TeamConnect® Office Suite 2.1.0.1

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User Guide

TeamConnect® Office Suite 2.1.0.1 User Guide

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TeamConnect for TeamConnect Enterprise
Matter Management for TeamConnect Legal Matter Management
TeamConnect Legal for TeamConnect Legal Matter Management
CSM for TeamConnect Collaborati Spend Management
Collaborati Spend Management for TeamConnect Collaborati Spend Management
SOP or SOP Manager for TeamConnect SOP Manager
Legal Hold for TeamConnect Legal Hold
Legal Reports for TeamConnect Legal Reports
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Financial Management for TeamConnect Financial Management
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Acknowledgements

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Table of Contents

Part I Preface 7

1 Conventions in this Guide ... 7
2 Using this Guide ... 8

Part II Getting Started 8

1 Updating Login Settings ... 9
2 Proxy Authentication ... 11
3 Project Integration ... 12
4 Preventing Records From Appearing ... 13
5 Syncing Outlook with Google Mail ... 14
6 Syncing and Offline Mode ... 16
7 Document Check In and Check Out ... 17
Check In Settings ... 19
Document Management ... 20
8 Search Filtering ... 21

Part III Installation Notes 24

1 Adding Plug-ins to TeamConnect ... 25
2 Installing the TeamConnect Office Add-In ... 26
3 Installing the TeamConnect Outlook Add-In ... 27
4 Administrator Installation Notes ... 28
Log-in with Windows ID ... 30
5 Upgrade Considerations ... 30

Part IV TeamConnect Outlook 31

1 TeamConnect Tasks in Outlook ... 31
Opening Tasks ... 32
Updating Information ... 33
Updating Task Activities ... 34
Creating Tasks ... 35
2 TeamConnect Appointments in Outlook ... 37
Updating Information ... 38
Updating Categories ... 38
Opening Appointments ... 39
Filtering Projects and Appointments ... 40
3 TeamConnect Outlook Documents and Emails ... 40
Metadata Population ... 43
Setting Metadata Display ... 44
Editing Document Metadata ... 46
Uploading Documents ... 48

Setting a Size Threshold ... 48
Outlook Email Storage Format ... 50
Attaching Documents ... 52
Opening Documents ... 54
Searching Documents ... 55
Opening Office Documents in Outlook ... 56
Moving Documents ... 57
Deleting Documents ... 57
Overwriting Documents ... 59
Version Control Overwriting ... 60
Saving to Local Machines ... 61

Part V TeamConnect Office 63

1 Saving Metadata from Office ... 64

2 Office Documents and Emails ... 64

Opening Documents ... 64
Saving Documents ... 65
Office Metadata Population ... 66
Updating Documents ... 67
Uploading Documents ... 67
Editing Document Metadata ... 68

Index 70

1 Preface

Welcome to the TeamConnect® Office Suite 2.1.0.1 User Guide.

This documentation is meant for people who need an overview of how to use the TeamConnect Office and Outlook plug-in. It describes the user interface and standard features. You can learn to perform common tasks and find reference information about standard fields and tasks for all system record screens, shortcut keys, and terminology. Review the Using this Guide and Conventions in this Guide entries for additional help with the User Guide.

Topics and functionality that apply to both Office and Outlook plug-ins can be found in the *Getting Started* section of this guide. These topics include syncing, document check in, and search filtering, among others.

The topics are organized by the major tasks that you must perform when using TeamConnect Office. There are several ways that you can access information in this guide:

- Browse topics using the Bookmarks Contents links in the left pane.
- Find topics with keywords using the Index and Search features in the left pane.
- Search this PDF for keywords by viewing its table of contents, index, or by pressing CTRL+F on your keyboard and entering the desired term.

1.1 Conventions in this Guide

Throughout this documentation, different text styles are used to help draw your attention to various types of information.

Style	Significance
Bold type	Highlights file and directory names, the names of interface items, such as tabs, field names, and buttons.
Italic type	Used for emphasis in the general text flow. Also used with monospace type to indicate variable user input.
`Monospace type`	Indicates code or user input, for example, `<Import application="CODE">`. Variables and other placeholders that the user must provide are shown in both monospace type and italic type, for example, *`CODE`*.
`Bold monospace type`	Indicates the sections in long code samples that are being explained or illustrated. For example: `<`**`Template`** `name="Letter to Client">`

Note: *Sample Text*	Additional information that supplements the points in the main text.
Important: Sample Text	Information that emphasizes important points in the main text. Important notes typically provide essential information for the successful operation of the software.

1.2 Using this Guide

You can find information in the User Help via the following ways:

- For overviews and learning concepts, browse the Table of Contents or bookmarks from the left pane.

- For specific topics or questions, browse the Index at the end of the guide. Click on the related page links to topics of interest.

For specific topics or questions, use the full-text Search. Click the Search toolbar button.

Type a keyword or phrase in the field and click search.

Users can also utilize the Microsoft shortcut **Ctrl+F** to highlight phrases or words within a selected page.

2 Getting Started

TeamConnect Office Suite includes the TeamConnect Office and Outlook Add-ins.

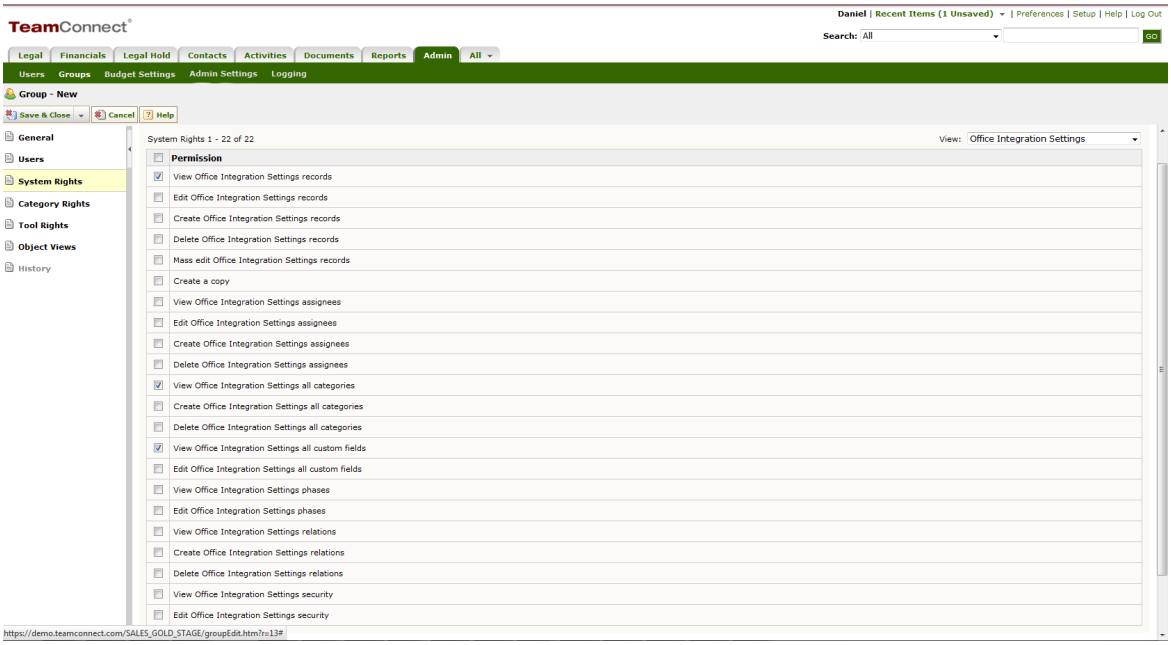
Use TeamConnect Office to make updates to documents that open in Microsoft Word, Excel, and PowerPoint.

Use TeamConnect Outlook to manage tasks, appointments, emails, and documents from Microsoft Outlook.

Both add-ins require settings information after you install them. For TeamConnect Office, when you enter settings information for Word, Excel, or PowerPoint, the other programs update with the same settings. For TeamConnect Outlook, you enter settings information separately. See the entries on Installing the TeamConnect Office Add-In and Installing the TeamConnect Outlook Add-In for further details.

Admins must enable the following permissions in TeamConnect for users and groups in order for Office Suite 2.1.0.1 to function:

- View Office Integration Settings records
- View Office Integration Settings all categories
- View Office Integration Settings all custom fields



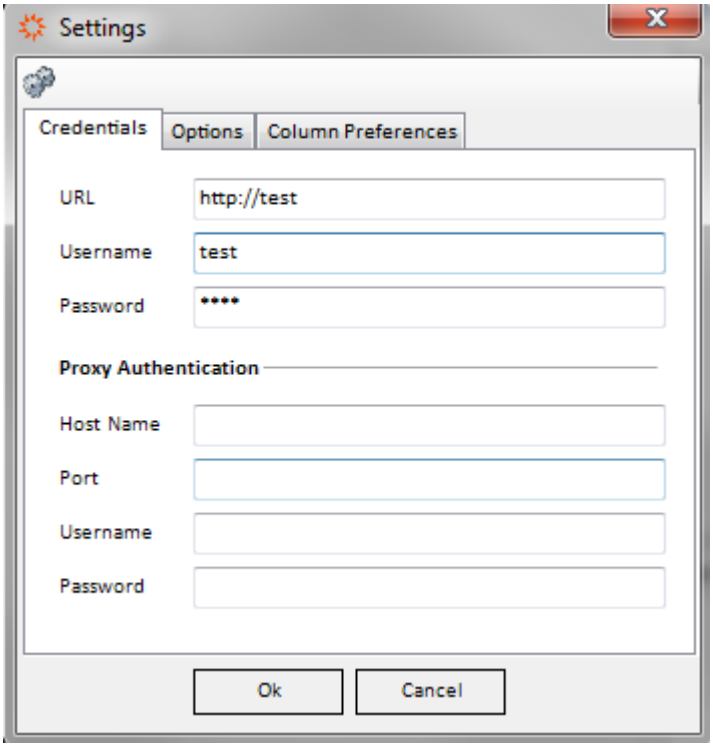
Permissions Necessary for Office Suite 2.0

2.1 Updating Login Settings

To update login settings information

For TeamConnect Office:

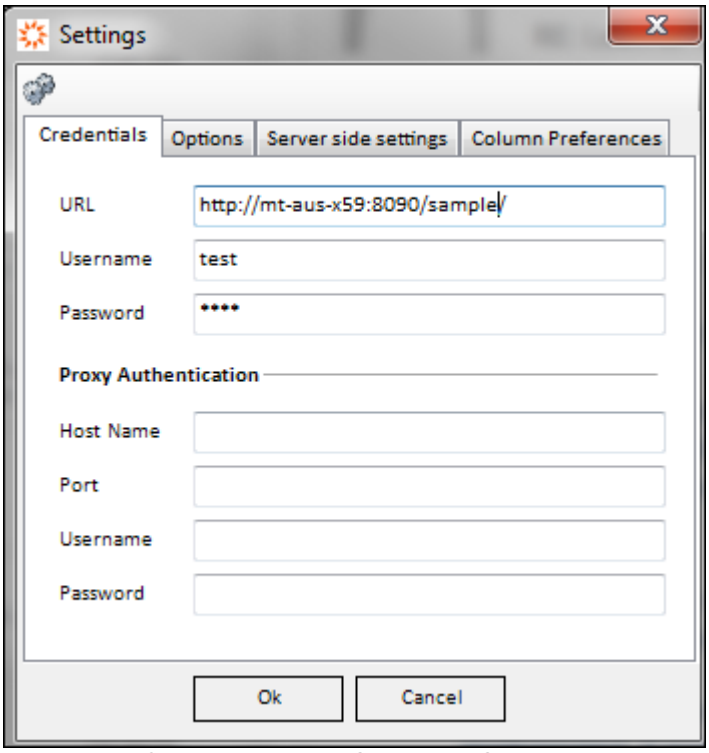
1. Open a Microsoft Office program, such as Word, Excel, or PowerPoint.
2. From the **TeamConnect** tab, click the **Settings** button.
3. Click the tab. Enter your changes. Click **Ok**.
4. A message appears to indicate whether authentication was successful or not.



Credentials Log-in Screen for Office

For TeamConnect Outlook:

1. Open Microsoft Outlook.
2. From the **TeamConnect** pane, click the **Settings** button.
3. From the **Credentials** tab, enter your changes. Click **Ok**.
4. A message appears to indicate whether authentication was successful or not.



Credentials Log-in Screen For Outlook

2.2 Proxy Authentication

Depending on your network configurations, your application may require proxy authentication to connect to Mitratech's server.

To set up a connection to a proxy

1. From the **TeamConnect** tab or pane, click the **Settings** button.
2. Navigate to the **Credentials** tab.
3. Enter information about your proxy server. See table below for a description of each field.
4. Click **Ok**.

Field Name	Description
Host Name	The host name of the proxy server on your network.
Port	The port number on which your proxy server listens for requests.
UserName	The user name that authorizes requests to the proxy server.

Field Name	Description
Password	The password that authorizes requests to the proxy server.

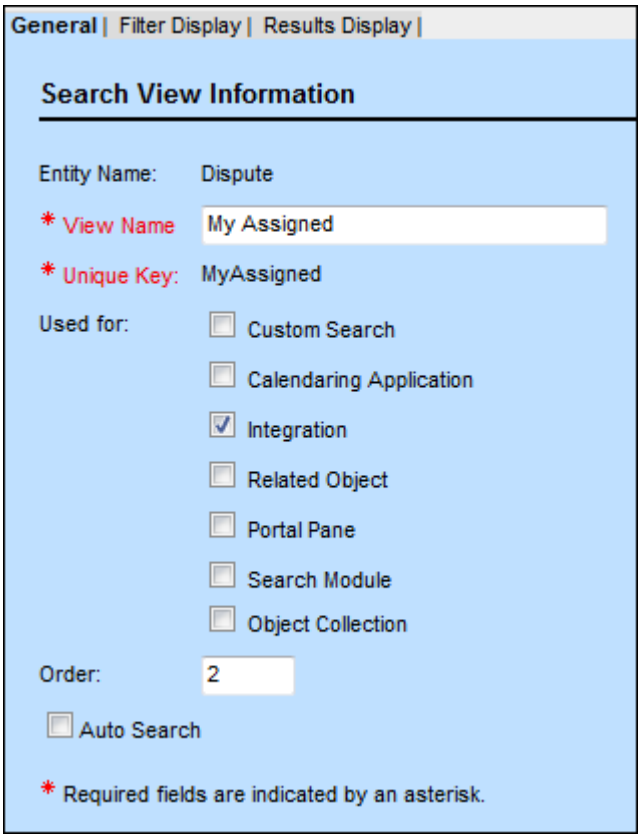
2.3 Project Integration

You can choose which projects integrate into Outlook and other Office programs. In addition, you can also determine which search views appear as folders in the folder hierarchy.

Note: *To optimize performance, it is best to limit the number of projects included to only those which you are currently working on.*

To integrate projects

1. Log in to the TeamConnect instance.
2. Click the **Setup** link.
3. From the **Go to** drop-down, select **Object Definitions**.
4. Select a project.
5. Click the **Search Views** tab.
6. Select the link for a search view.
7. Under **Used for**, place a check-mark in the **Integration** check-box.
8. Click the **Save and Close** button.
9. Repeat steps 6-7 for each search view folder you want to appear under a project.
10. Repeat steps 4-9 for each project you want to appear in the folder hierarchy.



Project Integration View

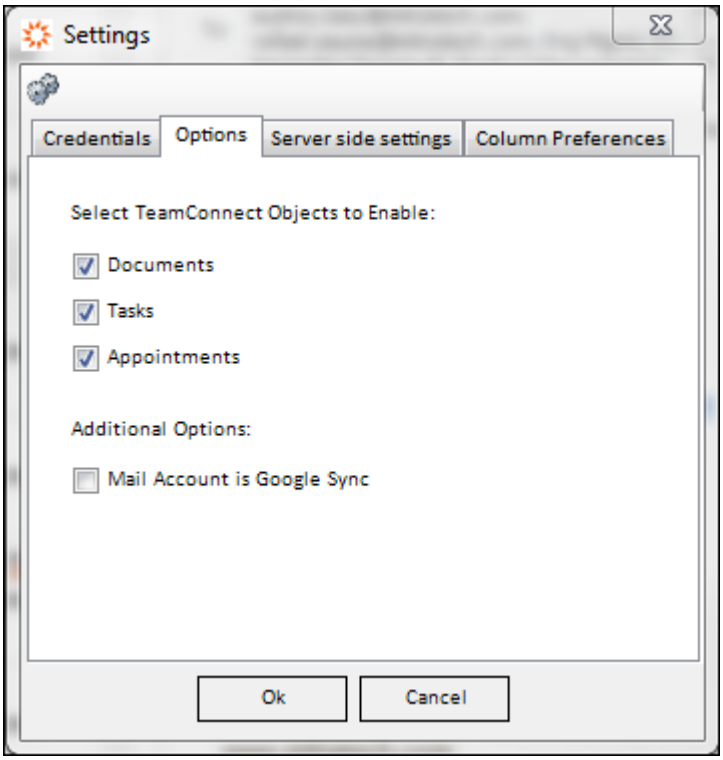
2.4 Preventing Records From Appearing

By default, TeamConnect enables documents, appointments, and tasks from TeamConnect to appear in the Outlook plug-in. However, if you do not want one or two of these types of records to appear, you can disable them.

To prevent documents, appointments, or tasks from appearing in Outlook

1. From the **TeamConnect** pane, click the **Settings** button.
2. From the **Settings** window, click the **Options** tab.
3. Remove the checkmarks from **Documents**, **Tasks**, or **Appointments** if you do not want any of those records to appear in Outlook.

   Note: *You cannot remove the checkmarks from all three record types.*
4. Click **Ok**.
5. Restart Outlook.



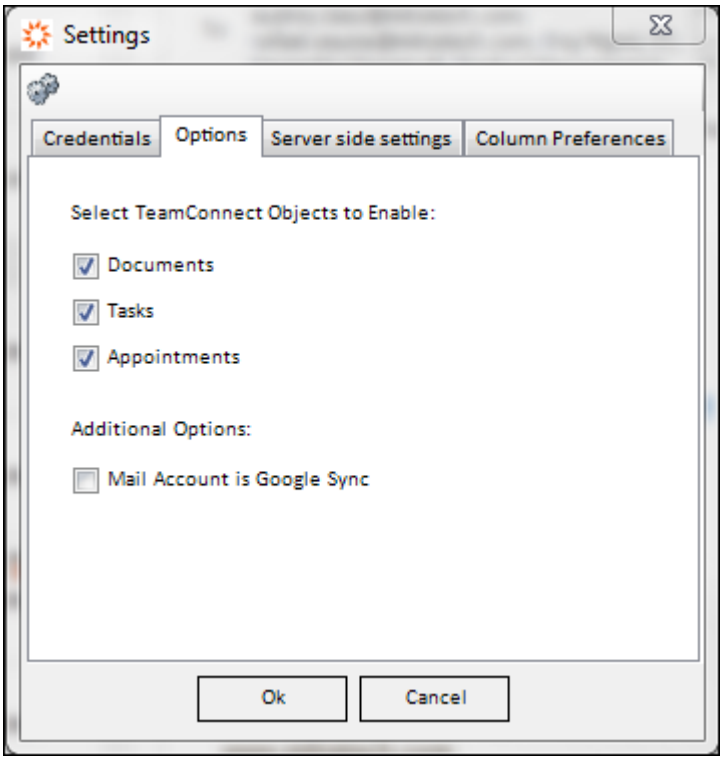
Object View Selection Screen

2.5 Syncing Outlook with Google Mail

If you use Google mail as your mail server, specify that your mail account is Google mail as part of your settings.

To specify your mail account is Google mail

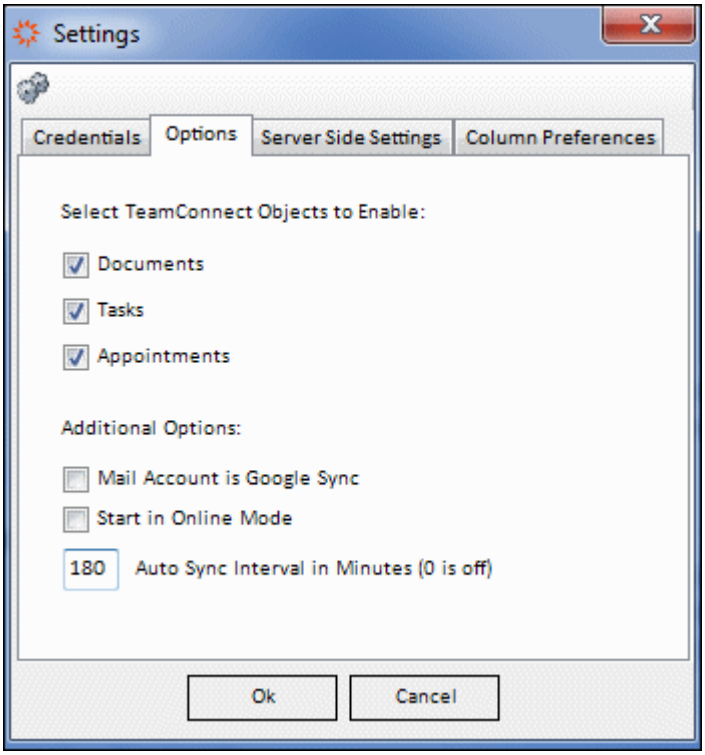
1. From the **TeamConnect** pane, click the **Settings** button.
2. From the **Settings** window, click the **Options** tab.
3. Select the **Mail Account is Google Sync** check-box.
4. Click **Ok**.



Syncing Outlook with Google Mail

2.6 Syncing and Offline Mode

The following page details functionality available from the **Options** subtab of the **Settings** menu.



Options tab on Settings (Outlook)

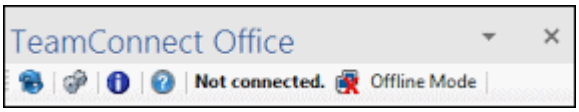
Autosync/Background Sync Intervals

The Auto Sync Interval allows users to set the plugin to sync enabled items automatically after a predetermined amount of time. This setting applies only for Outlook users. Set the value to '0' to disable this feature.

