

# BR-Docs Plug-In for Office Guide



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BR-Docs Plug-In for Office is a software solution you can use to dynamically file all of your Microsoft® Office documents (Word, Excel®, PowerPoint®) and e-mails (Outlook®), directly from your Microsoft® application into BR-Docs.

The BR-Docs Plug-In for Office Guide for Windows® contains recommendations, tips and suggestions to maximize your use of BR-Docs Plug-In for Office. To maximize the full potential of this guide, please familiarize yourself with the concepts and configuration procedures described in this guide, and in the documentation related to BR-Docs, the documents management Web module (DMS).

For more information, or to view documentation about the topics covered in this document, please refer to Brother's Website, at the following address: <http://www.brother.com>

This manual has been written and published under Brother's supervision, and it covers the latest product description and specifications.

All wordings, product references, recommendations and content are subject to change without notice.

Brother reserves the right to change, without prior notice, all specifications and information in this manual and will not be held responsible for any damage (including indirect damage) due to the information herein, including, but not limited to, typos and other errors related to the manual.



BR-Docs Plug-In for Office is a software solution developed for the filing and indexation of documents in **BR-Docs**.

The Microsoft® Office documentation that is able to be filed can be in either Microsoft® Word, Microsoft® Excel®, Microsoft® PowerPoint® or Microsoft® Outlook® formats.

At the start of the application, the Installer automatically detects Microsoft® Office 2003, Microsoft® Office 2007 or Microsoft® Office 2010.

**The three basic functions are:**

- Filing and indexation into BR-Docs of Microsoft® Office documents directly from Microsoft® Word, Microsoft® Excel® and Microsoft® PowerPoint®.
- Filing and indexation into BR-Docs of one or more Microsoft® Office documents at the same time (multiple selection or selection of a documents folder) directly from Windows® Explorer's contextual menu.
- Filing and indexation into BR-Docs from Microsoft® Outlook®:
  - Filing an email in PDF format, with its attachments.
  - Filing of one or more attachments only.

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## IMPORTANT

When you file an email, the original email is not deleted from your mailbox.

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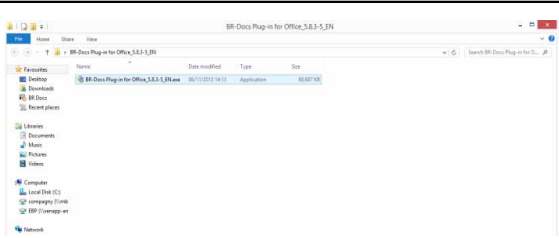

# Installing BR-Docs Plug-In for Office

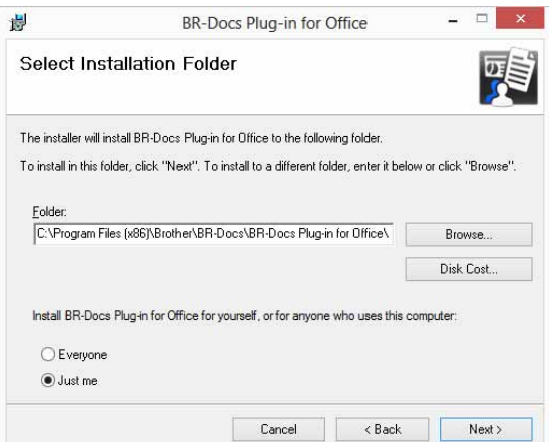
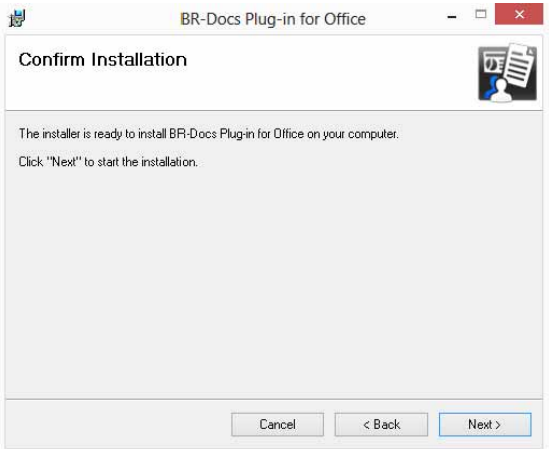
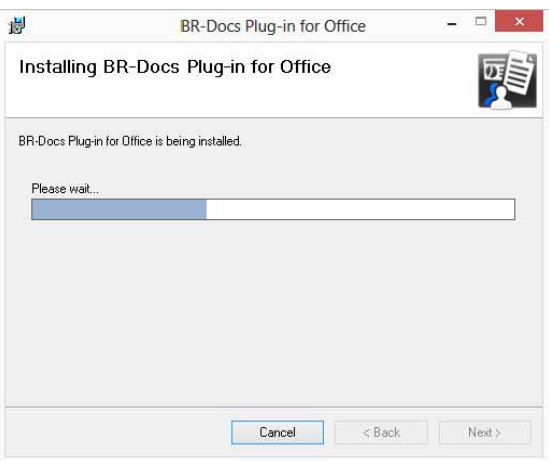
The Installation section of BR-Doc Plug-In for Office will guide you step by step through the software installation process.

