

Finding your documents and e-mails

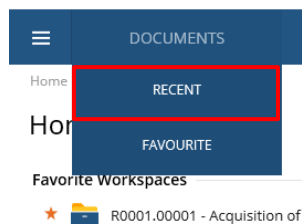
INTRODUCTION

You can find your files in different ways, either from your **NetDocuments browser (ndWeb)** or from an **application** e.g. Word.

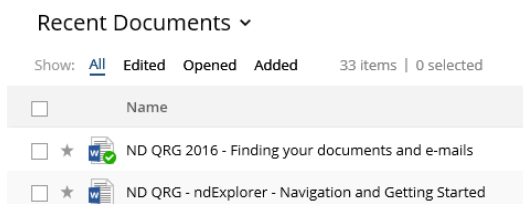
FINDING FILES IN NDWEB

Finding your recent documents/e-mails

1. Towards the top-left of the screen, click on **Documents**, then select **Recent**:

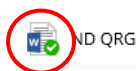


2. A list of your recently **created**, **viewed** and **edited** documents and e-mails is displayed:



3. Click once on the **name** of a file to open it.

NOTE - If a file is already **checked out**, i.e. open, you will see a **tick in a circle** on the document icon (green circle if the file was checked out by you, black circle if by someone else):



4. To view only files you have recently **edited**, click the small blue **Edited** link just below the heading **Recent Documents**:



Alternatively, click the blue **Opened** or **Added** links to view only files you have **opened** or **created**.

Running a simple search

1. Click the drop-down arrow on the left of the **Search** box (top of the page) to view a list of available **cabinets** to search in:



2. Click the cabinet you wish to search in, or click **All Cabinets** to search them all.

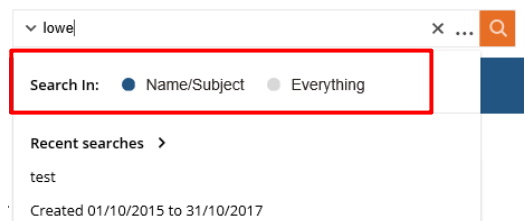
3. Click into the **Search** box:

- 3.1. Type part or all of a document **name**, a word or phrase in the **contents**, or the entire **document number**:



TIP – type phrases inside speech marks, e.g. “143 High St”

- 3.2. Select which **fields** to search in. In the drop-down list under the Search box, click **Everything** to search in all fields, or **Name/Subject** to search these fields only:



NB – if you run the search without selecting **Everything** or **Name/Subject** (by pressing **Enter** on the keyboard or clicking the **magnifying glass** icon), the search defaults to the option you selected last time you ran a search.

- 3.3. The drop-down list under the **Search** box also displays a list of **Recent Searches/Saved Searches**. Click once to run one of these searches again.

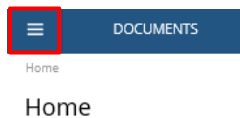
4. Search results are listed on the screen below. Click once on a file name to open.

Finding your documents and e-mails

Navigating to a workspace

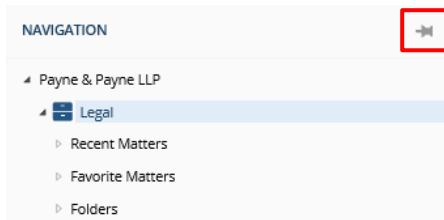
You can find files by browsing the **workspace** they are in. To locate a workspace, first display the **Navigation Pane**.

1. Click the **Navigation Icon** at the top-left of the screen, to the left of the word **Documents**:



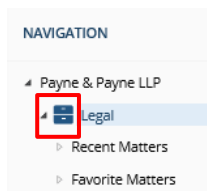
The **Navigation Pane** is shown on the left of the screen, displaying a list of **Cabinets**.

