



## **MS Office Addin Guide**

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## INTRODUCTION

### PURPOSE

Welcome to the Doccept Document Management System. This User Manual contains all essential information to make full use of the MS Office Addins for Doccept Document Management System.

## ADDIN INSTALLATION

### INSTALL FILES

Doccept Addin setup files for Outlook and Office (Word/ Excel/ PowerPoint) are mentioned below:

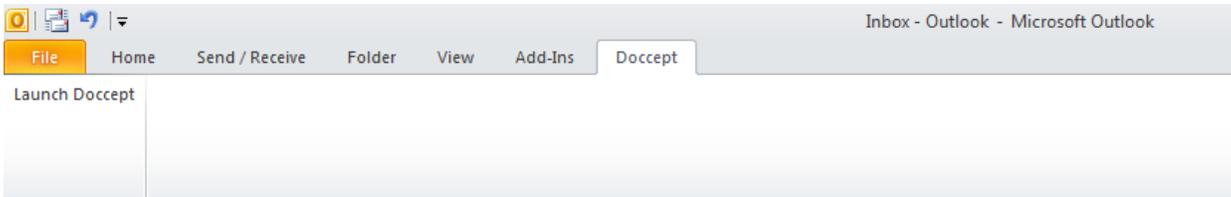
Outlook Addin setup file: DocceptOutlookAddinFrom2000Setup(1.0.0).msi

Office (Word/ Excel/ PowerPoint) Addin setup file: DocceptOfficeAddinFrom2000Setup(1.0.0).msi

**Double click on the .msi file (installer) to install the respective Addin on your machine.**

## MS OUTLOOK ADDIN

The Docept Addin for Microsoft Outlook is available from within the ribbon section of Outlook once it is installed. This is available for use only on Outlook running on Microsoft Windows Operating Systems.



Clicking on the Docept button on the toolbar brings up the following interface. Once the credentials are provided, when the user clicks on Login, the application checks to make sure that the credentials are working fine and presents a message illustrating the same:

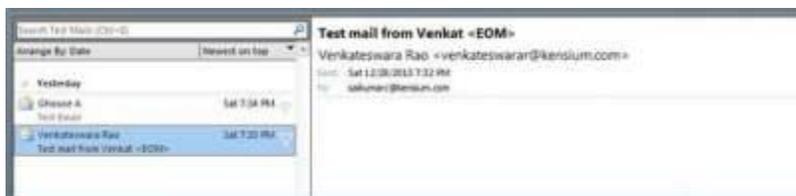


Once the user clicks on the OK button displayed for the confirmation message, the application activates the “Show Folders” button. Clicking on this button brings up the following screen which displays a list of all the folders that are accessible or available for this particular user from within Docept:



You are now ready to upload the selected email or emails from within Outlook to this instance of Docept. Assume that the user has selected the following email from within Outlook.

**Note: If the folder listed in the Folder tree is appearing in Red color that means that the user has only “Read” permission on that folder.**



Now if the user clicks on the “Upload to Doccept” button within the Addin window, the application brings up the following confirmation message so that the user can make sure that the right Email has been selected.



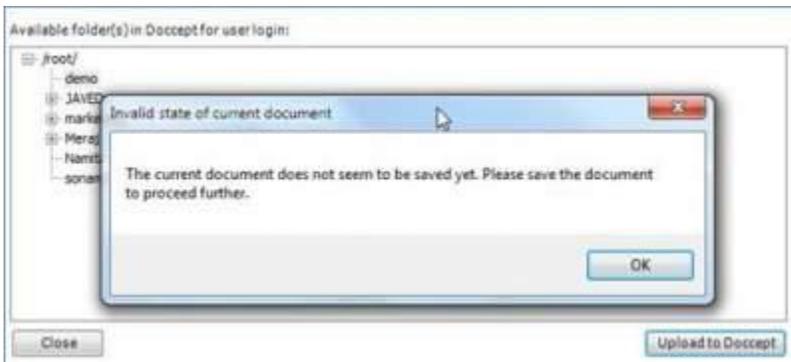
If the user clicks on the “Yes” button, this email is uploaded to Doccept within the selected folder on the above interface. The email now shows up within Doccept as follows:



If the user now attempts to upload the same email to Doccept again, the application confirms with the user if the document version should be upgraded with the new version of the email document since the same already exists.

## MS WORD & MS EXCEL ADDIN

The Microsoft Word and Microsoft Excel Addin function very similar to the Microsoft Outlook Addin. The only difference is that Word and Excel uploads the current document that is open within the tool. If a Document is not saved before clicking the Upload button, application prompts the user to first save the document and then click on the Upload button.



Once the user saves the document, the same can then be uploaded to Doccept. If the same document already exists in Doccept at the selected folder, the application prompts the user to confirm if they wish to upload a new version of the document.

**Note: If the folder listed in the Folder tree is appearing in Red color that means that the user has only “Read” permission on that folder.**