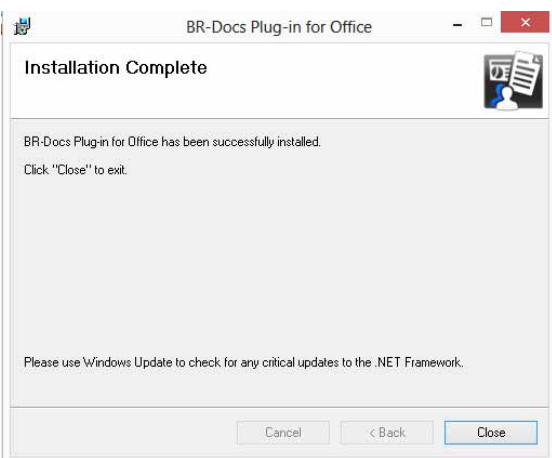
## IMPORTANT

Make sure you have closed all Microsoft® Office applications before installing BR-Docs Plug-In for Office.

Click the link **Click here to download additional tools** on your BR-Docs dashboard, and follow the installation steps below:

Description	Illustration
Double-click the .EXE file to run the Installer.	
The home page displays. Click <b>Next</b> .	

Description	Illustration
<p>Click <b>Browse...</b> to select where you want to install the software.</p> <p>Click <b>Next</b> when you have chosen a location.</p>	
<p>A confirmation page displays. Click <b>Next</b> to start the installation.</p>	
<p>Wait until the installation is finished.</p>	

Description	Illustration
<p>The installation is complete. Click <b>Close</b>.</p>	 <p>The screenshot shows a Windows-style dialog box titled "BR-Docs Plug-in for Office". The main heading inside is "Installation Complete". Below this, the text reads: "BR-Docs Plug-in for Office has been successfully installed. Click 'Close' to exit." At the bottom of the dialog, there are three buttons: "Cancel", "&lt; Back", and "Close". The "Close" button is highlighted with a blue border. There is also a small icon in the top right corner of the dialog area showing a document with a person icon.</p>



# Hardware and software requirements

- Computer with an Intel® Pentium® IV 800 MHz processor, or superior
- Windows® XP 32 bit, Windows Vista® 32 bit, Windows® 7 32 bit or 64 bit
- Microsoft® Office 2007 or Microsoft® Office 2010
- Microsoft® Framework .Net 4
- 512 MB flash memory (1 GB or more recommended)
- 200 MB of free disk space
- A minimal resolution of 800 x 600 (1024 x 768 or more recommended)
- TCP/IP network card

BR-Docs Plug-In for Office is designed to work with Microsoft® Office 2007 or 2010 on Windows® XP, Vista® or 7 32 bit, and with Microsoft® Office 2007 or 2010 on Windows® 7 64 bit.

BR-Docs Plug-In for Office works with **BR-Docs digital document management servers, version 5.2** or later.

The use of BR-Docs Plug-In for Office requires the use of a local administrator account for the workstation.

# Uninstalling BR-Docs Plug-In for Office

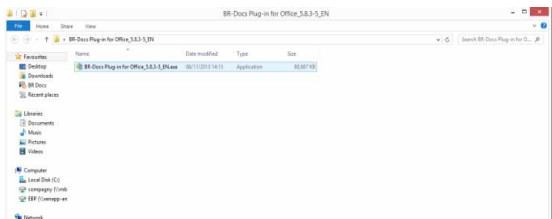
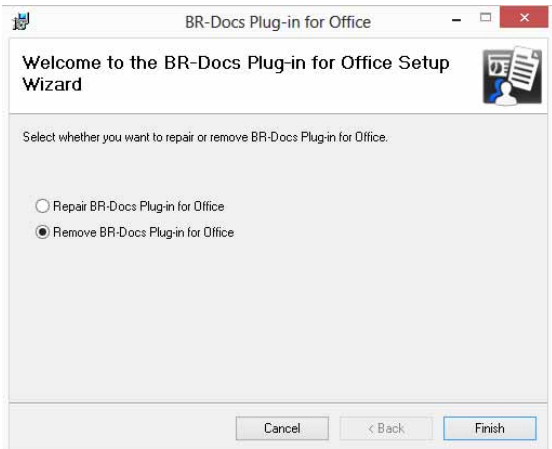
The Uninstallation section of BR-Doc Plug-In for Office will guide you step by step through the software uninstallation process.

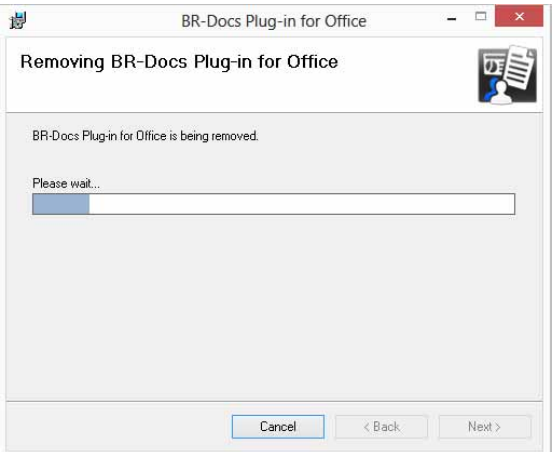
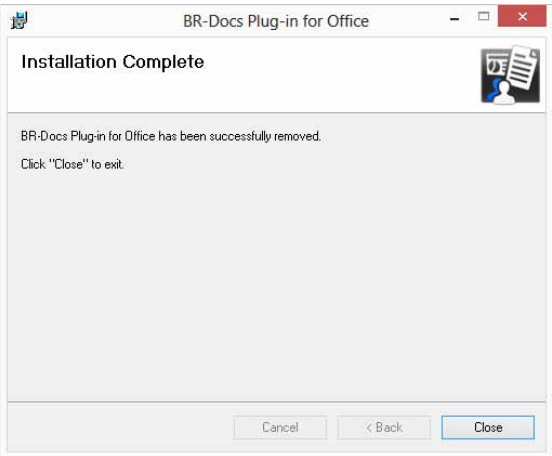
## IMPORTANT

Before uninstalling BR-Docs Plug-In for Office

- Close all active applications, especially your anti-virus software.
- Login as an administrator on you workstation

In the Windows® **Control Panel**, select **BR-Docs Plug-In for Office**, and then click **Uninstall**. Then, follow the uninstallation steps below:

Description	Illustration
Double-click the <b>.EXE</b> file to start the uninstallation process.	
The home page displays. Select <b>Remove BR-Docs Plug-In for Office</b> and then click <b>Finish</b> .	