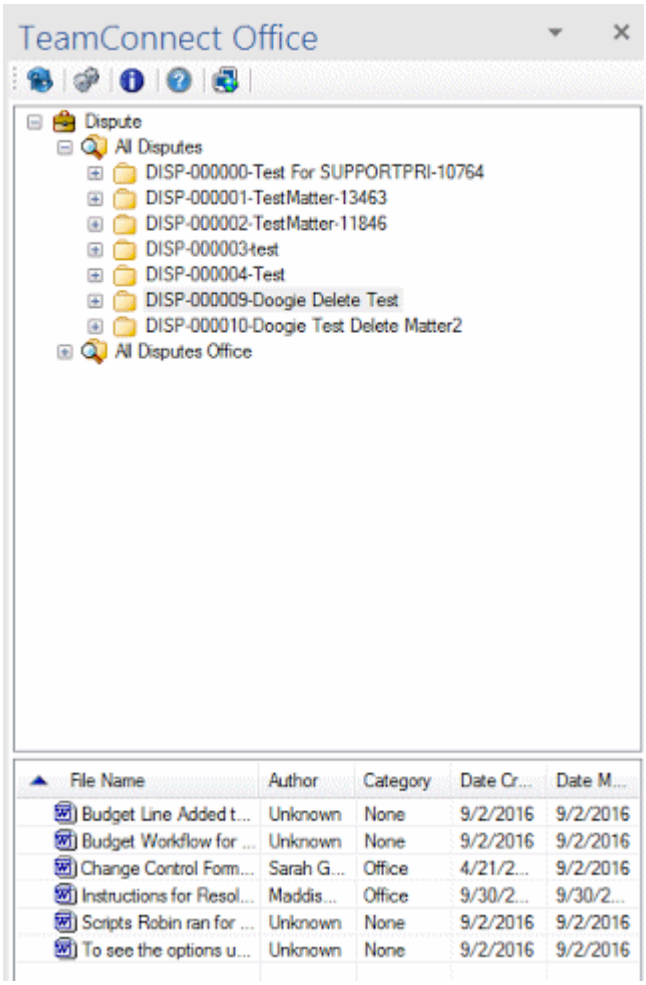
Working in Offline Mode

Checking the **Start in Online Mode** will cause the plugin to initiate sync upon load for each time you open Outlook or an Office product. ***Note:*** *The default setting for this box is checked.*

Leaving this block unchecked will result in the plugin opening in offline mode. Offline mode may help expedite processes by preventing unnecessary sync upon opening the program.



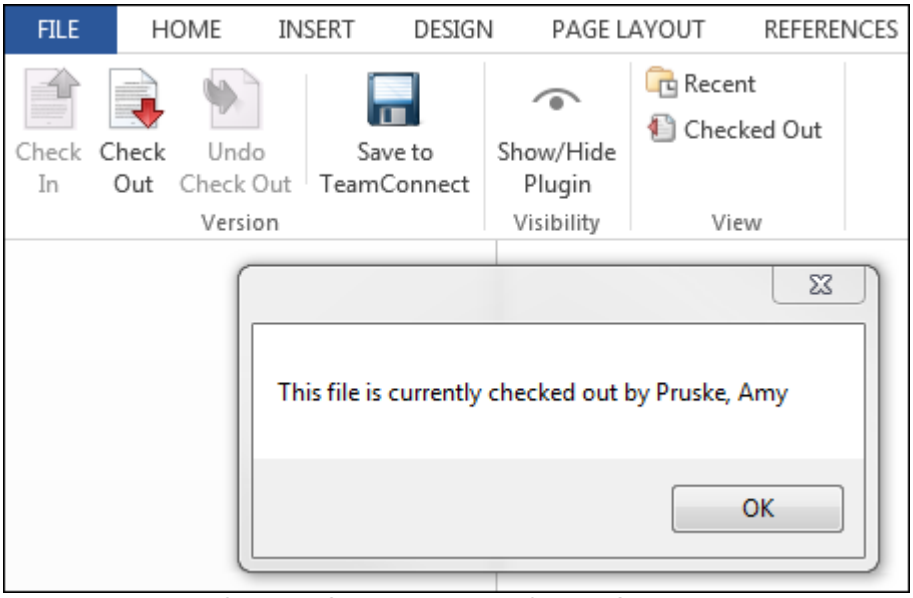
Once in the program, click the **Offline Mode** icon (above) to enable Online Mode. The user will need to navigate to each desired object and turn on the Online Mode after starting in Offline Mode. This process will need to be repeated each time the application is closed and re-opened with the default **Start in Online Mode** left unchecked.



2.7 Document Check In and Check Out

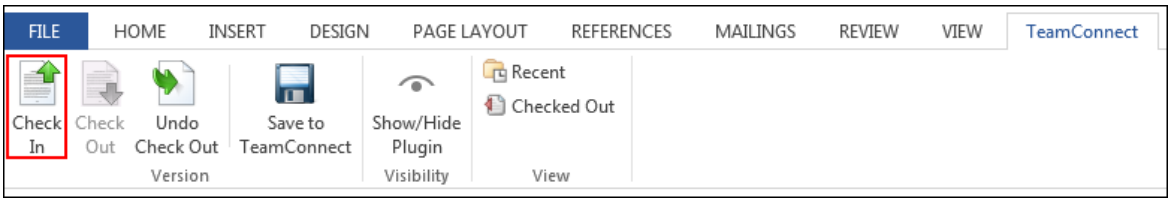
The TeamConnect Office Suite plug-in incorporates document check-in and check-out in order to prevent files from being edited by more than one user at a time. See Document Management for further information. ***Note:*** *Local changes will not be automatically reflected in the plug-in. Users must check the document back in for these changes to be stored and reflected in the plug-in.*

To check out a document, open a document from a Matter folder by double-clicking. Select **View** and click **Edit Document** from the drop-down list. Click the now highlighted **Check Out** icon under the **TeamConnect** tab. ***Note:*** *If the file is already checked out by another TeamConnect user, you will be given a notification.*



Checked Out Document Notification Screen

After editing the document, click **Check In** under the **TeamConnect** tab, or click **Undo Check Out** to return the document to the Matter folder without changes. Users may be prompted or required to enter a comment upon check-in. See **Version Control** below for more information.



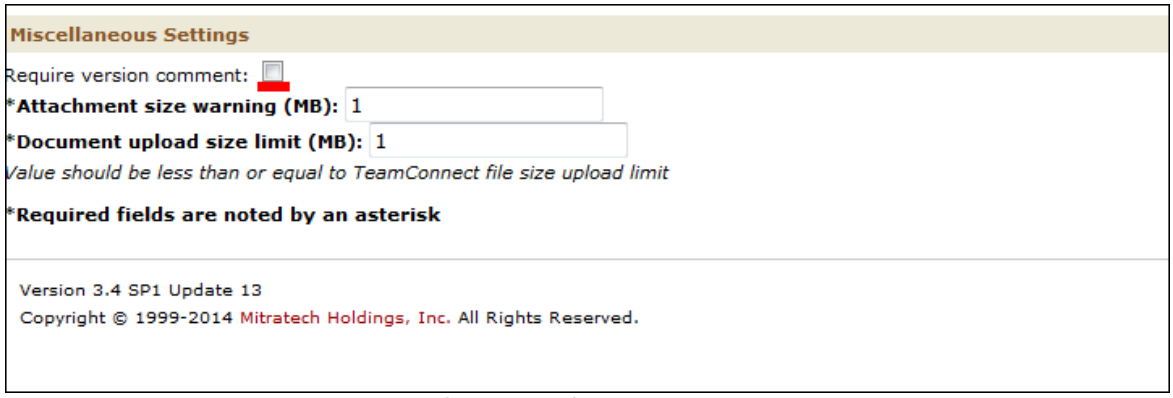
Document Check In Screen

Documents that are already checked out by another user will still have the **Check Out** option in the TeamConnect tab. Clicking Check Out will then display a message stating that the document is checked out and listing the user that has checked out the document.

Version Control

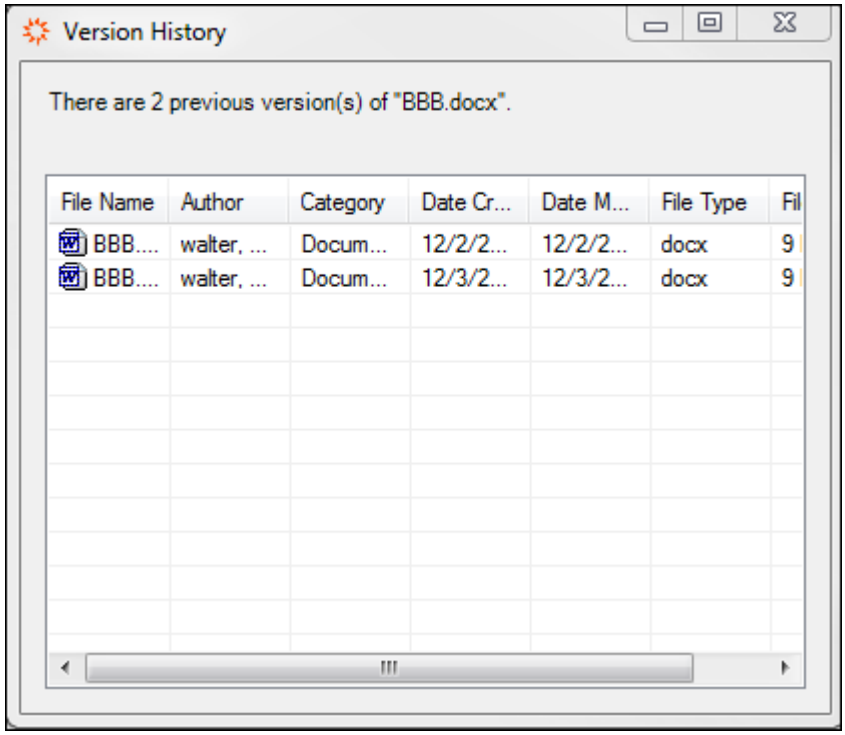
Version control is accessed through the **Documents** link of the **Admin** tab.

Checking in a document may prompt versioning comments. Administrators can set whether these comments are optional or mandatory in the **Settings** tab of **Office Integration Settings** found under the **All** dropdown.



Requiring Comments for Document Versioning

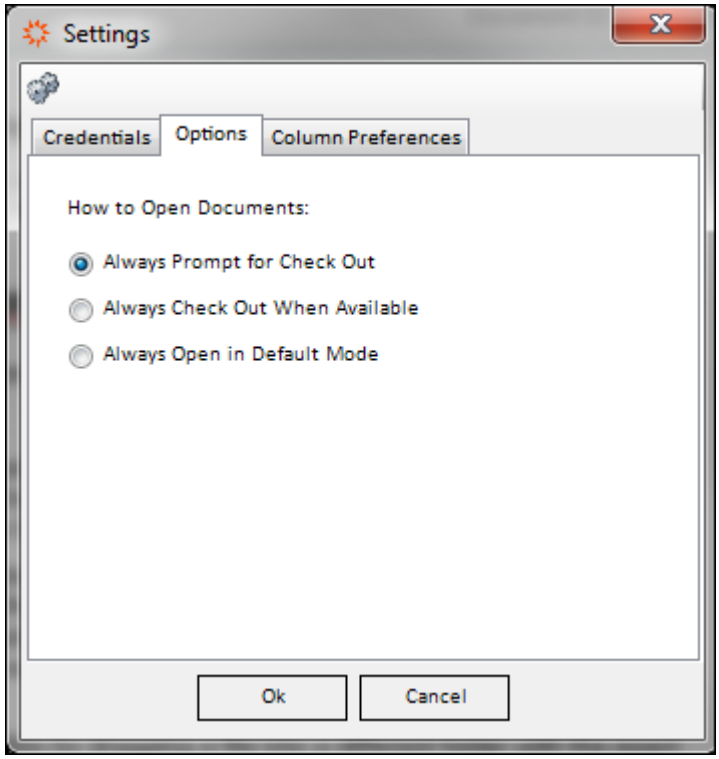
Right-click the document name to bring up the version history.



Document Version History

2.7.1 Check In Settings

Users can change the default settings for how document check-out operates in Office 2.0. From the TeamConnect plug-in window, select the **Settings** button and then **Options** to choose between the three available options detailed below.



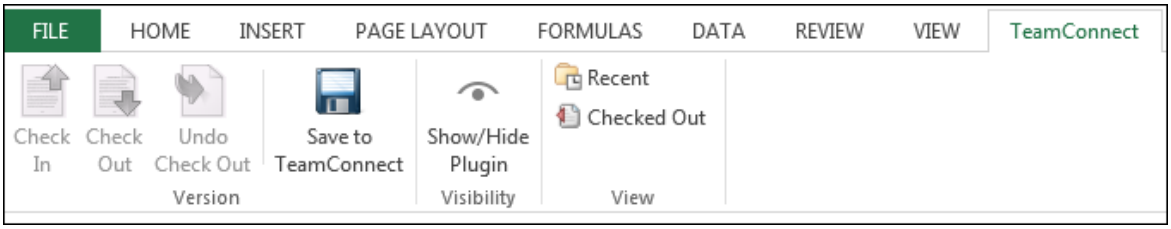
Check-Out Settings

Option	Details
Always Prompt for Check Out	Users are prompted to confirm any document check-out.
Always Check Out When Available	Opening a file that is available for check-out will automatically check out the document without any prompts or confirmation.
Always Open in Default Mode	Files will be opened in read-only mode unless they are already checked out.

2.7.2 Document Management

Users are able to view all recently edited or opened documents via the **Recent** button in the View section of the **TeamConnect** tab.

Similarly, the **Checked Out** button will show all documents currently checked out and the user associated with that document. These documents must be checked back in to save changes to the system. Local changes do not automatically reflect in the application.



Document Management Tools

2.8 Search Filtering

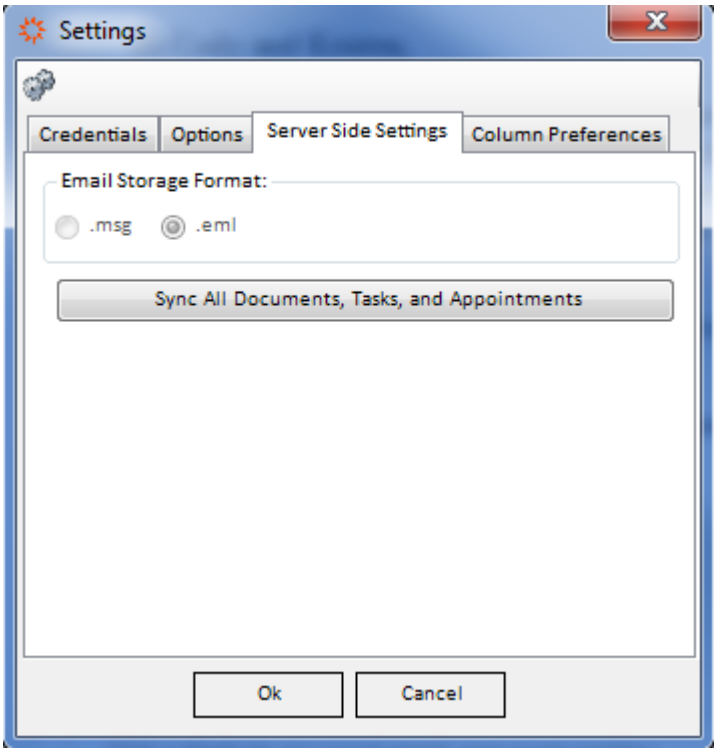
As of Office Suite 2.1, Outlook and Office users are able to utilize a search filter in the plug-in to optimize access to their matter folders and documents. This feature can be disabled or configured from the respective TeamConnect account for the Office account as detailed in TeamConnect-side Configuration.

Important: *If the* ***Setting up Search*** *steps are not completed, existing files from before the upgrade will not be returned in the search.*

Setting up Search

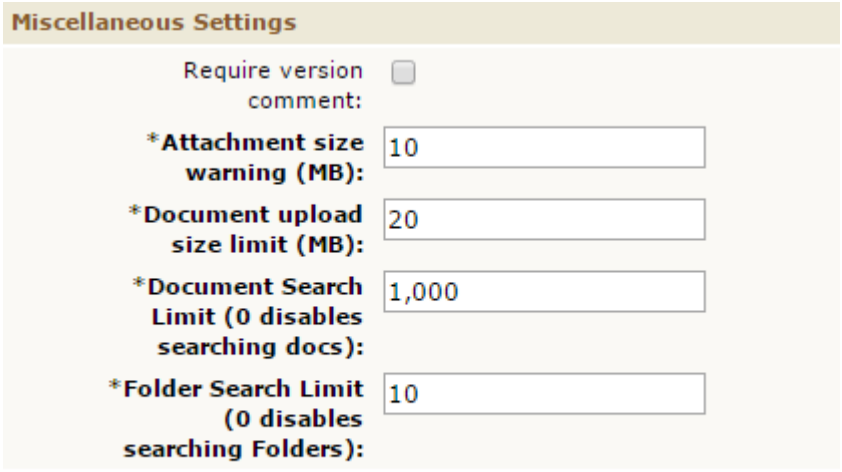
After installation, users should navigate to the **Server Side Settings** tab of their plug-in **Settings** to setup searching and filtering.

Click the **Sync All Documents, Tasks, and Appointments** button to ensure that all existing files are eligible for searching. Depending on the number of files in your TeamConnect system, this may take a large amount of time to complete. It is recommended to begin this sync when there is significant available time for processing so that your work with Outlook is not interrupted.



TeamConnect-side Configuration

Office Suite searching can be configured (or disabled) from the **Office Integration Settings** page within TeamConnect. See the images and table below for more detail.



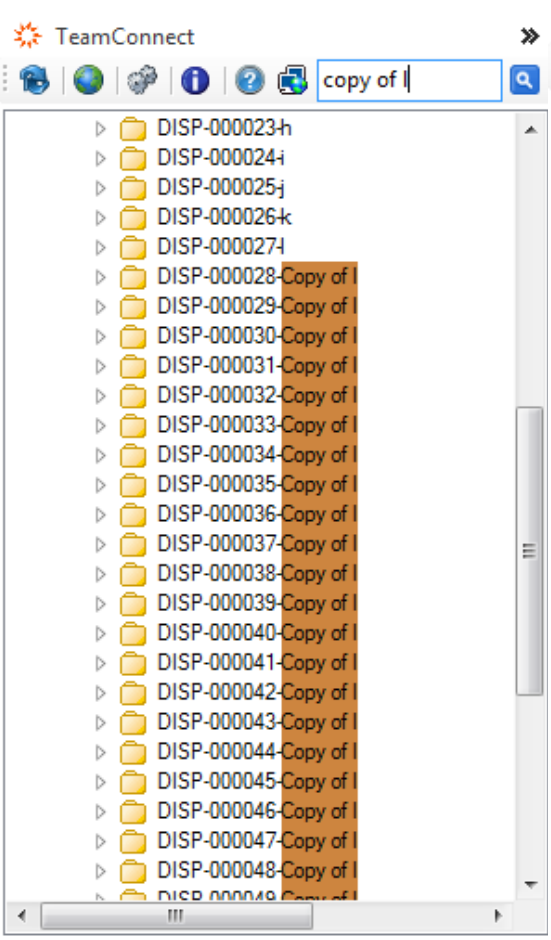
***Required fields are noted by an asterisk**

Field	Function	Example
Document Search Limit	Sets the number of Document/ File matches that will be returned upon a search.	**Document Search Limit =** 100 1. Enter a search for "Test Lawsuit." 2. Begin search. The first 100 documents that match "Test Lawsuit" will be expanded to and highlighted. 3. Repeating the search *will not provide additional results*, unlike how Folder Search Limit operates.
Folder Search Limit	Sets the number of folders that will be expanded per search. Users can continually repeat the search to continue expanding further groups of folders. This functionality is designed as such to optimize performance. All visible matches will be highlighted.	**Folder Search Limit =** 10 1. Enter a search for "Dispute." 2. Begin search. The folder structure will expand to show and highlight ten matching results. 3. If the desired folder is not shown, hit enter to continue the search.

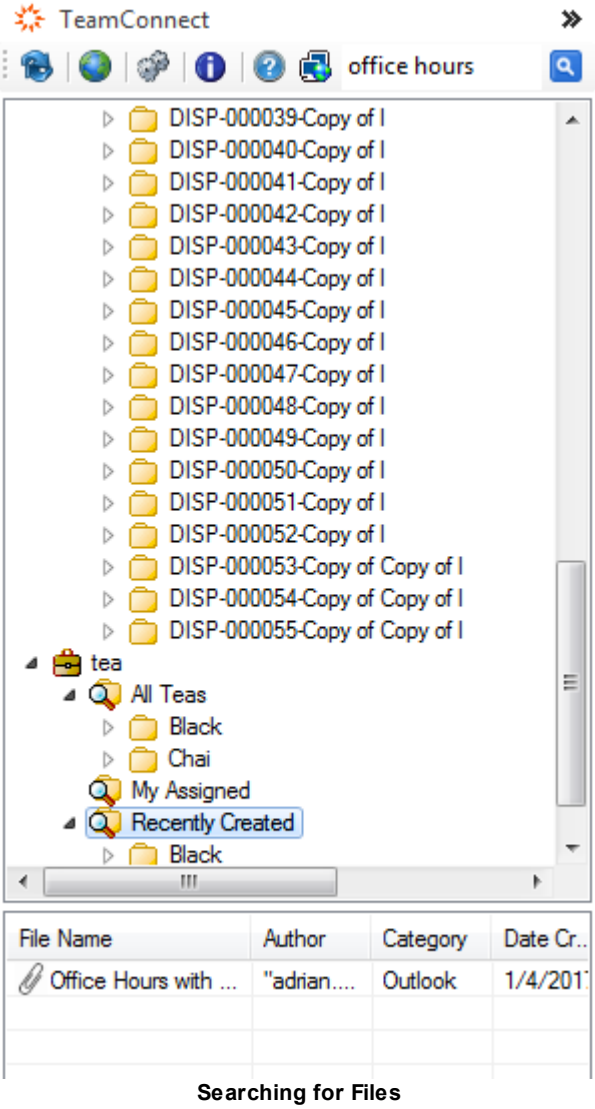
Field	Function	Example
		4. Ten more folders that match "Dispute" will be expanded to and highlighted. 5. Repeat as necessary to find the desired folder through manageable blocks of results and without significantly impacting Outlook performance.

Searching and Filtering with Office Suite

Type into the search bar to view folders or documents matching your query. Details on configuring search as well as how search operates can be found in the table above in the *Search Filtering.* See the examples below for further details.



Searching for Folders



Searching for Files

3 Installation Notes

Users are able to run Office Suite 2.1.0.1 on Office/Outlook 2007, 2010, 2013, and 2016. These programs have to be on your computer prior to Office/Outlook installation.
Office/Outlook Integration is available for users with TeamConnect Enterprise 3.3 SP2 or later.

