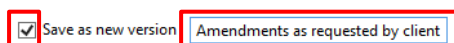


## SAVING A NEW VERSION USING NDOFFICE

1. Open the document you wish to save a new version of.
2. Click **File > Save As** to view the ndOffice **Save As** dialog box.
3. The version **location, name** and **details** are completed (using data from the current version) and cannot be amended.
4. Ensure the **Save as new version** check box is ticked. In the box to the right, enter a **description** about the new version if required:



5. When saving a new version ndOffice assumes it will be the **official version** (each document has one official version, which is the one that opens by default, and the **only** version indexed for searching)

If you do **not want** the version you are saving to be the official one, click the **Official version** check-box to **deselect** it:



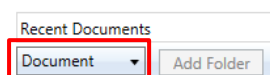
**Note** – you can mark it as official again at a later stage if required.

6. Click the **Save** button at the bottom-right. The document is then saved under the next incremental version number.

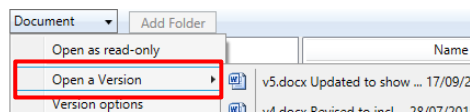
**NB** – sub-versions are not available.

## OPENING AN OLDER VERSION IN NDOFFICE

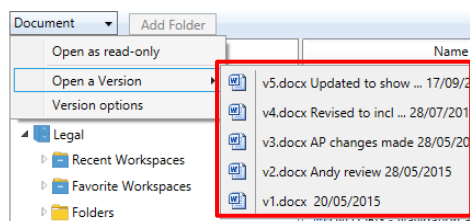
1. Click **File > Open** in the normal way. Then find the required document (search for it or use the folder tree to navigate to it).
2. Click once on the document to select it, then click the **Document** button at the top-left of the dialog box:



3. Under the **Document** button, click on **Open a Version**:



A list of the document's versions is shown on the right (descriptions are shown to the right of the version number):



4. Click once on the required version. **NB** – old versions are **not** read only.

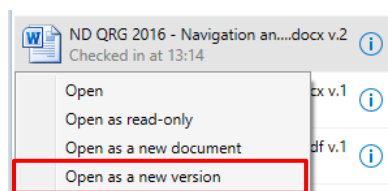
**TIP** – you can also **right-click** a document in the Open dialog box and select **Open a Version** from the menu.

## SAVING A NEW VERSION USING THE NDOFFICE ACTIVITY CENTRE

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



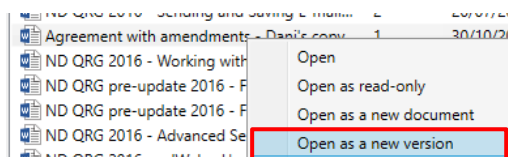
2. In the **ndOffice Activity Centre** window, right-click the required document and select **Open as a new version**:



The new version is created and opened on screen for editing.

## CREATING A NEW VERSION FROM THE FILE, OPEN DIALOG BOX IN WORD, EXCEL ETC.

1. Click **File > Open** to view the **Open** dialog box.
2. Navigate to, or search for the document you wish to create a new version of.
3. Right-click the document and select **Open as a new version**:

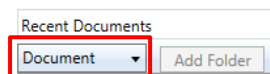


## CHANGING THE OFFICIAL VERSION OF A DOCUMENT IN NDOFFICE

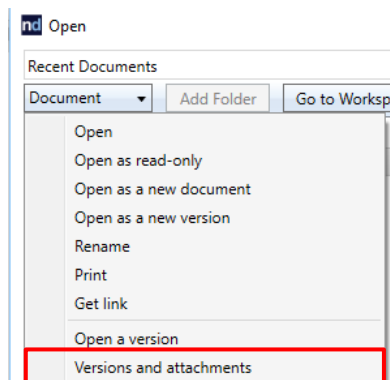
Each document has one **official version**. This is the version that opens by default when you open a document. It is also the **only** version which is indexed for searching (i.e. the contents can be searched for).