Description	Illustration
Wait until the uninstallation is finished.	
The uninstallation is complete. Click <b>Close</b> .	

## Configuring BR-Docs Plug-In for Office

Use this step to set the communication parameters with your **BR-Docs** server.

Start the **BR-Docs Plug-In for Office - Configuration** module:

- In the **Start** menu, click **BR-Docs Plug-In for Office - Configuration**, under **All Programs - Brother - BR-Docs - BR-Docs Plug-In for Office - BR-Docs Plug-In for Office - Configuration**.

OR

- Double-click the **BR-Docs Plug-In for Office - Configuration** icon that was created on your Windows® desktop by the Installer.



### NOTE

It is possible to connect with BR-Docs in SaaS mode, as well as with HTTPS secured mode (if the BR-Docs server has been configured in this mode).

Type in the IP address (or URL) for your **BR-Docs**, as well as the username (by default “admin”) and the password (by default: “admin”) corresponding to the server.

Type in the default port 8000 for Windows®-based **BR-Docs** servers, or 80 by default for Linux-based **BR-Docs** servers.

If you use a proxy, click **Configure a proxy server**. Two configuration methods are available:

- **Automatic configuration.** Click **Automatically detect settings** and then select **Save**.
- **Manual configuration.** Click **Manually set proxy settings**, fill in the fields below, and then select **Save**.

☒ **Configure a proxy server**

Configuration: Manually set proxy settings

URL or IP Address:

☐ **Proxy authentication**

Login:

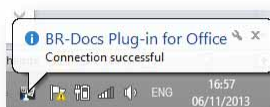
Password:

**Save**

Click **Save** to save the settings of the **BR-Docs** server.

A communication test is run during the saving process in order to test the parameters.

A tooltip appears in the Windows® notifications bar to inform you of the test results.



## IMPORTANT

BR-Docs Plug-In for Office works with **BR-Docs digital documents management servers, version 5.2** or later.

# Installing add-ins

Start the **BR-Docs Plug-In for Office** module:

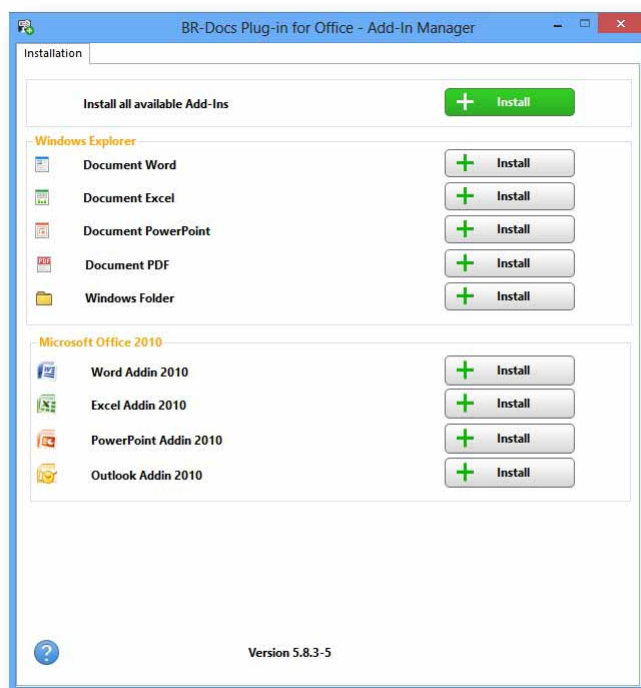
- In the **Start** menu, click on **BR-Docs Plug-In for Office**, under **All Programs - BR-Docs - BR-Docs Plug-In for Office**

OR

- Double-click the **BR-Docs Plug-In for Office** icon that was created on your Windows® desktop by the Installer.



In the Add-in Manager's **Install** tab, you can activate or deactivate all of the Office add-ins.



Click the **Install all available Add-Ins** to start installing all of the add-ins. The Microsoft® Office add-ins installation window will open. Select **Install** to install them.



You can also choose to install each add-in individually. To do so, follow the instructions in the following paragraphs.

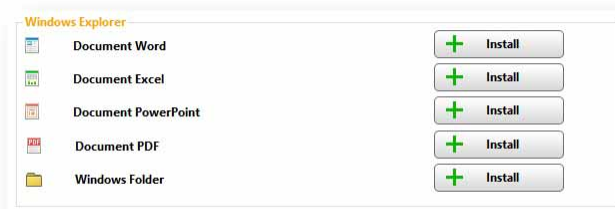
## Installing Windows® Explorer

Start the **BR-Docs Plug-In for Office** module:

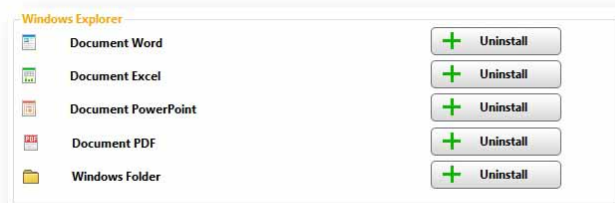
- In the **Start** menu, click **BR-Docs Plug-In for Office**, under **All Programs - Brother - BR-Docs - BR-Docs Plug-In for Office - Administration - BR-Docs Plug-In for Office**

OR

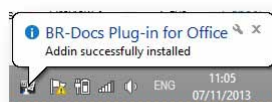
- Double-click the **BR-Docs Plug-In for Office** icon that was created on your Windows® desktop by the Installer.
- Click on the **Install** button to start installing the Windows® Explorer add-ins for each document type (Microsoft® Word, Microsoft® Excel®, Microsoft® PowerPoint®, PDF, Windows® folders).



