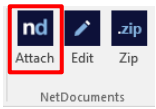
ndOffice - Sending and Saving E-mail Attachments

netdocuments®

ATTACHING A DOCUMENT TO AN E-MAIL

1. In a new e-mail message, click the ND Attach File button on the ribbon:



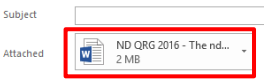
2. The Attach dialog box is displayed. Find and select the document/s you wish to send.

> **Tip** – click Recent Documents at the top of the left-hand panel to view a list of recently edited documents. Click Recent Locations to view a list of locations you have recently saved files to.

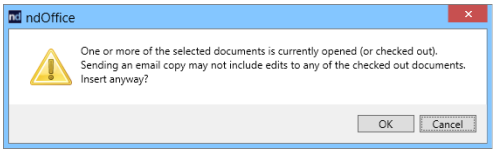
3. At the bottom of the dialog box, select whether to send the document/s as an attachment, a link or both:

> Attachment – sends a **copy** of the document. Use this option when sending to anyone **outside your firm**.

Attachments are added to the e-mail in an Attached field below the e-mail subject:



If any document you are sending is already checked-out, you will see the following warning:



> Link – sends a **link to the original** document:

If you are sending links to multiple documents, space will be left on screen between each document so that you can make notes about each one if required.

The recipient can click Open to check out the original document, or View to open the document as read-only.

NB – only use this option when sending documents to **employees within your firm**.

> Both – sends both a copy of the document and a link to the original document.

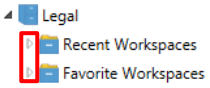
4. Click the Insert button, then send the e-mail in the normal way.

What if I can't see the document to be sent?

In the Attach dialog box, you can **navigate** to the required document, or **search for** it.

Navigating to a document

1. On the left-hand panel, click the arrow to the left of Recent Workspaces **or** Favorite Workspaces to expand and view the workspaces underneath:



2. Click the arrow to the left of any **workspace** in the list to expand and view filters, folders and searches underneath.

3. Click once on a **filter**, **folder** or **saved search** to view the contents on the **right**.

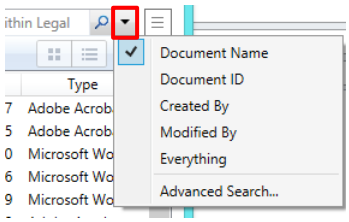
Searching for a document

1. At the top-right of the Attach dialog box, click into the Search field.

NB – the text in the Search field tells you which **cabinet** you are searching in, e.g. **Legal** as well as which **field** you are searching in, e.g. **Document Name**:

2. Type what you are searching for, e.g. part of a document name, then click the Search button (magnifying glass):

3. To change the **field** you are searching in, click the drop-down arrow to the right of the magnifying glass to view a list of options. Click on the required option:



Document Name – searches for your text in the name of documents.

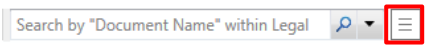
Document ID – searches for your text in the document numbers.

Created By – searches for documents created by the person you specify.

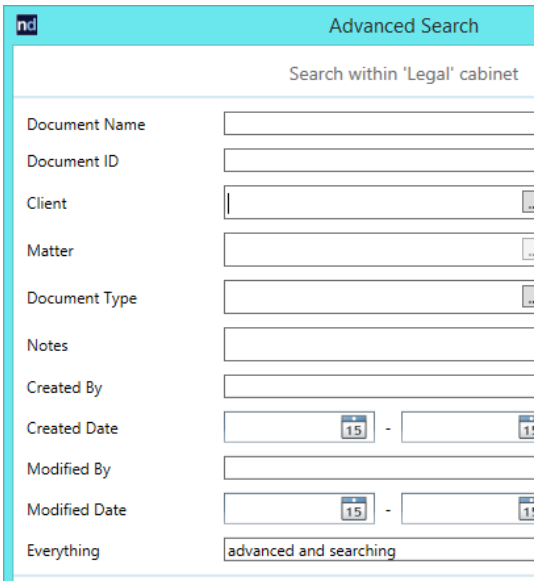
Modified By – searches for documents edited by the person you specify.

Everything – searches for your text in all document fields.

4. To search using further criteria, click the Advanced Search button:



The Advanced Search form is displayed:

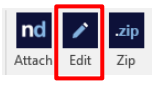


You can enter criteria into any/all of the fields, e.g. you can search for documents created for a specific **Client** or **Matter**, or created during a **specific time period** etc.