It is possible to set any version of a document as the official version:

1. Click **File > Open** in ndOffice and find the relevant document.
2. Click once on the document to select it, then click the **Document** button at the top-left of the dialog box:

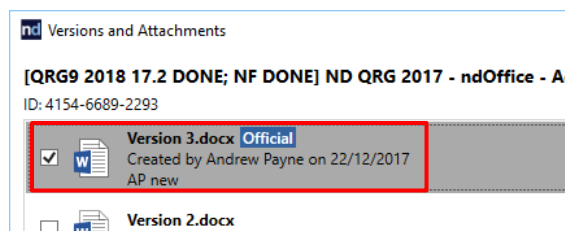


3. Under the Document button, click **Versions and attachments**:

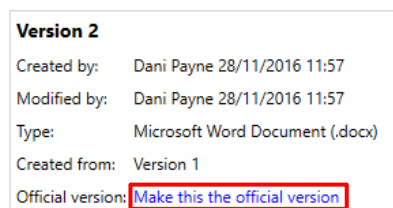


**TIP** – you can also **right-click** a document and select **Versions and attachments**.

4. The **Versions and attachments** dialog box is displayed with the official version ticked:



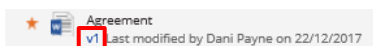
- 4.1. Click the check-box to the left of the Official version to **deselect** it.
- 4.2. Then click the check-box to the left of the version you wish to make official.
- 4.3. Click the blue link on the right **Make this the official version**:



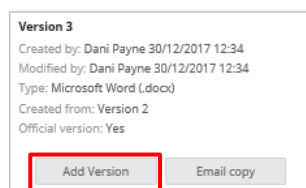
- 4.4. Click **Cancel** at the bottom-right of the **Version options**.
- 4.5. Click **Cancel** at the bottom-right of the **Open** dialog box.

## SAVING A NEW VERSION USING NDWEB

1. Find the document you wish to save a new version of.
2. Click the **version number** underneath the document name (or to the right if in List View):

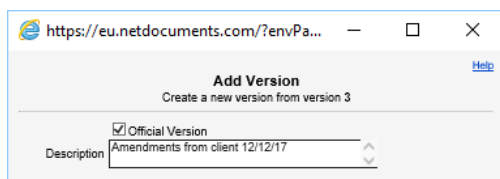


3. The **Versions and attachments** window opens. All versions of the document are shown on the left. Click the **Add Version** button on the **right** to create a new version:



## Working with Versions

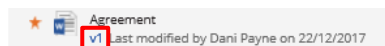
4. The **Add Version** window is displayed:



- 4.1. If you **do not** want the new version to be the official version, **deselect** the **Official Version** check-box.
- 4.2. Enter a **Description** if required.
5. Click **OK**. The new version is created and listed in the **Versions** window.
6. Click **Close** to return to the previous view.

## OPENING AN OLDER VERSION USING NDWEB

1. Find the required document.
2. Click the **version number** underneath the document name (or to the right if in List View):



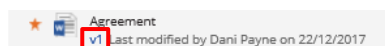
3. The **Versions and attachments** window opens. Click on the **name** of the version you wish to open:



**TIP** – you can also tick the check-box to the left of the version, then click the **View in browser** button on the right to **view** rather than open the version.

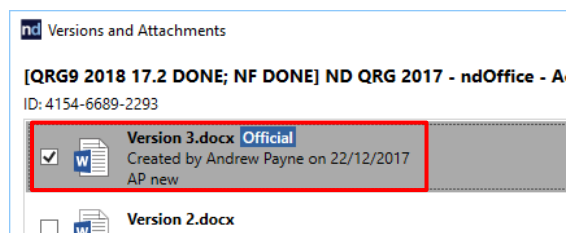
## CHANGING THE OFFICIAL VERSION OF A DOCUMENT IN NDWEB

1. Click the **version number** underneath the document name (or to the right if in List View):

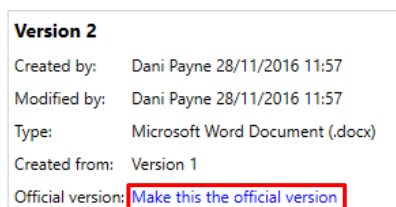


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2. The **Versions and attachments** dialog box is displayed with the official version ticked:



