



DocumentMall Office Plug-in

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Introduction

The DocumentMall Office Plug-in is an easy and convenient feature that provides MS Office users the ability to perform the following functions from within their Word, Powerpoint or Excel application:

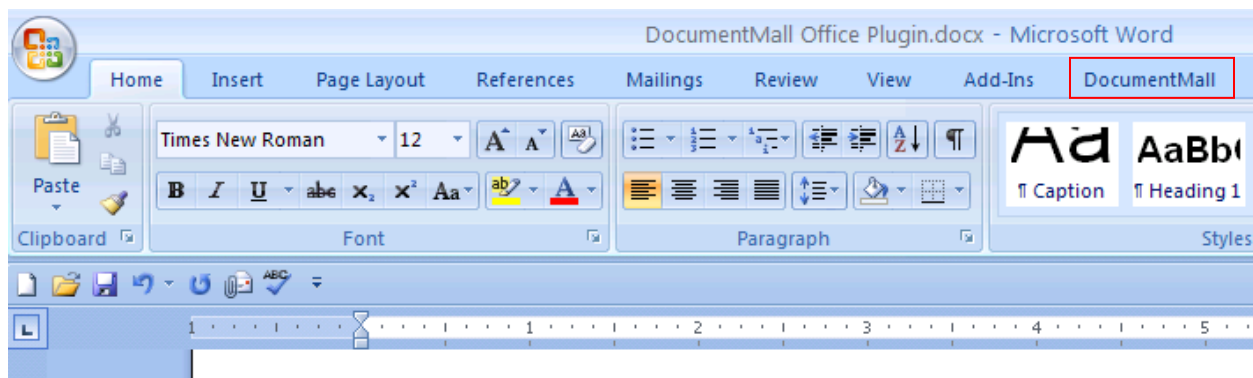
- Login to DocumentMall
- Upload a new file
- Perform Advanced or Text Searches
- Download (View) a file from the search results
- Check Out a file from the search results
 - Edit a checked-out file and upload back into DocumentMall as a new Minor version.

This guide will illustrate how to use the DocumentMall Office Plug-in using Microsoft Word, but it will offer the same functions with Microsoft PowerPoint and Excel.

Installation

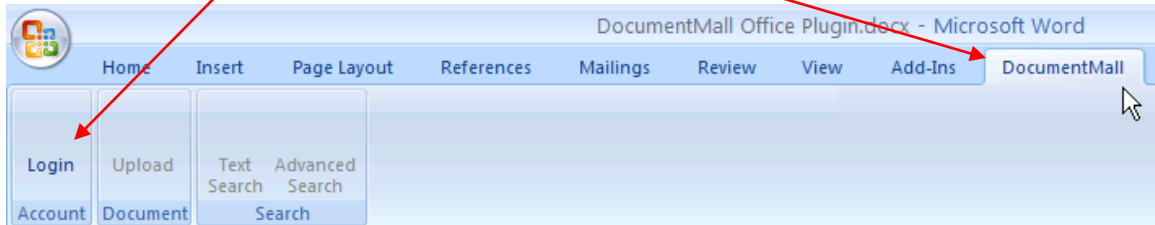
The DocumentMall Office Plug-in is available on the DocumentMall website: http://documentmall.com/support/user_resources. Navigate to the plug-in offering, click download, and follow the steps to download and install the plug-in.

Once the plug-in is installed, a DocumentMall plug-in tab will appear as an option. (See below). If the DocumentMall plug-in does not appear, and you have the Word, PowerPoint or Excel open, please close the Microsoft application, and then open it. The DocumentMall Office plug-in should now display and be available for use.

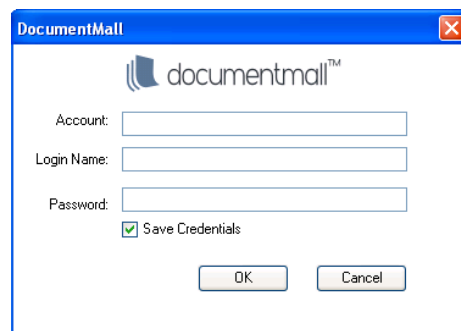


Logging In

- Click the DocumentMall plug-in tab
- Click the Login button

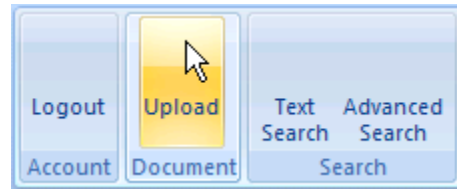


- The DocumentMall login screen will display
- Type in your DocumentMall login Account name, Login Name and Password
- Click the OK button to complete the login process.