NB - to keep the pane on screen, click the **Push Pin** icon at the top-right:

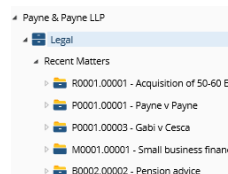


2. Locate the relevant **Cabinet** in the list, e.g. **Legal** will often contain client/matter workspaces:

- 2.1. Click the **drop-down arrow** to the left of the required cabinet to view **Recent** and **Favorite Matters** within that cabinet:



3. Click the drop-down arrow to the left of either **Recent** or **Favourite Matters** to view a list of workspaces:

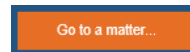


4. Click once on the required workspace to open it and view its contents.

Searching for a workspace

If the workspace you need is not one that you have added to Favorite Workspaces, or one that you have accessed recently, you will need to **search** for it:

1. Click the **Go to a matter...** button at the top-right of the screen:



2. Two search fields are displayed where the button previously was. The left-hand search field is where you search for a **Client workspace**, the right-hand search field is where you search for a **Matter workspace**:

- 2.1. Click into the relevant search field for either **Client** or **Matter**. **Note**: you do not need to enter the client details first when searching for a matter workspace.

- 2.2. Type the **client** or **matter number**, or any part of the **client** or **matter name** into the search field. As you type, a list of suggested workspaces which match your search criteria are displayed:



NB – if you have searched for the wrong workspace, click the **X** to the right of the search criteria to remove it.

- 2.3. Click the required workspace from the list to view its contents.

TIP – when searching, you can also click the **Lookup** button to the right of a search field and run a detailed search for a workspace:



- 2.4. Any matter workspace you search for and click on is then added to the **Recent Matters** list.

Finding your documents and e-mails

Searching within a workspace

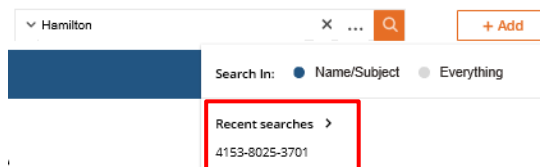
When viewing the contents of any workspace, you can search for a **word**, **phrase** or **document number** within that workspace:

1. Click into the **Search** field at the top of the screen (which may contain the name and number of the workspace you are viewing in light grey text) and type the word, phrase or document number you are looking for:



NB – any text showing in the Search box will clear when you click into the box.

2. As you type, a drop-down box is displayed listing recent searches. Click on any search to re-run it:



3. Press **Enter** on the keyboard or click the **orange magnifying glass** icon to run the search:



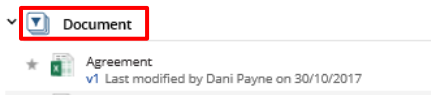
4. The search results are then listed on screen.

Navigating/browsing within a workspace

In a workspace (in *Summary* view), documents and e-mails are organised into **groups**. The groups are

Filters , **Folders**  and **Saved Searches** .

1. Each group displays its **icon** and **name** along the top:



2. Each group displays a certain number of documents/e-mails per page. The default number will differ between firms.

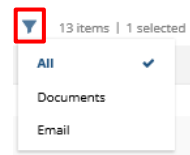
3. At the bottom-right of the group you can click the blue links **Previous** or **Next** to move between the pages of documents:



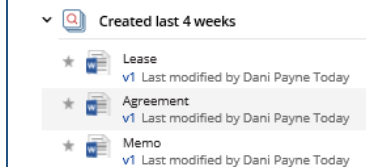
4. To view just one particular group on screen, click directly on the **Group name** to view the contents on a separate screen:



- 4.1. Click the **filter icon** under the group heading to show a drop-down menu. From here you can choose which type of documents within the selected group to display on screen, only **Documents**, only **Email** or **All**:

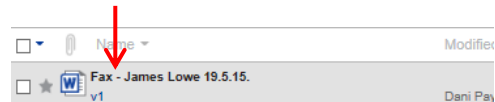


TIP – if there are any **Saved Searches** in the workspace, these can help you to quickly locate documents:

