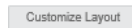


YOUR HOME PAGE

Your Home Page is **personal to you**. You can customise it to display the workspaces, folders, searches and documents you need.

Customising the layout of the Home Page

1. Click the **Customize Layout** button towards the top-right of the Home Page:



2. The **Customize Home Layout** window is displayed:

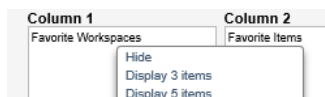


The Home Page is split into **3 columns**, numbered **Column 1, 2 and 3**. Under each column number, you will see which **sections** are displayed in that column.

3. To **hide** a section so it no longer appears on the home page, or **change the number of items** a section displays:
 - 3.1. Move the mouse pointer over the **section name** until you see a **drop-down arrow**:



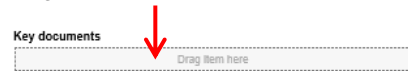
- 3.2. Click the arrow to view a menu:



- 3.3. Click **Hide** on the menu to hide the section from the Home Page view.
 - 3.4. Click **Display x items** to specify how many items that section should display on the home page, e.g. if you only wish to display up to 3 workspaces in **Favourite Workspaces**, click **Display 3 items**.

4. To **move a section**, click and drag it over to the required column.
5. To **create a new section**:
 - 5.1. Click **Create a Personal Section** towards the top-right of the window:
- 5.2. Type a name for the new section, then click **OK**.

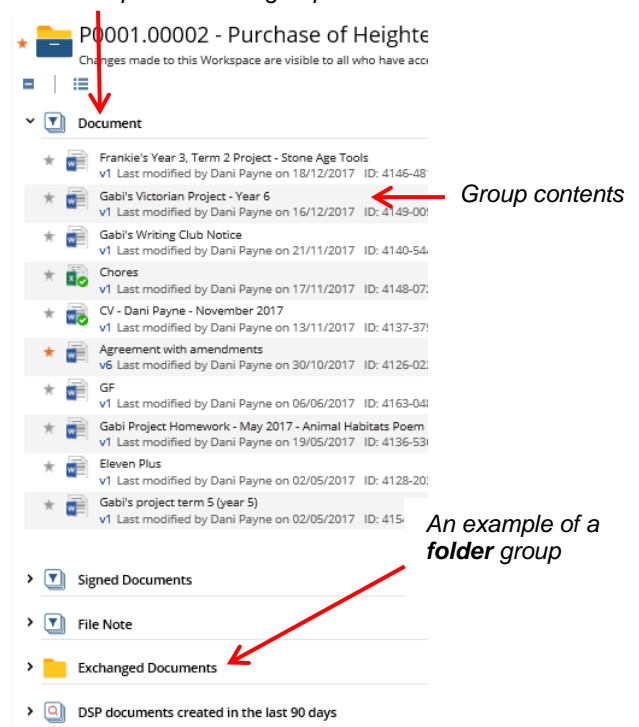
- 5.3. The new section will be displayed on the Home Page. To add items to it, click and drag them to the section:



SUMMARY VIEW

In Summary View, documents are displayed in **groups** according to which **filter**, **folder** or **saved search** they belong in, e.g. Correspondence, Documents etc.:

An example of a **filter** group



An example of a **saved search** group

ndWeb - Customising to suit your needs

Displaying and hiding the contents of a group (a filter, folder or saved search)

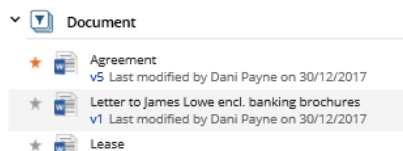
To **hide** the contents of **all groups** in Summary View, click the **Collapse All** icon under the workspace name at the top of the screen:



When the groups are collapsed, the button

becomes the **Expand All** icon . Click it to **show** the contents of **all groups** in Summary View.

