

Xerox[®] DocuShare[®] Platform

DocuShare Integration for Microsoft[®] Office Setup and User Guide



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Overview

The Xerox® DocuShare® Integration for Microsoft Office feature provides a seamless experience for opening, editing, and saving Microsoft Office documents (Excel, PowerPoint, Word) located in DocuShare.

The feature enables you to:

- Open DocuShare documents for editing, by browsing, searching, or using favorites, from an Office application's Backstage view.
- Save new documents or new document versions to DocuShare from an Office application's Backstage view.
- Check out documents from DocuShare to launch the Office application for easy editing and saving.

System requirements

Check the DocuShare 7 Update 1 Release Notes on the Xerox Support & Drivers page for the latest system requirements.

DocuShare version required:

- DocuShare 7.0 Update 1

Note: The Microsoft IIS (Internet Information Server) web server must be configured to use Windows authentication and the DocuShare server must be enabled for auto login. See the Auto login section in the DocuShare Administrator Guide.

Microsoft Windows and Office versions supported:

- Windows 7, 8.1, and 10; 32- and 64-bit
- Office 2013 and 2016 (Excel, PowerPoint, Word), for one computer

Installation

To use the Office Backstage view Open and Save commands, you need to install software on your computer. Before installing the software, make sure your computer meets the Microsoft Windows and Office requirements. The installer will not continue if your computer does not meet the requirements. You must be an administrator on the computer to install the software.

The DocuShare Backstage Setup software is located on the Xerox Support & Drivers page.

To install the software:

1. Unzip the software package and double-click **setup.exe** to launch the installer.
2. In the Welcome window, click **Next**.
3. In the Select Installation Folder window, use the default folder for the installation or choose a different folder. Also select who will use the installed software. Then click **Next**.
4. In the Confirm Installation window, click **Next**.
5. When the installation is complete, click **Close**.

Compatibility with DocuShare desktop clients

DocuShare Client has an Office Integration feature that adds a DocuShare tab with Open and Save commands to the Office Backstage view. If you have DocuShare Client installed, you will see both interfaces in the Backstage view. However, because there is no interaction between the two interfaces, each will behave as expected. DocuShare Drive does not have a similar feature.

However, if you use the Web check-out feature of DocuShare Client or DocuShare Drive, the DocuShare Integration for Office feature will be used when checking out Excel, PowerPoint, and Word documents. If you prefer to use the Web check-out feature of DocuShare Client or DocuShare Drive, you can disable the DocuShare Integration for Office feature. See [Disable the feature](#) on page 6.

Use of DocuShare Integration for Office requires a DocuShare administrator to enable it on the server; the feature is disabled by default. After the feature is enabled, individual users can disable the feature. Users will want to disable the feature if they are using an older version of Office. See [Disable the feature](#) on page 6.

The feature is enabled for specific Office formats, or MIME types. You can choose to enable the feature for other MIME types.

Enable the feature

To enable the feature site-wide:

1. On the DocuShare page footer, click **Admin Home**.
2. From the **Administration** menu, click **Site Management | Site Configuration**.
The Site Configuration page appears.
3. Select **Yes** next to **Use Office integration for document check out** to enable the feature for checking out, editing, and saving DocuShare documents within Office applications.
4. Click **Apply**.

Disable the feature

You should disable the feature if you are using a version of Office other than 2013 or 2016, or if you have DocuShare Client or DocuShare Drive installed and you prefer to use the application's Web check-out features. Disabling the feature does not affect use of the feature for other users.

To disable the feature:

1. On the navigation bar, click your username.
2. On the View Properties page, click the **Edit** link.
3. Select **Yes** next to **Disable Office integration**.
4. Click **Apply**.

Supported Office MIME types

The DocuShare Integration for Office feature is enabled for the Office MIME types listed below.

Microsoft Word

application/msword
application/vnd.ms-word.document.macroenabled.12
application/vnd.openxmlformats-officedocument.wordprocessingml.document
application/vnd.ms-word.template.macroenabled.12
application/vnd.openxmlformats-officedocument.wordprocessingml.template

Microsoft Excel

application/vnd.ms-excel
application/vnd.ms-excel.addin.macroEnabled.12
application/vnd.ms-excel.sheet.binary.macroEnabled.12
application/vnd.ms-excel.sheet.macroenabled.12
application/vnd.openxmlformats-officedocument.spreadsheetml.sheet
application/vnd.ms-excel.template.macroenabled.12
application/vnd.openxmlformats-officedocument.spreadsheetml.template

Microsoft PowerPoint

application/vnd.ms-powerpoint
application/vnd.ms-powerpoint.template.macroenabled.12
application/vnd.openxmlformats-officedocument.presentationml.template
application/vnd.ms-powerpoint.slideshow.macroEnabled.12
application/vnd.openxmlformats-officedocument.presentationml.slideshow
application/vnd.ms-powerpoint.presentation.macroenabled.12
application/vnd.openxmlformats-officedocument.presentationml.presentation

Use with other MIME types

As preferred by your organization, you can change a MIME type to use the DocuShare Integration for Office feature when the document's **Check Out** icon is clicked. For example, you might want to use the feature with the text/plain MIME type in order to have Word open when checking out a text file. You also can use the feature when adding a new MIME type.

