**OFFICE INTEGRATION
USER GUIDE**

DOCUMENT MANAGEMENT

INEIGHT

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CHAPTER 1 – INTRODUCTION TO OFFICE INTEGRATION

The Office Integration Tool for use with InEight Document is a plug-in that allows users to view, upload and edit their InEight Documents from within MS Word, Excel, PowerPoint, Visio and Project instead of having to log into InEight Document. All actions relating to the InEight Document completed within the relevant MS application are then saved back into the InEight Document system without the need to download and re-upload the document through the web interface

Features	Benefits
All MS Office Format project documents are accessible within the integration tool whilst retaining all InEight Document formatting, custom fields and attributes including Document Number, Revision, Discipline and Status.	Eliminates the need to use two different systems. The user automatically inherits a personal archive of all InEight Documents and can make changes to Microsoft Office documents.
Use of Microsoft Office to view, upload and creating new revisions of InEight Documents.	Familiarity with Microsoft Office minimises need for additional training.
Save InEight Documents directly to your computer.	Eliminates the need to log into the InEight Document interface to download the document.
Check out the InEight document while editing it in Microsoft Office.	Prevents other users from making any changes to the document.
Ability to upload a PDF copy along with the Microsoft Office format.	Allows user to upload a PDF file back into the InEight system accessible to other InEight Document users.

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CHAPTER 2 – INSTALLING OFFICE INTEGRATION

1. Close all Microsoft Office products (Word, Excel, PowerPoint), if open.

2. Download the installation package using the following link:
   https://www.teambinder.com/download/office/TeamBinderOfficeIntegration.zip

2.1 PRE-REQUISITES

- Windows 7 or above

- Microsoft Office 2007 Onwards

- .Net Framework version 4.0

2.2 INSTALLATION STEPS

1. Once the download is complete, unzip the zip files.

2. Double click and run the setup exe from the extracted files.

3. Select a folder location for file installation. Select "Just Me" for yourself or "Everyone" in order to install for all who use the computer.

4. Click **Next**.

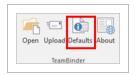5. Click **Next** once more to begin installation.

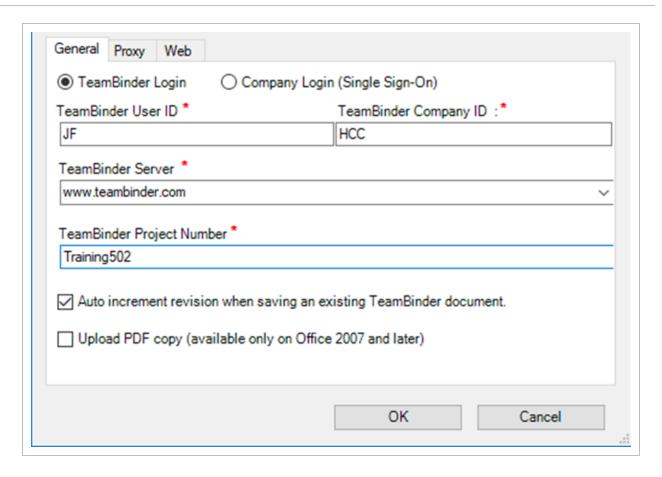| NOTE	The default Installation installs Office Integration with pre-defined settings. Custom Installation allows you to choose you own settings when installing Office Integration.

CHAPTER 3 – INEIGHT DOCUMENT CONFIGURATION AND LOGIN
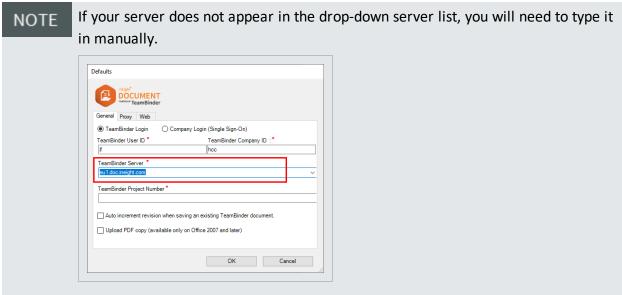
3.1 CONNECTING TO INEIGHT DOCUMENT FROM WORD

When starting Word for the first time after installation of the plug-in, you will need to set up your login details for InEight Document Office integration.