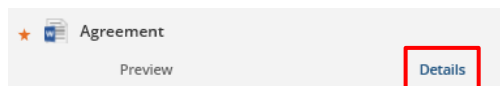
- 2.1. Click the check-box to the left of the Official version to **deselect** it.
- 2.2. Then click the check-box to the left of the version you wish to make official.
- 2.3. Click the blue link on the right **Make this the official version**:



- 2.4. Click **Cancel** at the bottom-right of the **Version options**.
- 2.5. Click **Cancel** at the bottom-right of the **Open** dialog box.

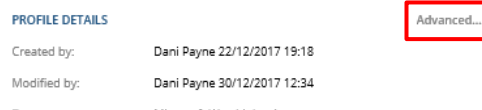
## IMPORTING A NEW VERSION

1. In **ndWeb**, ensure you are in **List View**. Click the **Switch to List View** icon if necessary
2. Tick the **check-box** to the left of the document you wish to import a new version to.
3. On the right-hand side of the screen, ensure you are looking at the document **Details** screen (not the **Preview** of the document). Click **Details** at the top of the right-hand panel if necessary:



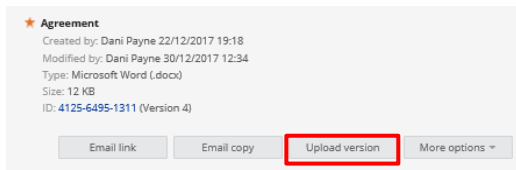
**Note** – if you cannot see the right-hand viewing panel, click the icon to display it.

4. Click the **Advanced** button on the Details panel:



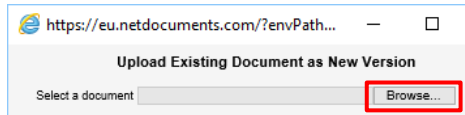
# Working with Versions

5. Click the **Upload version** button:



6. The **Upload Existing Document as New Version** window is displayed:

6.1. Click the **Browse** button:



6.2. Find the document you wish to import as a new version, then select it and click **Open** (or double-click it).

6.3. If you wish the imported version to be the official version, tick the **Official version** check-box.

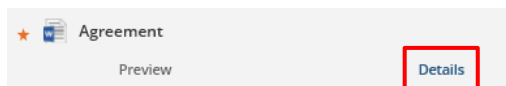
6.4. Enter a **Description** if required.


6.5. Click **OK**. The locally saved document is imported as a new version of the document you selected in ndWeb.

## ENABLING AUTO-VERSIONING

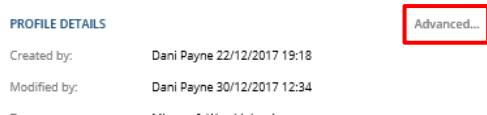
If auto-versioning is enabled, every time someone makes changes to a document and checks it back in, a new version is created.

1. In **ndWeb**, ensure you are in **List View**. Click the **Switch to List View** icon if necessary.
2. Tick the **check-box** to the left of the document you wish to enable auto-versioning on.
3. On the right-hand side of the screen, ensure you are looking at the document **Details** screen (not the **Preview** of the document). Click **Details** at the top of the right-hand panel if necessary:



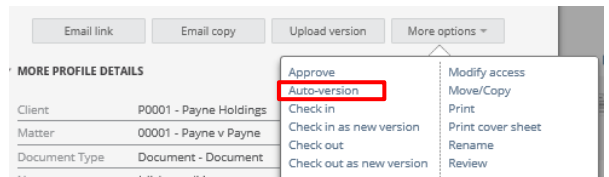
**Note** – if you cannot see the right-hand viewing panel, click the  icon to display it.