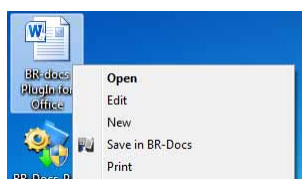
- When the add-ins are installed, the interface will be changed as follows:



- A tooltip will appear each time you click on **Install** in order to confirm that the Plug-In was successfully installed.



- Once the add-ins are installed, a new menu will appear when you right-click on a folder or in a file from Windows® Explorer **Save in Br-Docs**.



## Installing Microsoft® Word

Start the **BR-Docs Plug-In for Office** module:

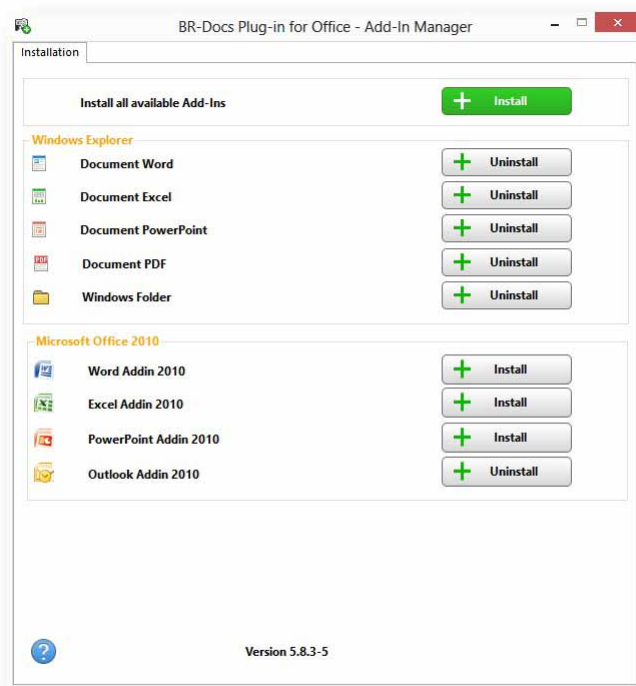
- In the **Start** menu, click **BR-Docs Plug-In for Office**, under **All Programs - Brother - BR-Docs - BR-Docs Plug-In for Office - Administration - BR-Docs Plug-In for Office**

OR

- Double-click the **BR-Docs Plug-In for Office** icon that was created on your Windows® desktop by the Installer.



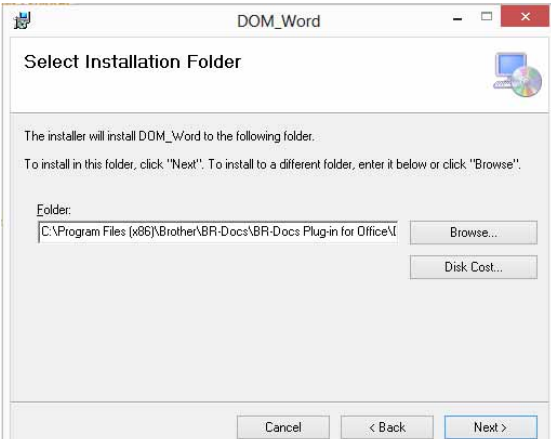


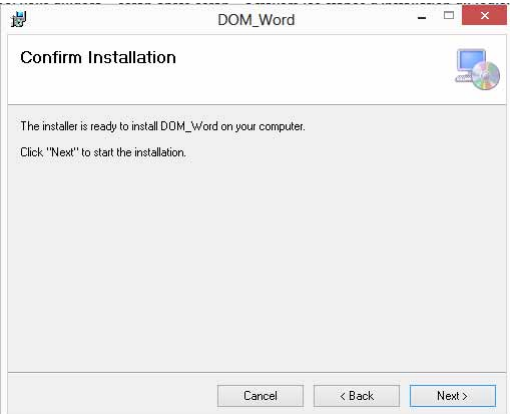
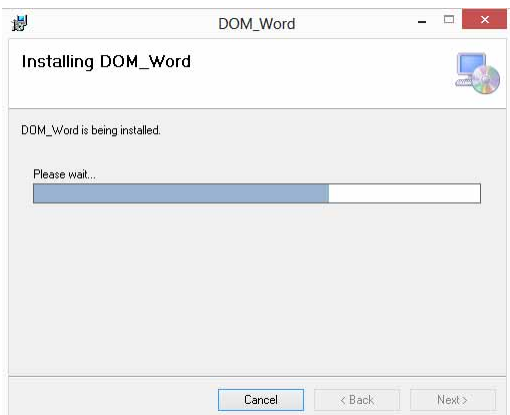
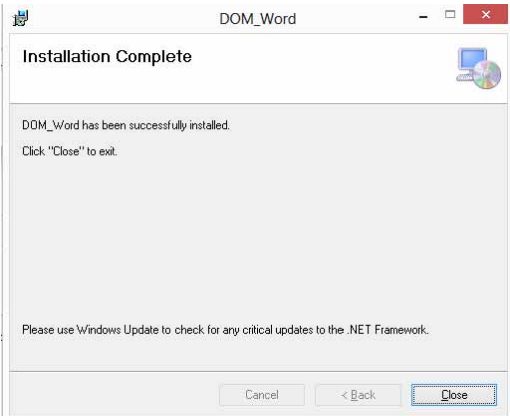
The following window opens:



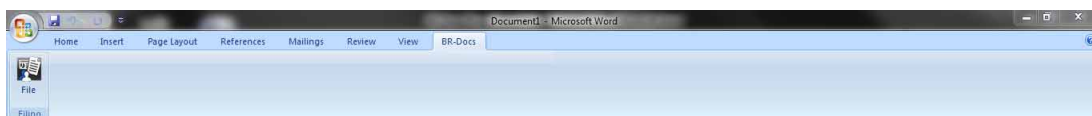


Now, follow the installation steps:

Description	Illustration
<p>Within the “Microsoft® Office 2010” section, on the right from “Word Addin 2010”, click the <b>Install</b> button to start the installation process.</p>	 <p>The screenshot shows a window titled 'Word Addin 2010'. On the right side, there is a green button with a plus sign and the text 'Install'.</p>
<p>The home page will display. Click <b>Next</b>.</p>	 <p>The screenshot shows a window titled 'DOM_Word' with the subtitle 'Welcome to the DOM_Word Setup Wizard'. It contains instructions: 'The installer will guide you through the steps required to install DOM_Word on your computer.' At the bottom, there are three buttons: 'Cancel', '&lt; Back', and 'Next &gt;'. A warning message is also present: 'WARNING: This computer program is protected by copyright law and international treaties. Unauthorized duplication or distribution of this program, or any portion of it, may result in severe civil or criminal penalties, and will be prosecuted to the maximum extent possible under the law.'</p>
<p>The access path for the installation of the add-in displays. Click <b>Next</b>.</p>	 <p>The screenshot shows a window titled 'DOM_Word' with the subtitle 'Select Installation Folder'. It contains instructions: 'The installer will install DOM_Word to the following folder. To install in this folder, click "Next". To install to a different folder, enter it below or click "Browse".' Below the instructions, there is a text field labeled 'Folder:' containing the path 'C:\Program Files (x86)\Brother\BR-DCos\BR-DCos Plug-in for Office\'. To the right of the text field are two buttons: 'Browse...' and 'Disk Cost...'. At the bottom, there are three buttons: 'Cancel', '&lt; Back', and 'Next &gt;'. A warning message is also present: 'WARNING: This computer program is protected by copyright law and international treaties. Unauthorized duplication or distribution of this program, or any portion of it, may result in severe civil or criminal penalties, and will be prosecuted to the maximum extent possible under the law.'</p>

Description	Illustration
A confirmation page displays. Click <b>Next</b> to start the installation.	
Wait until the installation is finished.	
The installation is complete. Click <b>Close</b> .	

When the installation is complete, a new **BR-Docs** tab will be added to Microsoft® Word. It contains a **File** option used to file a document in BR-Docs.



## Installing Microsoft® Excel®

Refer to the installation process for Microsoft® Word (section *Installing Microsoft® Word*), but use the process for the Microsoft® Excel® plugin.

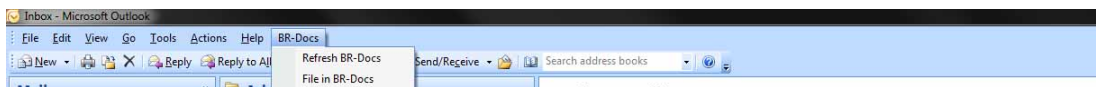
## Installing Microsoft® PowerPoint®

Refer to the installation process for Microsoft® Word (section *Installing Microsoft® Word*), but use the process for the Microsoft® PowerPoint® plugin.

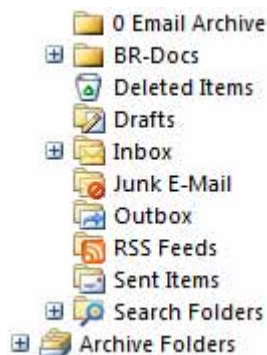
## Installing Microsoft® Outlook®

Refer to the installation process for Microsoft® Word (section *Installing Microsoft® Word*), but use the process for the Microsoft® Outlook® plugin.

When the installation is finished, a new menu will be added to Microsoft® Outlook®.



A new “BR-Docs” folder will be added to the mailbox.

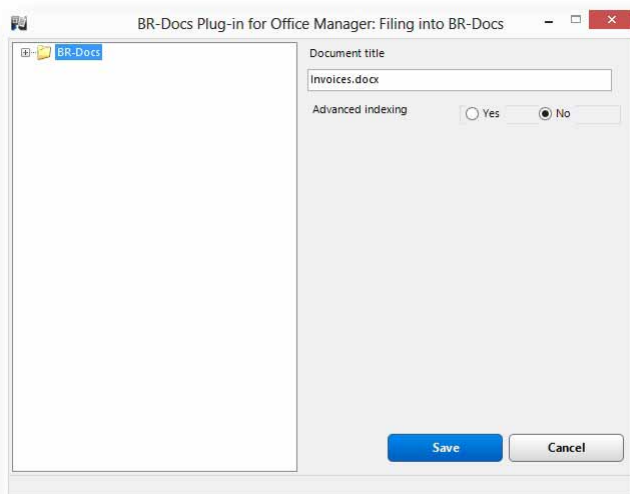


# 3

## User's guide

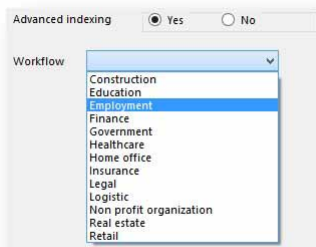
### Using the “Filing in to BR-Docs” window

When filing documents, BR-Docs Plug-In for Office displays a **Filing in to BR-Docs** window.