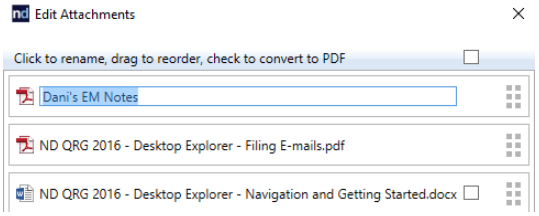
EDITING ATTACHMENTS

Once you have attached files, you can **rename** the attachments, **edit the order** they appear in, or **convert them to PDF** before sending.

Click Edit on the NetDocuments group on the ribbon:



The Edit Attachments dialog box is displayed:



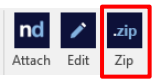
1. To rename an attachment, click once on the name and type over the new name as required.
2. To reorder an attachment, click and drag the handle to the far-right of the attachment name:

3. To convert an attachment to PDF, click the check-box to the right of the attachment name.
4. Click OK to save changes.

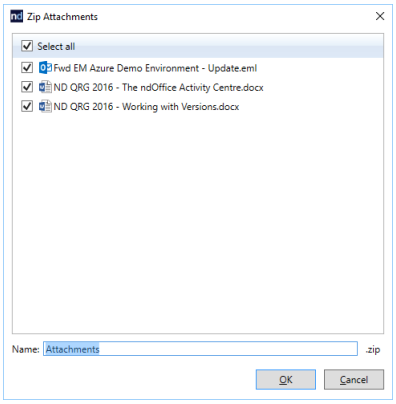
ZIPPING ATTACHMENTS

Once you have attached files, you can place some or all of them into a zip file before sending.

1. Click Zip on the NetDocuments group on the ribbon:



2. The Zip Attachments dialog box is displayed:



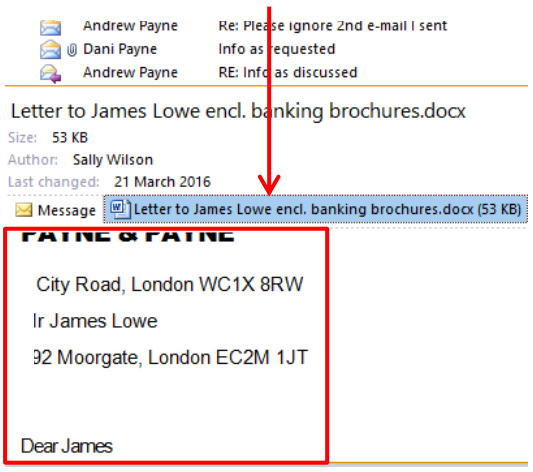
3. Tick the check-box to the left of any file you wish to be zipped.
4. Type a name for the zip file in the Name field along the bottom of the dialog box.
5. Click OK.
6. The attachments are zipped, and the zip file is added to the Attachments List in the e-mail:

VIEWING RECEIVED E-MAIL ATTACHMENTS

1. To **open** an attachment, double-click it.

2. To **preview** an attachment, ensure the Outlook Reading pane is switched on. Select the e-mail containing the attachment, then click **once** on the attachment you wish to view:

Click once on the attachment



The attachment **content** is displayed in the Reading Pane below

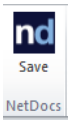
SAVING E-MAIL ATTACHMENTS

Saving e-mail attachments together with the e-mail

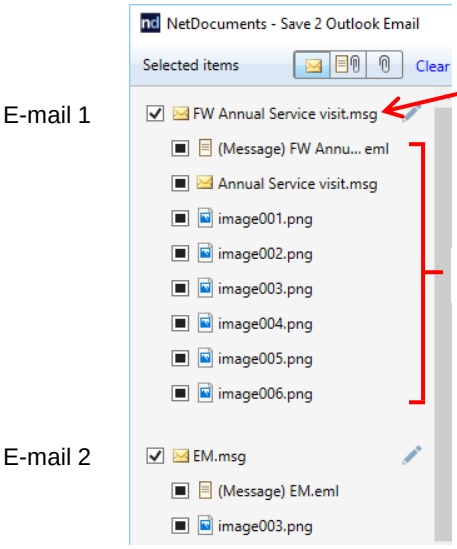
1. Select the e-mail/s to be filed.

> **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:



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**, **just the attachments**, or **both**:

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

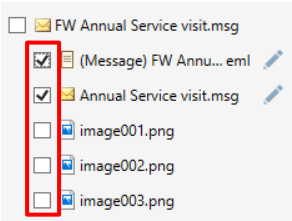
> To file **just the e-mail message**, click the Select Outlook msg files button:

> 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.

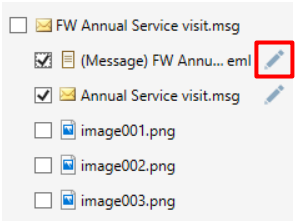
> To file **just the attachments** but not the e-mail message, click the Select attachments button:

> 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.

