.

From here you can create new copies and/or versions of these documents.

1. Click the **Activity Centre** icon  on the right-hand side of the taskbar, near the computer clock.
2. If you cannot see the icon on the taskbar, click the **up arrow** as shown below to view further icons:

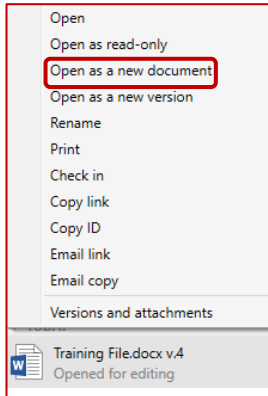


3. The **ndOffice Activity Centre** is displayed:



## Creating and Saving a Document

- To create a copy of a document, right-click it and select **Open as a new document** from the menu:

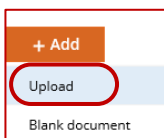


- The **Select Location** window for the new document is displayed. Select a location for the new document, then complete any other required fields.
- Click **Save**. The new copy of the document is created and opened on screen for editing.

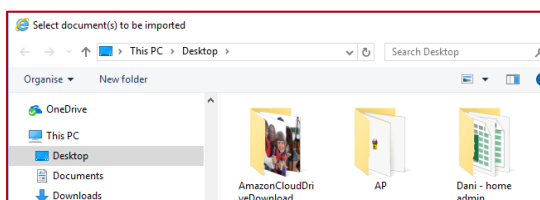
### Importing using ndWeb

#### Importing using the Upload button

- In ndWeb, click the **+ Add** button at the top of the screen (to the right of the Search box), then click **Upload** on the menu:



- The **Select document/file(s) to be imported** dialog box is displayed:

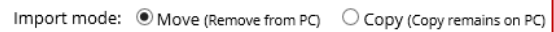


- Find the document(s) locally saved on your computer and select it.
  - Click **Open**.
  - The Upload Documents form is displayed; with the document/s you have selected for import listed at the top:
- 
- To remove a document, click the blue Remove link to the right of the name.
  - To import additional documents, click the blue Select more documents link at the bottom of the list.

- Select a location to which the document/s is to be saved.
- For more information on how to do this, please see What if I don't know the Client Name or Matter Name details? above.

Note – you can also add workspaces as described above.

- Select the Import Mode:



Move - saves the files in NetDocuments and deletes the originals from the PC.

Copy - saves the files in NetDocuments and leaves the originals on the PC.

- Click OK.
- If further information is required, the Edit Profile/Tags screen is displayed:

**Edit Profile/Tags**

\* Indicates that an entry is required. # Indicates an entry that affects security.

[Clear Profile](#) [Restore original values](#)

ID **4146-3582-1085**

Document name \*

Client \*

Matter \* #

Author \*

Document Type \*

Notes

[Save As Template](#) [Validate](#)

- Complete any missing information, for example, Author.
- Select whether to apply the information you have entered to all documents you are importing, or just this one:

Apply these profile values to this document and the other documents in the import list.

Apply these profile values to this document only.

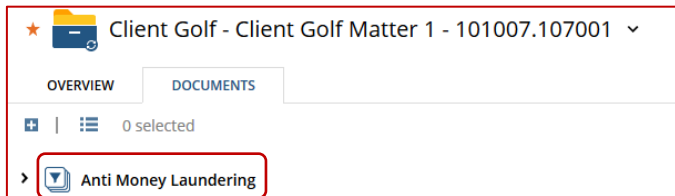
Note – if you select the first option to apply to all documents, the documents will not all be given the same name. The document name is taken from the document/s you are importing.

- Click **Continue**. The document/s are imported and displayed in a list.

## Creating and Saving a Document

### Importing using drag and drop

1. In ndWeb, click on the workspace you wish to import the document/s to, then click on the **name** of the **filter/folder** into which you wish to import:

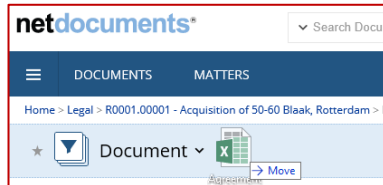


2. Click the **Restore Down** button at the top-right of the ndWeb window.

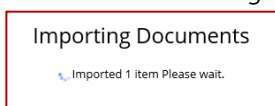


This allows you to access other windows while still being able to see the ndWeb window.

3. Minimise any other windows until you can see just two - the location your documents are in and the ndWeb window.
4. Click and drag the document/s into the ndWeb window, on top of the **filter/folder name** at the top of the screen.
5. A message similar to the following message will flash quickly up on screen while the document is being imported:



6. The following information will appear while the documents are being imported:



7. You will be required to complete the profile information:
8. When completed, press **Continue** and the document is then imported.

Note - you may need to refresh the view before you see it in the chosen location.

### Uploading to Websites

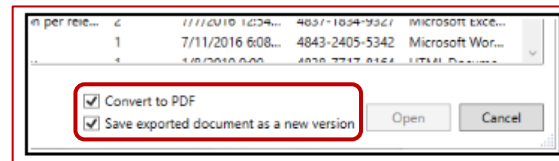
This process requires the use of Microsoft Edge or Google Chrome and ndClick.

If you need to upload a document that is saved in NetDocuments to a website, you do not need to and should not save the document locally to your PC first.

If the web site is connected to NetDocuments, use the upload functionality in the web site. When the web site asks to upload the document and you click Browse or whatever the website requires to upload, the **ND Open** dialog box is displayed, allowing you to

search for or navigate to the document directly from NetDocuments.

Note – at the bottom of the dialog box you can select the **Convert to PDF** check-box to upload your document in PDF format. If you select this option, you may also wish to tick the **Save exported document as a new version** check-box, which creates a new version of your document:



Once you have selected the required document and other options, click **Open** to upload the document to the website.

### Offline Mode

In ndOffice your connection to NetDocuments is monitored.

Depending on your settings (set by your administrator), you will be alerted to the fact you are offline and that edits will be saved to NetDocuments when the connection is restored.

### Help and Support

If there is a support agreement with Hoffbrand Consulting Limited, please send an email to [support@hoffbrand.consulting](mailto:support@hoffbrand.consulting) detailing your issue or call us on +44 (0)7770 608770 or [Click to talk on Teams](#)

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