In this window, you need to:

- Check the documents you want to file in the documents list. If the documents list contains only one document, it will be selected by default.
- Choose the **BR-Docs** directory in which you want to file the selected documents.
- Choose the indexation type (advanced or not). If you select **Yes**, a form appears in which you can select the indexation rule you want to apply to the documents.



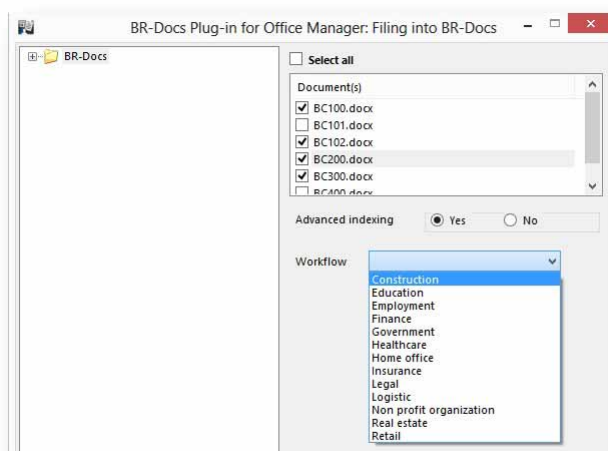
Click **Save** to start processing the document filing in BR-Docs.

Click **Cancel** to cancel the filing and close the window.

#### IMPORTANT

The processing operation can take a few seconds.

If the documents list contains several documents, you can then select the ones you want to file:



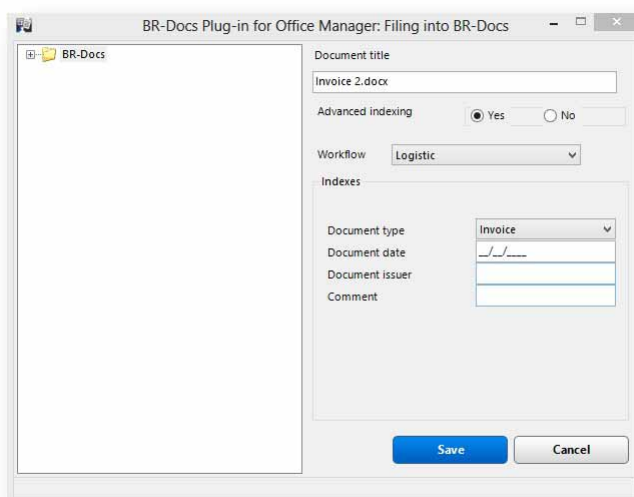
## IMPORTANT

You cannot create a BR-Docs directory from this window.

If you need to create a new directory, connect to your **BR-Docs** using your browser.

## Using advanced indexation

With BR-Docs Plug-In for Office, you can choose advanced indexation options when filing documents.



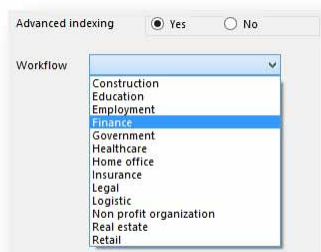
### IMPORTANT

This function allows you to incorporate indexes to the documentation being filed into BR-Docs. In order for the advanced indexation to work, you must use **BR-Docs 5.2** or later.

When filing a document, BR-Docs Plug-In for Office communicates with BR-Docs in order to retrieve the list of document types it can process and the related indexes.

If you want a rule to appear in BR-Docs Plug-In for Office, said rule must therefore have been used at least once by BR-Docs and it must be set so in order to use BR-Docs Plug-In for Office.

If you select **Yes** for advanced indexation, BR-Docs Plug-In for Office will display the list of rules. When you select the rule of your choice, a form appears with the list of indexes related to this rule. These indexes will be associated with the document and will be used for document searches in BR-Docs.



### NOTE

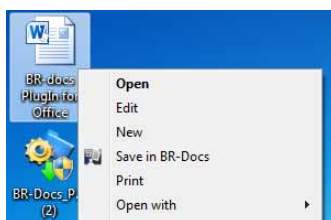
These indexes are found under the document's properties within your BR-Docs interface.

If you do not want to use advanced indexation, your document will be saved under the **Default** type.