Installing the TeamConnect Office Add-In

Installing the TeamConnect Outlook Add-In

Adding Plug-ins to TeamConnect

Administrator Installation Notes

Log-in with Windows ID

3.1 Adding Plug-ins to TeamConnect

Administrators are able to download the Office Integration plug-ins from within the main TeamConnect application.

1. After purchasing Office Suite 2.1.0.1, download the patch and module provided for your version of TeamConnect. For more information, contact Mitratech Support about the patch for Office Suite Integration.
2. Under the **All** tab, select **Admin Settings.**
3. Select **About.**
4. Click **Show updates available for installed products.**
5. Select the Office/Outlook plug-ins to begin your download. ***Note: The Office Plug-in must be installed and configured prior to installing the Outlook plug-in.***

The file downloaded will be a .zip file. After extracting these files to the chosen destination, users can select from between a x64 and x86 setup executable file. The download will automatically generate a folder to your destination.

Note: *Admins must enable the following permissions in TeamConnect for users and groups in order for Office Suite 2.0 to function:*

- View Office Integration Settings records
- View Office Integration Settings all categories
- View Office Integration Settings all custom fields

For more information on installation, see Installing the TeamConnect Office Add-In and Installing the TeamConnect Outlook Add-In.

3.2 Installing the TeamConnect Office Add-In

The steps below outline the installation process for the plug-in. If you need help downloading the installation files necessary to proceed through these steps, please see Adding Plug-ins to TeamConnect.

The Office Plug-in must be installed and configured prior to installing the Outlook plug-in.

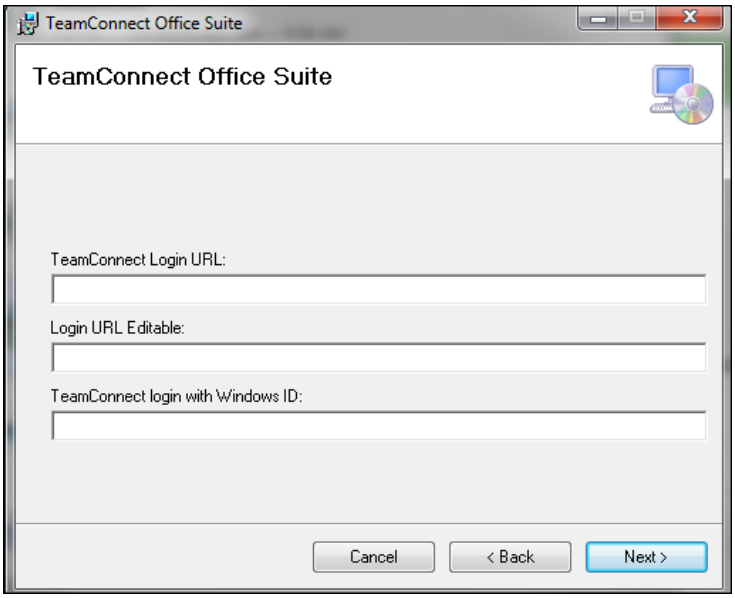
To install the TeamConnect Office Add-In

1. Select the appropriate x86 or x64 installer based on your version of Office.
2. Double-click the `setup.exe` file.
3. Click **Next** from the **Mitratech TeamConnect MS Office Add-In** window.
4. If you want to change the folder where the installer saves the add-in, click **Browse**.

   Note: *To use the default folder, click* ***Next*** .
5. From the **Mitratech Setup** window, enter the **URL** for your instance of TeamConnect. Include `http://` at the beginning and `/` at the end of the URL.

   ex. http://testsite:3303/4.0.2/

   Note: *If you want to preset the log-in url for your users, enter "false" in the URL editable entry field. This will ensure that users cannot edit the log-in URL. Entering "false" will not work if there is no log-in URL. Enter "true" if you would like to make the URL editable. All fields left blank will default to "true."*



Office Suite Installation

6. Click **Next** to begin the installation.
7. Click **Next** from the **Mitratech Setup** window.
8. After a successful installation, click **Close** to exit the installer.

After successful installation, the **TeamConnect** tab appears in Microsoft Word, Excel, and PowerPoint. If you need to change your TeamConnect login information, click the **Settings** button

from the **TeamConnect** window. Entering your login information allows TeamConnect to integrate with the Office programs. See Project Integration for further details.

3.3 Installing the TeamConnect Outlook Add-In

The steps below outline the installation process for the plug-in. If you need help downloading the installation files necessary to proceed through these steps, please see Adding Plug-ins to TeamConnect.

The Office Plug-in must be installed and configured prior to installing the Outlook plug-in.

To install the TeamConnect Outlook Add-In

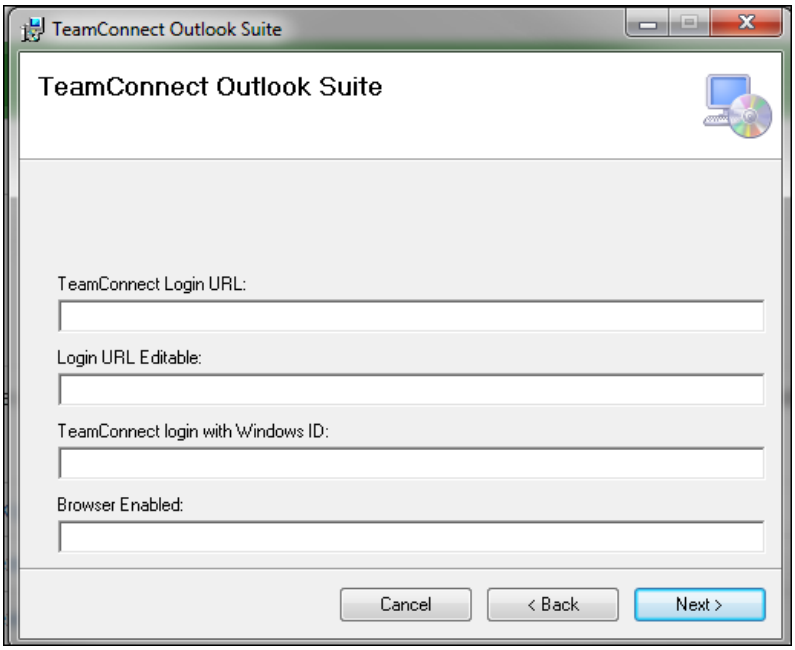
1. Select the appropriate x86 or x64 installer based on your version of Outlook.
2. Double-click the `setup.exe` file.
3. Click **Next** from the **TeamConnect Outlook Add-In** window.
4. If you want to change the folder where the installer saves the add-in, click **Browse**.

   Note: To use the default folder, click **Next**.
5. From the resulting window, enter the **URL** for your instance of TeamConnect. Include `http://` at the beginning and `/` at the end of the URL.

   ex. http://testsite:3303/4.0.2/

   Note: *If you want to preset the log-in url for your users, enter "false" in the URL editable entry field. This will ensure that users cannot edit the log-in URL. Entering "false" will not work if there is no log-in URL. Enter "true" if you would like to make the URL editable. All fields left blank will default to "true," with the exception of Browser Enabled.*

   Note: *If you want to remove the built-in browser from Outlook, enter "false" in the Browser Enabled entry field. Enter "true" to leave the browser in the program.*



Outlook Installation

6. Click **Next** to begin the installation.
7. Click **Next** from the resulting window.
8. After a successful installation, click **Close** to exit the installer.

After successful installation, the **TeamConnect** tab appears in Outlook. If you need to change your TeamConnect login information, click the **Settings** button from the **TeamConnect** window. Entering your login information allows TeamConnect to integrate with the Office programs. See Project Integration for further details.

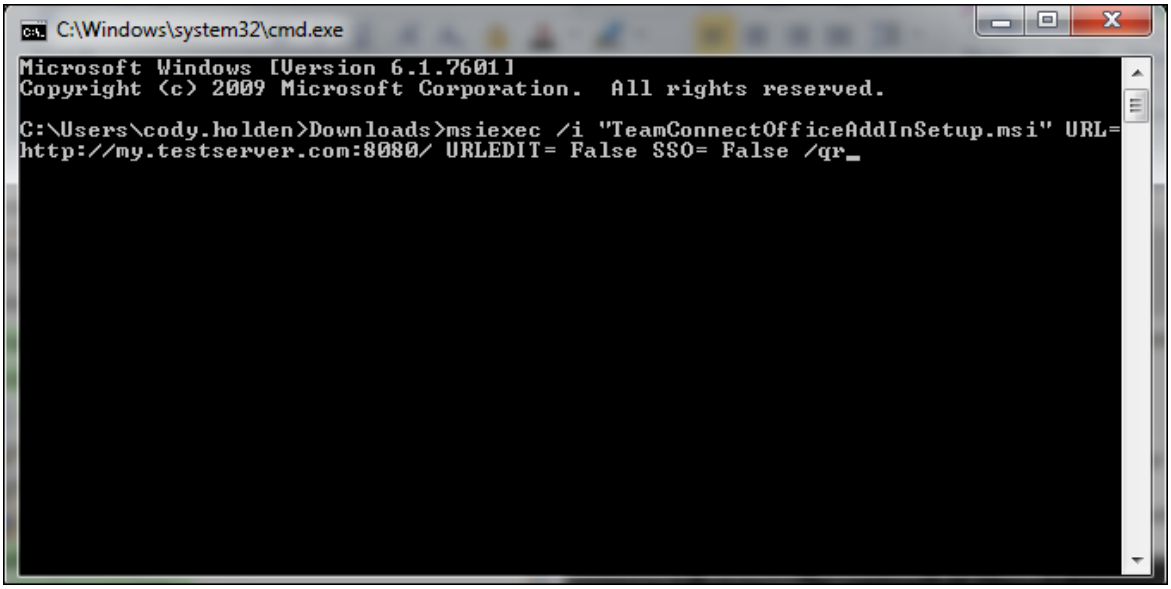
3.4 Administrator Installation Notes

Administrators can install the plug-in via Administrator Command Prompt if so desired. The values for the URL, TeamConnect login with Windows ID (token-based authentication), and the Outlook in-application browser can be adjusted with the text given below.

Note: The Office Plug-in must be installed and configured prior to installing the Outlook plug-in.

Administrator Command Line Setup

1. Find the command interpreter executable by searching for "**cmd**" from your start menu.
2. Right-click the file and select "**Run as Administrator**."
3. Navigate to the folder where the **.msi** file is located and enter it into the command line.



Command Line Install

Defined Template Structure for Command Prompt

```
[directory location] msiexec /i "name of .msi file"
URL=url of instance URLEDIT=True/False SSO=True/False
BROWSER=True/False /q
```

Note: *Admins can change the '/q' value to '/qn' (no UI), '/qb' (basic UI), '/qr' (reduced UI), '/qf' (full UI) to change the UI for the installer. The default value is '/qf'. For more information, please see the Windows Installer SDK documentation.*

Enter either **True** or **False** for the values in order to allow user input for the given field. If anything besides True or False is entered here, or the field is left blank, the object will be set to its default value: URLEDIT defaults to True, SSO defaults to False, and Browser defaults to False.

Note: *URLEDIT will not be read unless there is a defined* ***URL****.*

Example Command Line Results: The example command line will result in an install with:

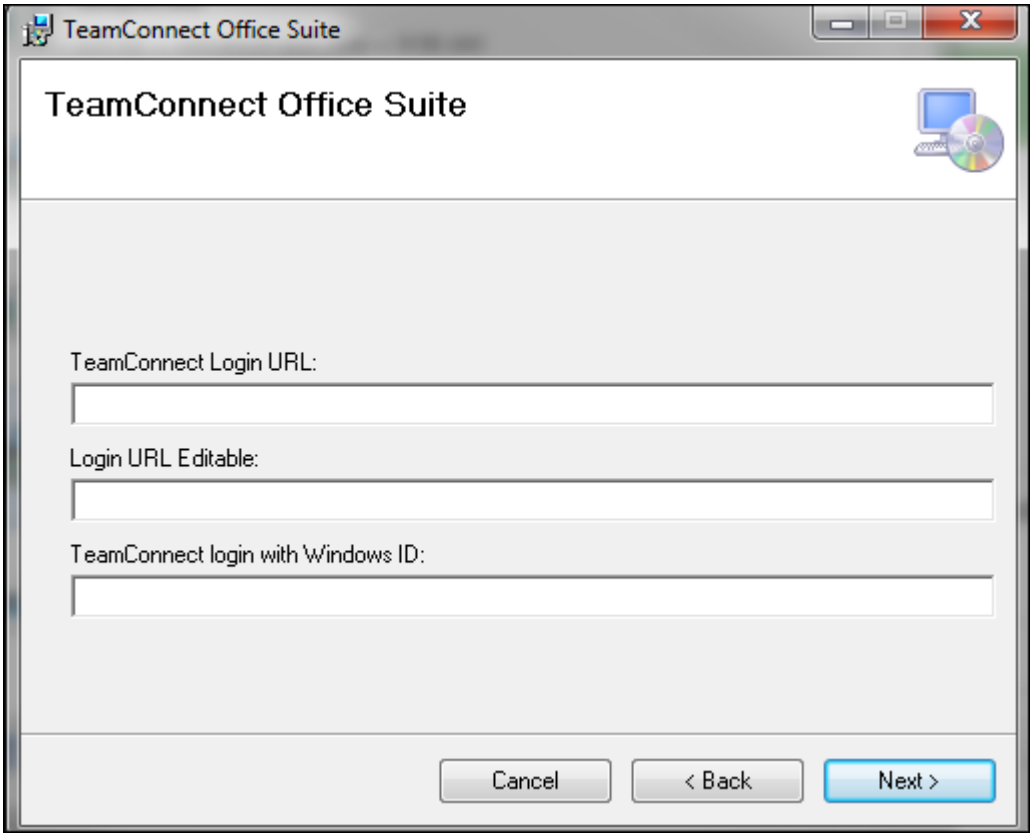
Set, uneditable URL
No single sign-on
(token-based authentication via Windows ID) enabled
Embedded browser
enabled

3.4.1 Log-in with Windows ID

The TeamConnect Office/Outlook plug-in allows for improved log-in via your Windows ID.

Users that utilize their Windows ID for TeamConnect main application log-in have access to this feature. The TeamConnect application provides users with a token that gives access to the plug-in, which they can use to avoid multiple instances of authentication.

If the Windows ID has been filled out, users will be unable to change the log-in credential fields within the plug-in.



Log-in with Windows ID Field

3.5 Upgrade Considerations

Users looking to upgrade an existing TeamConnect Office Suite instance should refer to the respective release notes for more detail on supported paths.

Upgrades can be obtained through your application through the following steps:

1. Under the **All** tab, select **Admin Settings.**
2. Select **About.**
3. Click **Show updates available for installed products.**
4. Select the TeamConnect Office and Outlook Integration plug-in for installation.

4 TeamConnect Outlook

TeamConnect Outlook integrates into Microsoft Outlook so that you can view and update appointments and tasks that have been created in TeamConnect.

In Outlook, TeamConnect appointments and tasks include the same functionality as all other appointments and tasks you create with Outlook, which means that you can view and edit them as you would any other Outlook appointment or task.

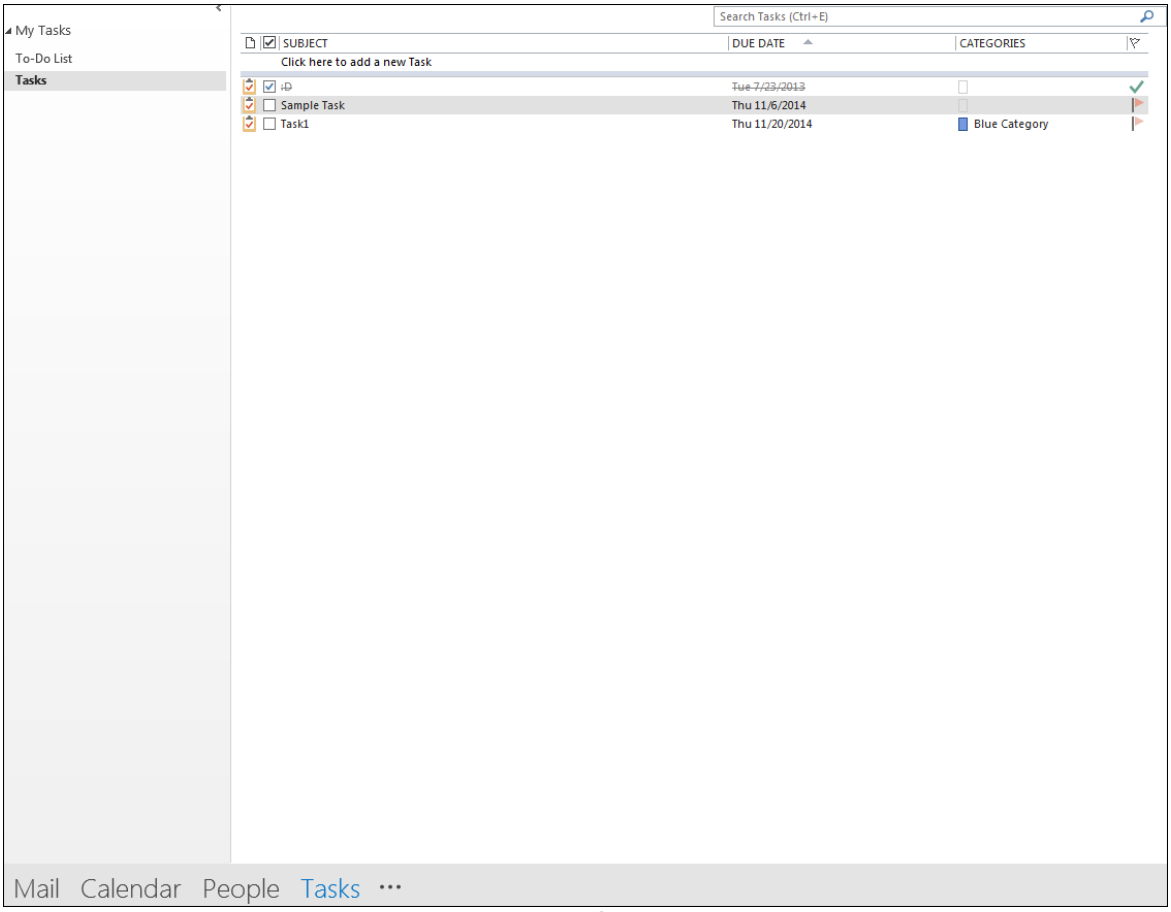
If you update them from Outlook, TeamConnect reflects these updates after the two programs sync.

Note: *You can also use TeamConnect Outlook to view documents and emails saved to TeamConnect projects. Unlike with TeamConnect Office, TeamConnect Outlook opens any file accessible on your computer, not only Word, Excel, and PowerPoint files.*

- *TeamConnect Tasks in Outlook*
- *TeamConnect Appointments in Outlook*
- *TeamConnect Outlook Documents and Emails*

4.1 TeamConnect Tasks in Outlook

TeamConnect tasks displayed in Outlook include the name of the project associated with the task. To locate your tasks, go to the bottom of your Outlook window and select **Tasks**. Your task window will initially display your **To-Do List** arranged by due date. To view your tasks, click on **Tasks** on the left-hand side of the screen.

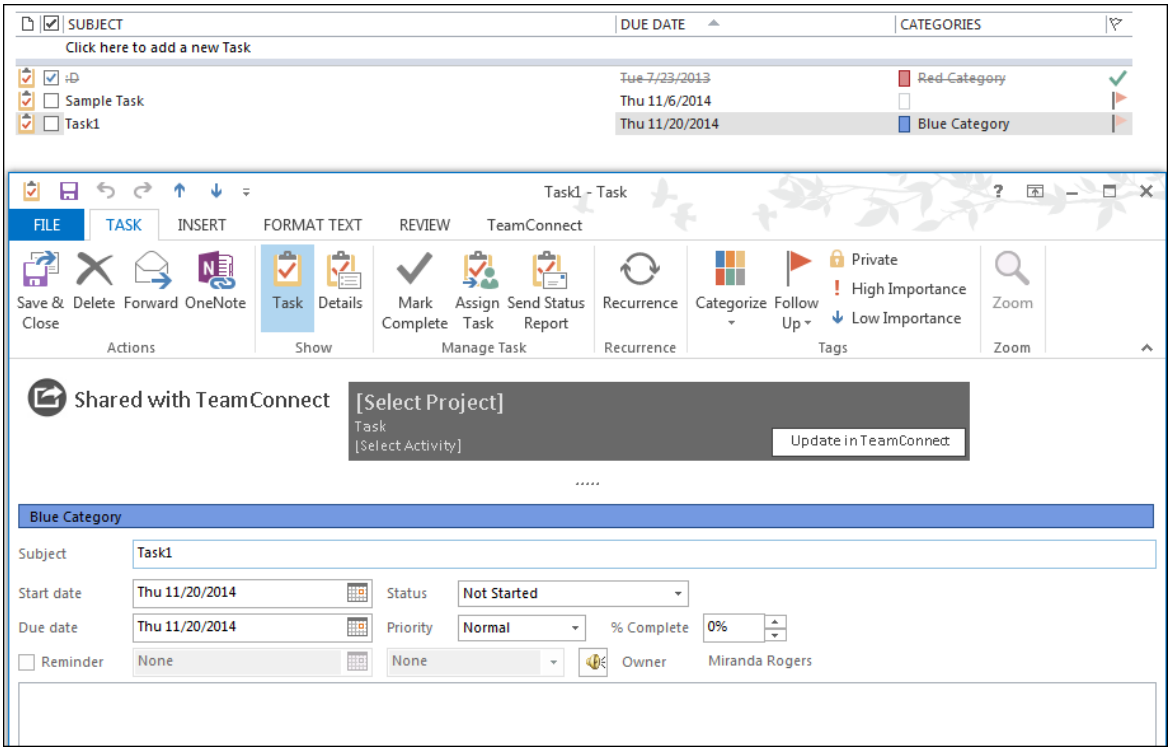


Tasks in Outlook

4.1.1 Opening Tasks

Tasks can be opened through Outlook without logging in to the TeamConnect website. This keeps users from having to switch between applications and saves time.

To open a task, first select **Tasks** at the bottom of the page in Outlook. Under **My Tasks**, click on **Tasks.** Double-click any task to open it in a new window.

