NewgenONE Content Cloud

NCC Add-in for Office

User Guide

Version: 2024.2

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Preface

This chapter provides information on the revision history, about this guide, intended audience, related documents, and documentation feedback.

Revision history

Revision date	Description
October 2024	Initial publication

About this guide

This guide describes procedures for uploading documents and emails in the NewgenONE Content Cloud repository using the NCC Add-in for both Office 365 and Microsoft (MS) Office.

Intended audience

This guide is intended for the users responsible for uploading documents and emails in the NewgenONE Content Cloud repository using NCC Add-in. The user must have access rights to the NewgenONE Content Cloud repository.

> To ensure you are referring to the latest and most recent revision of this guide, download it from one of the following locations:
> - Newgen Internal Doc Portal, if you are a Newgen employee.
> - Newgen Partner Portal, if you are a Newgen partner.

Related documents

The following documents are related to NewgenONE Content Cloud:

- NewgenONE Content Cloud Administration Guide
- NewgenONE Content Cloud User Guide for Micro UI

Documentation feedback

To provide feedback or any improvement suggestions on technical documentation, write an email to docs.feedback@newgensoft.com.

To help capture your feedback effectively, share the following information in your email:

- Document name
- Version
- Chapter, topic, or section
- Feedback or suggestions

Introducing NCC Add-in for Office 365 and MS Office

NCC Add-in enables uploading a document from Word, PowerPoint, and Excel to a folder inside the repository in NCC. It also allows you to save emails and attachments from Outlook directly to the repository.

Signing into NCC

To sign in to NCC for uploading documents, emails, and attachments, perform the following steps:

1. Open any Word, Excel, PowerPoint document, or an email.
2. Click the **Home** tab and select **Upload to NewgenONE Content Cloud** Add-in. The NCC sign in pane appears.
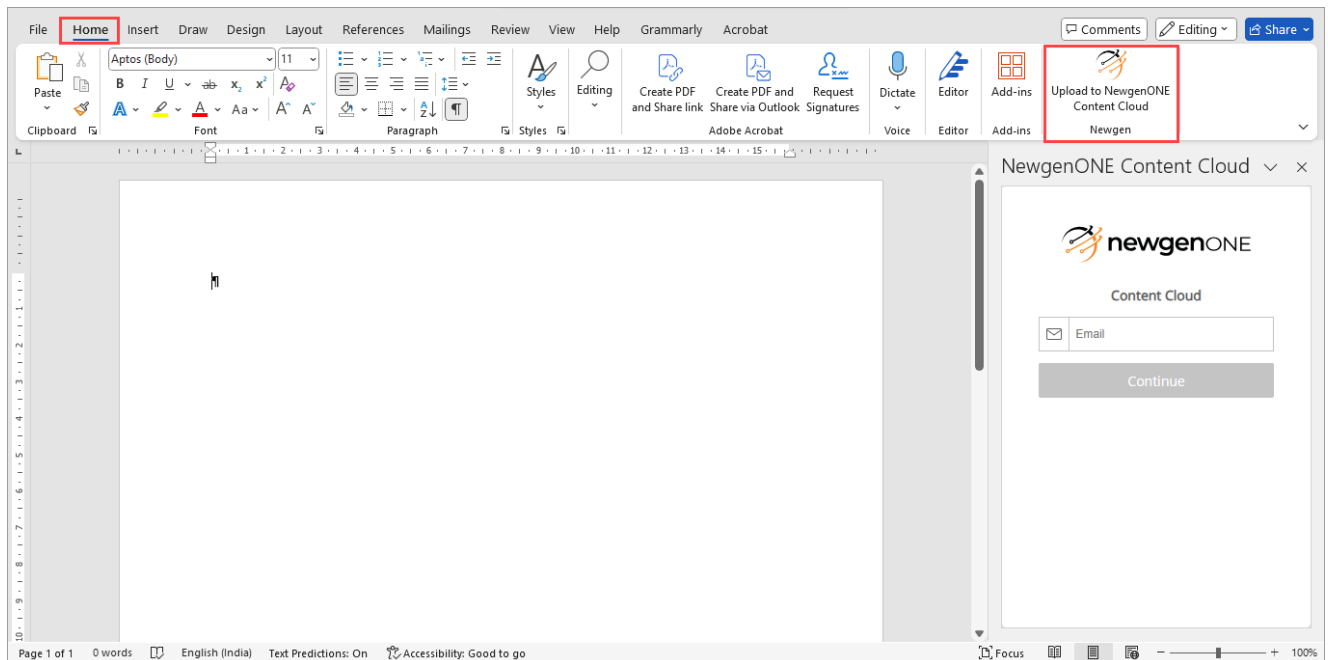
3. Enter the email registered on NCC and click **Continue**. A verification code is sent to your registered email address.