# Filing documents with Windows® Explorer

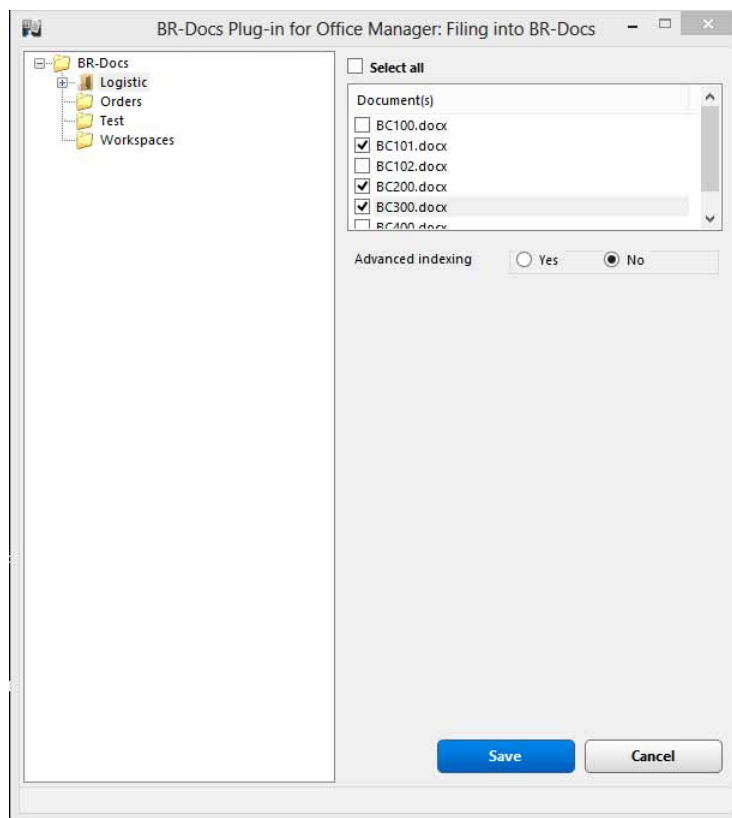
## Filing a folder

With this add-in, you can file all of the documents that exist in a Windows® folder. Open the directory's contextual menu by right-clicking on it, and then click **Save in BR-Docs**.



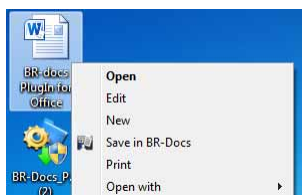
The **Filing into BR-Docs** window appears.

Refer to *Using the "Filing in to BR-Docs" window* for more information on how the filing is processed.



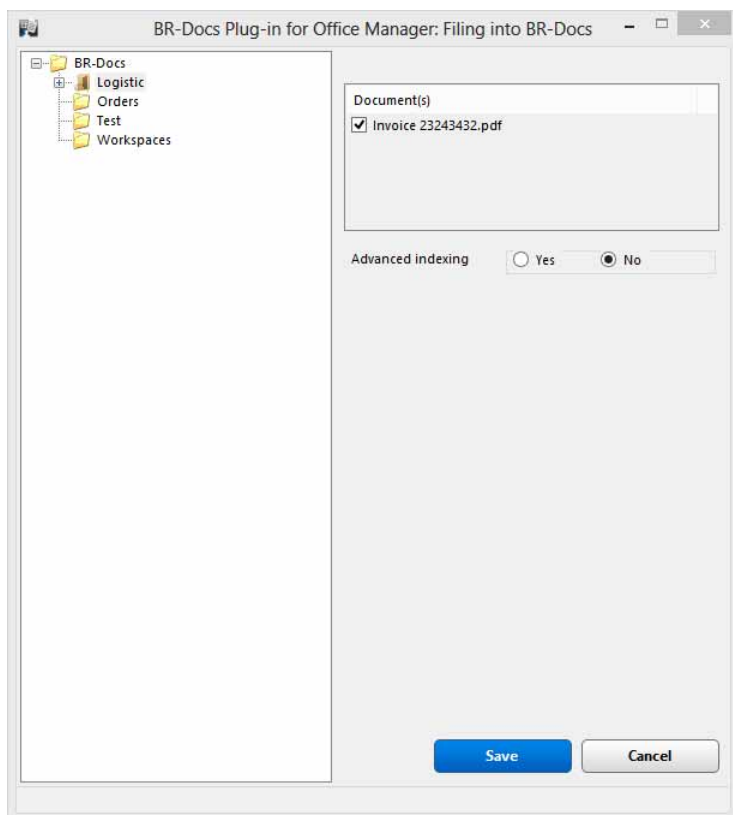
## Filing a document

To file a PDF document, Microsoft® Word document, a Microsoft® Excel® spreadsheet or a Microsoft® PowerPoint® slideshow directly from Windows® Explorer into BR-Docs, just right-click on the document, and then click on **Save in BR-Docs**.



The **Filing into BR-Docs** window appears.

Refer to *Using the “Filing in to BR-Docs” window* for more information on how the filing is processed.

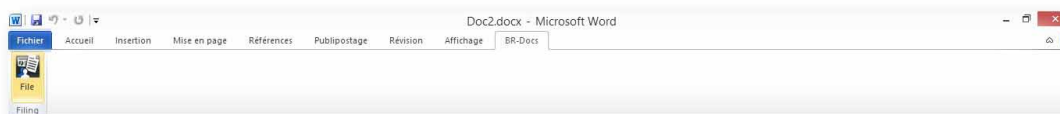


Once you have chosen a destination directory for the document, click **Save** to start processing the document filing in BR-Docs.



## Filing Microsoft® Word documents

To file a Microsoft® Word document in BR-Docs, open the BR-Docs tab, and then click the **File** button.

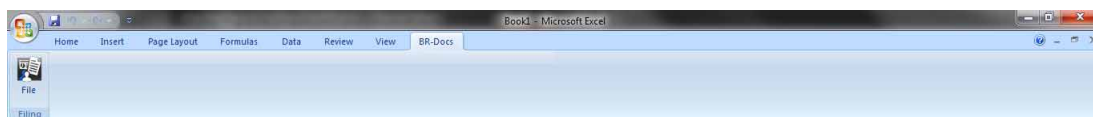


The **Filing into BR-Docs** window appears.

Refer to *Using the “Filing in to BR-Docs” window* for more information on how the filing is processed.

## Filing Microsoft® Excel® documents

To file a Microsoft® Excel® document in BR-Docs, open the BR-Docs tab, and then click the **File** button.