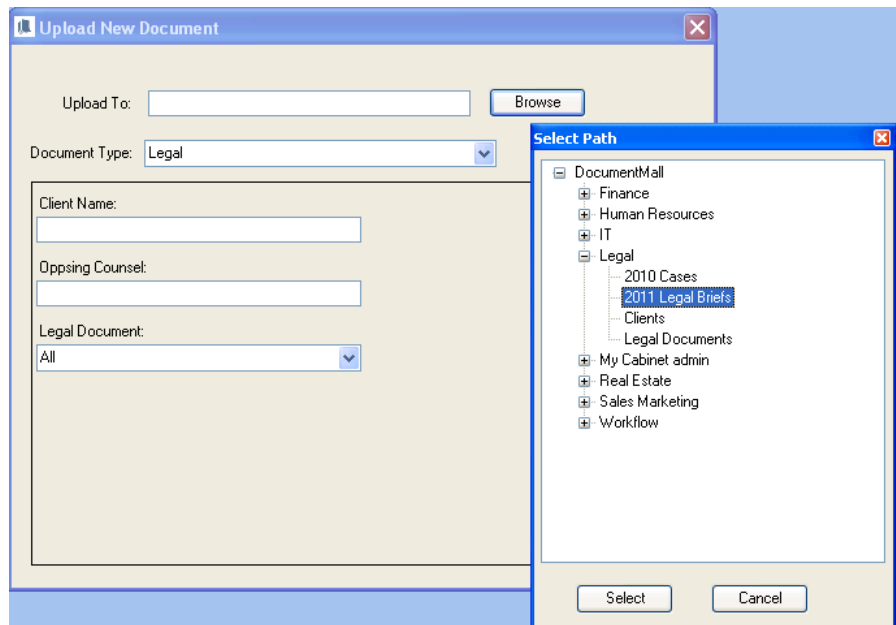


Upload a new document

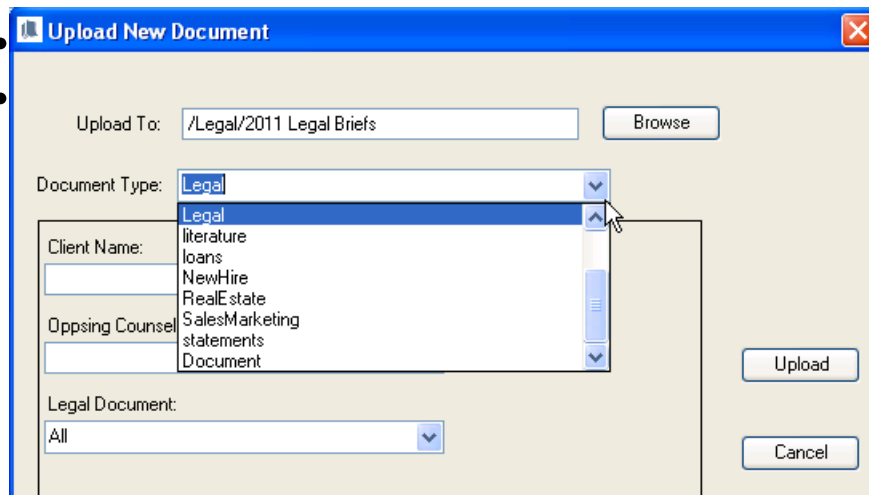
- Create and save a new document
- Click the Upload button. (You may need to click the DocumentMall plug-in tab to display the Upload button.)



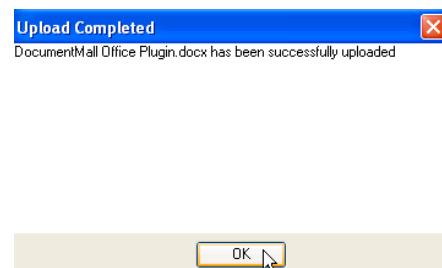
- Click the Browse button. Your list of available DocumentMall cabinets and folders will display.
- Select the desired location to upload the file.



- Click the Document Type down arrow to display the document type choices.
- Note: you may not have any document type choices, depending on how your administrators setup your account. You may just use “Document”.
- If document types are available, a drop down list will display for selection.