4. Enter the verification code and click **Verify**.
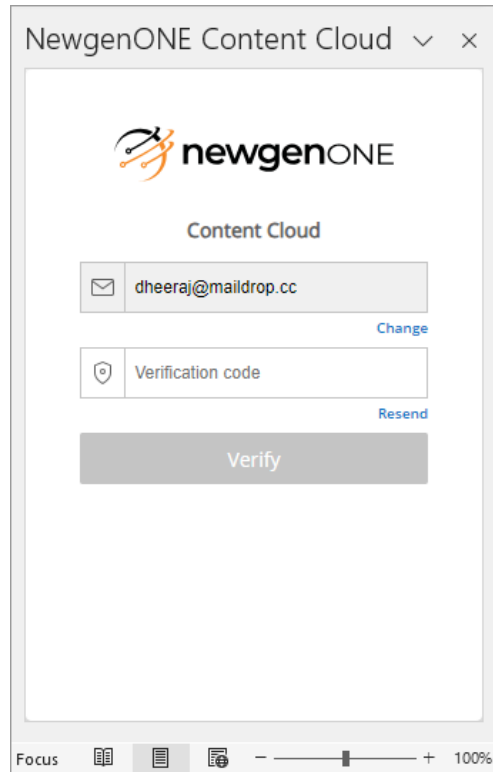
> If the NCC Add-in is disabled for your organization, the "Microsoft Add-in is not enabled for your organization. Please contact administrator." notification appears. In such a case, contact your administrator to enable the Add-in for your organization.

The password field appears.

5. Enter the password and click **Sign In**. On successful sign in, the NCC home pane appears displaying following elements:

Elements	Description
User icon	Clicking this icon displays information about the signed-in user, including their username, organization name, and the number of subscription days remaining. It also allows you to sign-out from the NCC Add-in.
Folder list	This list contains the folders existing in NCC. *Explore Sample Application* is a system-generated folder. You can only perform the View Properties action on this folder.
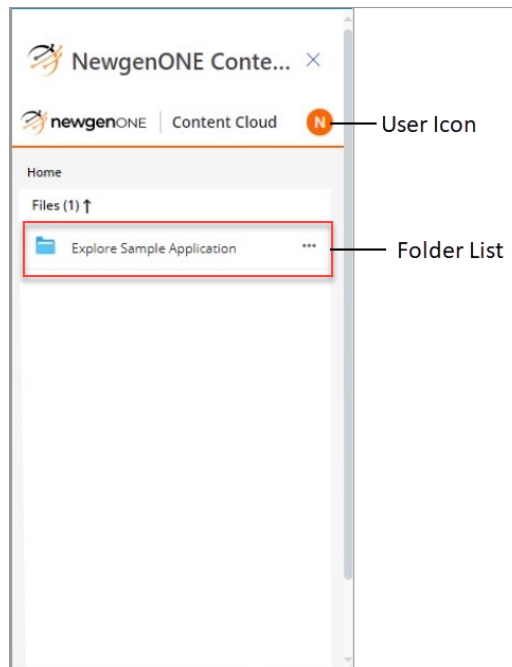
The top bar displays the folder hierarchy as a breadcrumb for easy navigation. Click any part of the breadcrumb trail to jump to a parent folder. For example, if you are in the *Bank Statements* sub-folder under *Home > My Documents > Bank Statements*, you can click *My Documents* to go directly to that folder.