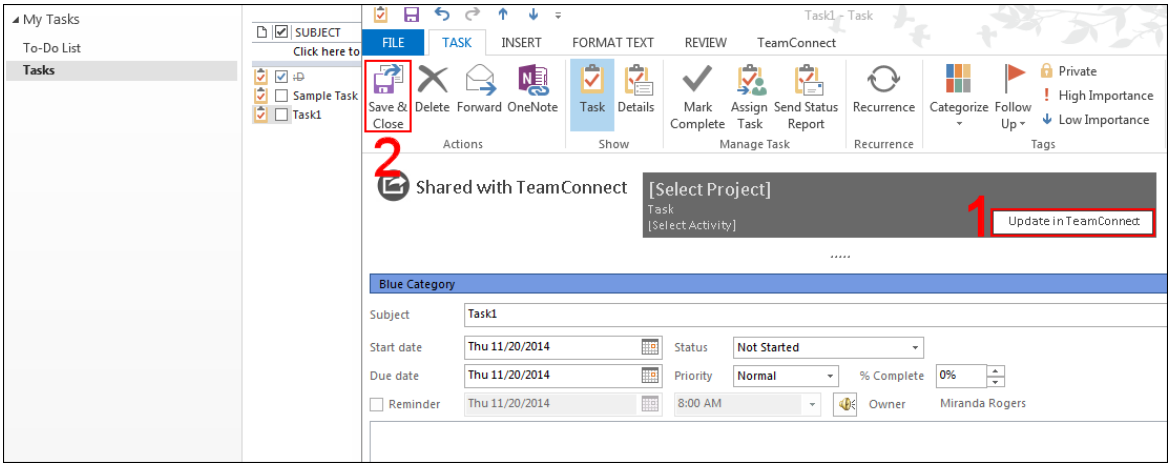


Tasks in Outlook

4.1.1.1 Updating Information

It will be necessary, at times, to update information on a task, like changing the due date or status of the project. All changes can be done through **Tasks** in Outlook, eliminating the need to switch between Outlook and the TeamConnect application.

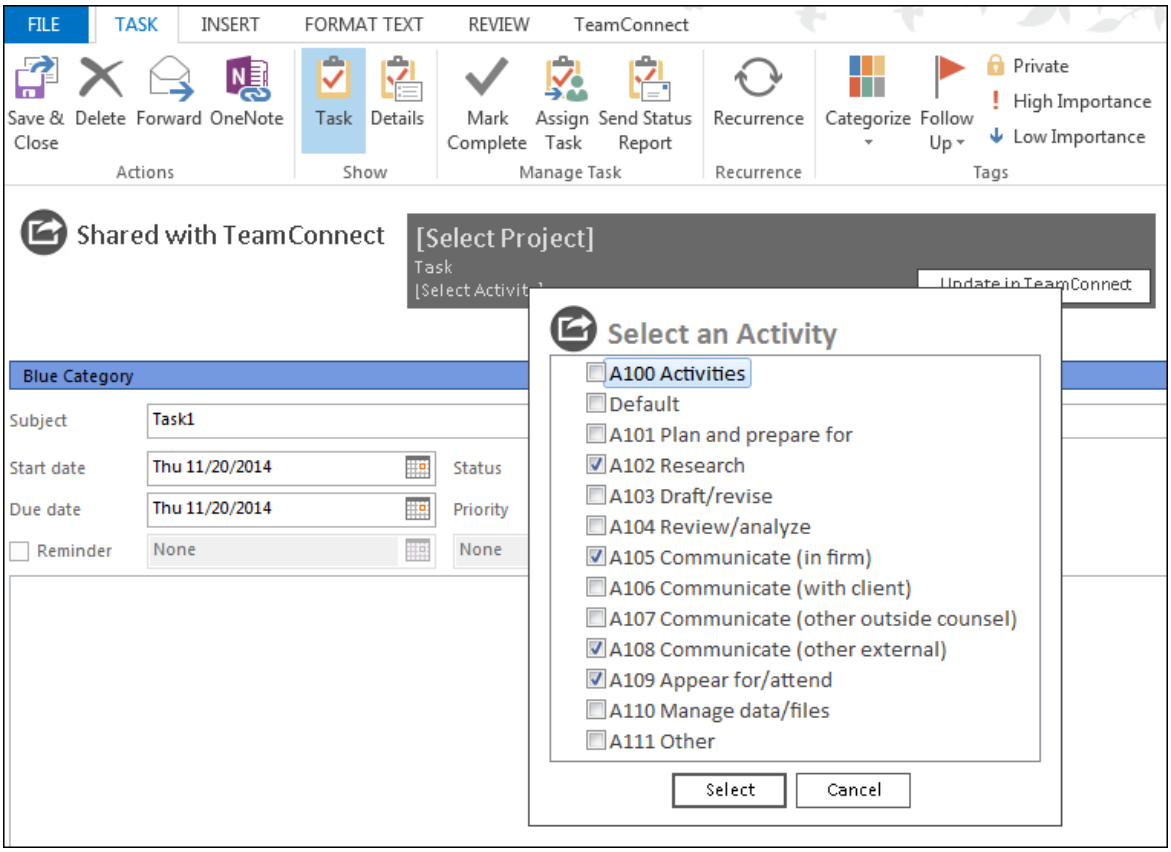
Double-click on a task to open it. From the pop-up window, all data fields can be changed to reflect the updated task. Click on **Update in TeamConnect** and then click **Save & Close.**



Updating in TeamConnect

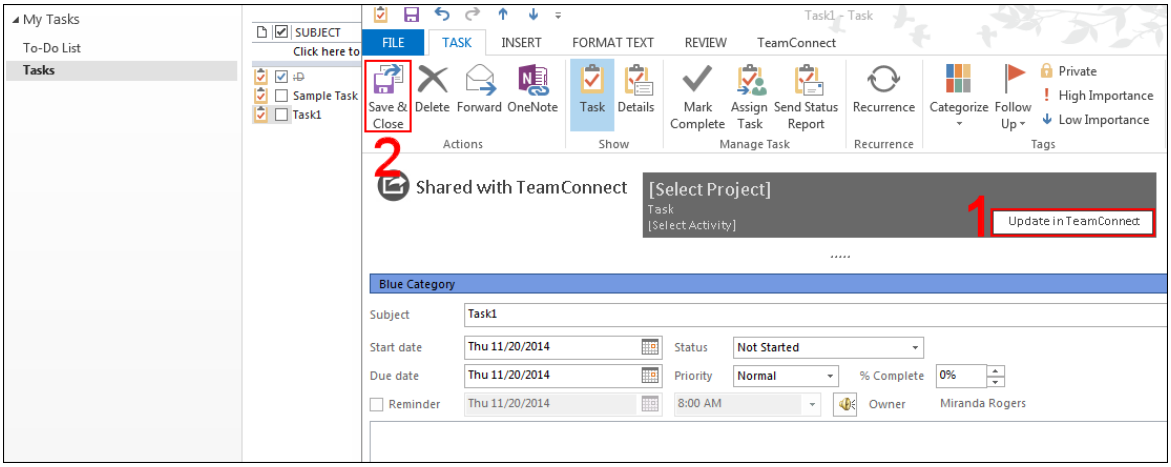
4.1.1.1.1 Updating Task Activities

1. Double-click a task to open it in a new window for updating. Click **[Select Activity]** and select or deselect the check-box(es) in the pop-up window.



Task Activities

2. Click on **Update in TeamConnect** and then click **Save & Close.**



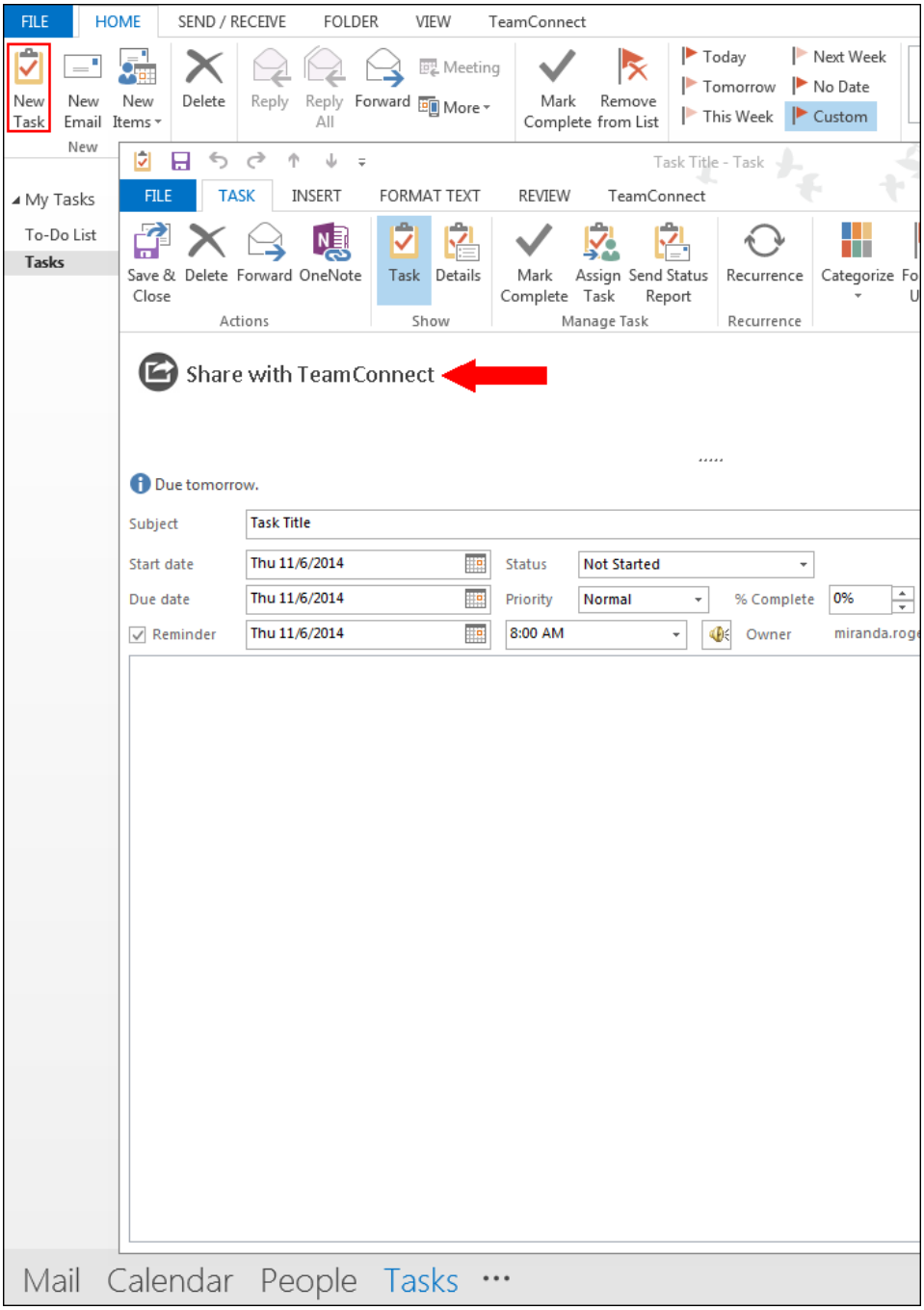
Updating in TeamConnect

4.1.2 Creating Tasks

Tasks can be created through Outlook without logging in to the TeamConnect website. This keeps users from having to switch between applications and saves time.

Creating a new task

1. Click on **New Task** in the upper left-hand corner of the **Home** tab.
2. In the new pop-up window, enter a title in the **Subject** box and click on to enter a start date.
3. Click the check-box next to **Reminder** to set an alert date and time.
4. Click next to reminder time to choose a time from the drop-down box. ***Note:*** *Setting a start date will auto-create a due date and reminder date (if the reminder check-box has been selected). Click on* *in the respective date box to adjust the date*. Click to change the sound of the reminder alert.



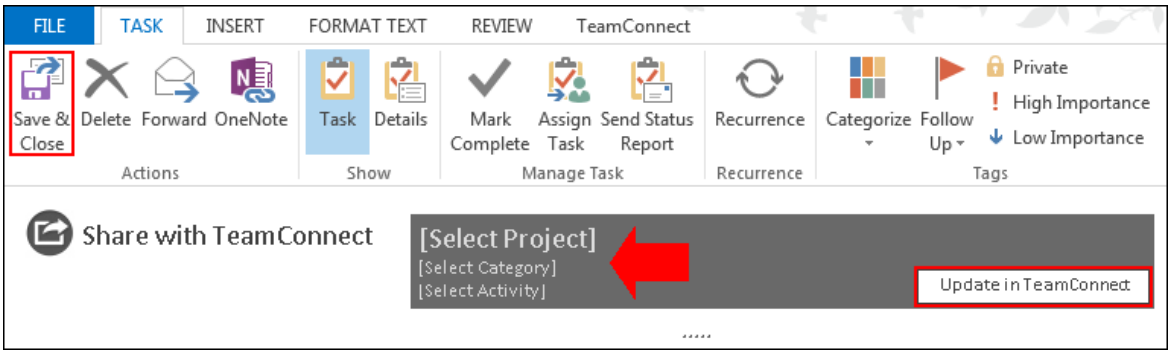
Creating a New Task

Click on the ▾ in the **Status** bar to change **Not Started** to **In Progress, Completed, Waiting on someone else,** or **Deferred.** Below **Status**, click on ▾ next to **Priority** to change **Normal** to **Low** or **High.**

To sync the new task with the TeamConnect application, click next to **Share with TeamConnect** and choose **Update in TeamConnect.**

1. Click **[Select Project]** to assign the task to a dispute.
2. Click **[Select Category]** and select **Internal Tasks, Other Vendor Fees, Outside Counsel Fees,** or **Task.**
3. Click **[Select Activity]** to select a description of the type of task you are creating.

Click **Update in TeamConnect,** then click **Save & Close.**

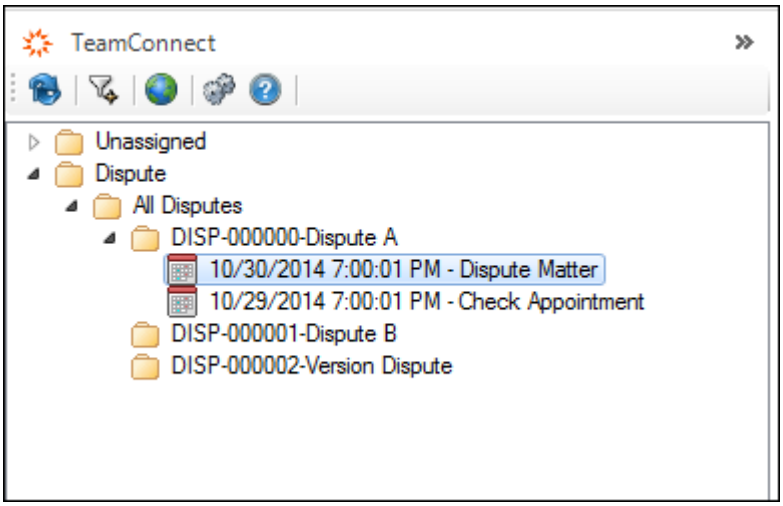


Updating Tasks in TeamConnect

4.2 TeamConnect Appointments in Outlook

TeamConnect automatically syncs appointments from the primary application to your Outlook.

Calendar appointments are included in the relevant folders to the dispute.

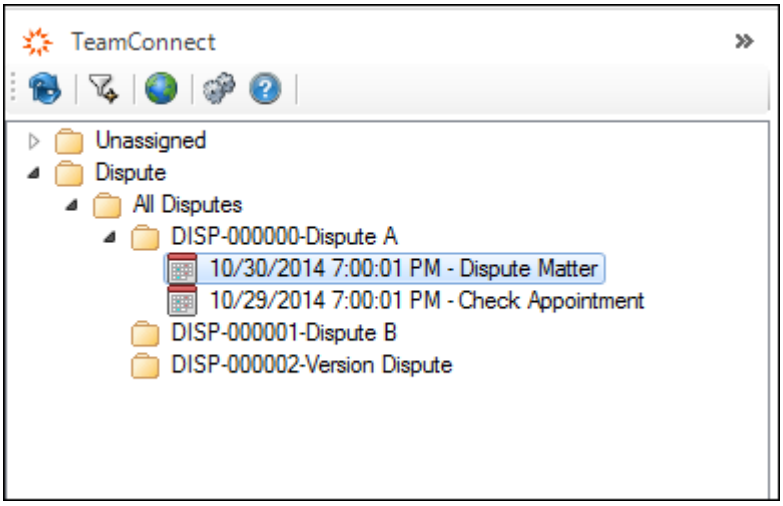


TeamConnect Appointment View

Double-click any appointment in a matter to open and edit its details. ***Note:*** *The appointments by matter view is only available via Outlook Calendar view.*

4.2.1 Updating Information

From Outlook, you can associate TeamConnect appointments with a project and categories and TeamConnect tasks with a project, categories, and activities. Changes you make to existing TeamConnect appointments or tasks through Outlook update in TeamConnect. ***Note:*** *Appointments do not need to be linked to a specific project to be visible in the plug-in.*

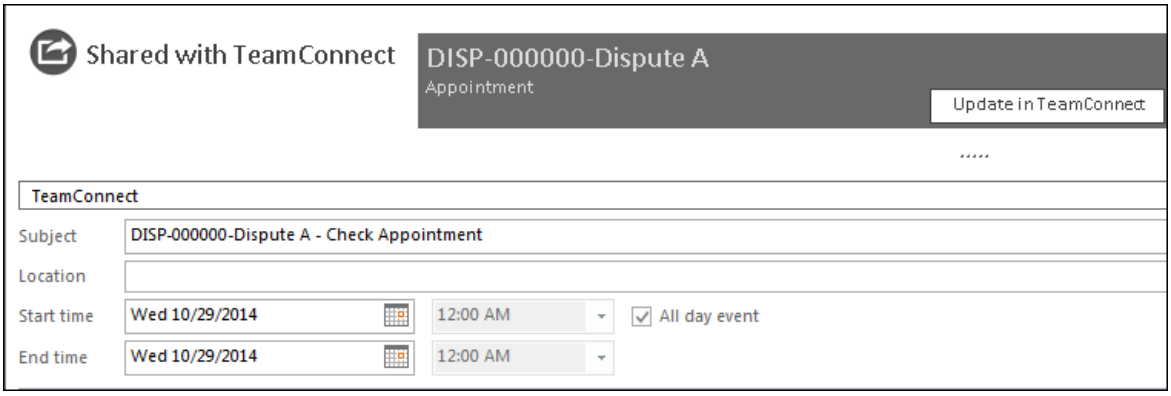


To add or update the project of an appointment or task

1. Double-click the Calendar item to open the editing interface.
2. Make any desired changes.

Note: *This interface should have "* *Shared with TeamConnect* *" at the top of the screen if the appointment is properly linked.*

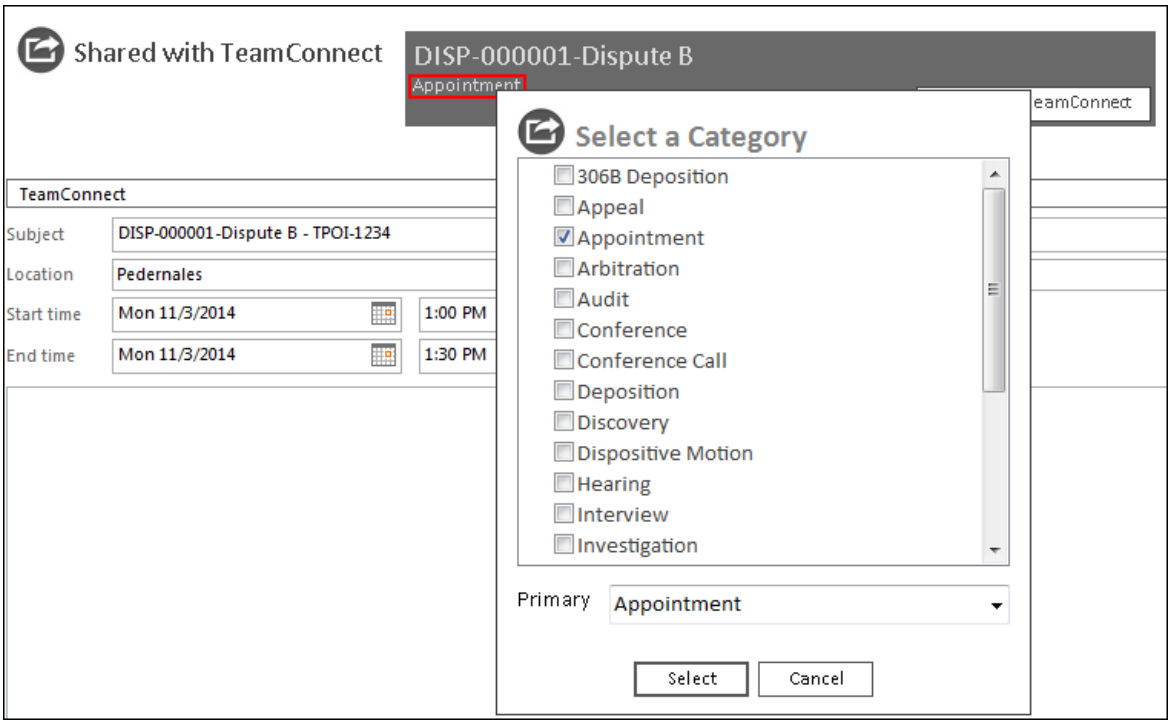
3. After changes are made, click the **Update in TeamConnect** button at the top of the screen.



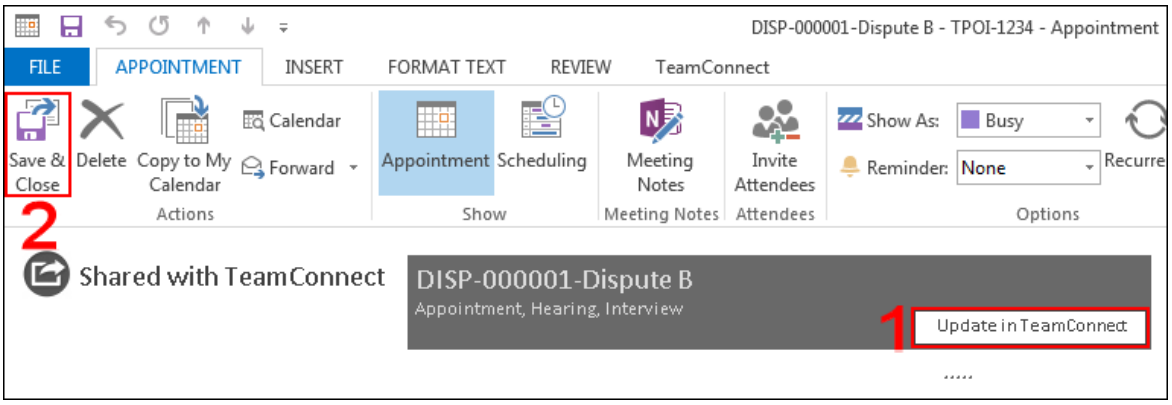
4.2.1.1 Updating Categories

TeamConnect categories can be updated by opening the appointment from Outlook without having to log in to the TeamConnect application.