- Select the appropriate (if any) document type, and type in the index information for the file to be uploaded.
- Click the Upload button to upload the file.
- A message will appear after the file is successfully uploaded.



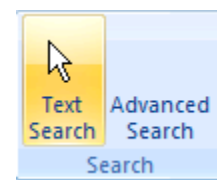
Search For Documents

DocumentMall documents can be located using Text Search and Advanced Search. You can toggle between Text and Advanced Search to help you quickly locate the file(s) you are looking for. Files that are located can be downloaded for review, or checked out for editing.

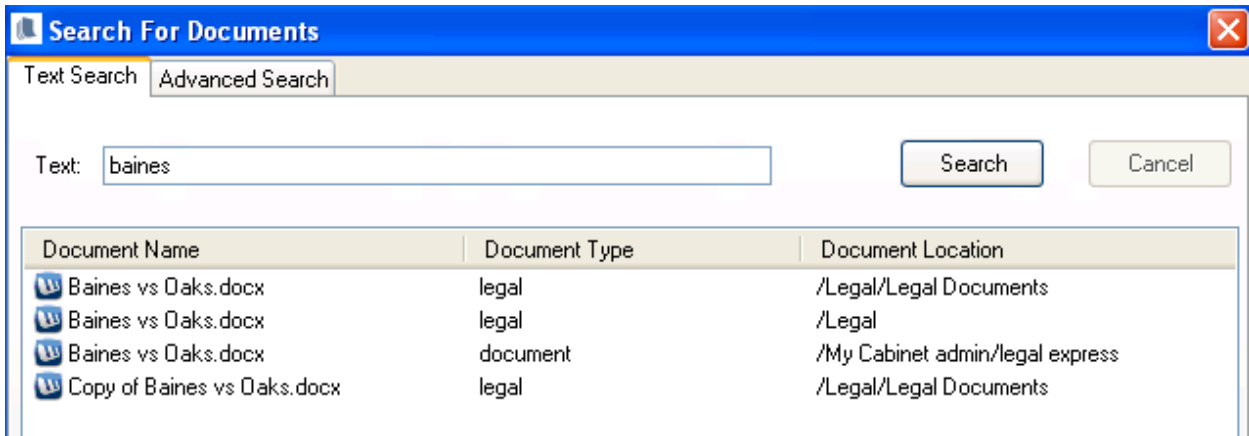
Text Search

Text Search allows you to search for documents based on the file name, or words within the document. To use the Text Search:

- Select the Text Search option.
- Type in the file name or text within the file.



- Click Search.
- If files are located that match your text entry, they will display.

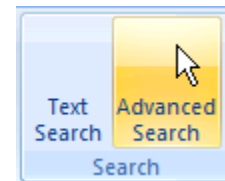


Advanced Search

Advanced Search takes advantage of Document Type indexing.

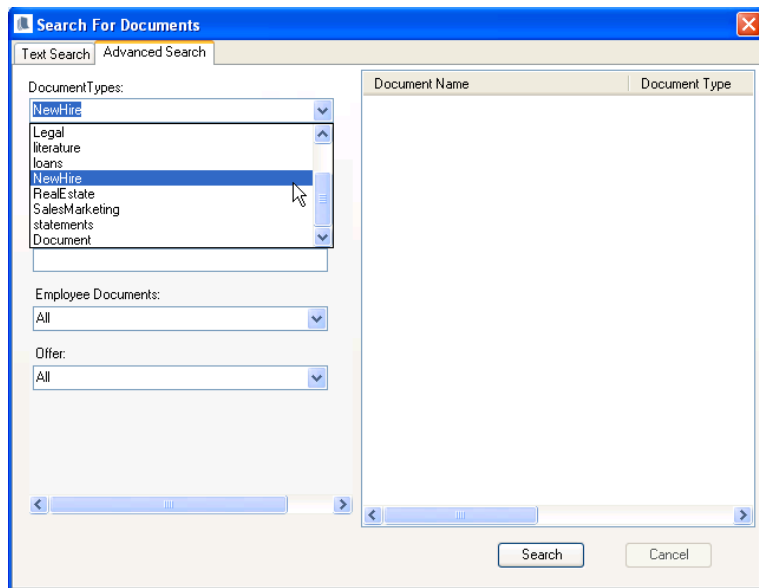
It can be used when Document Types are implemented within a DocumentMall account.