Uploading Word, Excel, or PowerPoint document to NCC

To upload a Word, Excel, or Powerpoint document to NCC, perform the following steps:

1. On the home panel of NCC, select the default folder *Explore Sample Application*. Alternatively, you can click **New Folder** to create a specific folder for uploading a document. The New Folder dialog appears.

   Ensure that the folder name does not contain any special characters except hyphens (-) and underscores (_).
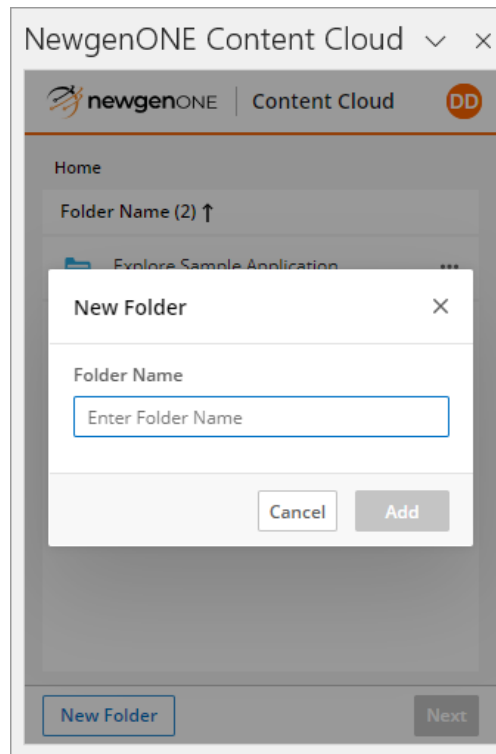
2. Enter the folder name and click **Add**. The folder gets added.The ellipses ⊡ icon present against the folder name allows you to perform the following operations:
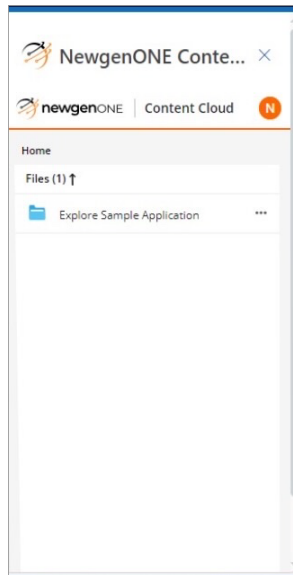
- **Rename** — It allows you to rename the folder name.
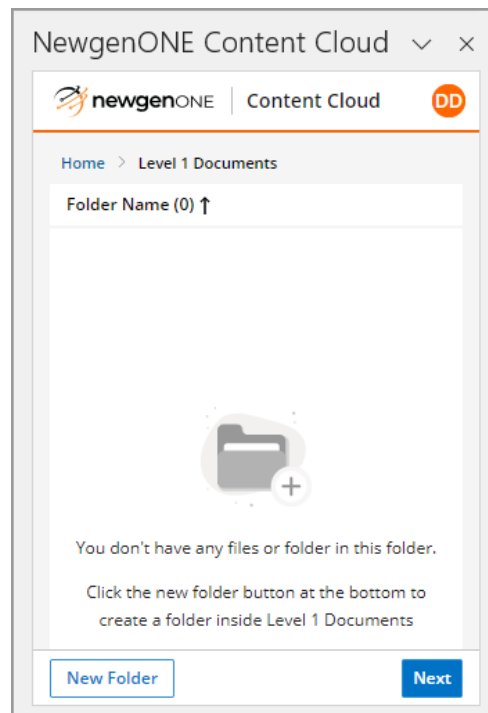- **View Properties** — It allows you to view the folder properties.
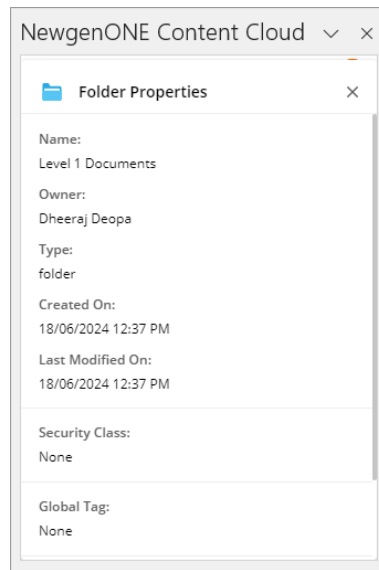
• **Delete** — It allows you to delete the folder.