To change or add MIME types:

1. From the **Administration** menu, click **Site Management | MIME Types**.

2. To change an existing MIME type, do the following:
 - a. Locate the MIME type you want to change and click its **Edit** button.
 - b. From the **Open With** menu, select the Office application to use to open and edit documents of this format.
 - c. Click **Submit**.
3. To add a new MIME type, do the following:
 - a. At the top of the MIME types table, enter the required information.
 - b. From the **Open With** menu, select the Office application to use to open and edit documents of this format.
 - c. Click the **Add** button.

You use the DocuShare Integration for Office feature to open, edit, and save DocuShare documents within an Office application. You can also check out Office documents from DocuShare and they open in the application for editing.

Open documents for editing

Depending on your preference, you can open and edit a document from an Office application or from DocuShare. To edit a document, you must have the appropriate permission to it.

To open a document from an Office application:

1. Click the application's **File** tab.
2. Under **Open**, select **DocuShare**.
3. Under **Open from DocuShare**, do the following:
 - a. Enter or select the DocuShare server URL.
 - b. Check **Allow editing** if you want to edit the document. The document will be locked until you close it.
 - c. Click the **Browse DocuShare** button.A DocuShare window opens.
4. In the window, do one of the following:
 - Click **Personal Collection** (the tab displays if personal collections are used on the site). Browse to the document, select it, and click **Open**.
 - Click **Browse**. Browse to the document, select it, and click **Open**.
 - Click **Favorites**. Select the document and click **Open**.
 - Click **Recent**. Select the document and click **Open**.
 - Use the search area to find the document. Select the document and click **Open**.The document opens in the application.
5. Edit the document. Each time you save your edits, a new version is added to DocuShare.
6. When you are finished editing the document, do one of the following:
 - Save and close it. A new version is added and the document is unlocked.
 - To save the document as a new document (not a new document version), see [Save documents from Office](#) on page 10.

To open a document from DocuShare:

1. Locate the document that you want to edit.

2. From the document's **More Actions** menu, select **Check Out**.
3. If your browser displays a window asking for permission to launch the Office application, allow opening the application.
DocuShare locks the document and opens it in the application.
4. Edit the document. Each time you save your edits, a new version is added to DocuShare.
5. When you are finished editing the document, save and close it.
The document is unlocked.

Save documents from Office

From an Office application, you can save a new document or a new version of an existing document.

To save a new document to DocuShare from an Office application:

1. Click the application's **File** tab and then click **Save As**.
2. Under **Save As**, select **DocuShare**.
3. Under **Save to DocuShare**, do the following:
 - a. Enter or select the DocuShare server URL.
 - b. From the **Save as type** menu, select the format of the document.
 - c. Click the **Browse DocuShare** button.A DocuShare window opens.
4. To save a new document, do one of the following:
 - Click **Personal Collection** (the tab displays if personal collections are used on the site). Browse to a collection and select or open it. Then click **Save**.
 - Click **Browse**. Browse to a collection and select or open it. Then click **Save**.
 - Click **Favorites**. Browse to a collection and select or open it. Then click **Save**.
 - Click **Recent**. Browse to a collection and select or open it. Then click **Save**.
 - Use the search area to find a collection. Select or open the collection and then click **Save**.
5. In the Edit Property Values window, do the following:
 - a. Enter a title and any other required property values.
 - b. Click **Optional Properties** and enter any property values.
 - c. From the **Choose Document Type** menu, select the DocuShare document type.
 - d. Click **Save**.

The new document is added and the document is locked. The document is unlocked after you close it.

To save a new document version to DocuShare from an Office application:

1. Click the application's **File** tab and then click **Save As**.
2. Under **Save As**, select **DocuShare**.
3. Under **Save to DocuShare**, do the following:
 - a. Enter or select the DocuShare server URL.
 - b. From the **Save as type** menu, select the format of the document.
 - c. Click the **Browse DocuShare** button.

A DocuShare window opens.

4. To save a new document version, do one of the following:
 - Click **Personal Collection** (the tab displays if personal collections are used on the site). Browse to the document and select it. Then click **Save**.
 - Click **Browse**. Browse to the document and select it. Then click **Save**.
 - Click **Favorites**. Browse to the document and select it. Then click **Save**.
 - Click **Recent**. Browse to the document and select it. Then click **Save**.
 - Use the search area to find the document. Select the document and click **Save**.

