

WebDocs

Microsoft Office

Add-Ins

Using the WebDocs Microsoft Office Add-Ins

This short guide shows you how to use WebDocs Microsoft Office Add-Ins to:

- Work directly with Microsoft Word and Excel files stored in WebDocs.
- Check in new documents to WebDocs from within Word or Excel.
- Save emails from Microsoft Outlook to WebDocs.

This guide is divided into the following sections:

[Exploring the WebDocs Tab](#)

[Connecting to WebDocs](#)

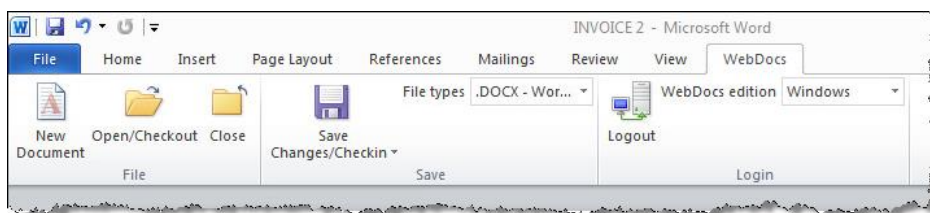
[Working with Documents](#)

[Adding Emails](#)

Exploring the WebDocs Tab

In Word, Excel, and Outlook, the **WebDocs** tab is located on the ribbon.

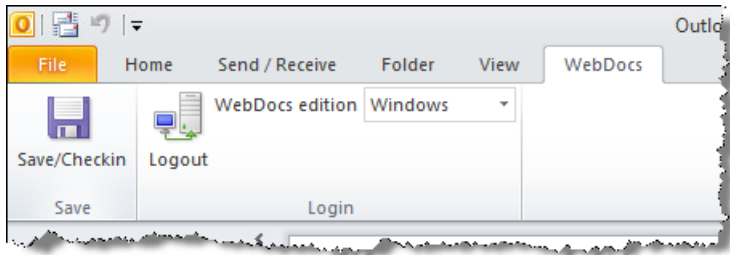
In Word and Excel:



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In Outlook:

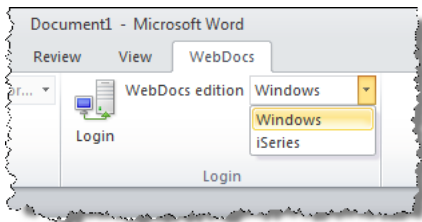


Connecting to WebDocs

You must connect to WebDocs to be able to work with WebDocs documents directly from Word, Excel, or Outlook.

To connect to WebDocs:

1. Go to the **WebDocs** tab. In the **Login** group, choose whether you are using WebDocs for Windows or iSeries.



2. Click **Login**.

WebDocs Login displays.

A dialog box titled 'WebDocs Login' with three input fields: 'WebDocs User Name', 'WebDocs Password', and 'Web Service URL'. It has 'OK' and 'Cancel' buttons at the bottom.A dialog box titled 'WebDocs Login' with four input fields: 'WebDocs User', 'WebDocs Password', 'iSeries User', and 'iSeries Password', and a fifth field for 'iSeries System'. It has 'OK' and 'Cancel' buttons at the bottom.

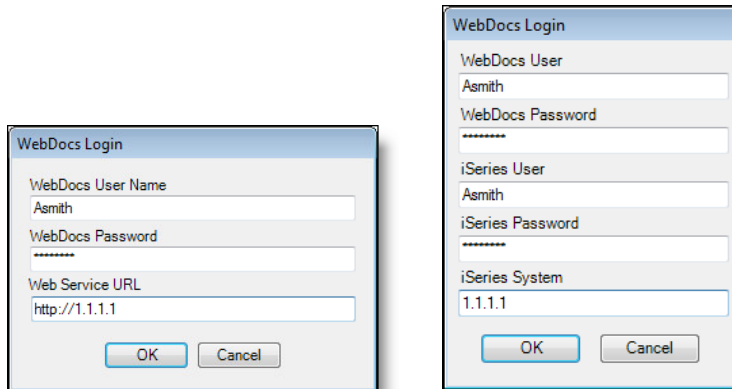
3. Type your WebDocs user name and password.

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(For WebDocs iSeries) Type your iSeries user and password.

4. Type the address of the WebDocs server.
 - WebDocs for Windows: Type the web service URL or IP address.
 - WebDocs for iSeries: Type the IP address of the iSeries.