4. Click the **Advanced** button on the Details panel:

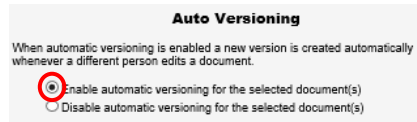


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5. Click the **More options** button on the right and click **Auto-version** on the menu:



6. Ensure the **Enable automatic versioning for the selected document(s)** radio button is selected:



7. Click **OK**. A confirmation message is displayed – click **OK** again to close it.

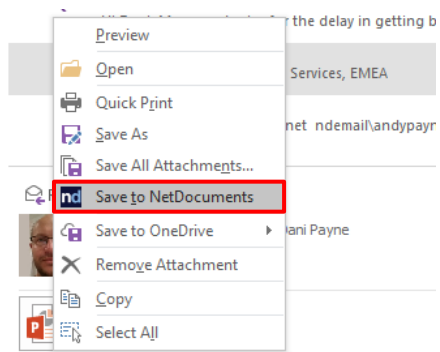
**TIP** – to disable auto-versioning, repeat steps Error! Reference source not found. to 1 above. In the **Auto Versioning** window click the **Disable automatic versioning for the selected document(s)**, then click **OK**.

## SAVING A NEW VERSION FROM AN E-MAIL ATTACHMENT

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**:

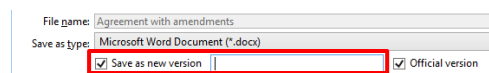


## Working with Versions

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:

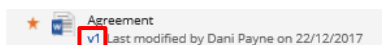


Enter any comments about the new version alongside the check-box if required, e.g. 'amendments as requested by client'.

5. Click the **Save** button.

## FURTHER VERSION OPTIONS IN NDWEB

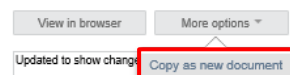
For the following options you will need to find the document in ndWeb and click the **version number** underneath the document name (or to the right if in List View):



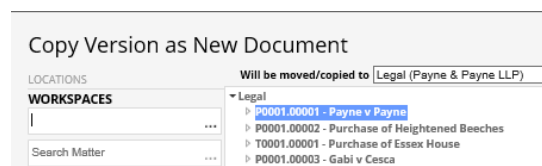
This will open the **Versions** window.

### Copying a version as a new document

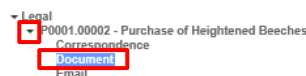
1. In the **Versions** window, tick the check-box to the left of the version you wish to copy as a new document.
2. On the right, click the **More Options** button and select **Copy as new document**:



3. The **Copy Version as New Document** window is displayed:

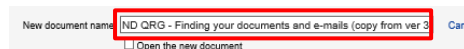


- 3.1. Select a **location** for the new document. **Recent Matters** are listed on the right - click the **arrow** to the left of a workspace to expand it, then click a filter/folder:



On the left you can also click **Favorite Matters**, or search for a workspace using the **Search Client/Matter** boxes.

- 3.2. Click the **Copy** button (bottom-right).
- 3.3. At the bottom of the window you will now see a **New document name** box:

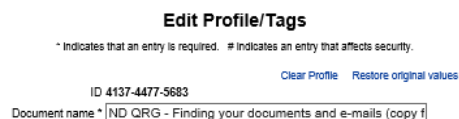


- 3.3.1. Type a new name if required.

- 3.3.2. To open the copy after creating, click the **Open the new document** check box.

- 3.3.3. Click the **OK** button (bottom-right).