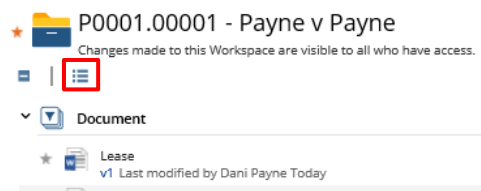


Viewing your documents/e-mails

1. To **open** a file, click once on its **name**:

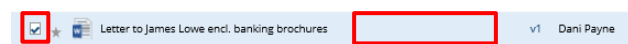


2. To **preview** a document, first ensure you are in **List View**. Click the **Switch to List View** button under the workspace name at the top-left:



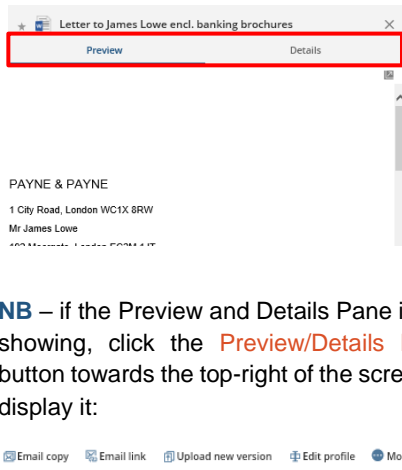
3. Select the required document, then use the **Preview and Details Pane** on the right:

- 3.1. To select it, either tick the **empty checkbox**, OR click once in the empty space **next** to the document name:



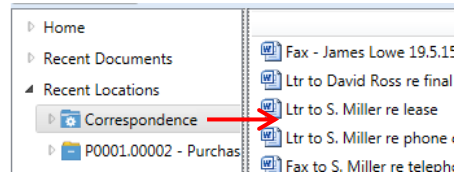
Finding your documents and e-mails

- The document is then shown in a **Preview and Details Pane** on the right. You can click **Details** at the top of this pane to view document information (profile details, document options etc.):



NB – if the Preview and Details Pane is not showing, click the **Preview/Details Pane** button towards the top-right of the screen to display it:

- Click once on a folder or filter in the workspace to view the contents on the right of the dialog box:



TIP – to view a list of *all* the documents in a workspace, first click once on the workspace on the left of the dialog box. Then click the **View the list of documents in the Workspace** button at the top-right of the dialog box:

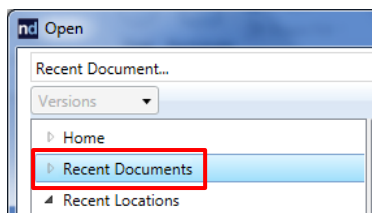


FINDING FILES IN NDOFFICE (WORD, EXCEL ETC.)

Click **File > Open** in the normal way. The **ND Open** dialog box is displayed. There are two ways to find your document: **navigate** to it or **search** for it:

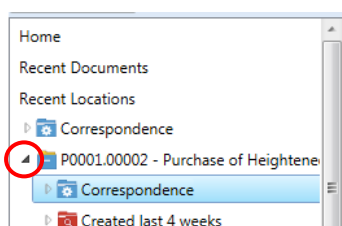
Navigating to your document

- Click **Recent Documents** in the folder tree on the left to view your recently opened and edited **documents** on the right:



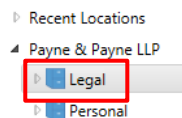
- Expand **Recent Locations** to view your recently accessed **workspaces** and **folders**:

- Click the **arrow** to the left of a workspace name to expand it:



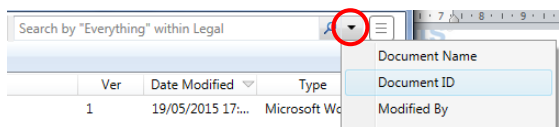
Searching for your document

- On the left-hand panel, select the **cabinet** to search in:

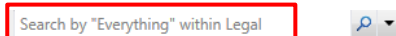


- Select which **fields** to search in, e.g. **Document ID** or **Document Name**.