Note: If you do not know the IP address or host name of the WebDocs server, contact your WebDocs administrator.

5. Click **OK**.

You are logged in to WebDocs.



Note: To log out, on the **WebDocs** tab, in the **Login** group, click **Logout Logout**.

Working With Documents

You can work with WebDocs documents within Word or Excel in the following ways:

[Adding a New Document](#)

[Finding and Checking Out a Document](#)

[Checking In a Document](#)

[Closing the Current Document](#)

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Adding a New Document to WebDocs

This topic shows you how to add a new document to WebDocs, from within Word or Excel. Adding a new document to WebDocs is useful if you have a saved document that is not already stored in WebDocs and want to add it, or if you create a new document that you want to store in WebDocs.

To add a new document to WebDocs:

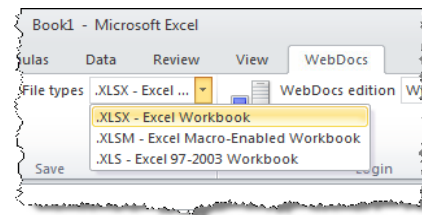
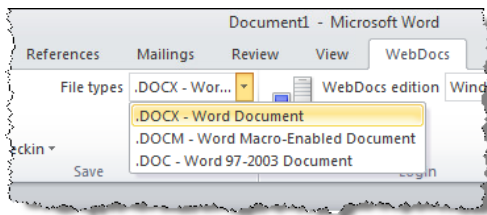
1. Choose what type of document you want to add. Either:
 - Open a saved document from the Microsoft Office application.
 - Create a new document by going to the **WebDocs** tab in the application and



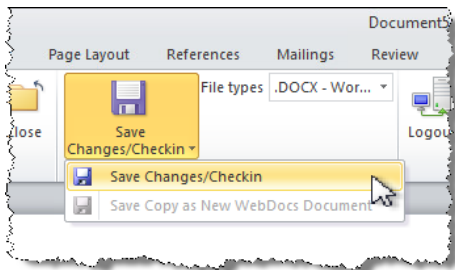
New

clicking **New Document** Document.

2. On the **WebDocs** tab, choose the file format in **File types**.



3. Click **Save Changes/Checkin, Save Changes/Checkin**.

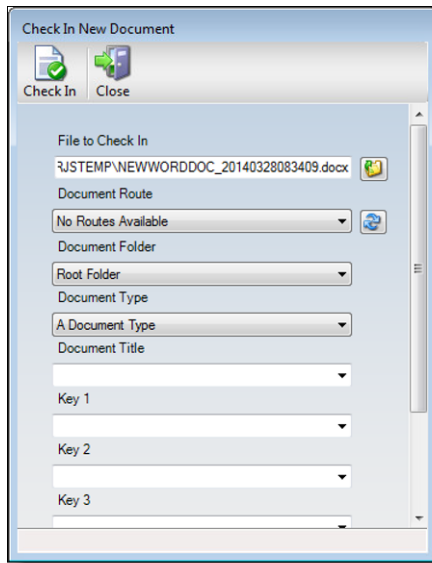


A confirmation message displays.

4. Click **Yes** to continue checking in the document.

The document closes and Check In New Document displays.

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Note: File to Check In displays the temporary path to the document. Do not change this path.

5. (Optional) In **Document Route**, choose a pre-designed WebDocs route to assign the document to after check-in.
6. In **Document Folder**, choose the WebDocs folder to save the document to.
7. In **Document Type**, choose the Document Type to assign to the document.
8. In **Document Title**, type a title.
9. In **Key 1 – Key 30**, choose or type search-key values for this document.

Note: Your WebDocs administrator may have set up useful names that display for **Key 1 – Key 30** depending on the Document Type you chose.

10. Click **Check In**.

Note: For WebDocs iSeries, click **OK**.

A confirmation message displays, and the document is added to WebDocs.

Finding and Checking Out a Document

This topic shows you how to open and check out a document stored in WebDocs, directly from Word or Excel. This allows you to find a document to edit without having to go to the WebDocs website. Later, you will learn how [to check this document back in to WebDocs](#).

