

EXFORMATICS ECM OFFICE ADDIN 7.7.3

The Office AddIn 7.7.3 is part of Exformatics' ECM solution. Please review these release notes to learn what is new in this version, as well as important remarks concerning known issues.

Exformatics Office AddIn supports Word, Excel, PowerPoint, and Outlook - facilitating work with documents and emails. Further details on the areas of improvement will be provided in the following section.

Users of earlier releases are advised to upgrade. Installation instructions can be found in the last section of this document.

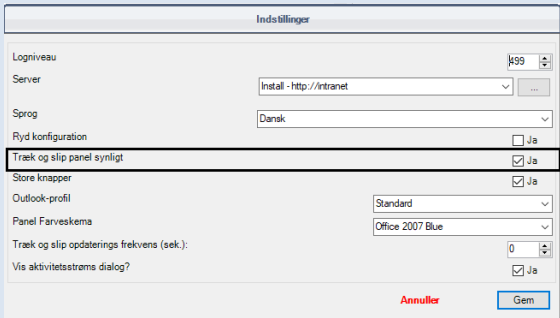

Release notes

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Changes in Exformatics Office AddIn 7.7.3

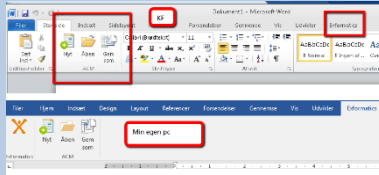
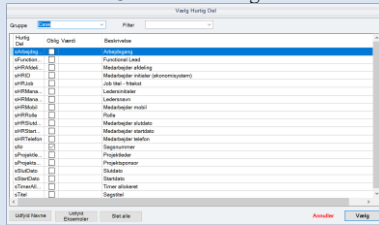
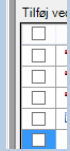
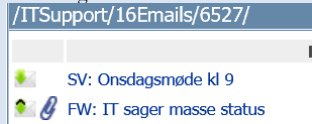
Bugfixes

Case	Title	Description
7128	Tracking emails with large files attached	<p>When having emails with large files attached (pdf, docx etc.) which was more than 100Mb in size, these could not be tracked to a case from Outlook.</p> <p>It now allows you to track mails with a very large size.</p> <p>NOTICE: New Patch is required which changes your limit of size of emails (200-500mb pr. Email). Contact Exformatics for more info.</p>
7361	Unable to 'Save As' (PowerPoint)	<p>Using the Exformatics Ribbon button Save As in PowerPoint should allow you to choose where and which business object you want to save your file to. This was not working but has now been fixed.</p> <p>You can now save PowerPoint files directly into a business object using the Save As.</p>
7784	'Save Changes' dialog Box in Word	<p>Creating documents from system templates provoked a 'Save Changes' dialog box even though you had not made any changes to the document.</p> <p>This dialog box has been removed while closing the Word Application without editing the opened document.</p> <p>This improves the user experience when creating documents by using system templates in activities etc.</p>
7862	Drag & Drop Panel	<p>The Drag & Drop panel in Outlook have settings which shows/remove the visibility of the panel. Removing the checkmark in the checkbox and restarting Outlook ignored your settings and kept showing the panel.</p> <p>This has now been fixed and will give the users the ability to decide if the Drag & Drop panel should be visible.</p> 
7909	Untracking mail on IT case doesn't disappear in Outlook	<p>If the system had more then 9 business objects (IT case, activities, Projects etc.) it was not possible to remove the tracking number on emails located in Outlook, when deleting the email from the relevant business object.</p> <p>The new AddIn allows us to support up 19 Business objects.</p>
7940	Error on Copy-Paste Pictures Function on IT cases	<p>The webpart Pictures has a drop-down function which allows user to directly paste pictures from clipboard.</p> <p>Due to an upgrade of Internet Explorer it failed. This bug has been fixed.</p> 