Double-click an appointment from the **Calendar** to make adjustments. The category title is located under dispute title, and will display any category that was selected when first created. Click the category title **(Appointment)**. Add new categories or deselect the current category to change the visible data and press **Select** to confirm. ***Note:*** *If more than one categories are selected, all categories will be displayed, separated by commas.*

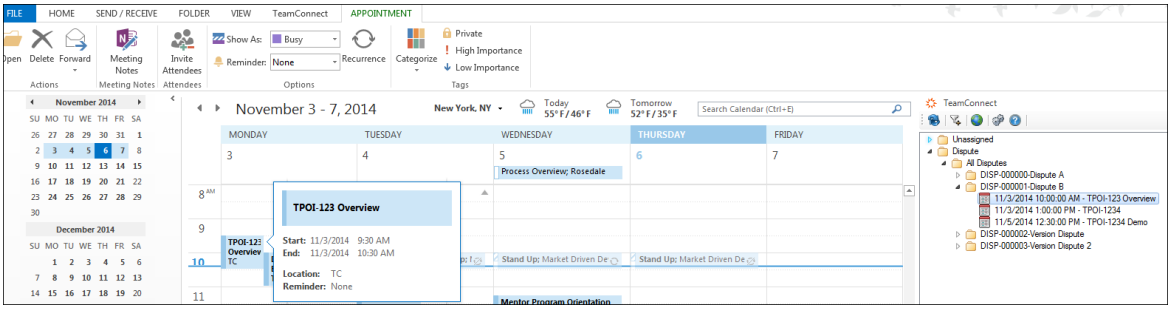


Click **Share with TeamConnect,** and then click **Save & Close.**



4.2.2 Opening Appointments

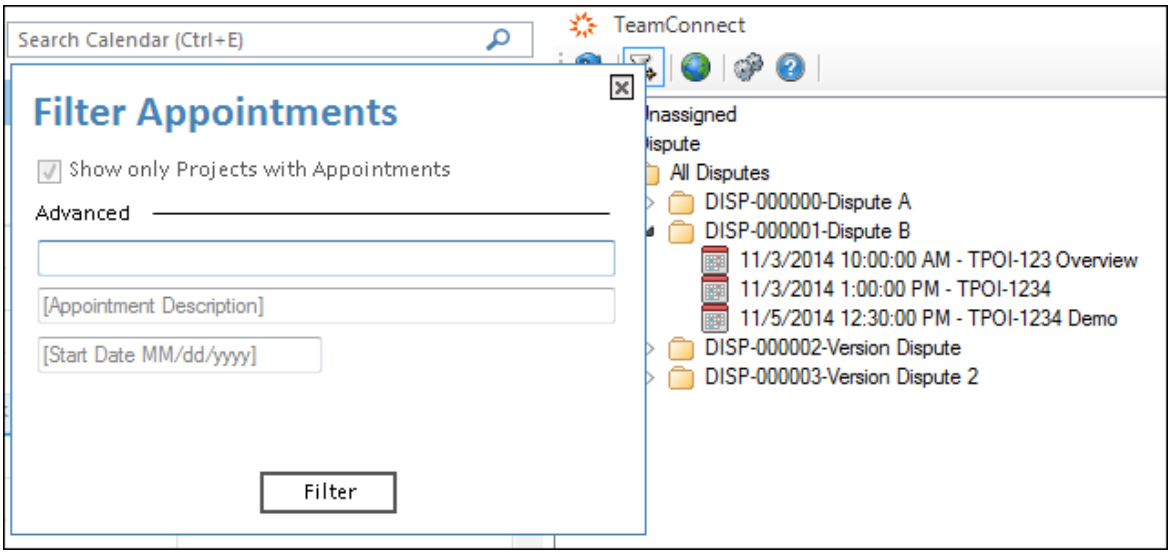
TeamConnect appointments are displayed in the TeamConnect plug-in located on the right-hand side of Outlook Calendars. To open an appointment, double-click the blue appointment box within the calendar, or double-click the icon in the TeamConnect plug-in pane. ***Note:*** *Appointment details can be expanded by hovering your mouse over an appointment within the Outlook calendar.*



4.2.3 Filtering Projects and Appointments

Appointments created in TeamConnect and Outlook can be filtered in Outlook Calendar to minimize or maximize what projects or appointments you see in your TeamConnect plug-in pane.

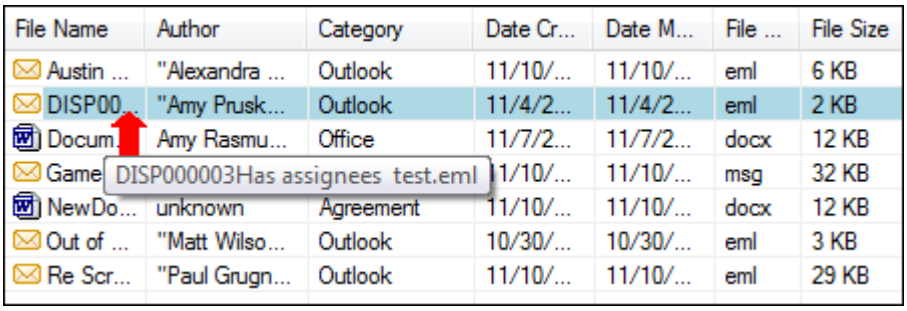
Go to Outlook Calendar by clicking **Calendar** at the bottom of the Outlook window. To filter appointments, click on the icon at the top of the TeamConnect plug-in on the right-hand side of the screen. Use the new pop-up window to find an appointment by title, description, or start date, then click **Filter** to apply the changes. The icon will change to . Click to remove the filter. ***Note:** If is selected but no changes are made, the TeamConnect plug-in will display all appointments created in existing disputes.*



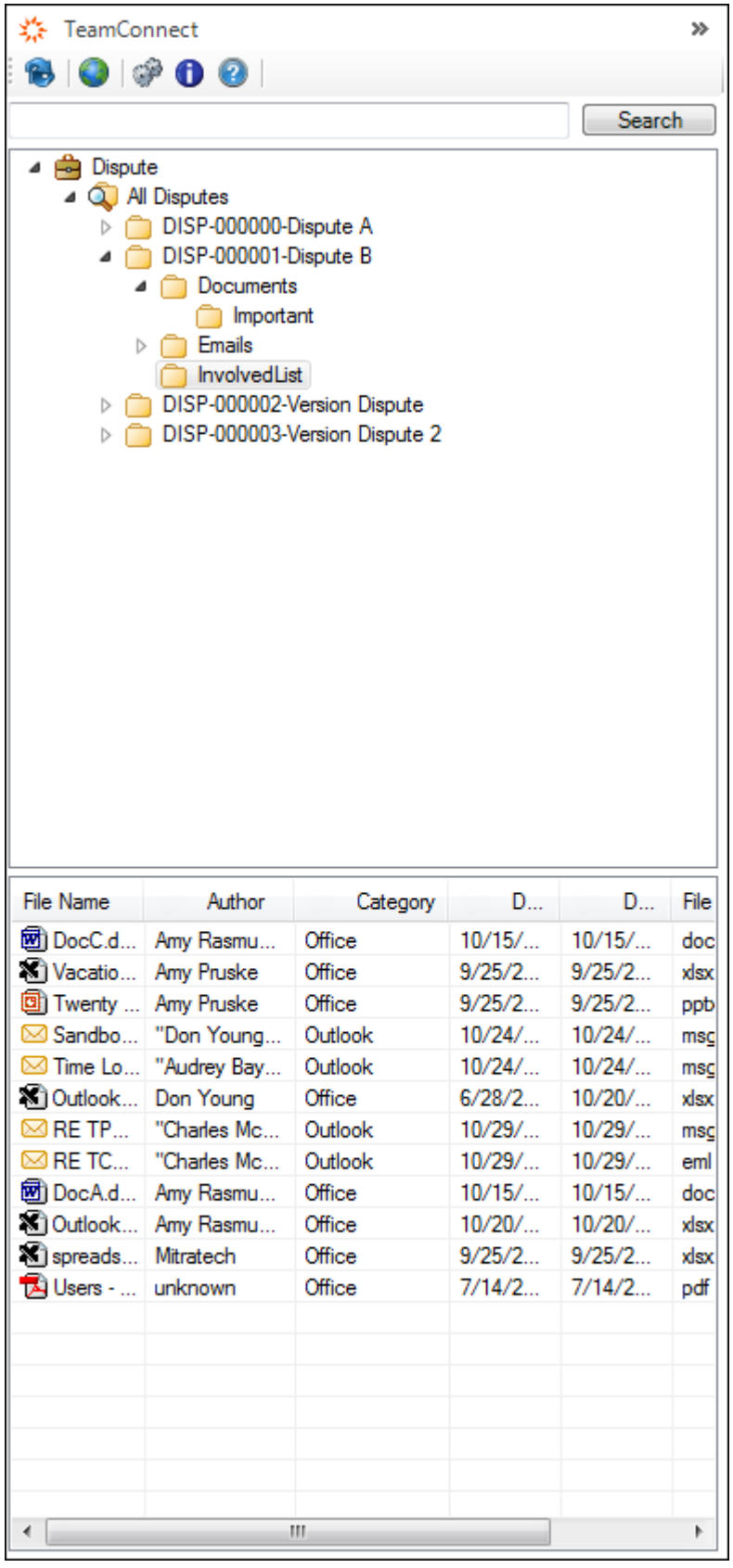
4.3 TeamConnect Outlook Documents and Emails

With the TeamConnect plug-in in Outlook, users can easily view their documents in TeamConnect from the **Matter Folders & Document Pane.** The ability to view matter folders and documents from TeamConnect within Outlook eases the process of communication with clients and outside counsel who refer mostly to email. Documents and disputes can be pulled from the **Matter Folders & Document Pane** and inserted easily into emails, or in between folders.

Hover over a cell in the Matter metadata pane to see the full contents of the document detail.

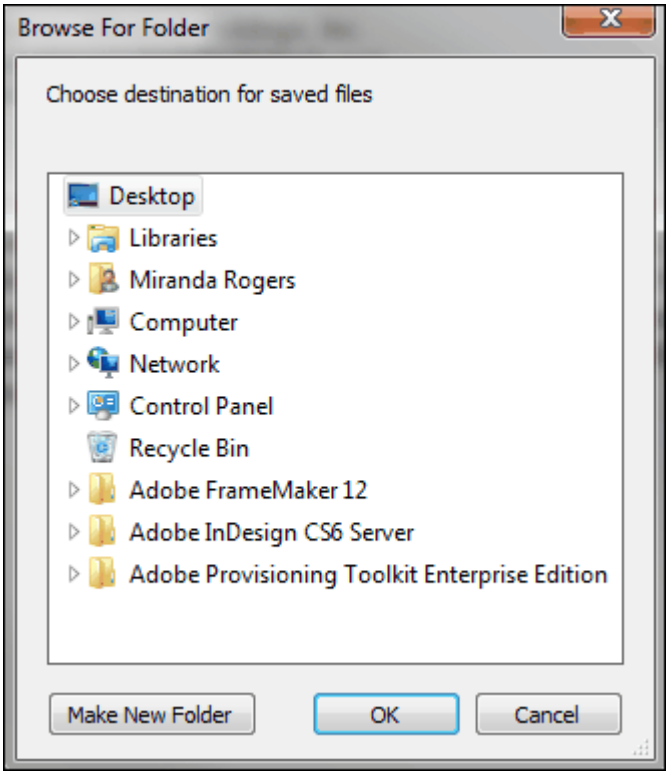


To open a document or email, double-click the item from the list. ***Note:*** *You may need to expand the folder to view sub-folders.*


TeamConnect
Search
Dispute
All Disputes
DISP-000000-Dispute A
DISP-000001-Dispute B
Documents
Important
Emails
InvolvedList
DISP-000002-Version Dispute
DISP-000003-Version Dispute 2
File Name
Author
Category
D...
D...
File
DocC.d... Amy Rasmu... Office 10/15/... 10/15/... doc
Vacatio... Amy Pruske Office 9/25/2... 9/25/2... xlsx
Twenty ... Amy Pruske Office 9/25/2... 9/25/2... ppb
Sandbo... "Don Young... Outlook 10/24/... 10/24/... msg
Time Lo... "Audrey Bay... Outlook 10/24/... 10/24/... msg
Outlook... Don Young Office 6/28/2... 10/20/... xlsx
RE TP... "Charles Mc... Outlook 10/29/... 10/29/... msg
RE TC... "Charles Mc... Outlook 10/29/... 10/29/... eml
DocA.d... Amy Rasmu... Office 10/15/... 10/15/... doc
Outlook... Amy Rasmu... Office 10/20/... 10/20/... xlsx
spreads... Mitratech Office 9/25/2... 9/25/2... xlsx
Users - ... unknown Office 7/14/2... 7/14/2... pdf

4.3.1 Metadata Population

Documents can be uploaded via the Outlook plug-in, and metadata is automatically extracted and placed into the appropriate fields. This visible data will make locating and identifying documents easier.



TeamConnect extracts the following metadata from documents and emails:

Extracted Metadata	Conversion Description
Document Name	File Name
Document's Creator	Author
Document Category	Category
Document Creation Date	Date Created
Document Last Modified	Date Modified
Document Extension	File Type
Document Size	File Size

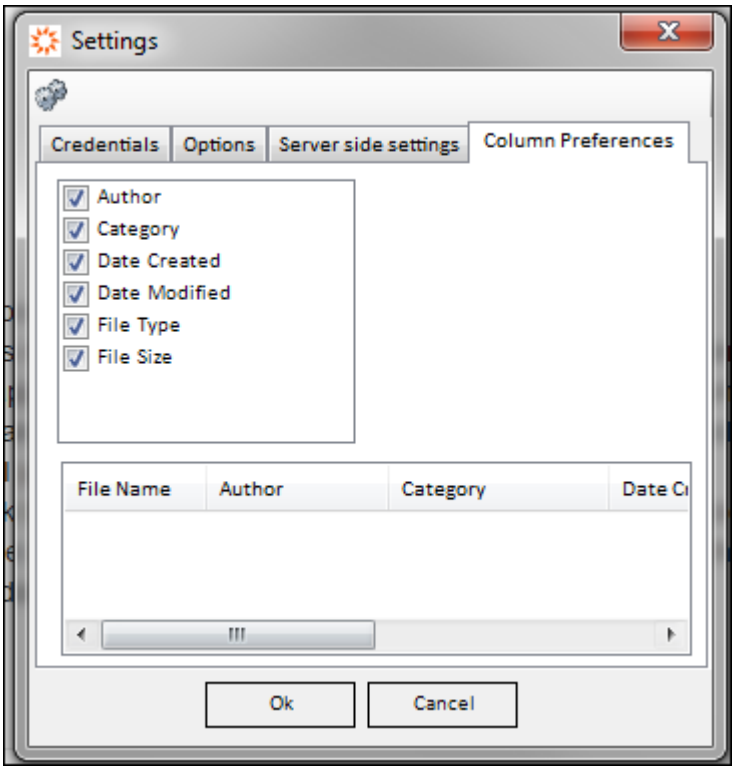
Emails will be reflected in the main TeamConnect instance with the above metadata when provided.

Note: *If the Document's Creator cannot be extracted, the description will be left blank. If Creation Date cannot be extracted, the current date will be used. If Last Modified cannot be extracted, Creation Date will be used.*

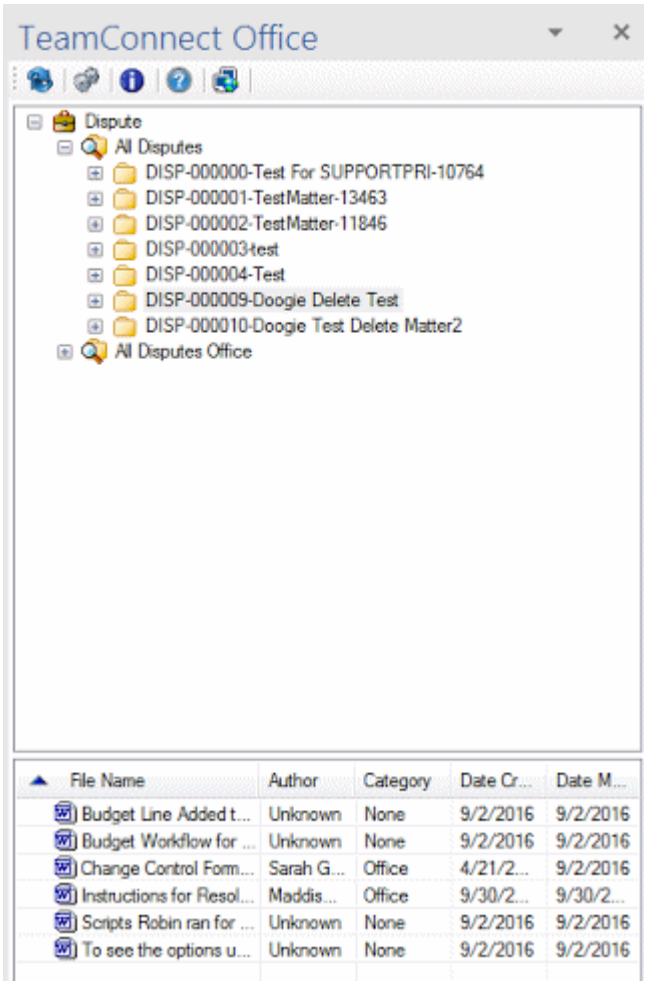
4.3.1.1 Setting Metadata Display

Metadata can be configured to display the most important and relevant information to end users in the TeamConnect Documents Pane.

The first time the Settings window is opened, the fields for Author, Category, Date Created, Date Modified, File Type, and File Size will appear with all boxes checked by default. ***Note:*** *File Name cannot be modified, as it would increase the difficulty of identifying documents.*



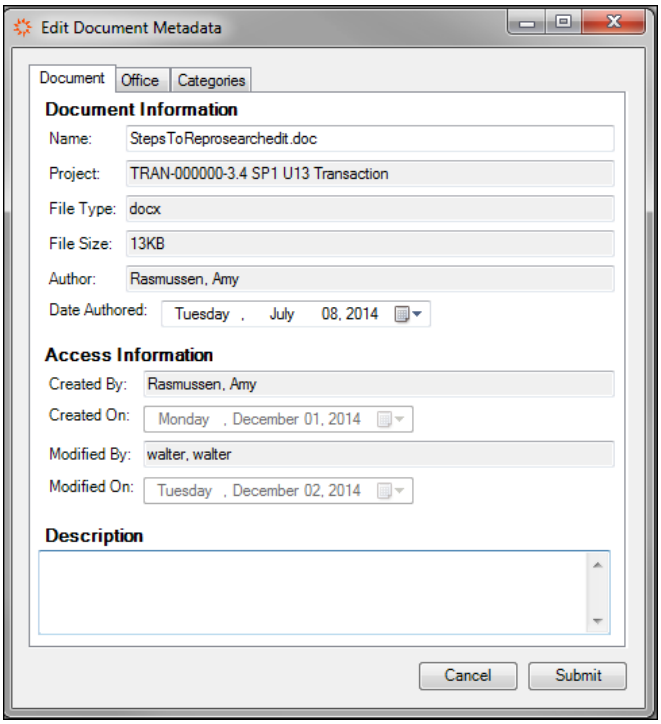
The metadata fields that have been checked will match the columns at the bottom of the TeamConnect plug-in in Outlook.



Important Note: *When updating to a newer version of the Outlook or Office plug-in, any adjustments made to these settings are preserved. If the newer plug-in no longer has the settings that existed in the old version, the old settings are ignored or excluded while all other settings remain the same.*

4.3.1.2 Editing Document Metadata

From any Office or the Outlook plug-in, I can right-click on any document or email (in Outlook) in the TC Documents Pane and I have an option to **Edit Document Metadata.**



Edit Document Metadata

Users are able to change fields and document information that they would have access to change in the main TeamConnect application. Changes made to the document metadata here will be reflected both in the plug-in as well as the main application.

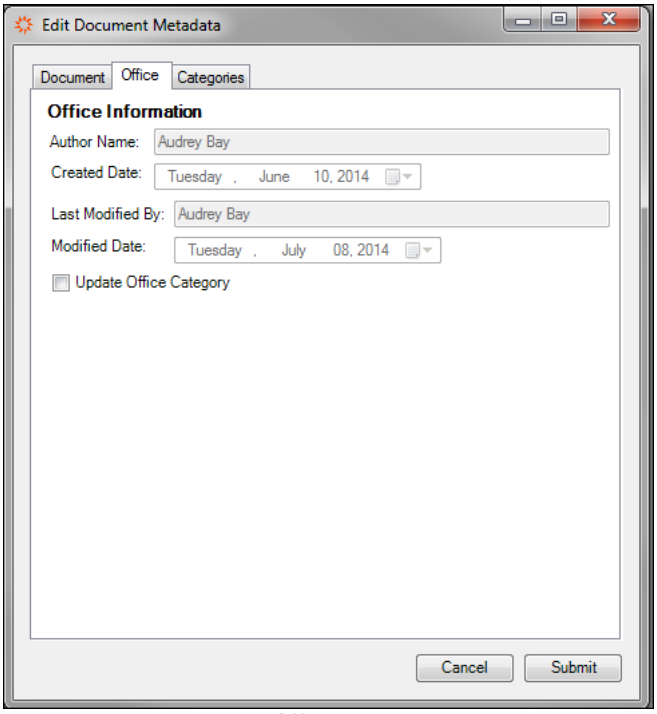
Document Tab

The document tab contains the editable name and author date of the file as well as other non-editable information fields. Click **Submit** to finalize any changes to the name field or **Date Authored** field.

While the File Type is not editable, users can change the extension via the **Document Name** field. Users will be prompted to click **Yes** after clicking **Submit** if they make changes to the extension. While the name will now reflect the new extension, your computer will still recognize the file as its original file type. Changes to the file type should be made in the main application.