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Note: Only check out documents with a file extension for the Microsoft Office application you are using:

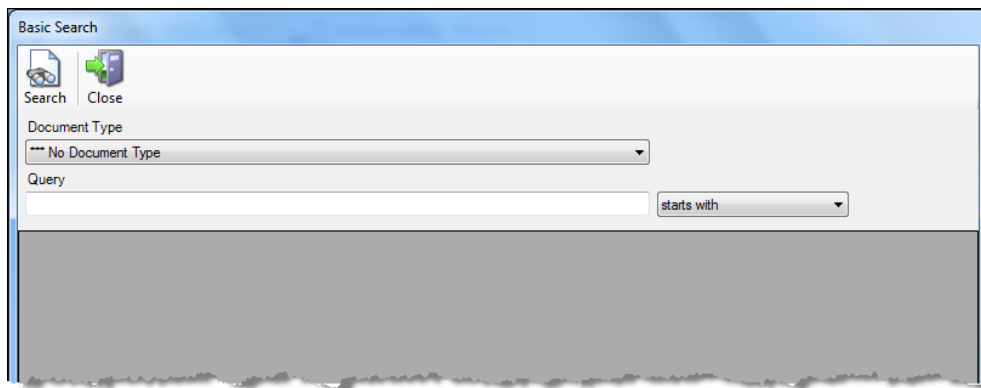
- For Word: Documents with a DOC, DOCM, or DOCX extension.
- For Excel: Documents with a XLS, XLSM, or XLSX extension.

To find and check out a document:



1. On the **WebDocs** tab, click **Open/Checkout** Open/Checkout.

Basic Search displays.



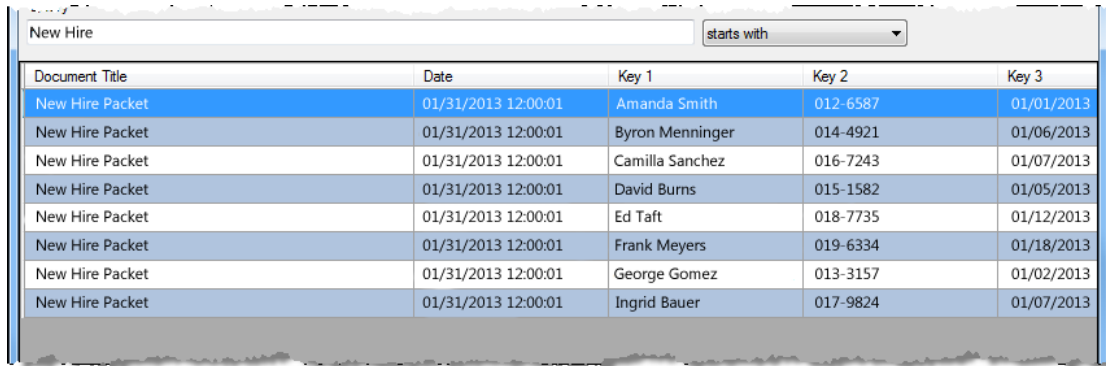
2. In **Document Type**, choose the Document Type of the document to check out.
3. In **Query**, type a document title or search-key value for the document to search for.

Note: You can use the percent sign (%) as a wild-card character. For example: Searching for *inv%* finds documents that have *inv* at the beginning of one of their search-key values or whose title begins with *inv*.

4. To the right of **Query**, choose how to qualify the query:
 - *starts with* – The query is the beginning of a document's title or one of its search-key values.
 - *with the exact phrase* – The query is the exact document title or one of its search-key values.
 - *contains word(s)* - The query is part of a document's title or one of its search-key values.

5. Click **Search**.

All the documents that match your query display.



The screenshot shows a search results window titled "New Hire" with a search filter set to "starts with". The results are displayed in a table with the following columns: Document Title, Date, Key 1, Key 2, and Key 3. The first row is highlighted in blue.

Document Title	Date	Key 1	Key 2	Key 3
New Hire Packet	01/31/2013 12:00:01	Amanda Smith	012-6587	01/01/2013
New Hire Packet	01/31/2013 12:00:01	Byron Menninger	014-4921	01/06/2013
New Hire Packet	01/31/2013 12:00:01	Camilla Sanchez	016-7243	01/07/2013
New Hire Packet	01/31/2013 12:00:01	David Burns	015-1582	01/05/2013
New Hire Packet	01/31/2013 12:00:01	Ed Taft	018-7735	01/12/2013
New Hire Packet	01/31/2013 12:00:01	Frank Meyers	019-6334	01/18/2013
New Hire Packet	01/31/2013 12:00:01	George Gomez	013-3157	01/02/2013
New Hire Packet	01/31/2013 12:00:01	Ingrid Bauer	017-9824	01/07/2013

6. Double click the document you want to check out.

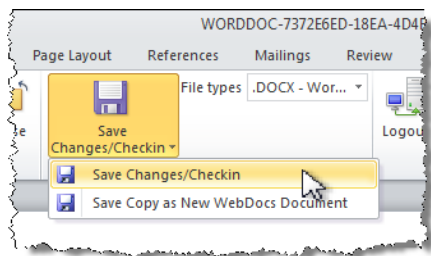
The document opens in Word or Excel, and it is checked out.