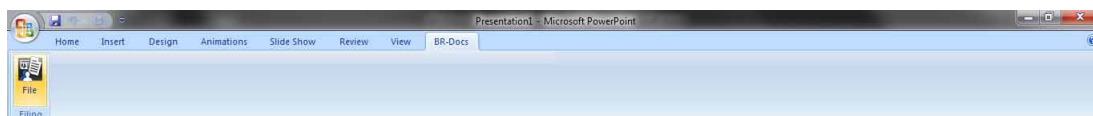


The **Filing into BR-Docs** window appears.

Refer to *Using the “Filing in to BR-Docs” window* for more information on how the filing is processed.

## Filing Microsoft® PowerPoint® documents

To file a Microsoft® PowerPoint® document in BR-Docs, open the BR-Docs tab, and then click the **File** button.



The **Filing into BR-Docs** window appears.

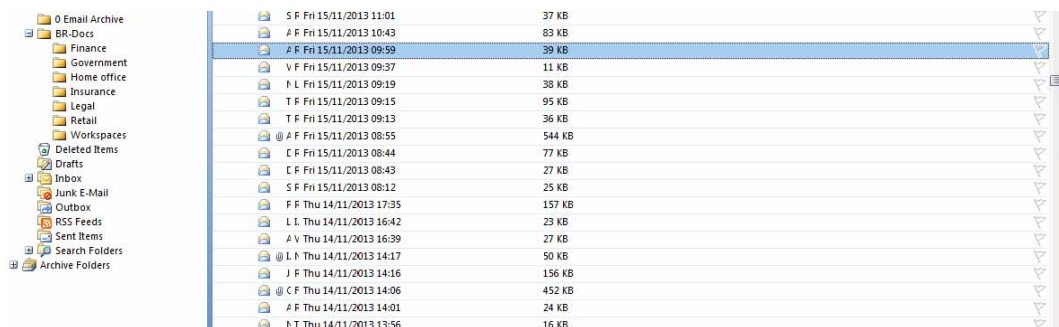
Refer to *Using the “Filing in to BR-Docs” window* for more information on how the filing is processed.

## Filing Microsoft® Outlook® documents

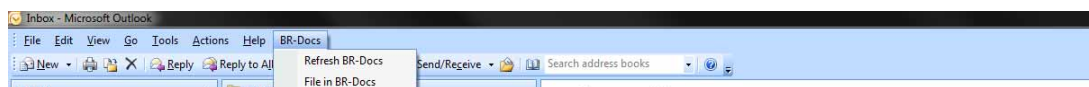
This add-in lets you file and index e-mails and attachments in BR-Docs, directly from Microsoft® Outlook®.

There are two choices to file one or more emails:

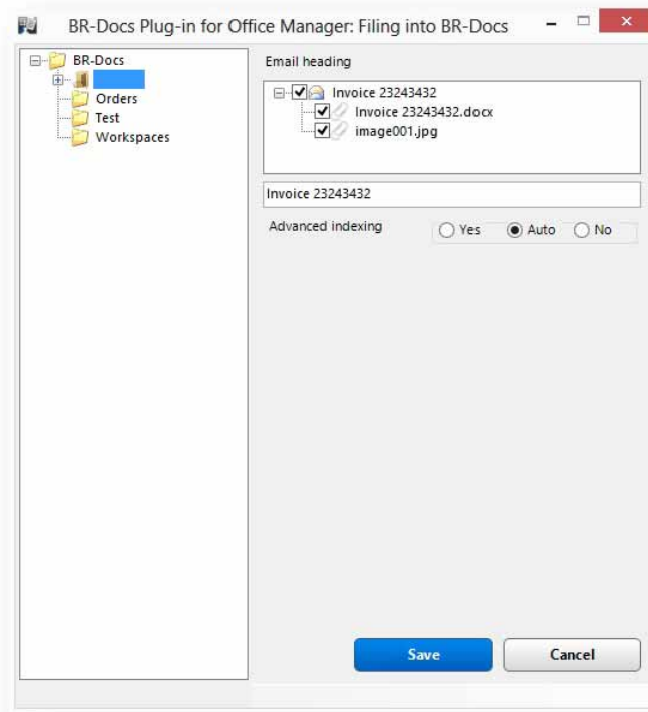
- Select the email(s) you want to file and drag and drop them into the corresponding BR-Docs subfolder.



- Select the email(s) you want to file, and then click **File in BR-Docs**, under the **Complements** tab, at the top of the Outlook® bar.



The **Filing into BR-Docs** window appears.  
It contains certain Microsoft® Outlook® settings:



In this window, you can select the emails and attachments to be filed using the checkboxes. The email are filed in text PDF format and the attachments in their original format. You can change the title of the email should you wish to do so. During the filing process, BR-Docs Plug-In for Office creates a directory with this title in **BR-Docs** and uses it to file the PDF email and the attachments.

If you select only one attachment, BR-Docs Plug-In for Office will not create a directory and will file the document in the BR-Docs selected in the Microsoft® Outlook® list of folders.

BR-Docs Plug-In for Office offers automatic email advanced indexation with Microsoft® Outlook®. BR-Docs Plug-In for Office will index the sender, the recipient and the subject line for each email you file. The email will be filed in **BR-Docs** under the "Microsoft® Outlook®" document type. Refer to *Using advanced indexation* for more information on advanced indexation.

## IMPORTANT

- BR-Docs Plug-In for Office files only emails. You cannot file other Microsoft® Outlook® objects, such as Meeting Requests, Events or Tasks.
- When you file an email, the original email is not deleted from you mailbox.