

Adding and managing Profile Values

Add and edit Client and Matter values in your repository's lookup tables.

Before you begin: You need NetDocuments administrator access. Lookup-table edits are made under your name › *Admin › Repository › Profile Attributes*.



WHAT IS A PROFILE VALUE?

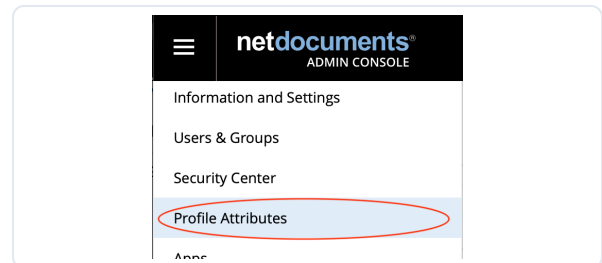
Profile attributes (like **Client** and **Matter**) are the structured fields users choose when profiling a document. Each attribute's *lookup table* is the curated list of allowed values — adding, editing, and closing those values is how administrators keep workspaces accurate and searchable across the firm.

HOW IT WORKS

1

Open the Profile Attribute Lookup Table

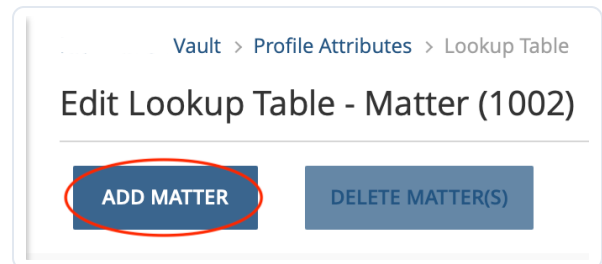
- › From the upper-right corner, choose your name › *Admin › Repository › Profile Attributes*
- › Click anywhere on the attribute row (or *Open lookup*) to open its lookup table



2

Add or Edit a Profile Value

- › To add: select *Add [Profile Value]* (*Add Matter* for example) at the top of the lookup table
- › Fill required fields marked with a red asterisk; click *Add* or *Add Another*
- › To edit: double-click a row to open the side panel, then *Save*. The *Key* field cannot be changed



3

Bulk Add via Download / Upload Table

- › **Download table:** export the current lookup as a spreadsheet for editing
- › Add or update many rows at once in Excel, then save as CSV/XLSX
- › **Upload table:** re-import the file to apply all changes in a single batch



KEY BENEFITS



Clean, Reliable Lookups

Curated profile values keep profiling consistent and prevent free-text drift across the firm.



Faster Workspace Search

New values appear instantly in the workspace selector so attorneys jump straight to the right matter.



Profile-Based Security

Use the **Access** field to scope a Matter to specific users or groups for advanced configurations.



Lifecycle, Not Lost

Close a value to retire it without breaking links — existing documents stay profiled and findable.