1. Click the **Defaults** button.

2. At the Login window, select the appropriate server that your project is located on. This is the URL shown once logged into InEight Document. If you are unsure of the server details, contact the InEight Document Help Desk.

> **NOTE**   If your server does not appear in the drop-down server list, you will need to type it in manually.
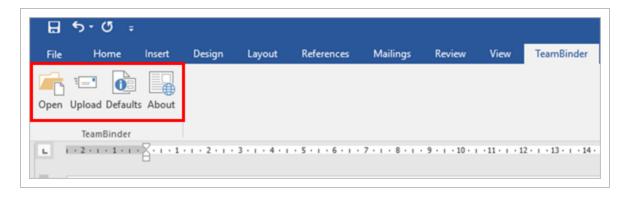

3. Log in by entering your InEight Document User ID, Company ID & Password or Company Login (Single Sign-On) then clicking **OK**.

CHAPTER 4 – INEIGHT DOCUMENT UPLOAD FUNCTIONS

The toolbar below allows users to open and upload documents directly to InEight Document and set application defaults.
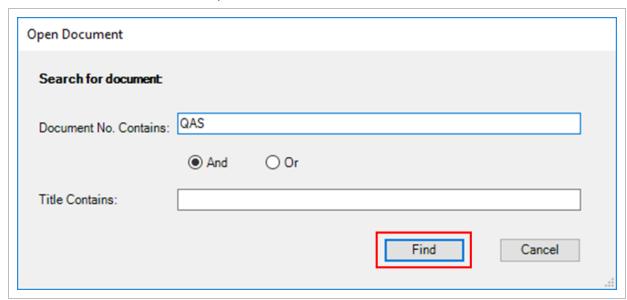

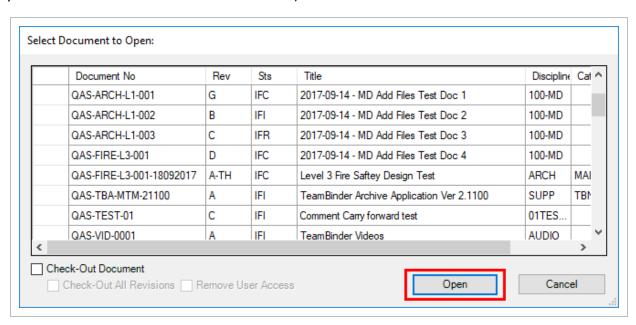## 4.1 LOCATING A DOCUMENT REVISION USING OFFICE INTEGRATION

The following steps describe the typical process to download and update a document and then seamlessly upload the document back to the register.

1. To open an InEight Document using Office Integration, select the **InEight Document** tab then select **Open**.

2. Use the filter screen to search by document number and/or document title if known.

3. Click **Find**. This will search your InEight Document project to find any document containing the search criteria you entered.

4. Select the required document. Ensure it is compatible with the application you are using (i.e. if you are in MS Word then look for Word files).

5. Click **Open** and **Save**. Once saved the document is visible within Office Integration.
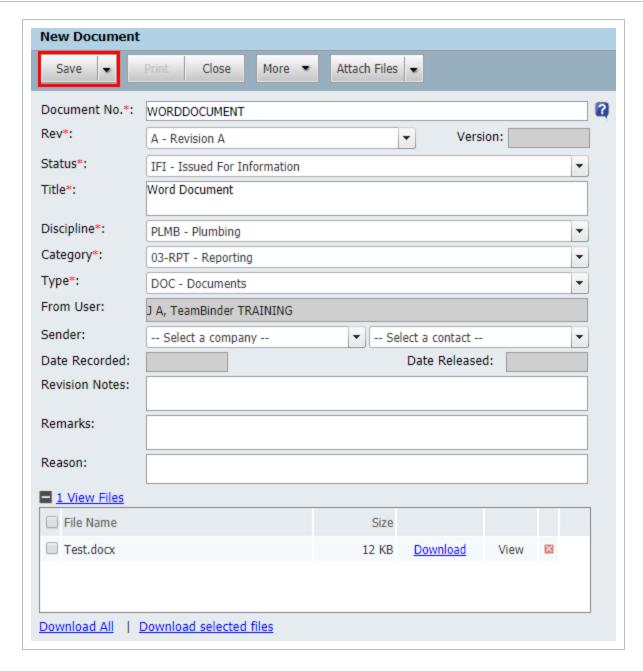
6. Update the document within Microsoft Office. Once complete select the InEight Document Tab and click **Upload**.