Files can be located based on the Document Type index values that are entered, when files are originally imported into DocumentMall.

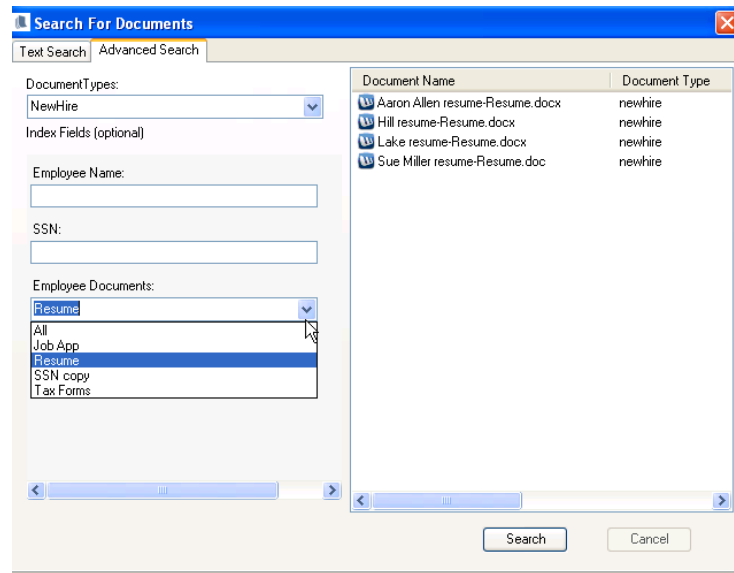


- Select the Advanced Search option.
- The Advanced – Search for Documents screen will display.
- Select a Document Type from the drop down list.

Note: Keep in mind that Document Types will need to have been previously setup by your DocumentMall Admin.



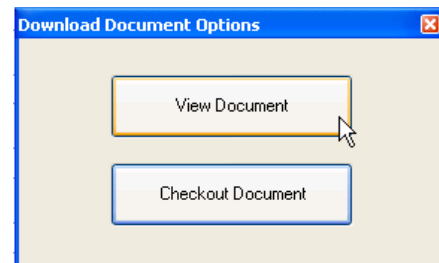
- Type in appropriate index values, and / or select items from drop down lists.
- Files that match your selections will display.



View Document

When the Text or Advanced Search option is used and files are displayed, they can be viewed if the user has the “Read” permission set. The permission set is setup by the DocumentMall Administrator. To view a document:

- Double click on a file that’s displayed in the Text or Advanced search result.
- Click the View Document option.
 - The file will be downloaded and available for viewing.
 - Since View is selected, this file can be edited, but *it cannot* be uploaded into DocumentMall as a minor version. The file can be saved with a different name, and uploaded into DocumentMall.



Check Out Document

The Check Out Document option works like the Edit Document and Check Out features in DocumentMall. A user must have Write or Delete permission in order to check out a file. This permission set is determined by the DocumentMall account administrator.

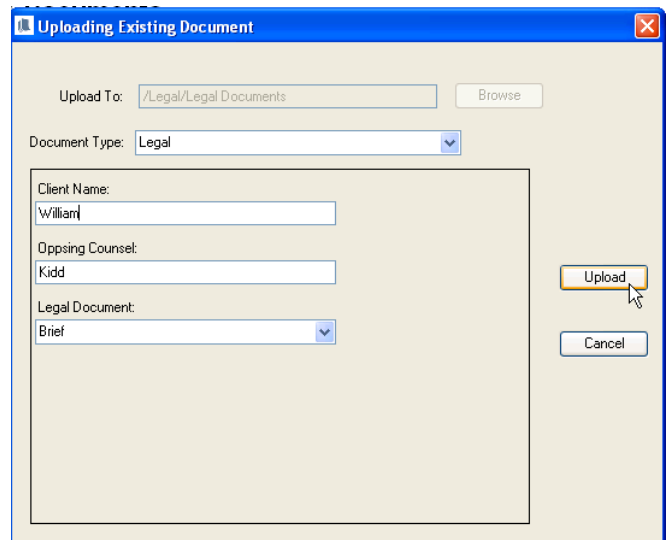
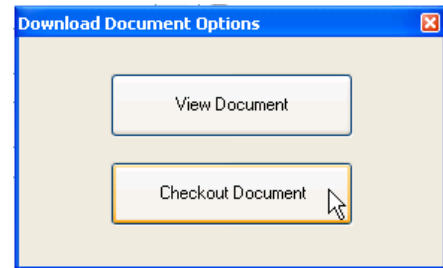
When a file is checked out, it also locks the file in DocumentMall so no other users can access it for editing and uploading, thus protecting the file from being edited by different users at the same time.