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

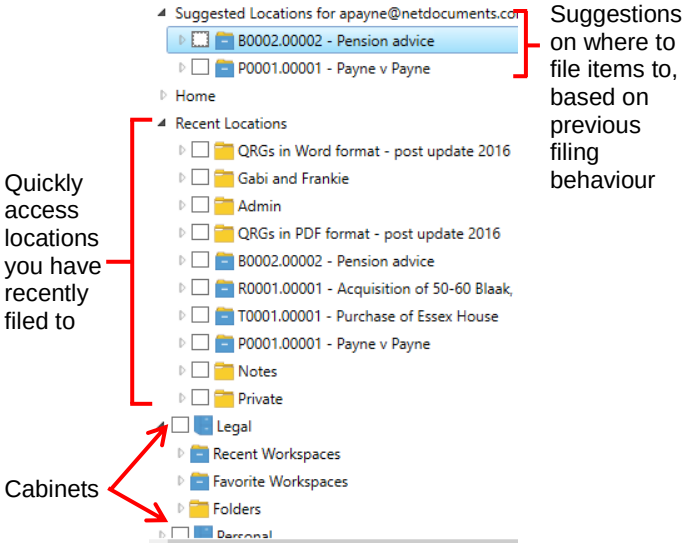


6. To edit any e-mail subject, msg file name or the attachment name, click the Pencil icon to the right of the relevant item:



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

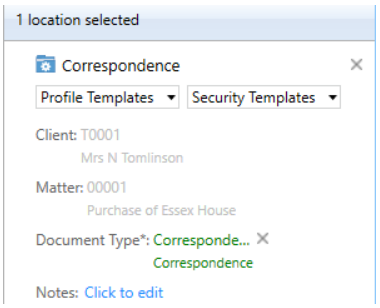
8. Select a location to file the e-mail/s to, in the centre section of the window:



8.1. 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.

8.2. Under the relevant workspace, click the Email folder (or another folder if preferred).

8.3. The selected filing location is then shown in the right-hand section of the window:

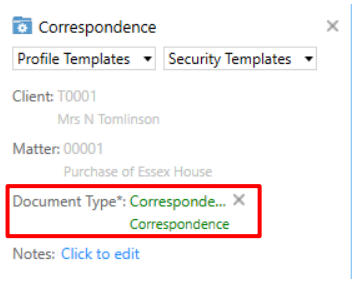


NB – you can select more than one location to file to. All selected locations will be shown in the right-hand section of the window.

8.4. 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.

9. Click the Save and Close button at the bottom-right of the window. The e-mail/s will be filed to the selected location/s and available for viewing immediately in ndWeb and ndOffice. 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.

NB – when viewing a filed e-mail in ndWeb, a paperclip icon indicates that the e-mail contains attachments:

Saving attachments separately from the e-mail message

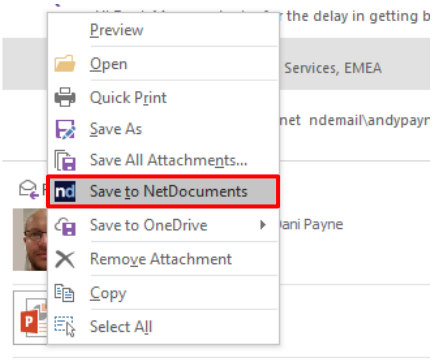
1. Open the attachment. **NB** – every attachment must be saved individually.
2. Select File > Save As.
3. Find and select the **location** i.e. **workspace**, **filter**, **folder** etc. you wish to save the attachment to.
4. Make any changes required, e.g. to the document name.
5. Click the Save button. The attachment is saved to NetDocuments as a separate document.

Saving an 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.

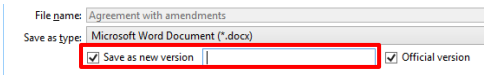
1. Open or preview the e-mail that contains the attachment you wish to save.
2. Right-click the attachment and select Save to NetDocuments:



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:



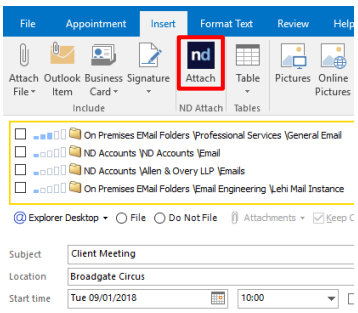
   Enter any comments about the new version alongside the check-box if required, e.g. 'amendments as requested by client'.

5. Click the Save button.

Calendar events

You can attach items to a calendar appointment in Outlook.

1. In the appointment window, click the Insert tab, then click the Attach button on the ribbon:



2. The Attach dialog box opens. Select the required item/s to attach (as described above), and click Insert.