Checking In a Document

This topic shows you how to check in a checked-out document open in Word or Excel. Checking in a document without having to leave Word or Excel means all your tasks are completed in one application.

To check in a document that is checked out:

1. On the **WebDocs** tab, click **Save Changes/Checkin**, **Save Changes/Checkin**.



A message displays, asking if you want to save the changes.

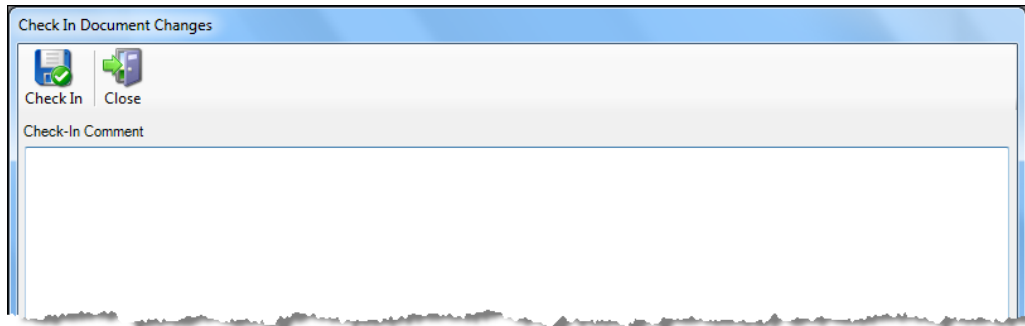
Note: The document's WebDocs-generated file name displays (for example: EXCELDOC-AC073D58-5E98-4EFD-A482-DEEFFD1E4165-20100603111622.XLS). This complex file name is normal and is simply one of the ways that WebDocs manages documents.

2. Click **Yes**.

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3. Check In Document Changes displays.



4. (Optional) In **Check-In Comment** type any check-in comments.

Note: These comments display when you click the Versions button on the Document Details page from within WebDocs.

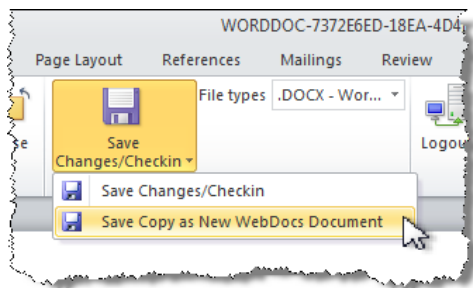
5. Click **Check In**.

A message displays confirming the document was uploaded and checked in.

6. Click **OK**.

To check in a copy of a document without affecting the original document:

1. On the **WebDocs** tab, Click **Save Changes/Checkin, Save Copy as New WebDocs Document**



Note: If the document you are saving has not previously been checked in to WebDocs, the **Save Copy as New WebDocs Document** button will be disabled.

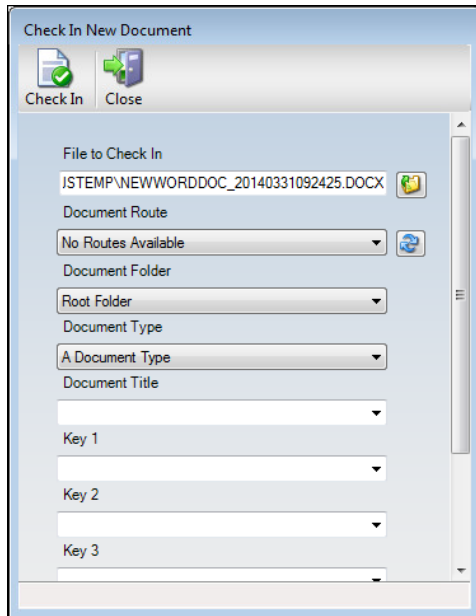
A message displays asking if you want to save a copy of the document to WebDocs.

2. Click **Yes**.

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3. Check In New Document displays.



Note: File to Check In displays the temporary path to the document. Do not change this path.