To do this, click the drop-down arrow on the **Search** box (to the right of the magnifying glass) and click the required option in the list:



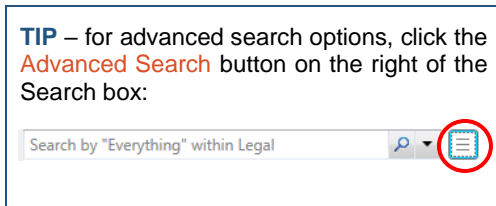
NB - if you select **Everything**, you will be searching in all fields including the content of the documents:



- Click into the **Search** box at the top of the dialog box. Any text currently in the box will clear when you click into it.
- Type what you are searching for, e.g. the **document number**, **part of the document name** etc. and press **Enter** on the keyboard, or click the **magnifying glass** icon to run the search.

Finding your documents and e-mails

- The results are listed in the dialog box below. Double click a document to open it.

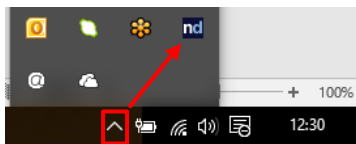


THE NDOFFICE ACTIVITY CENTRE

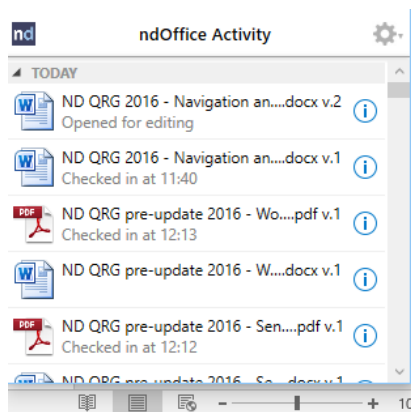
The **Activity Centre** is an area where you can access up to 100 of your **recent documents**, even when ndWeb and/or MS Office is closed.

- 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** as shown below to view further icons:



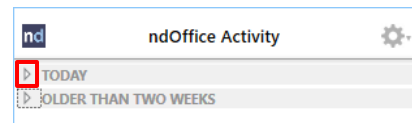
- The **ndOffice Activity Centre** is displayed:



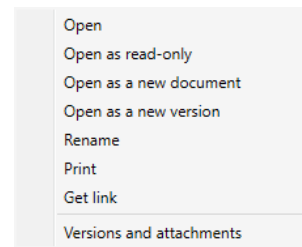
- Up to 100 of your recent documents are listed.
- If you have opened **multiple versions** of the same document, each separate version you have opened will shown in this list.

netdocuments®

- Documents are **grouped by date**. To expand a group, click the arrow to the left of the **group name** (click the arrow again to collapse the group):



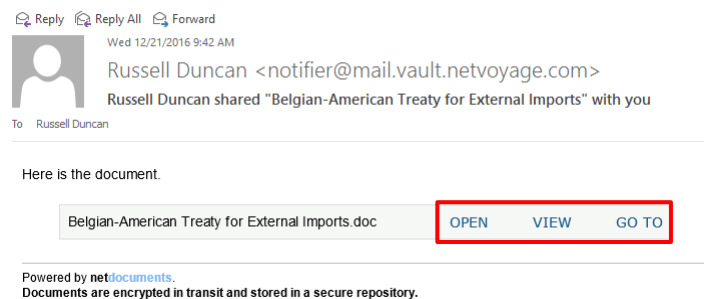
- Right-click** any document in the list to view a **shortcut menu**. Click an option on this menu to perform the required action on the selected document, e.g. **Open as a new document** or **version**, **Print** etc:



For more information on how the Activity Centre works, please see [The ndOffice Activity Centre QRG](#).

DOCUMENT LINKS

If someone sends you a link to a document via e-mail, you will see three options within the e-mail link section:



- Open** – click this to check out the document and view it within its application.
- View** – click this to preview the document in the browser.
- Go To** – click this to open ndWeb and display the selected document in a list view, like a search result. You will then be able to choose which action to perform on the document.