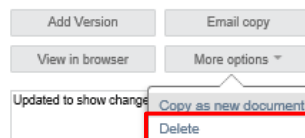
4. If the **Edit Profile/Tags** window displays, ensure all **required** fields are completed, then click the **Continue** button:



5. The copy of the version is saved, and will open if you requested it.

### Deleting a version of a document

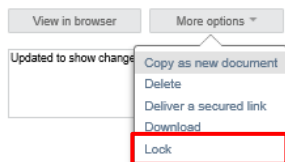
1. In the **Versions** window, tick the check-box next to the version to be deleted.
2. On the right, click the **More Options** button and select **Delete**:



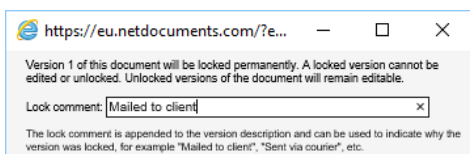
3. At the prompt **Are you sure you wish to delete this version?** click **OK**.

## Locking a version of a document

1. In the **Versions** window, tick the check-box to the left of the version you wish to lock.
2. On the right, click the **More Options** button and select **Lock**:



3. A warning message is displayed:



**NB** – once a version is locked it **cannot be edited or unlocked**.

- 3.1. Enter a **Lock comment** in the box if required. The comment will be added to the description of the version.
- 3.2. Click the **Lock** button at the bottom.

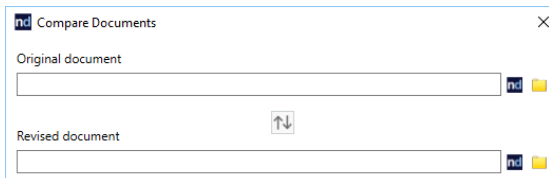
## COMPARING VERSIONS

It is possible to compare two separate documents, or two versions of the same document (either stored in NetDocuments or locally).


1. In Microsoft Word, click the **Review** tab above the ribbon, then click the **NetDocuments Compare** button:




2. The **Compare Documents** window is displayed:




- 2.1. In the **Original document** field, **browse** for the first document you wish to compare:

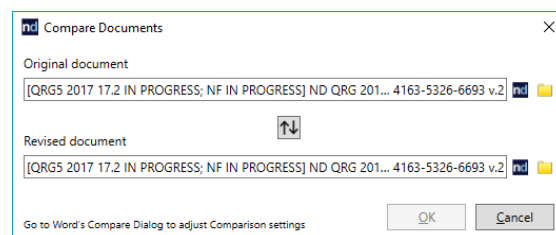
Click the **NetDocuments** icon  to browse for a document stored in NetDocuments.

Click the **yellow folder** icon  to browse for a document stored locally on your computer.

- 2.2. Repeat the above step in the **Revised document** field, to browse for the document you wish to compare the original to.

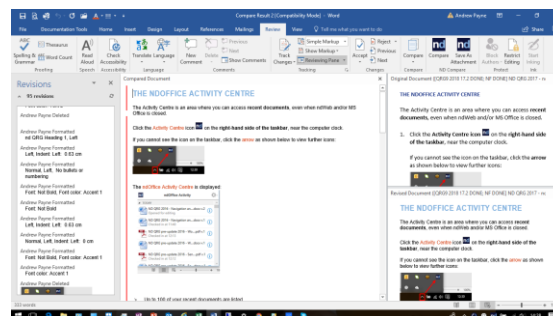
**NB** – when selecting from NetDocuments, you may need to select an **older version** of the document to compare. See above for information on selecting earlier versions.

- 2.3. Click the **swap** arrows in the middle to swap the original and revised documents round if necessary .
- 2.4. The document information is entered into the fields:



Click **OK** to run the comparison.

3. The comparison is opened in a new Word document:



- > On the **left** of the screen is a panel showing the revisions made.
  - > In the **centre** of the screen is the comparison document.
  - > On the **right** of the screen, the top half shows the original document, and the bottom half shows the revised document.
  - > You can use Microsoft Word Compare tools to work with the comparison document.
4. If required, you can save the comparison document, either as a new document, or as a new version of either the original or revised documents.