Office Tab

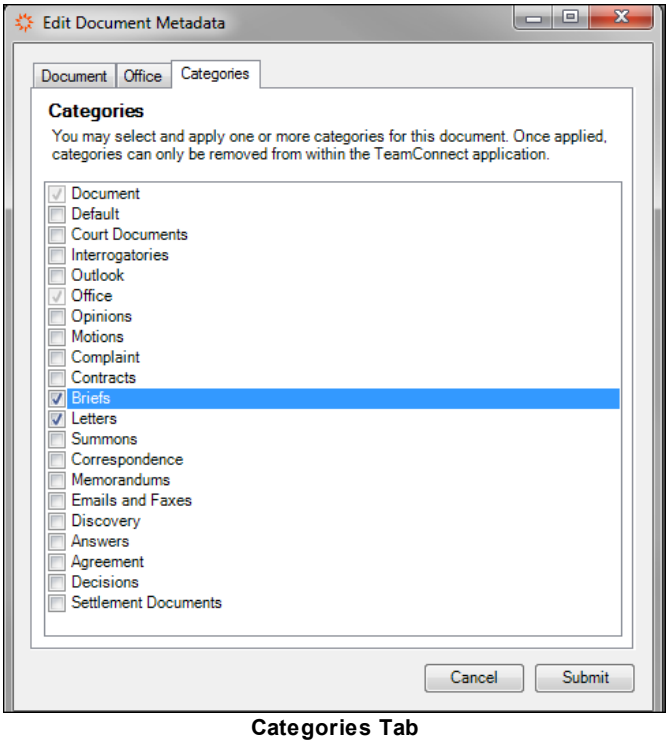
Click the **Update Office Category** checkbox to make edits on the **Office** tab. These changes will be reflected in the document file bank in the plug-in but not in the **Document** tab.



Office Tab

Categories Tab

The Categories tab allows for improved filtering and document management. Click the checkbox next to the desired categories to add that category. Categories inherited from TeamConnect cannot be removed from the plug-in. Likewise, categories added in the plug-in itself cannot be removed after clicking **Submit**. Categories can be removed in the main application.

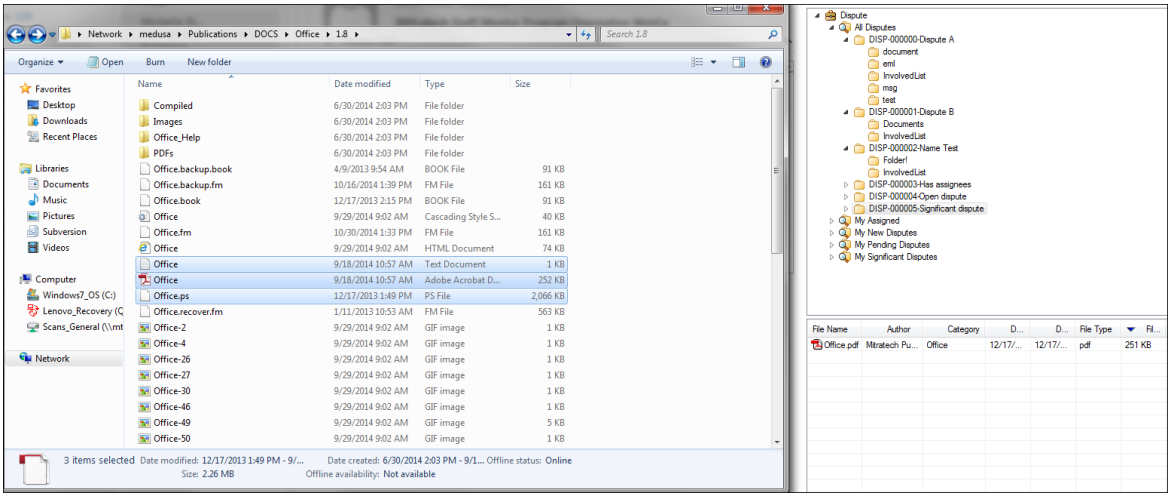


Categories Tab

4.3.2 Uploading Documents

Documents uploaded in TeamConnect will appear in the **Matter Folders & Document Pane** in Outlook. The TeamConnect plug-in in Outlook provides a drag-and-drop interface to move documents from anywhere on your computer to a file in the TeamConnect plug-in, or vice versa. ***Note:*** *Documents uploaded in TeamConnect must be assigned to a dispute in order to be viewed in that* ***Matter Folders & Document Pane*** *in Outlook.*

To upload a document to the TeamConnect document pane, simply drag one or more document(s) from your **Windows Explorer** and drop it into the desired file. ***Note:*** *If more than one document is selected to be uploaded and one of the documents exceeds the size threshold, only the documents that meet the requirements will show up in the pane to the right.*

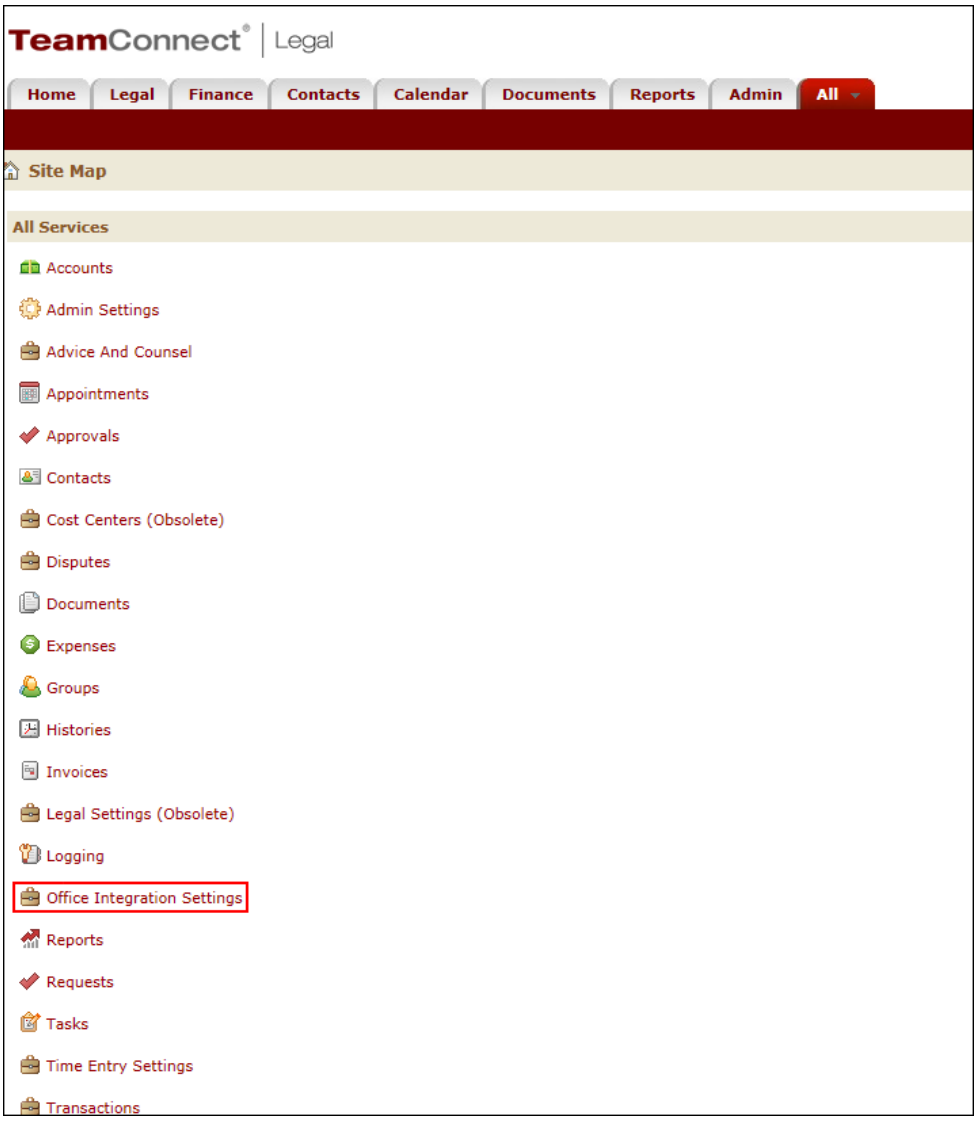


Upload Scenario	File Origin	Result
A single file within size threshold	Local Computer	Uploads without problem
Multiple files all within size threshold	Local Computer	Uploads without problem
A single file outside of size threshold	Local Computer	Does not upload
Multiple files with one file outside of threshold	Local Computer	None of the files upload
Multiple files that add up to exceed threshold	Local Computer	None of the files upload
A single file within size threshold	Outlook message	Uploads without problem
Multiple files within size threshold	Outlook message	Uploads without problem
A single file outside of size threshold	Outlook message	Does not upload
Multiple files with one file outside of threshold	Outlook message	Files that are individually within the size threshold upload, files that are not do not upload
Multiple files that add up to exceed threshold	Outlook message	Files that are individually within the size threshold upload, files that are not do not upload

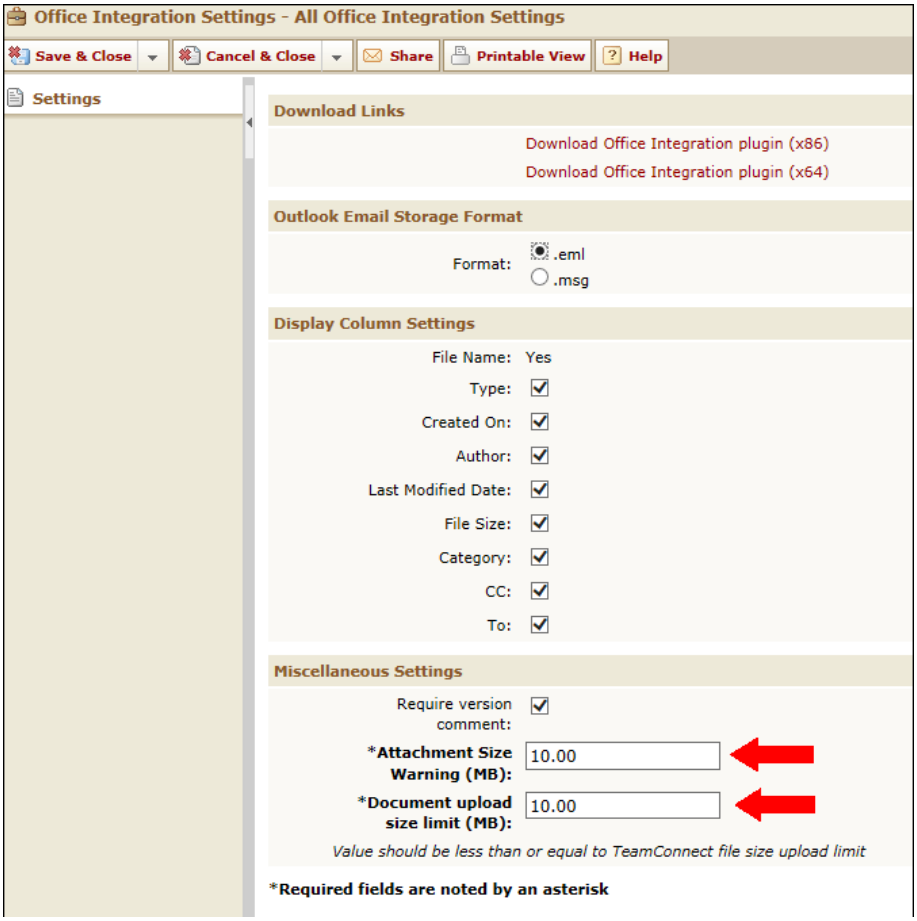
4.3.2.1 Setting a Size Threshold

As a TeamConnect administrator, you have the option to set a size threshold that will warn users of the Outlook Plug-in when they are trying to attach documents outside of TeamConnect that exceed the maximum amount. This will save users from wasting time downloading temporary copies of documents that Outlook will ultimately reject for being too large. ***Note:*** *Outlook 2010 has a default limit of 20MB for internet email accounts. Exchange accounts have a default limit of 10mB and can be set by the Exchange Server Administrator here.*

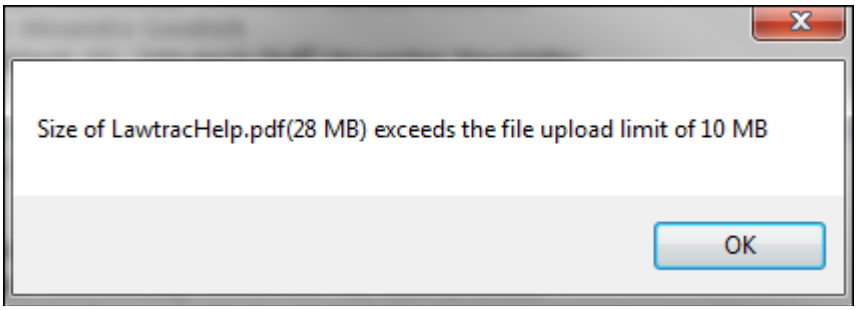
From the TeamConnect Home page, click on the **All** tab and select **Office Integration Settings**, or hover the mouse over the tab and select the option **Office Integration Settings** from the drop-down menu.



Under **Miscellaneous Settings**, click on the box next to **Attachment Size Warning (MB)** or **Document Upload Size Limit (MB)** to change the amount. ***Note:*** *The value of the* ***Attachment Size Warning*** must *always be less than or equal to the* ***Document Upload Size*** *limit.* Click on **Save & Close** to apply your new settings, or **ALT + C**.



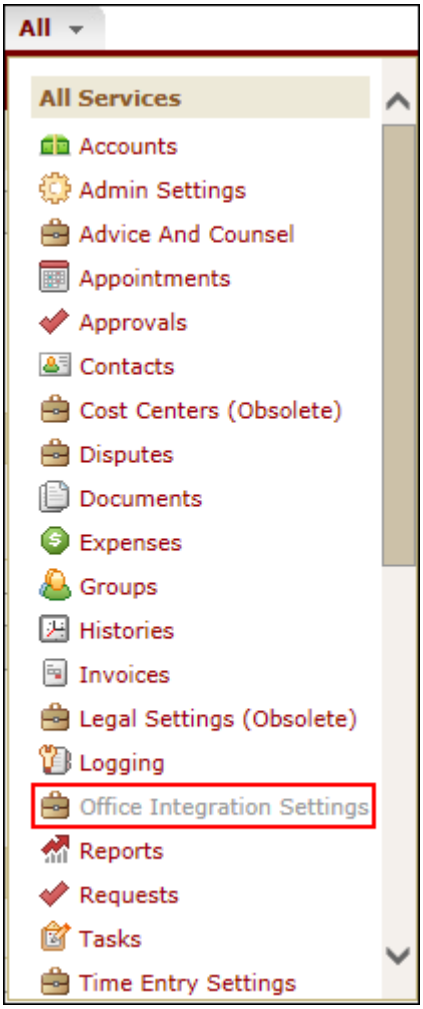
Note: *Any attempt to upload a document to a file or attach a file to an email that exceeds the threshold limit will result in the following notice:*



4.3.2.2 Outlook Email Storage Format

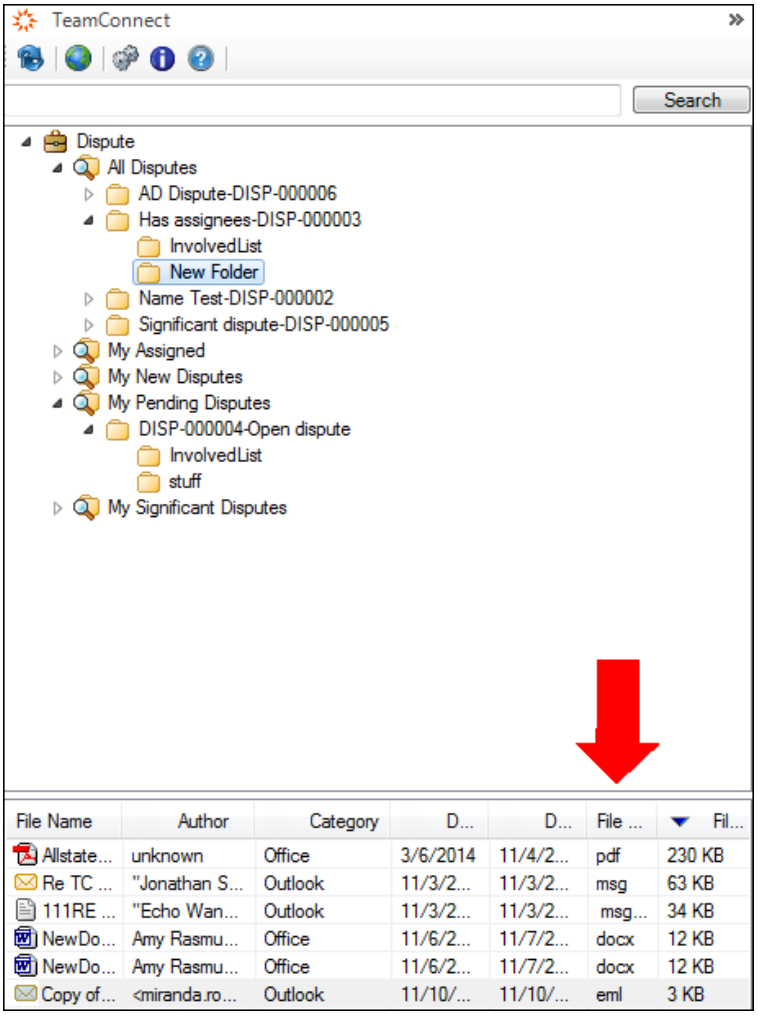
Emails uploaded into TeamConnect via the Outlook plug-in can be uploaded as .msg or .eml files in order to use the format most suitable for your organization's needs. This option is accessible to all users who have permissions to access the Outlook/Office plug-in settings area.

From the TeamConnect website, select **Office Integration Settings** from the **All** tab.



In the new page, click **Edit** to select the desired format under **Outlook Email Storage Format.** ***Note:*** *The format is defaulted to .eml.* Click **Save & Close** to confirm, then in your Outlook plug-in, click to refresh your TeamConnect pane.

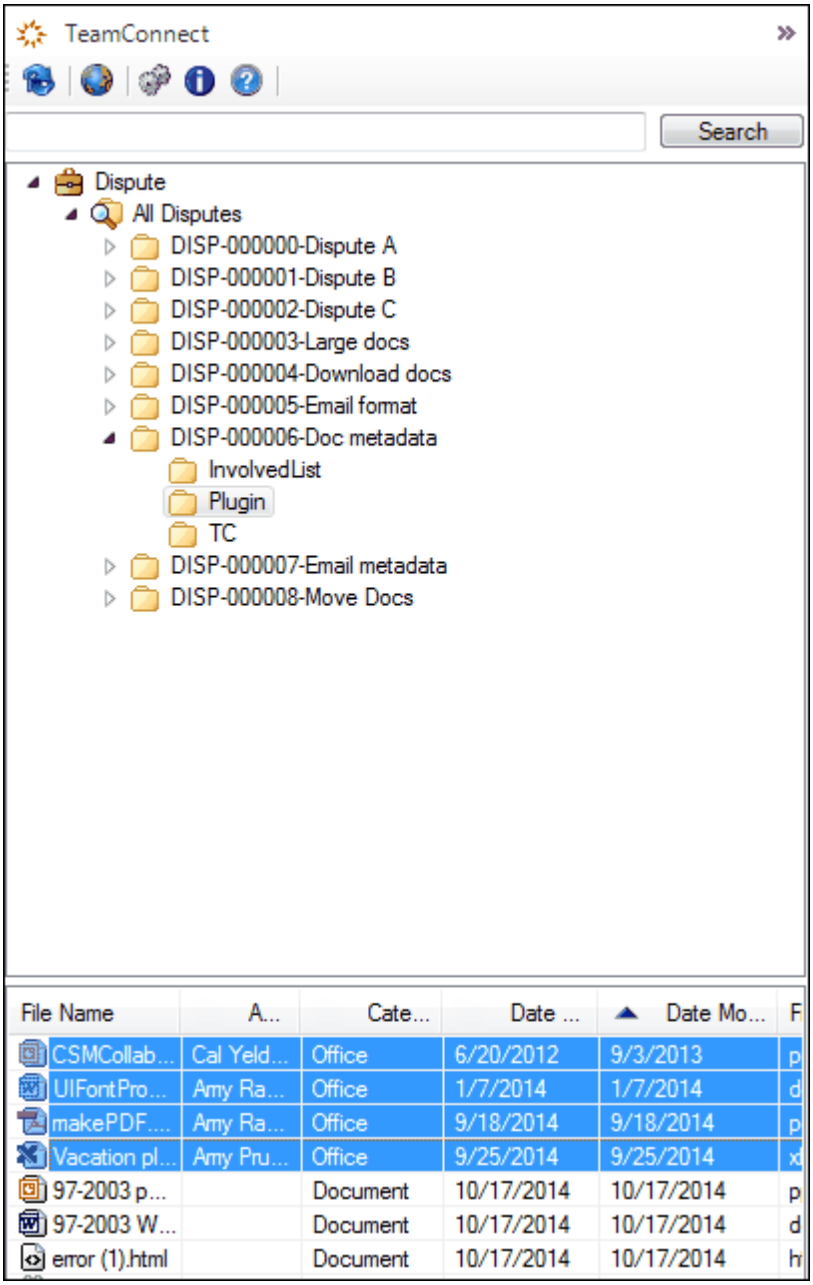
You can see the format of uploaded documents in the **File Format** column.