7. This opens the document metadata screen. Update the revision of the document (sequentially as appropriate).

8. Click **Save** to upload into InEight Document.

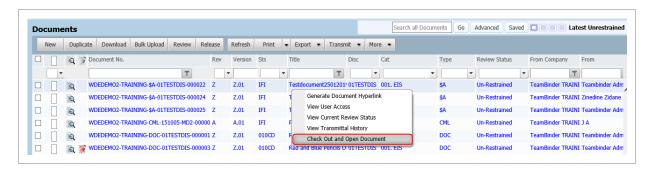| NOTE	• The document must be saved upon opening it within the application as a temporary copy must be stored on the local computer while editing.
	• If you have Versioning enabled on your project, the version will update automatically. However, if you wish to create a new revision of the document, you will need to update this manually as described above.

4.2 UPLOADING A NEW INEIGHT DOCUMENT

1. From the InEight Document tab within Office Integration, click **Upload**; you will be prompted to enter your login details. Once completed click **Login**.

2. Within the single upload screen enter the metadata details. Note the document attaches automatically.
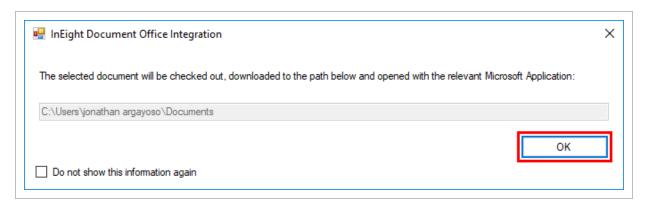
3. Click **Save** once complete. This will upload the document into InEight Document. If PDF has been selected, then a PDF copy is automatically attached to the document as well.

