

FileDirector OfficeLink
Quick Guide

Spielberg
POWERED BY EFALIA

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The software consists also of Open Source modules, listed below:

Software, which is based in part on the work of the Independent JPEG Group.

Cryptographic software written by Eric Young (eay@cryptsoft.com).

It uses the FreeImage open source image library. See http://freeimage.sourceforge.net for details.

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Overview

FileDirector Component Service

The Component Service setup installs the document viewer, which allows users to display electronic documents and create thumbnails of electronic documents. With the viewer, many different document formats can be displayed, without the originating application having to be installed.

FileDirector OfficeLink

FileDirector OfficeLink is an Add-on for Microsoft Office products and allows documents to be saved directly into FileDirector from these applications.

Depending on the selected option, the documents are either stored in original format or converted into the PDF/A format.

Installation

Component Service with OfficeLink

The setup of FileDirector Component Service also includes the option for the installation of FileDirector OfficeLink. In default, the checkbox is selected and the installation routine will install FileDirector Component Service inclusive the FileDirector OfficeLink.

- Select Install for Component Service on the web page
- The initial window will open, click *Next* to continue. If you are asked for a signature, confirm with *Yes*.
- Afterwards an installation path can be selected. This path is later automatically used for the installation of the OCR engine.
- Selecting *Next* will complete the installation.

Note:
If the Component Service is installed with the option Just me *the button in the Office Application only exists for the user who installed the Component Service.*

Microsoft Word, Excel and PowerPoint

The Office Link offers different options for storing Microsoft Office documents directly in FileDirector.

Save to FileDirector (PDF/A)



This option stores the active Microsoft Office document directly into FileDirector. The document is converted into PDF/A format.

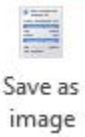
Save to FileDirector



This option stores the active Microsoft Office document in original format directly into FileDirector.

Using this option, the document can be re-opened directly from FileDirector WinClient and further edited in the corresponding Microsoft Office application. The edited document can be stored back into FileDirector, either as a revision or a new document.

Save as image*



Converts the active Microsoft Office document into an image and stores it via FileDirector ImagePrinter.

Note:
**This option requires a licensed and installed FileDirector ImagePrinter on the respective client.*

Print and save as image



Converts the active Microsoft Office document an image and stores it via FileDirector ImagePrinter. At the same time, a print process is started on a physical printer. The printer defined in the Windows settings as the default printer on the respective client is used for this.

Note:
**This option requires a licensed and installed FileDirector ImagePrinter on the respective client.*

Microsoft Outlook

The Office Link offers different options for storing emails or part of emails into FileDirector.

Save to FileDirector (PDF/A)



Stores the selected email in FileDirector in PDF/A format.

This option converts the email into PDF/A format, including corresponding attachments. The formats permitted for conversion can be defined within the app.xml of FileDirector Component Service.

The default installation path is:

C:\Program Files (x86)\Spielberg Solutions GmbH\FileDirector Component Service

In default, the key does not contain any predefined file formats. The added file formats must each be separated with a semicolon.

Empty Key

If the key does not contain any file formats, all attachments contained in the e-mail will be saved in their original format within the PDF/A file, as an attachment.

Customised Key

If the key contains file formats, all corresponding attachments are converted and appended to the PDF/A document.

File types that are not listed and attachments that cannot be converted are not imported.

A corresponding warning message is displayed.

Example:

Default key:

```
<add key="ImportedFileTypes" value=" " />
```

Customised key:

```
<add key="ImportedFileTypes" value="doc;docx;xls;xlsx;pdf;txt;jpg;tif;tiff;png" />
```

Note:
The changes will only take effect after a restart of Microsoft Outlook.

Save to FileDirector



This stores the email in original format, including any attachments.

The attachments can be opened via a link.

The corresponding attachments are displayed below the header data in the viewer.

Example

To: Our_Customer@company.de
Importance: Normal
Sensitivity: None
Subject: OfficeLink und Microsoft Outlook

Example.pdf

Save to FileDirector (Message)



This option stores the body of the selected email in original format in FileDirector. Any attachments that may exist are not stored in FileDirector.

Save to FileDirector (Attachments)



Only the attachments of the e-mail are stored in FileDirector in the original format.

Save as image*



Converts the selected e-mail into an image and stores it via FileDirector ImagePrinter.

Note:
**This option requires a licensed and installed FileDirector ImagePrinter on the respective client.*

Print and save as image



Converts the selected e-mail into an image and stores it via FileDirector ImagePrinter. At the same time, a print process is started on a physical printer. The printer defined in the Windows settings as the default printer on the respective client is used for this.

Note:
**This option requires a licensed and installed FileDirector ImagePrinter on the respective client.*

This is private mail



Via this button, e-mails that have been saved in the ECM system either via the OfficeLink or the optional FileDirector MailStore module can be marked as private mail.

This marks the corresponding e-mail as deleted in the ECM system.

Documents marked as deleted are no longer displayed in the hit list during a search or advanced search.

Show ECM column*



This option toggles the column *ECM* on/off.



This shows whether an email has been archived in the ECM system via the FileDirector MailStore option.

Note:
** This column only contains information if the corresponding email was archived directly via the Microsoft Exchange Server using the FileDirector MailStore module.*
This column is not used for emails archived via the FileDirector OfficeLink or otherwise in the FileDirector ECM system.

Open mail in ECM*



Using this option, an email can be opened in FileDirector WinClient. Requirement is, that the email was stored in FileDirector via the MailStore option.

Note:
**This option is only active if the selected email was previously archived via the optional FileDirector MailStore module.*
This option is not active for emails archived via the FileDirector OfficeLink or otherwise in the FileDirector ECM system.