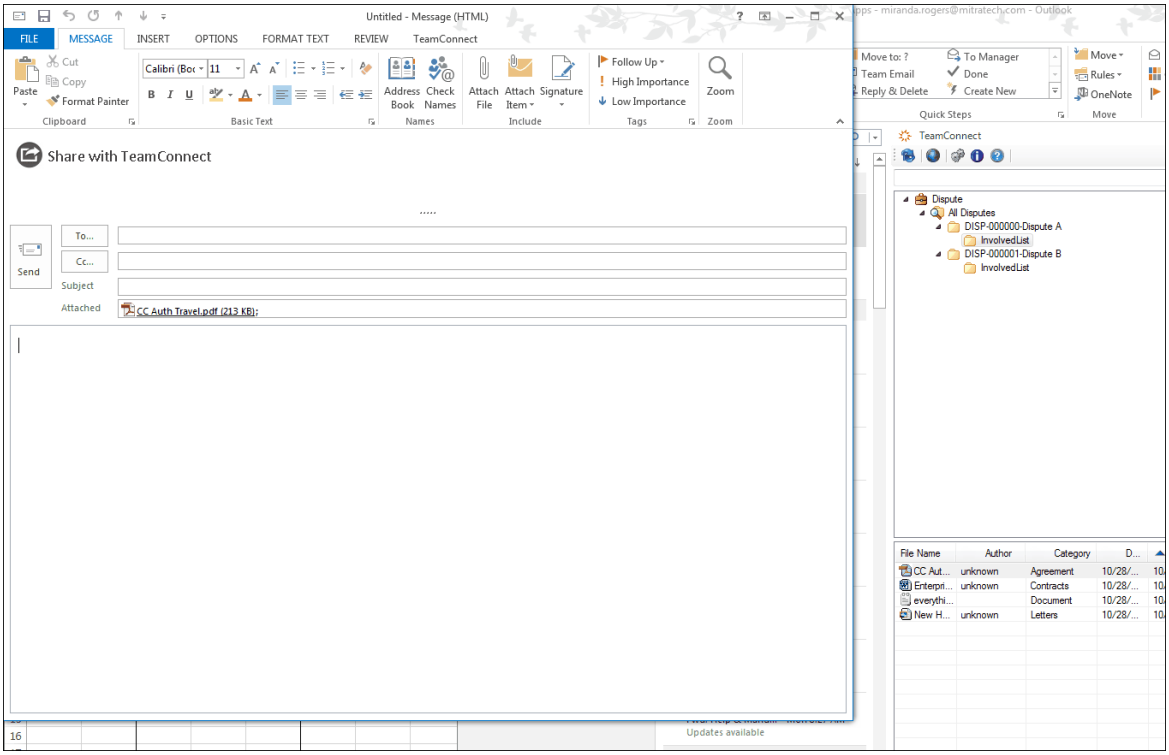
4.3.3 Attaching Documents

Documents can be quickly and easily attached to and from the Outlook TeamConnect plug-in, sparing users the necessity of switching back to the main TeamConnect application.

When one or more documents are selected, they will be highlighted as a visual indication that further action (i.e. saving or deleting) can be taken. Users can select multiple documents by holding down the **CTRL** button while clicking the files.



Attach any selected document(s) to an email by right-clicking and selecting **Attach to New Email** from the pop-up context menu, or drag the selected files and drop them into a pre-existing email composition window. ***Note:*** *Files from different folders can be attached to the same email.*

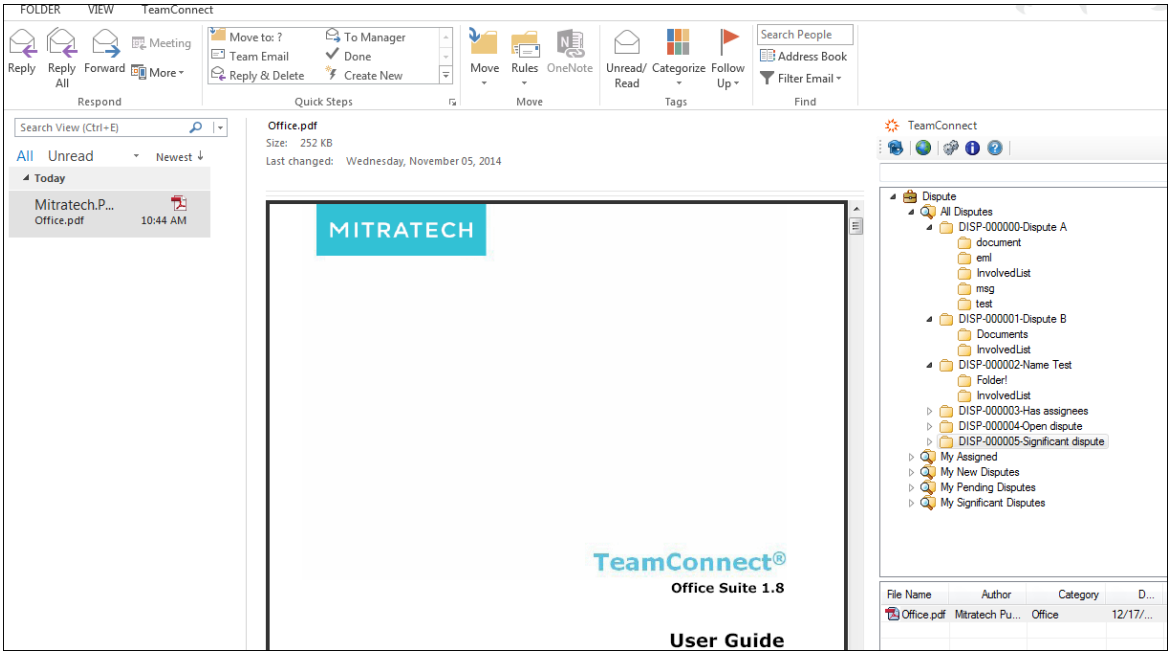


4.3.4 Opening Documents

With the TeamConnect plug-in in Outlook, users can easily view their documents in TeamConnect from the **Matter Folders & Document Pane.**

To preview a document or email, double-click the item from the list and the file will preview within the Outlook window. You may need to expand the folder to view sub-folders.

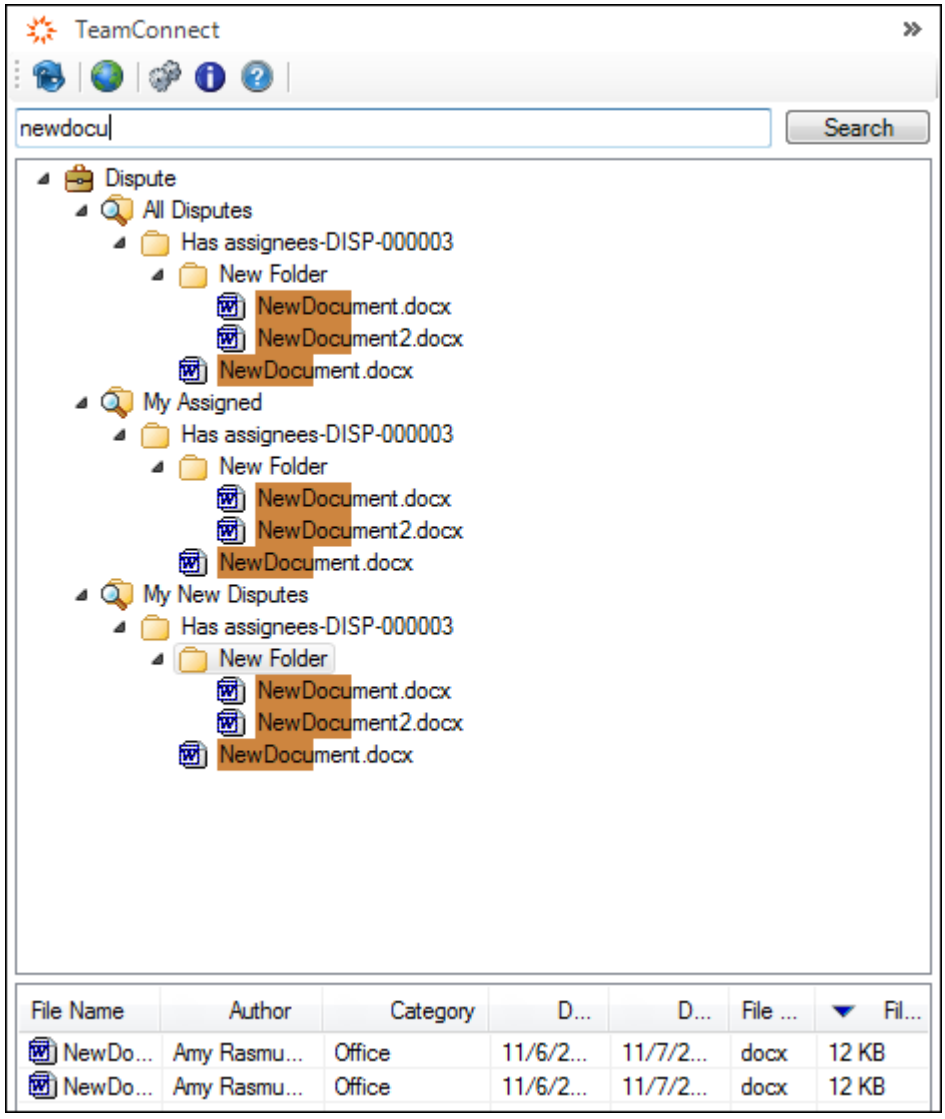
Documents should be opened via **right-click+Open** rather than double-clicking the previewed item.



4.3.4.1 Searching Documents

Matters can be quickly searched from the TeamConnect plug-in within Outlook, saving users from scrolling through hundreds or thousands of Matter folders. The search bar is always visible when the TeamConnect pane is expanded, and can be used to locate documents by file name, document content, or file type.

Enter your query into the Search text box. As you type, Matters will automatically show up that include the typed information. Click on one of the search results documents and the action is the same as when you interact with documents in the standard TeamConnect document pane. ***Note:*** *Search results will remain until the text is erased from the Search bar.*



4.3.4.2 Opening Office Documents in Outlook

Users opening Office documents in Outlook should use **right-click+Open** to open the documents rather than double-clicking.

Upon launch in the native application, the Document Check-In and Check-Out options will be unavailable. Users should save the document using the **Save to TeamConnect** button.

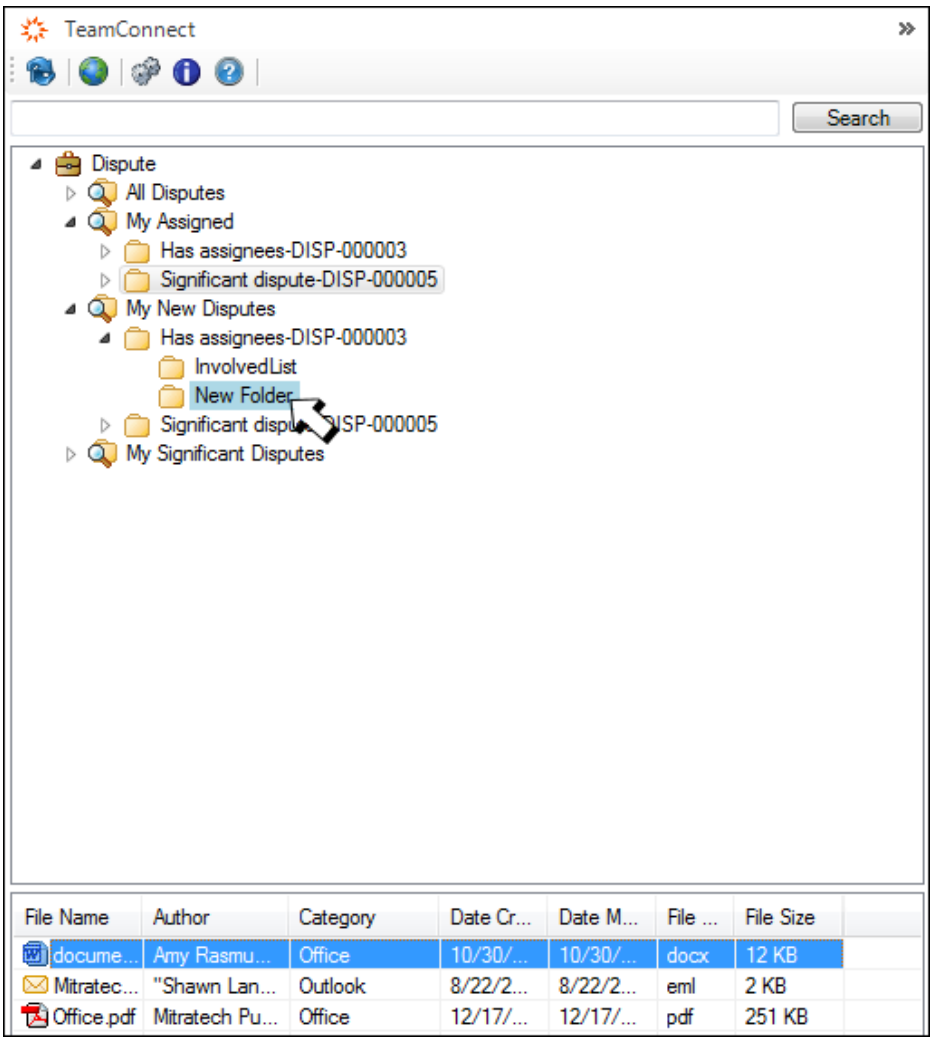
Saving to the same folder as a document with an identical file name will cause an error message. However, clicking the exact identical file and saving to it will allow versioning.

After saving, the document will then be **checked-in** and sent to TeamConnect.

4.3.5 Moving Documents

To move one or more document(s) in the TeamConnect Outlook plug-in, click on a document within the pane and drag the file up to the desired folder. You can also right-click the file and select **Cut** or **Copy** in order to open a different folder and paste it there. Alternatively, click on the document, press **CTRL+C**, open a new file and click on a document in the that file and press **CTRL+V**.

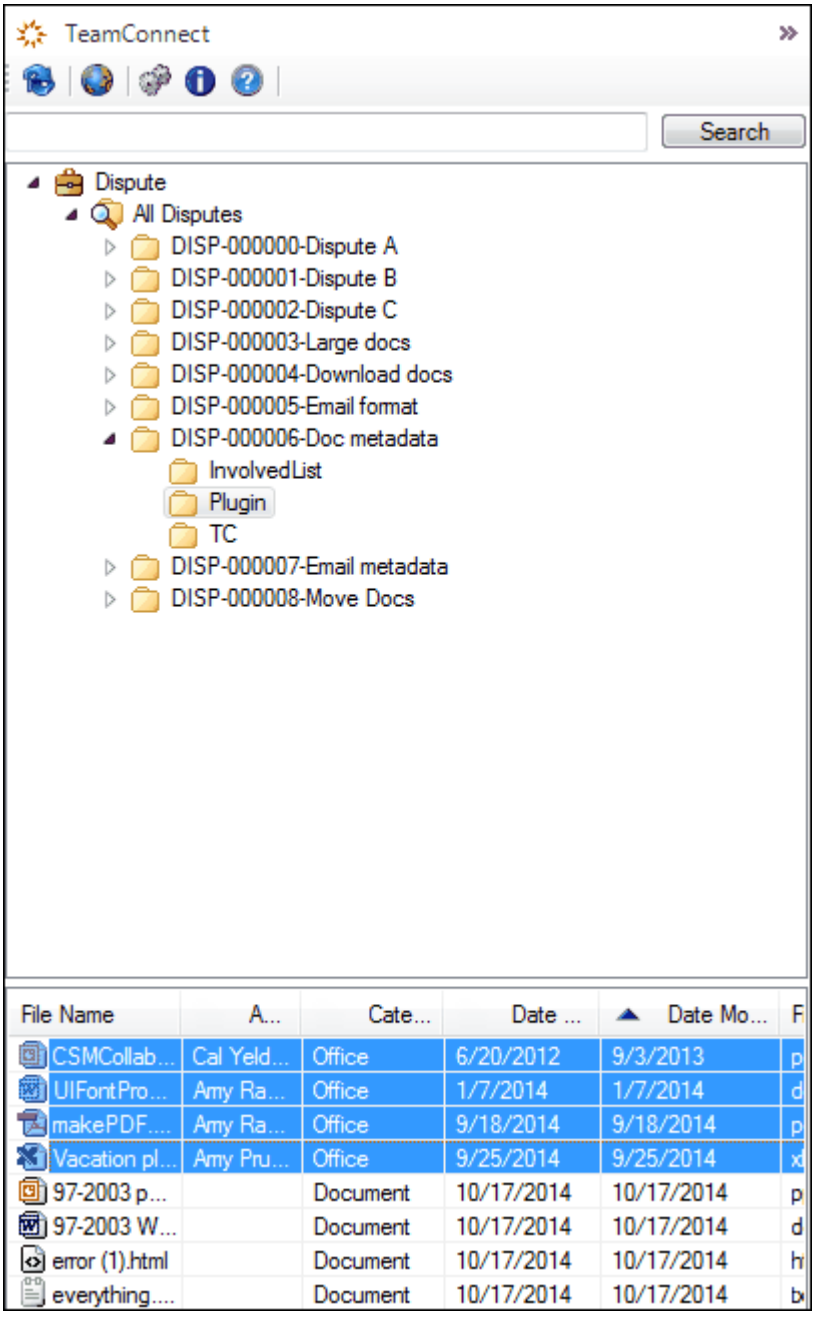
Note: *When dragging a document from one file to another, a* ⃠ *will appear in the place of the mouse indicator if the file cannot hold the document. If a file is willing to accept a document, a* ✚ *will appear next to the mouse indicator.*



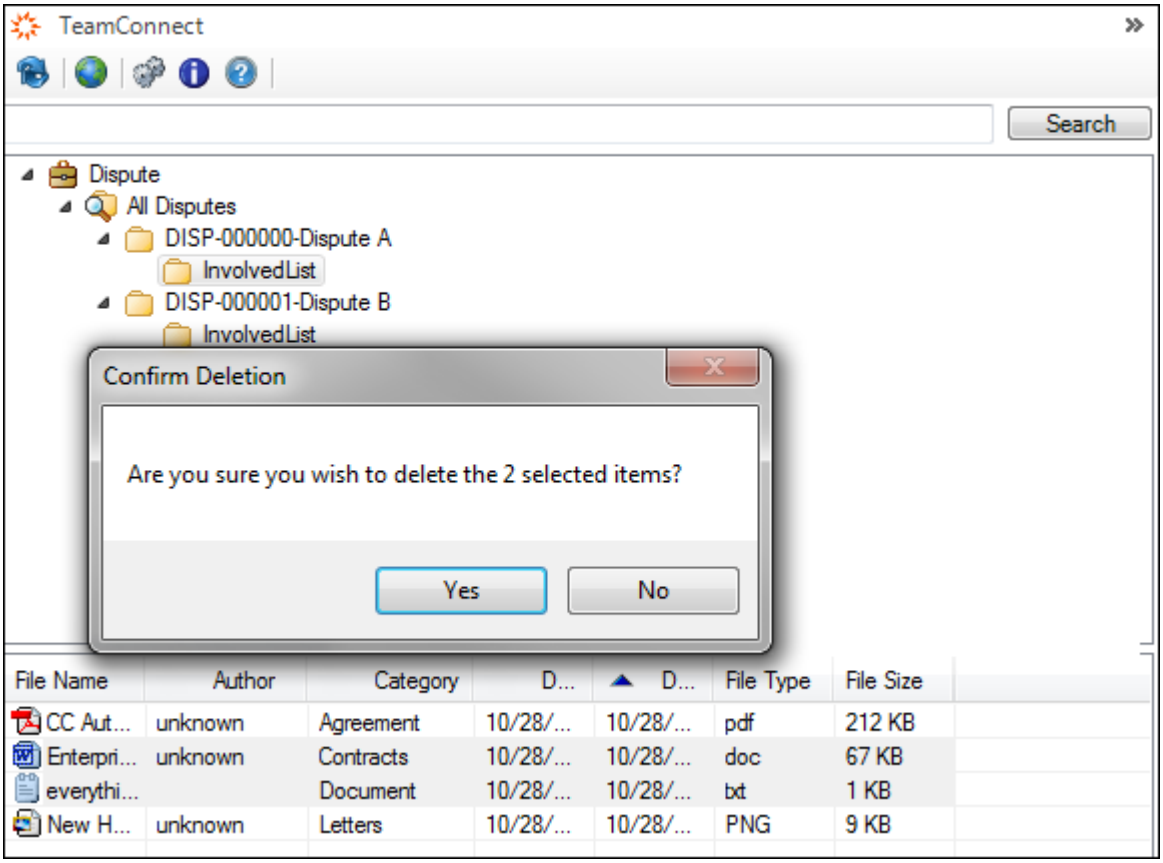
4.3.5.1 Deleting Documents

Documents can be quickly and easily deleted from the Outlook TeamConnect plug-in, sparing users the necessity of switching back to the main TeamConnect application.

When one or more documents are selected, they will be highlighted as a visual indication that further action (i.e. saving or deleting) can be taken. Select multiple documents by holding down the **CTRL** button while clicking the files.



Click the **Delete** icon or right-click any selected file and choose **Delete** from the pop-up context menu to save your file. Selecting **Delete** will prompt a window to pop-up to confirm the action. ***Note:*** *The numbers of files that have been selected to be deleted will appear, but not the file names.*



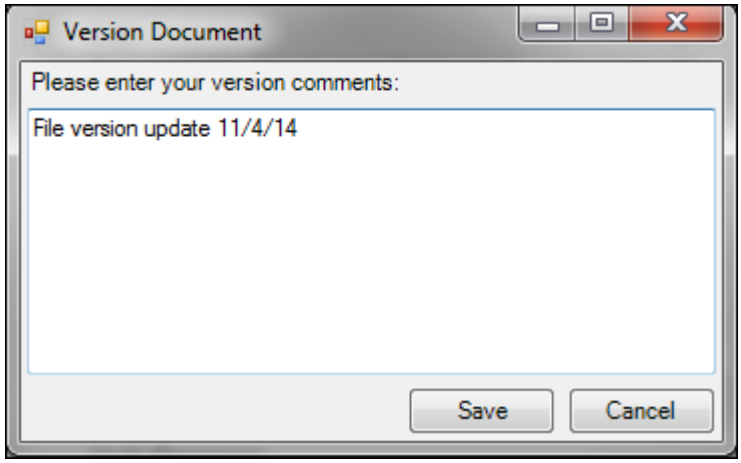
If a file cannot be removed, a notification will pop up stating the cause of the issue.

4.3.5.2 Overwriting Documents

Users are able to overwrite and version documents moved within the plug-in and documents moved in from emails. See Version Control for further details.

To overwrite with a document from an email

1. **Drag and drop** the desired document from the message to **the file you want to overwrite.**
   Note: *If you drag the file to the folder instead of to the file itself, you will encounter an error message.*
2. If the folder already contains that file name, the file will overwrite.
3. Enter a **Version Comment**, if desired.



4. Click **Ok** to finalize the overwrite.

To overwrite with a document from within the plug-in
Users are not able to drag and drop a file from within the plug-in to another folder with an outdated file of the same name. This action throws an error and will not overwrite the old document or move the new document.

In order to overwrite from within the plug-in, users must first **delete** the old file before **moving** the new file to the intended location.