Case	Title	Description
8013	'Save As' function supports subfolders with new document webpart	<p>When using the Save As function in any Office application, you can now save directly into a subfolder located on the case/activity. The default value chosen for the save location is Documents.</p> <p>This have now been changed so that the default path to save the current file is the relevant business object and you can choose which subfolder to save in.</p> <p>This provides the users for faster method to save their document.</p> <p>NOTICE: This might need some configuration. Contact Exformatics for more info</p>
8157	'Save As' not working in Word	<p>Using the Exformatics Ribbon button Save As in PowerPoint should allow you to choose where and which business object you want to save your file to. This was not working but has now been fixed.</p> <p>You can now save PowerPoint files directly into a business object using the Save As.</p>
8195	Wrong business object in advice(mention) box	<p>In some cases, you could provoke word to not chose the correct business object when saving a document.</p> <p>We notice that once you have changed a document in a case and saved it, an incorrect business object number appears or no business object appeared in the message box.</p> <p>It has been fixed and always shows the current relevant business object when opening a document from an activity or case.</p>

When installing 7.7.3 all changes from previous versions are automatically included

From previous versions we'll like to highlight these changes:

Version	Title	Description
7.7.2	AddIn buttons is relocated	<p>Exformatics AddIn buttons can now be located at the "Homepage" in Office Applications. Previously they were under the ribbon Exformatics. You have the possibility of choosing location of the AddIn buttons.</p> 
	Autotracking of sent emails	<p>When answering emails that have already been tracked, the respond from you is automatically tracked to the same business object of the email you are responding to.</p> <p>Note: This only applies to the inbox and sent box. If you are using subfolders in Outlook, this will not work.</p>
	Changing date format to UTC	<p>Microsoft has changed the way SharePoint servers are handling the date format. So, we have changed the way we display the date format on emails in the document webpart.</p> <p>The format we will be using from now on is set to UTC, everywhere.</p>
7.7.1	Group case Quick Parts in Office.	<p>The Insert Quick Part dialogue in Word now have a second filter function:</p>  <p>Quick Parts of the type case can be grouped into sub-types.</p> <p>Notice: A miner server change is needed to do this – please contact us about this</p>
	Select all attachments or contacts with one click.	
	Incoming mails cannot be seen.	<p>An incoming email is defined as an email coming from a person outside the company. An email can be incoming or not.</p> <p>Notice: An email sent internally is considered non-incoming as the sender is coming from the company itself.</p> <p>Depending on the configuration the document web part will show whether the email is incoming or not:</p>  <p><i>We might change the icons later.</i></p> <p>Notice: A miner server change is needed to do this – please contact us about this</p>
7.6.3	Track reply mail opened from portal.	<p>Mails tracked with the new AddIn 7.6.3 can now be tracked when replying to the email when opened from the portal. Previously this was only possible for mails opened from Outlook.</p>

Version	Title	Description
	AddIn Express updated.	Updated AddIn Express to latest release in order to ensure it works with latest Office releases.

How to Install Exformatics Office Extension 7.7.3

It is a requirement to our customers, that all employees within the company are using the latest addin from Exformatics.

We recommend installing our addin via windows install policies.

If you do not use windows install policies, our addin can be installed using administrative privileges. This can always be done with the help of your local administrator, where the installation file is run with administrative privileges.

If you install the new addin individually on your own PC, this must be done by running the installation file through a "Command Prompt" (cmd) as the administrative user.

IMPORTANT NOTICE!

Note: Remember to uninstall the previous addin before installing the new one.

Note: You cannot install the addin as usually be clicking on the Exformatics.Extensions.Office.Installer.msi file. Reason for this is that Microsoft has made some recent changes the way Windows is executing the installer package files used by Windows.

Download AddIn 7.7.3 here:

- **Exformatics Office Extension v. 7.7.3 (32-bit Office):**

http://exformatics.dk/Portals/7/Exformatics/AddIn/7.7.3_Exformatics.Extensions.Office.Installer.x32.zip

- **Exformatics Office Extension v. 7.7.3 (64-bit Office):**

http://exformatics.dk/Portals/7/Exformatics/AddIn/7.7.3_Exformatics.Extensions.Office.Installer.x64.zip

Shortcuts available in Outlook with Exformatics Office Extension

Shortcut keys	Function
CTRL + T	Open track window
CTRL + E	Expand track window
ALT + B	Select the business object
CTRL + SHIFT + F	Global search
CTRL + F	Local search
CTRL + Q	Next Tab (Recent, Bookmarks, Search Result)
CTRL + SHIFT + Q	Previous Tab (Recent, Bookmarks, Search Result)
CTRL + SHIFT + T	Save mail as ..
ALT + A	Go to the attachments field
ALT + D	Go to the folder box
ALT + C	Go to the contact area
CTRL + S	Save / Track
ESC	Close track window

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