The new version is added and the document is locked. The document is unlocked after you close it.

Troubleshooting

4

This chapter provides information on how to resolve issues that might occur when using the DocuShare Integration for Office feature. As noted in the system requirements, your DocuShare server must be configured to use auto login.

Note: Before performing each troubleshooting solution, clear your browser cache and your Office document cache. Otherwise, the solution may not resolve the issue.

Clear your browser and Office document caches

To clear your browser and Office document caches:

1. Clear your browser cache by doing one of the following:
 - **For Internet Explorer:** Display Internet Options. Under **Browsing history** on the General tab, click the **Delete** button. Uncheck **Preserve Favorites website data**. Check the **Temporary Internet files and website files**, **Cookies and website data**, and **Passwords** checkboxes. Click the **Delete** button.
 - **For Firefox:** From the **History** menu, select **Clear Recent History**. From the **Time range to clear** menu, select **Everything**. Under **Details**, check the **Cookies**, **Cache**, and **Active Logins** checkboxes. Click the **Clear Now** button.
 - **For Chrome:** Display Settings. On the Settings page, click the **Clear browsing data** button. From the **Obliterate the following items from** menu, select **the beginning of time**. Check the **Cookies and other site and plugin data**, **Cached images and files**, and **Passwords** checkboxes. Click the **Clear browsing data** button.
2. Clear the Office document cache by doing the following:
 - a. From the Windows **Start** menu, enter Office Upload Center in the **Search programs and files** field.
 - b. Open the Office Upload Center.
 - c. Click **Settings**.
 - d. Under Cache Settings, click the **Delete cached files** button. Then click the **Delete cached information** button.

DocuShare login prompt displays

If your DocuShare server is configured to use auto login and you are logged into Windows, you should not be prompted to log into DocuShare when accessing documents from an Office application. If you are prompted to log into DocuShare, check your browser settings.

Note: Chrome uses Internet Explorer's settings.

To check your browser settings:

1. For **Internet Explorer** and **Chrome**, do the following:
 - a. Display Internet Options and then click the **Security** tab.
 - b. Under **Select a zone to view or change security settings**, click **Trusted sites**. For Edge browsers, select **Local intranet**.
 - c. Click the **Sites** button.
 - d. In the **Add this website to the zone** field, enter the URL of your DocuShare server. Click the **Add** button.
 - e. Click the **Custom level** button.
 - f. In the Settings box, select **Automatic login only with current user name and password** under **User Authentication**.
 - g. Click the **OK** button.
 - h. Click the **Advanced** tab.
 - i. In the Settings box, select **Enable Integrated Windows Authentication*** under **Security**.
 - j. Click the **OK** button.
2. For **Firefox**, do the following:
 - a. In the Firefox address bar, type **about:config**.
 - b. When prompted, accept the risk.
 - c. Find **network.automatic-ntlm-auth.trusted-uris**, right-click it, and select **Modify**.
 - d. In the Enter string value window, enter the URL of your DocuShare server.
 - e. Click the **OK** button.

Office application does not launch

1. Ask your DocuShare administrator to verify that the DocuShare Integration for Office feature is enabled. If it is enabled, make sure that you have not disabled the feature. See [Disable the feature](#) on page 6.
2. Try a different browser.

Office application launches, but the document does not open

This can occur when you are accessing DocuShare using a secure connection (HTTPS). Contact your DocuShare administrator for help. Your administrator may need to change the Secure Sockets Layer (SSL) settings on the server to ignore client certificates or to install a client certificate on your computer.

Document opens in the Office application, but it is read-only

If you are trying to check out a document for editing, but it opens in read-only, first check if the document is locked by someone else. When Office determines the document is locked by someone else, it provides the option to open the document in read-only in the File In Use window. If you know that the document is not locked by someone else, follow the steps below.

If your computer is configured to use a proxy server, make sure your DocuShare server is in the proxy bypass list:

1. Display Internet Options and then click the **Connections** tab.
2. Click the **LAN settings** button.
3. If **Automatic configuration** is checked, your network administrator will need to verify that your DocuShare server is in the proxy bypass list. You should also verify that **Use a proxy server** is unchecked. Unpredictable behavior can occur if **Automatic configuration** and **Use a proxy server** are both checked.
4. If **Use a proxy server** is checked, do one of the following:
 - If you access your DocuShare server using a host name (for example, http://mydocushare), check the **Bypass proxy server for local addresses** checkbox.
 - If you access your DocuShare server using an IP address (for example, http://10.0.0.1) or a fully qualified domain name (for example, http://mydocushare.xerox.com), click the **Advanced** button. Add your DocuShare server to the **Exceptions** list if it is not listed.

Page refresh issues after clicking Browse DocuShare button

Use the solution in [Office application launches, but the document does not open](#) on page 14.