4.3.5.2.1 Version Control Overwriting

Versioning of documents and email messages is improved in Office Suite 2.0.
Users are able to drag-and-drop new files onto an existing target file.

These are the following scenarios users may encounter when versioning documents:

Action	Target	Result
Dropping a file from an email onto an existing file within the TC plug-in **(see below)**	File of same type (.eml or .msg for emails) that is **not checked out**	Pop-up window requests version comment. **Save** will version the targeted file and **Cancel** will cancel the versioning. Both choices close the new window.
Dropping a file from an email onto an existing file within the TC plug-in	File of a different type	Prompts a warning message that notifies you of extension mismatch. Click **Yes** to proceed with the versioning or **No** to cancel
Dropping a file from an email onto an existing file within the TC plug-in	File that is currently **checked out**	Prompts a message stating that you cannot version a checked out file. This message includes the name of the user who has checked out the document. Provides an

Action	Target	Result
		option to save a copy with a unique added identifier (sample.doc -> sample(1).doc) instead.
Dropping one or more local documents into the plug-in directory	Hovering over individual file	Cannot upload or version
Dropping one or more local documents into the plug-in directory	Hovering over folder or subfolder	Uploads or begins versioning process as planned

Versioning Files

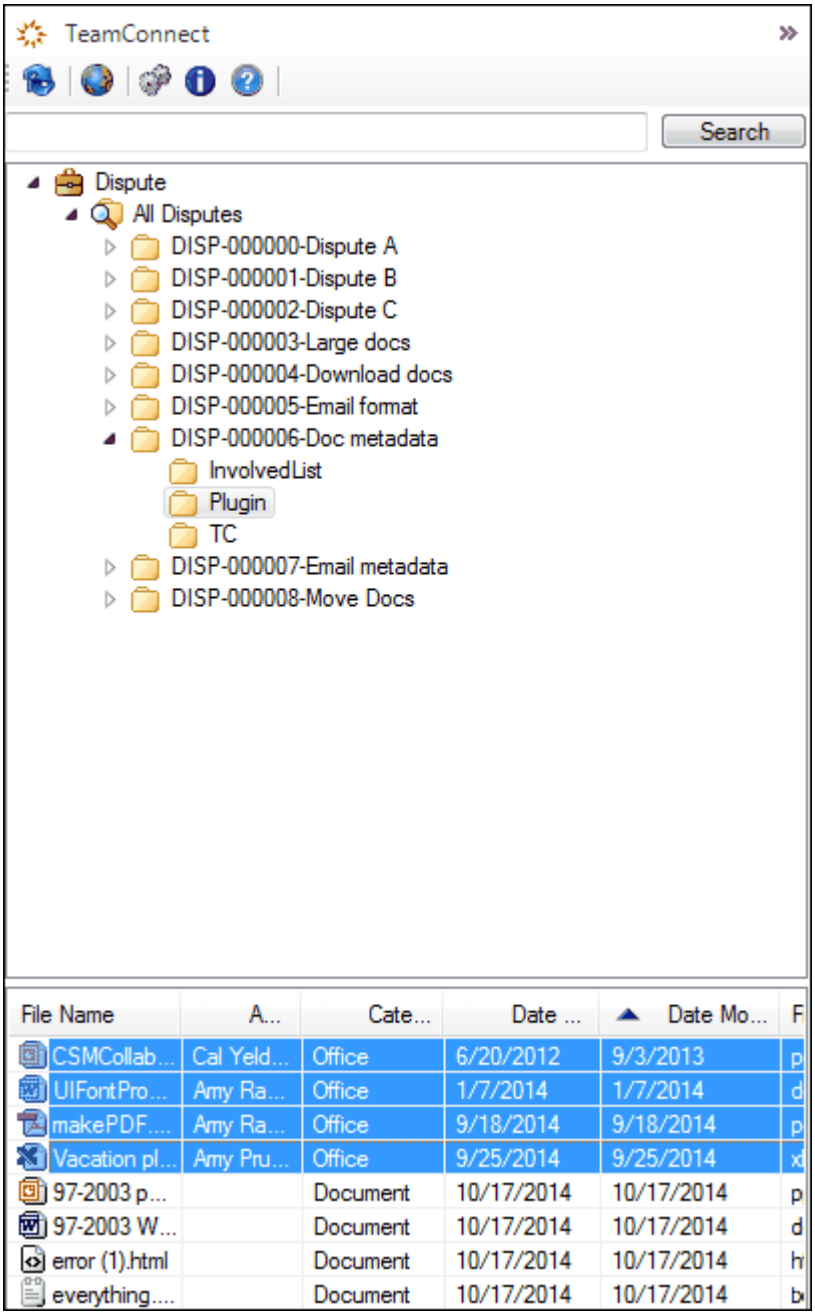
Dragging files directly from an email to a file in the document bank can provide direct versioning. The file will always take the name of the destination file in the document bank. Clicking the file in the document bank twice (not double-clicking it) will open up the version history. Users can also version a file with a document of a different extension.

For example, users can drag a .docx file to a .doc file for versioning. The file extension will still be .doc for TeamConnect or locally downloaded files, but this feature can allow users with legacy files better version control. Users can also version an entirely unrelated file type, such as adding a .pptx file over a .pdf. TeamConnect will attempt to open the file as a .pdf and locally downloaded versions of the .pptx.pdf file will have errors.

4.3.5.3 Saving to Local Machines

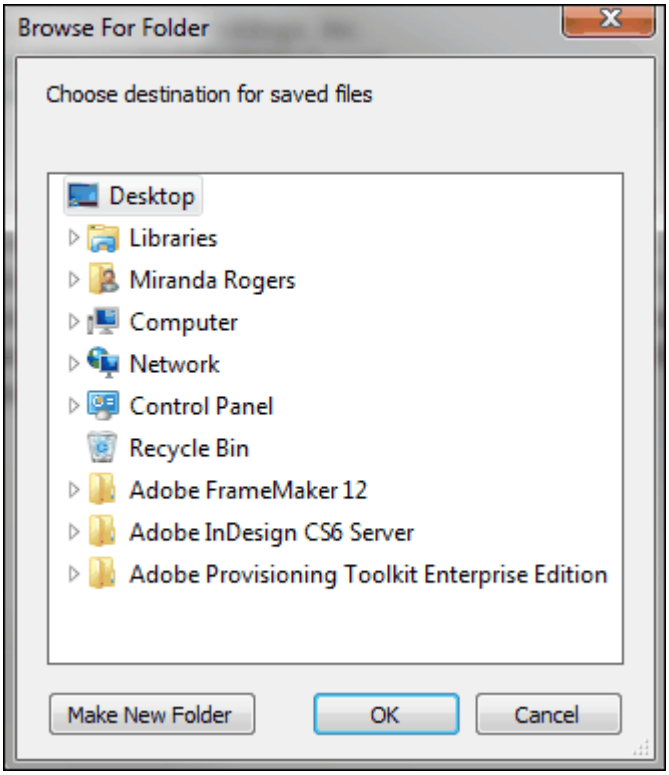
Documents can be quickly and easily saved to a local machine from the Outlook TeamConnect plug-in, sparing users the necessity of switching back to the main TeamConnect application.

When one or more documents are selected, they will be highlighted as a visual indication that further action (i.e. saving or deleting) can be taken. Select multiple documents by holding down the **CTRL** button while clicking the files.



Click the **Save** icon or right-click any selected file and choose **Save** from the pop-up context menu to save your file.

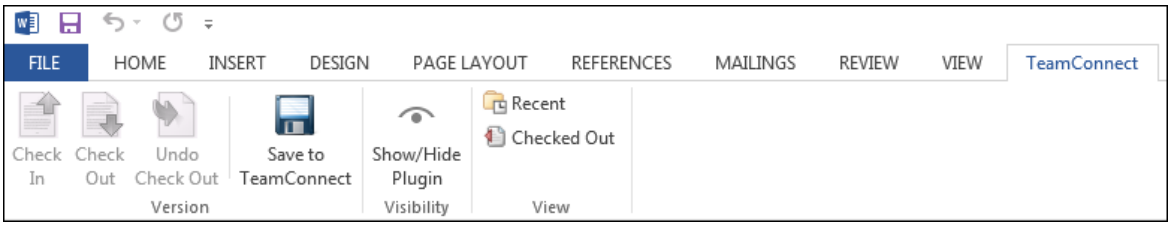
Choose a destination in which to save the file. ***Note:*** *File names will remain as they appear on the server, but duplicate names must have a numeric identifier appended in order to provide uniqueness in the file system.*



5 TeamConnect Office

TeamConnect Office integrates into Microsoft Office so that you can view and update Word, Excel, and PowerPoint files that have been added to TeamConnect. You can also upload documents to projects in TeamConnect.

Note: *You can only open documents from and add documents to the Documents page for a project.*



Office Navigation Panel

Click **Recent** to see the recently viewed documents, and click **Check Out** to see any currently checked-out documents.

5.1 Saving Metadata from Office

Documents can be uploaded via the TeamConnect plug-in, and metadata is automatically extracted and placed into the appropriate fields. This visible data will make locating and identifying documents easier. See Uploading Documents for more details.

TeamConnect extracts the following metadata:

Extracted Metadata	Conversion Description
Document Name	File Name
Document's Creator	Author
Document Category	Category
Document Creation Date	Date Created
Document Last Modified	Date Modified
Document Extension	File Type
Document Size	File Size

Note: *If the Document's Creator cannot be extracted, the description will be left blank. If Creation Date cannot be extracted, the current date will be used. If Last Modified cannot be extracted, Creation Date will be used.*

5.2 Office Documents and Emails

Documents and emails that are shared in TeamConnect can be opened in Office Suite with the TeamConnect plug-in, allowing easier access to documents without the necessity of working from multiple programs.

In an Office Suite program, such as Word, documents can be seen in the TeamConnect plug-in on the right side of the page. Double-clicking on a document inside the TeamConnect pane will allow you to view the document content in **Read-Only Mode**.

5.2.1 Opening Documents

When you open a document, you have the option to open it as read-only, to check it out, or to save a copy.

Note: *When looking for a document in a list of folders, you can only find documents in project folders or folders within project folders.*

To open a document from the TeamConnect plug-in, double-click a document from a Matter folder in your Disputes. The document will open in **Read Mode.** ***Note:*** *Click on the* *icon to view the document in* ***Print Layout****, or* *to view the document in* ***Web Layout****.*

5.2.1.1 Saving Documents

When you upload a document to TeamConnect, you must upload the document to a project.

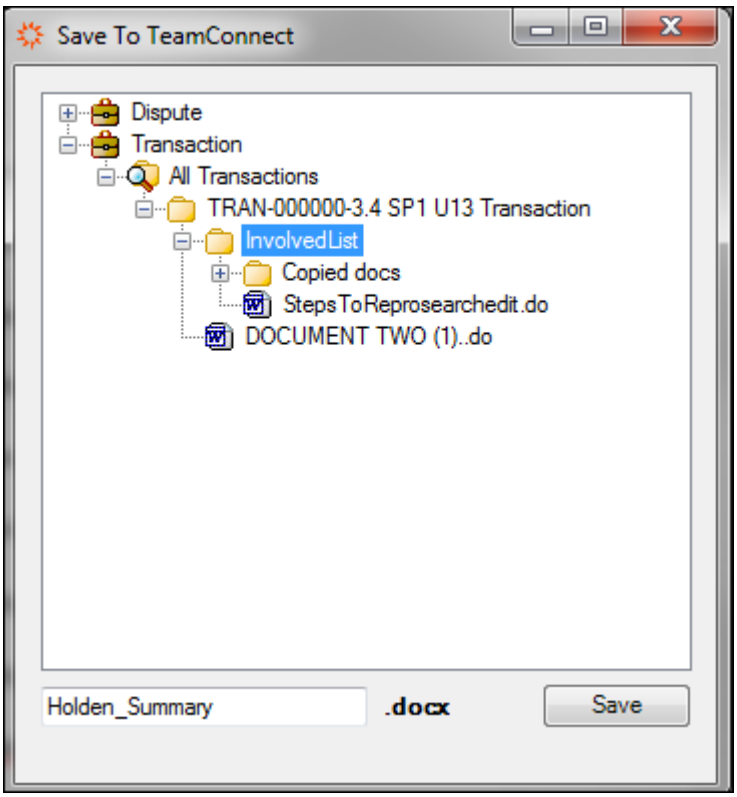
The name of the document will auto-populate in the entry field after clicking save. ***Note:*** *The document extension is not able to be edited.*

To save a document from Word, Excel, or PowerPoint to TeamConnect

1. From the document, click the **Save to TeamConnect** button from the toolbar.
2. Browse to the project folder where you want to save the document.
3. Enter a filename for the document in the **File Name** field.
4. Click **Save**.

In TeamConnect, the document now appears on the **Documents** page for the project.

Saving to the same folder as a document with an identical file name will cause an error message. However, clicking the exact identical file and saving to it will allow versioning.



Saving to TeamConnect

5.2.1.1.1 Office Metadata Population

Documents can be uploaded via the Office plug-in, and metadata is automatically extracted and placed into the appropriate fields. This visible data will make locating and identifying documents easier.

TeamConnect extracts the following metadata:

Extracted Metadata	Conversion Description
Document Name	File Name
Document's Creator	Author
Document Category	Category
Document Creation Date	Date Created
Document Last Modified	Date Modified
Document Extension	File Type
Document Size	File Size

Note: *If the Document's Creator cannot be extracted, the description will be left blank. If Creation Date cannot be extracted, the current date will be used. If Last Modified cannot be extracted, Creation Date will be used.*

5.2.1.2 Updating Documents

To update documents

If the document is a read-only document, click the **Check Out** button. Click the **Undo Check Out** button to check the file back in without saving your changes.

1. Make your updates to the document.
2. Click the **Check In** button.
3. (Optional) Enter an explanation of your changes in the **Notes** field of the **Save Dialogue** window.
4. Click **Save**. A read-only version of the updated document opens.

You can see a list of the documents you have checked out in the **Checked Out Documents** section under the tab.

5.2.2 Uploading Documents

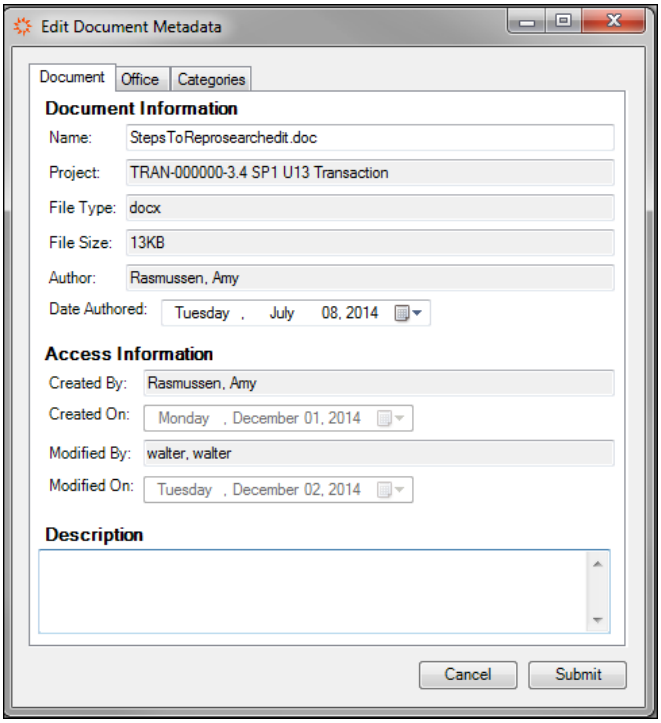
Users can easily upload local documents into TeamConnect via the plug-in. Documents uploaded from a local computer will then be able to be checked in or checked out by multiple users.

Uploading a document

1. Click the **TeamConnect** tab.
2. Select **Save to TeamConnect.**
3. Select the desired directory, and add a name for the file and description (if needed). Click **Save**.
4. The **Check Out** and **Check In** options are now available for this file.
5. Check Out this file to make changes.
6. The document will now be locked for editing by other users. Click **Check In** after your changes to remove this lock.
Note: *Local changes will not be automatically reflected in the plug-in. Users must check the document back in for these changes to be stored and reflected in the plug-in.*

5.2.3 Editing Document Metadata

From any Office or the Outlook plug-in, I can right-click on any document or email (in Outlook) in the TC Documents Pane and I have an option to **Edit Document Metadata.**



Edit Document Metadata

Users are able to change fields and document information that they would have access to change in the main TeamConnect application. Changes made to the document metadata here will be reflected both in the plug-in as well as the main application.

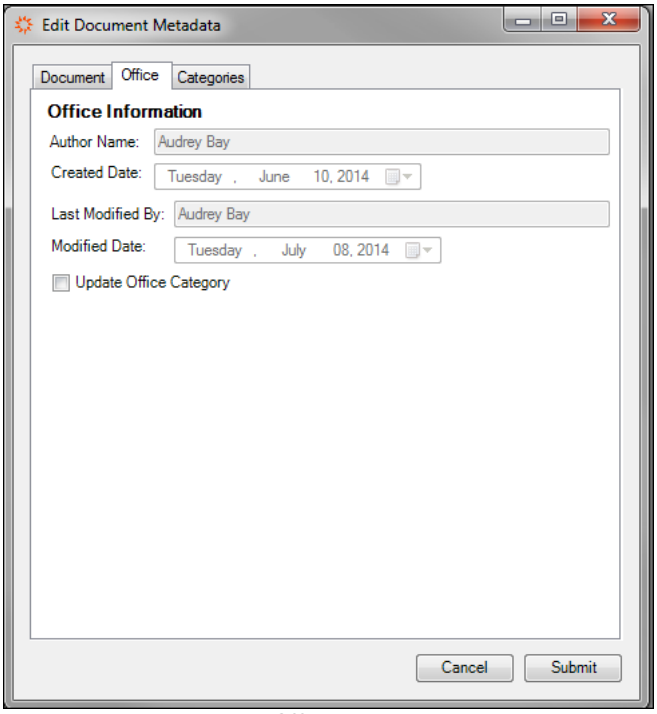
Document Tab

The document tab contains the editable name and author date of the file as well as other non-editable information fields. Click **Submit** to finalize any changes to the name field or **Date Authored** field.

While the File Type is not editable, users can change the extension via the **Document Name** field. Users will be prompted to click **Yes** after clicking **Submit** if they make changes to the extension. While the name will now reflect the new extension, your computer will still recognize the file as its original file type. Changes to the file type should be made in the main application.

Office Tab

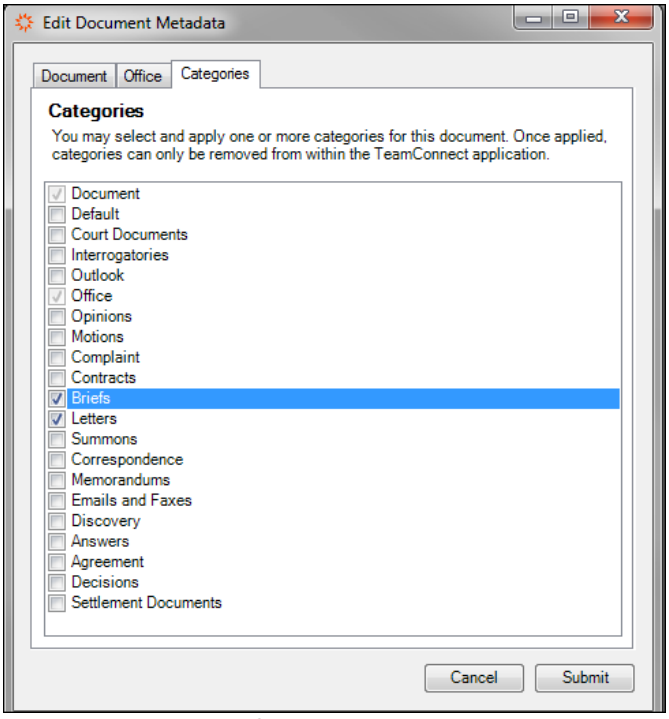
Click the **Update Office Category** checkbox to make edits on the **Office** tab. These changes will be reflected in the document file bank in the plug-in but not in the **Document** tab.



Office Tab

Categories Tab

The Categories tab allows for improved filtering and document management. Click the checkbox next to the desired categories to add that category. Categories inherited from TeamConnect cannot be removed from the plug-in. Likewise, categories added in the plug-in itself cannot be removed after clicking **Submit**. Categories can be removed in the main application.



Categories Tab

Index

- A -

Appointment 38
Appointment details 39
Appointments 37, 38
Attaching Documents 52
Attachment Size Warning 48
authentication 30

- C -

Calendar 37, 38, 38, 39, 40
Categories Tab 68
Check In 17
Check Out 17
check-out 19
Conventions 7
Conventions in this Guide 7
Creating Tasks 35

- D -

Deleting Documents 57
document check-out 19
Document Tab 68
Document Upload Size Limit 48
Documents 40
Documents and Emails 40, 64

- E -

Editing Document Metadata 68
Email 52
Emails 40
Excel 8, 63
Extracted Metadata 64

- F -

Filter 40
Filtering Projects and Appointments 40

- G -

Google mail 14

- H -

Host Name 11

- I -

install 26, 27
installation 26, 27
integrate projects 12
Integration 12, 50

- L -

local machine 61
login 9, 26

- M -

Matter Folders 40
Metadata 43, 44, 64, 68
Metadata Display 44
Moving Documents 57
My Tasks 32

- N -

New Task 35

- O -

Office 8
Office Integration Settings 50
Office Suite 8
Office Tab 68
offline mode 16
Opening Appointments 39
Opening Documents 54, 64
Outlook 8
Outlook Documents 40
Outlook Email Storage Format 50
Overwriting Documents 59

- P -

Port 11
PowerPoint 8, 63
Preventing Records From Appearing 13
Project Integration 12
proxy 11
proxy authentication 11, 27

- R -

Read Mode 64

- S -

saving 61
Saving to Local Machines 61
Search 8, 55
Searching Documents 55
Setting a Size Threshold 48
Single Sign-On 30
Size Threshold 48
Syncing Outlook with Google Mail 14

- T -

Tasks 31, 32, 33, 35
Tasks in Outlook 31
TeamConnect Office 8, 63
TeamConnect Outlook 8
To-Do List 31
token-based authentication 30

- U -

Updating Categories 38
Updating Information 38
Updating Login Settings 9
Updating Task Activities 34
Upload 48
Uploading Documents 48
Using this Guide 8

- W -

Windows ID 30
Word 8, 63