1. If you click **Expanded**, all groups within the workspace will display their contents as shown below:



2. If you click **Collapsed**, the contents of all groups will be hidden so that you can only see the headings:



3. To expand and view **one particular group** without expanding all groups, click the **arrow** to the left of the group heading:



Customising individual groups (filters, folders and saved searches)

You can edit individual **filters**, **folders** and **saved searches** to change how many documents are displayed at one time. You can also decide which file information you wish to see under the name of each document or e-mail in the group.

E.g. below is a document that displays extra file information under its name, i.e. **Modified by**, **Modified Date**:

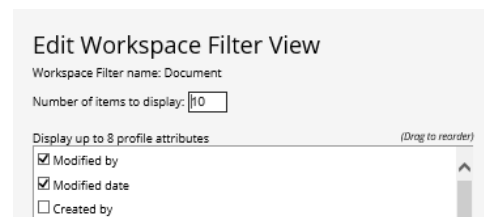


How do I edit a filter, folder or saved search?

Each filter, folder or saved search displays a blue **Edit** link to the far-right of the heading:

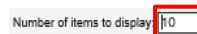


Click the blue **Edit** link to view the **Edit Workspace Filter View** window for that particular filter, folder or saved search:



All available information fields are listed in this window. Fields that are already selected to display under the document/e-mail name are shown with a tick in the check-box.

1. To change the number of documents and e-mails displayed on each page of the filter, folder or saved search, enter the required number in the **Number of items to display** box:

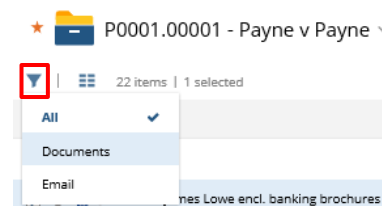


NB – you can have up to **100 files** displayed on each page.

2. To add further fields of information to be displayed under each document or e-mail name:
 - 2.1. Click the check-box to the left of any field you wish to add. A tick is added to the box. **NB** - you can have up to **8 fields** in total.
 - 2.2. Click the check-box to the left of any field you wish to remove. The tick is removed from the box.
 - 2.3. To reorder a field, **click and drag** it to its new location in the list.
3. When you have finished making changes, click **Save Changes** at the bottom-right.

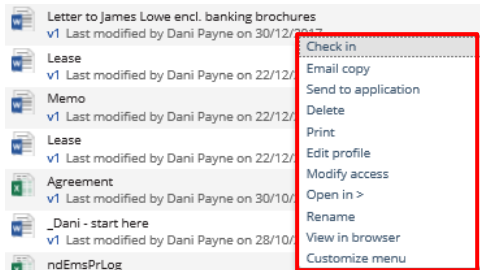
LIST VIEW

To filter the view to show **only e-mails** or **only documents**, click the small blue **Filter** button under the workspace name and select the required option from the drop-down menu:



THE DOCUMENT/E-MAIL RIGHT-CLICK MENU

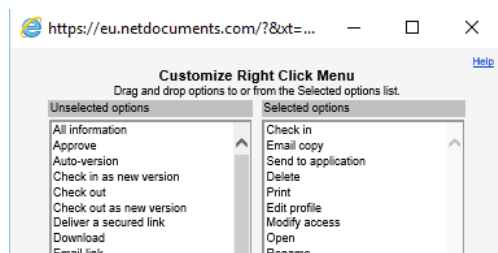
In any view, you can **right-click** a document or an e-mail and view a **menu of actions** that you can run on the selected document:



This menu is **personal to you**. You can customise it to **add** menu items you regularly use, **remove** items you never use and **move** the position of items on the menu.

How do I customise the right-click menu?

1. At the bottom of the right-click menu, click **Customize menu**. The **Customize Right Click Menu** window is displayed:



In the **left-hand column** is a list of actions that **are not** showing on the menu.

In the **right-hand column** is the list of actions that **are** showing on the menu.

- 1.1. To **add a menu item**, find it in the column on the left, then click and drag it over to the column on the right.

NB – you can have up to **20 items** on the right-click menu.

- 1.2. To **remove a menu item**, click and drag it from the right-hand column over to the left-hand column.
- 1.3. To **move a menu item** to a different place on the menu, click and drag it to the required location.

2. Click **OK** to save changes.