

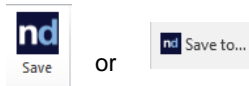
FILING E-MAILS USING NDOFFICE

Filing e-mails using the ND Save button

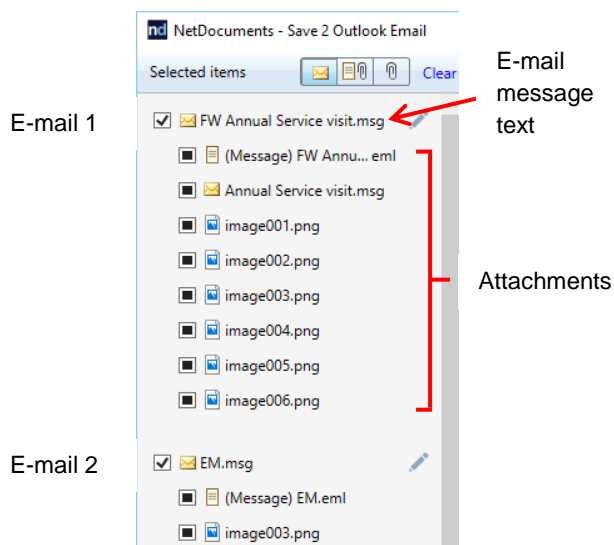
1. Select the e-mail/s to be filed.

Tip - To file multiple e-mails, select them by holding down the **Shift** or **Ctrl** keys on the keyboard.

2. Click the **ND Save** button on the ribbon:



3. The **NetDocuments Save** window is displayed. Each e-mail you have selected to file is listed on the left-hand side of the window:



You can use the scroll bar on the right of this left-hand panel to scroll down and view further e-mails.

4. On the toolbar at the top-left of the window, select whether you want to file the **e-mail message only**, the **e-mail and attachments**, or **just the attachments**:



Settings apply to all the e-mails you have selected to file.

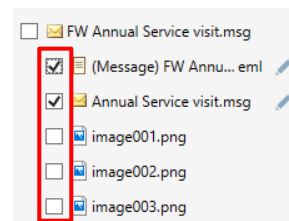
- > To file **just the e-mail message**, click the **Select Outlook msg files** button:

- > To file **both the attachments and the e-mail message**, click the **Select text and attachments** button: The e-mail and attachments are saved separately.

- > To file **just the attachments** but not the e-mail message, click the **Select attachments** button:

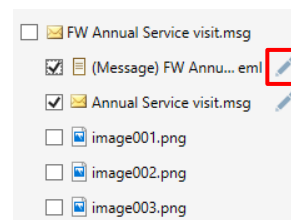
- > You can **customise** what you file from each e-mail, e.g. if there are several attachments to an e-mail but you only wish to file certain ones, or you wish to file attachments in just one of the e-mails you are filing, not all.

Click the **check-box** to the left of any message or an attachment to either select or deselect it for filing:



You can use the scroll bar on the right of this left-hand panel to scroll down and view further e-mails.

5. To change any e-mail subject, msg file name or the attachment name, click the **Pencil** icon to the right of the relevant item:



Type the new name, then press **Enter** on the keyboard.

6. Select a **location** to file the e-mail/s to, in the centre section of the window:

Suggestions on where to file items to, based on previous filing behaviour

Quickly access locations you have recently filed to

Cabinets

- 6.1. Click the **arrow** to the left of any workspace or folder to expand it. You can select from **Suggested** or **Recent Locations** or **Cabinets** you have access to.
- 6.2. Under the relevant workspace, click the **Email** folder (or another folder if preferred).
- 6.3. The selected filing location is then shown in the right-hand section of the window:

NB – you can select more than one location to file to. All selected locations will be shown in the right-hand section of the window.

- 6.4. If you select either the **top-level folder** (i.e. the Matter Workspace name), or the **Email** folder within a workspace to file to, the e-mail will automatically be assigned a **Document Type** of **Email**.

Tip - if you select a different folder to file to, e.g. **Correspondence**, the e-mail will be assigned the relevant document type for that folder.

To change this, in the right-hand column of the window you will see the **Document Type** field with the current document type shown in green:

Click the **X** in the right-hand corner of this field to remove the existing document type, then type the word **Email** and press **Enter** on the keyboard.

7. Click the **Save and Close** button at the bottom-right of the window.

The e-mail/s will immediately be queued for background filing and the dialog box will close, leaving you able to continue working.

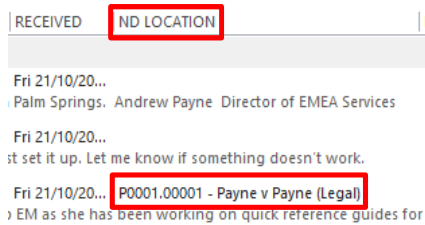
After filing, a copy of the e-mail/s remains in Outlook.

Tip – if you want to file the selected e-mails but keep the window open to file further e-mails afterwards, click the **Save** button instead of the **Save and Close** button.

The e-mails will be queued for filing and the checkboxes will be cleared.

THE ND LOCATION FIELD

Once an e-mail has been filed using either of the above methods, the filing location is displayed in the **ND Location** column in Outlook:



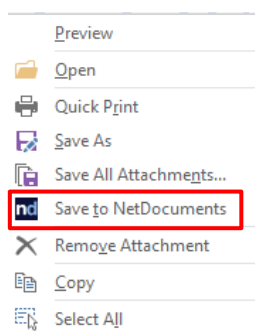
Number and name of the workspace the e-mail is filed to

SAVING AN E-MAIL ATTACHMENT AS A NEW VERSION OF AN EXISTING DOCUMENT

It is possible to save an e-mail attachment as a new version of an existing NetDocuments document.

E.g. if you send a document to a client via e-mail, which they then amend and send back to you, you can save those amendments as a new version of your original document.

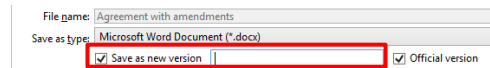
1. Open or preview the e-mail that contains the attachment you wish to save.
2. Right-click the attachment and select **Save to NetDocuments**:



3. The **Save As** window is displayed. Select the document you wish to save the attachment as a new version of.

NB - if the document is not showing on the screen you will have to navigate to it or search for it.

4. At the bottom of the **Save As** window, the option to **Save as new version** is already ticked:



Enter any comments about the new version alongside the check-box if required, e.g. 'amendments as requested by client'.

5. Click the **Save** button.