4. (Optional) In **Document Route**, choose a pre-designed WebDocs route to assign the document to after check-in.
5. In **Document Folder**, choose the WebDocs folder to save the document to.
6. In **Document Type**, choose the Document Type to assign to the document.
7. In **Document Title**, type a title.
8. In **Key 1 – Key 30**, choose or type search-key values for this document.

Note: Your WebDocs administrator may have set up useful names that display for **Key 1 – Key 30** depending on the Document Type you chose.

9. Click **Check In**.

Note: For WebDocs iSeries, click **OK**.

A confirmation message displays, and the document is added to WebDocs.

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Closing the Current Document

This topic shows you how to close a document and undo the check-out of a document currently open in Word or Excel. Undoing a check-out is useful if you check out a document, but do not make changes to it.

To close the current document and undo the check-out:



1. On the **WebDocs** tab, click **Close** *Close*.

A message displays asking if you are sure you want to undo the check-out and warning that all changes will be lost.

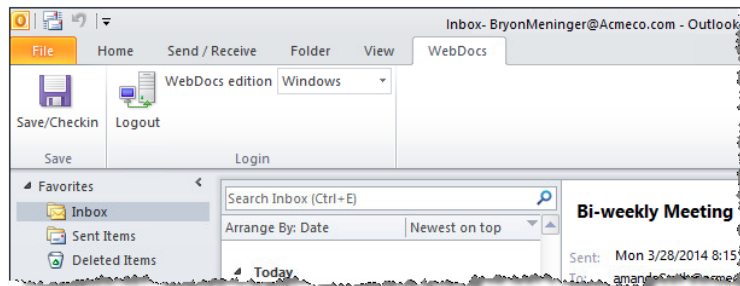
2. Click **Yes**.

Adding Emails


This topic shows you how to add an email to WebDocs directly from Outlook.

To add an email to WebDocs:

1. Do one of the following:
 - From the main screen:



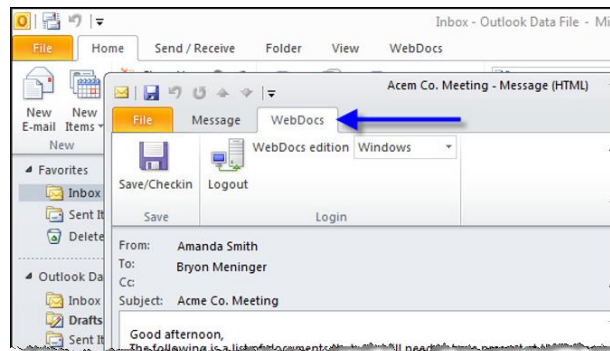
- a. Click to highlight the email you want to add to WebDocs.
- b. Go to the **WebDocs** tab.
- c. Click **Save/Checkin**.

Note: Once you have highlighted an email, you can right-click the email and choose **WebDocs Save/Checkin**  **WebDocs Save/Checkin** from the drop-down menu.

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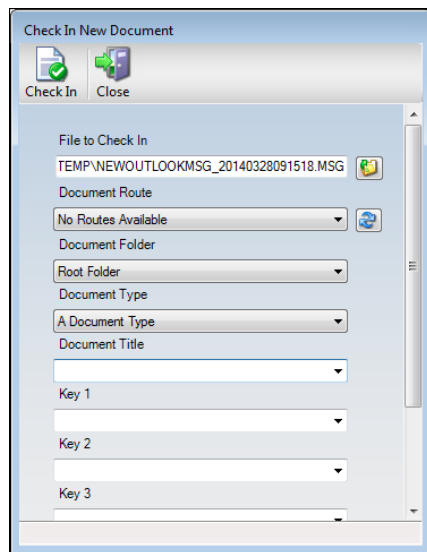


- From the read or compose email screen:



- a. Go to the **WebDocs** tab.
- b. Click **Save/Checkin**.

2. Check In New Document displays.



Note: File to Check In displays the temporary path to the document. Do not change this path.

3. (Optional) In **Document Route**, choose a pre-designed WebDocs route to assign the document to after check-in.
4. In **Document Folder**, choose the WebDocs folder to save the email to.
5. In **Document Type**, choose the Document Type to assign to the email.

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6. In the **Document Title**, type a title.
7. In **Key 1 – Key 30**, choose or type search-key values for this email.

Note: Your WebDocs administrator may have set up useful names that display for **Key 1 – Key 30** depending on the Document Type you chose.

8. Click **Check In**.

Note: For WebDocs iSeries, click **OK**.

A confirmation message displays, and the email is added to WebDocs.