When a user selects Check Out Document, they can:

- Check out a file in DocumentMall.
- Make edits to the file.
- Upload / check in the file back into DocumentMall.
- Automatically store the file with a minor version level.

To use the Check Out option:

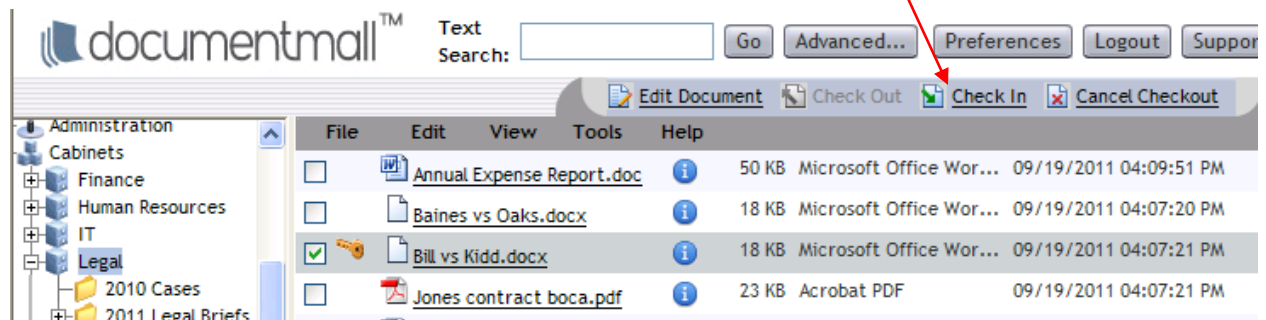
- Double click on a file that's displayed in the search results.
- Click the Check Out Document button.
- The file will be downloaded to your PC and display.
- Make any appropriate edits and save it.
- Click the Upload button in the DocumentMall plug-in.
 - If a document type is associated with the file, enter any pertinent index values.
- Click Upload. A message will display when the file is successfully uploaded.
- The file will reside in the cabinet or folder based on the Upload To: path.
- The file will be checked in to DocumentMall, and will be unlocked so other users can have access to it.
- It will be saved as a minor version, and not overwrite the original.



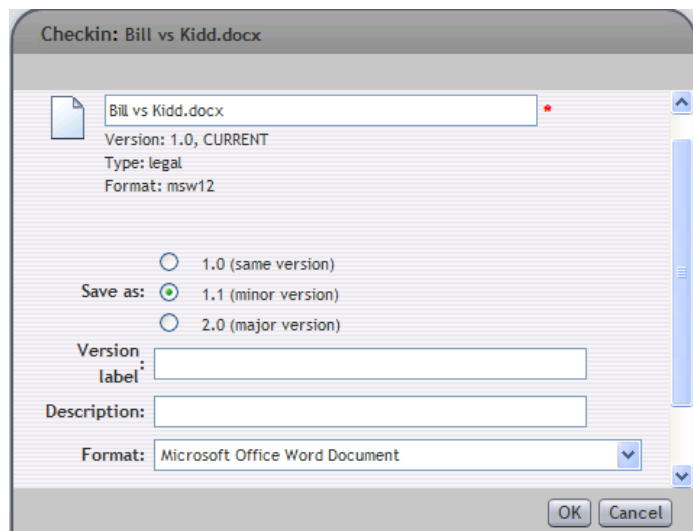
Upload a File with a Different Version Level in DocumentMall

If you would like to upload a checked out and edited file into DocumentMall, but prefer to control the versioning:

- Save your file (in Word, PowerPoint or Excel).
- Login to your DocumentMall account.
- Navigate to cabinet and/or folder location of the checked out file.
- Click the Check In option on the DocumentMall main page.



- A Version option will display.
- Select the version level you desire for the file, (Overwrite/same, minor or major).
- Click OK once you've made your selection.
- The file will be saved with your version selection, and become unlocked so other users can access the file.



Note: For more information about Check In, Check Out and Versioning, click on Help from the DocumentMall main screen task bar, and review the Online documentation or tutorials.