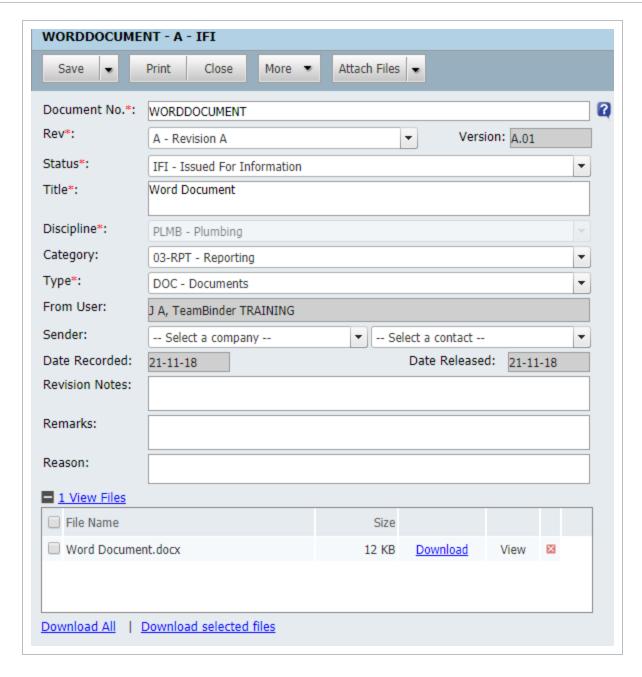# 4.3 CHECK OUT AND OPEN DOCUMENT WITH OFFICE INTEGRATION

1. From the Document register, you can right-click a Word file and select **Check Out and Open Document**.

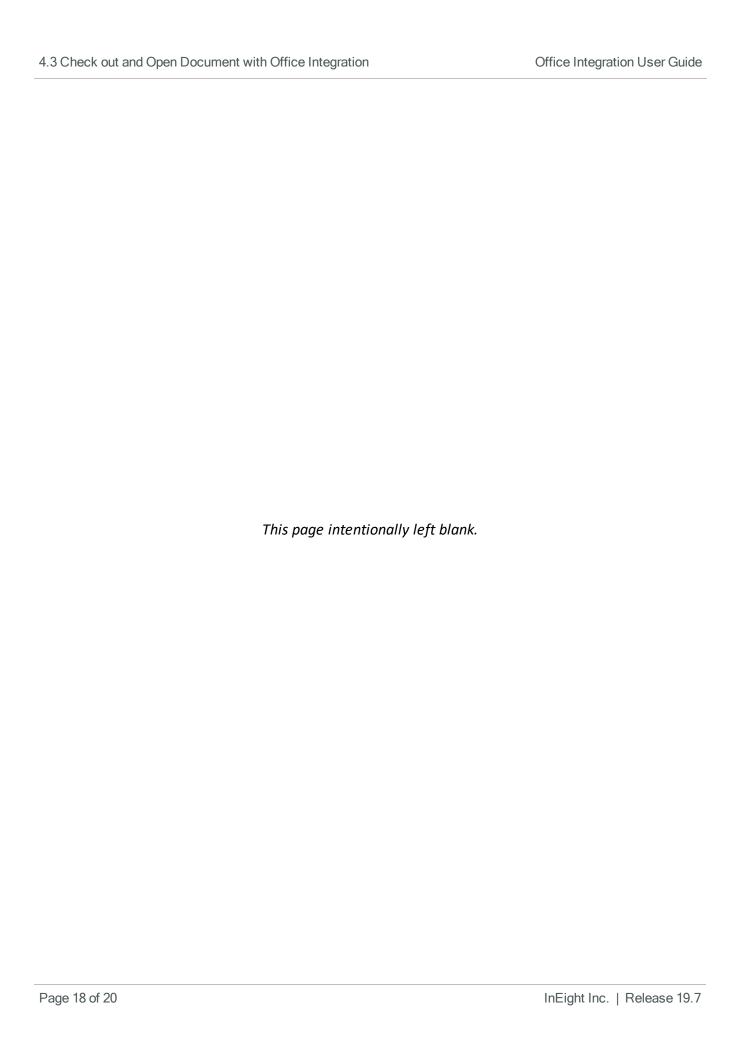2. Click **OK** when prompted with the download path.

3. The document will then become Checked Out and open in Microsoft Word.

4. Once you have made changes in Word, the file can be uploaded back into the register through the existing Office Integration.

5. In Word, from the **TeamBinder** tab, select **Upload**. The standard upload screen appears with the updated file metadata.

6. Click **Save**. This will check-in the previous revision/version and upload the new revision/version. Click **Close** to exit this screen.

NOTE

- This feature is compatible with Internet Explorer.

- This feature requires access to the existing Office Integration tool.

- Office Integration **must** be enabled on the Project. Please contact InEight Document Support to enable this.

- To use this feature for Google Chrome you will need to install a 3rd party application called **click once**.
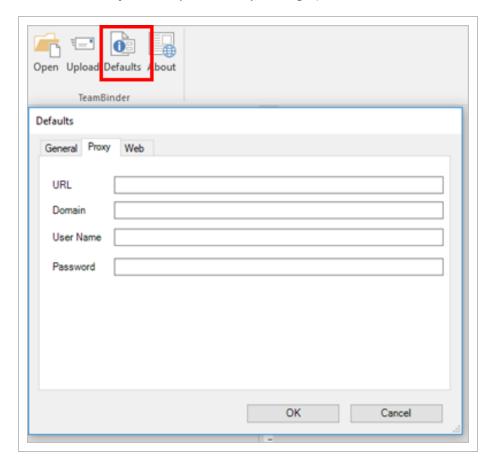
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CHAPTER 5 – SETTINGS

The InEight Document Office Integration Settings window allows the user to modify settings at a user level. The settings on the General Tab have been described in Section 3.1

5.1 PROXY SETTINGS

Use this tab to set the proxy server settings for InEight Document Office Integration when connecting to the InEight Document servers.

1. Click **Defaults**.

2. Select the **Proxy** tab to update Proxy settings (between the user's account and the internet).

5.2 WEB SETTINGS

Disable Expect: 100-continue headers

Enable this option to fix connection issues between InEight Document Office Integration and the InEight Document server caused by the 100-expect-continue and keep-alive headers.