> ⓘ Once you delete the folder, you cannot undo this action.

3. Double-click the folder to open it.
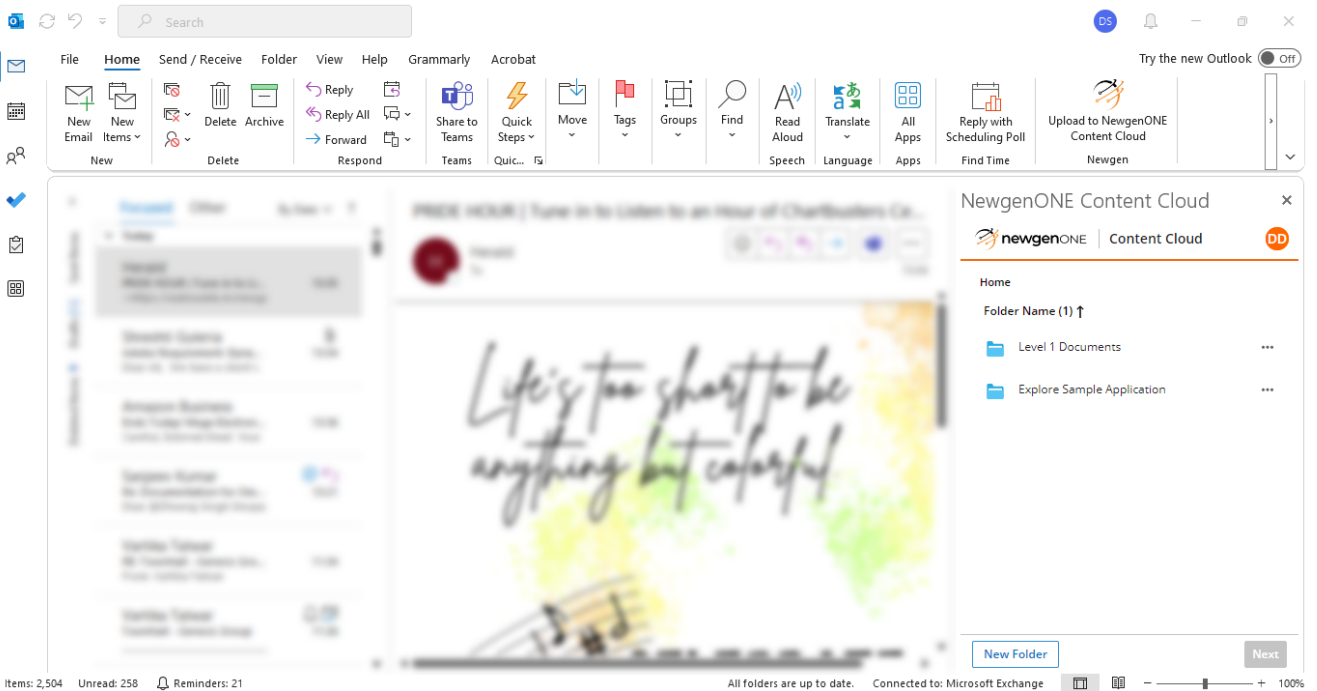

4. Click **Next**, the document is ready to upload.

 Hover over the document name, click the 🖉 icon to edit it, and then click the ✔ icon to save. Ensure that the document name does not contain any special characters except hyphens (-) and underscores (_).

5. Click the **Dropdown** and select the required Security Class, Global Tag, and Data Class.
6. Once all the properties are set, click **Upload**. The "File uploaded successfully" message appears and your file gets uploaded to the NCC.

Uploading Outlook emails and attachments to NCC

To upload Outlook emails and attachments to NCC, perform the following steps:

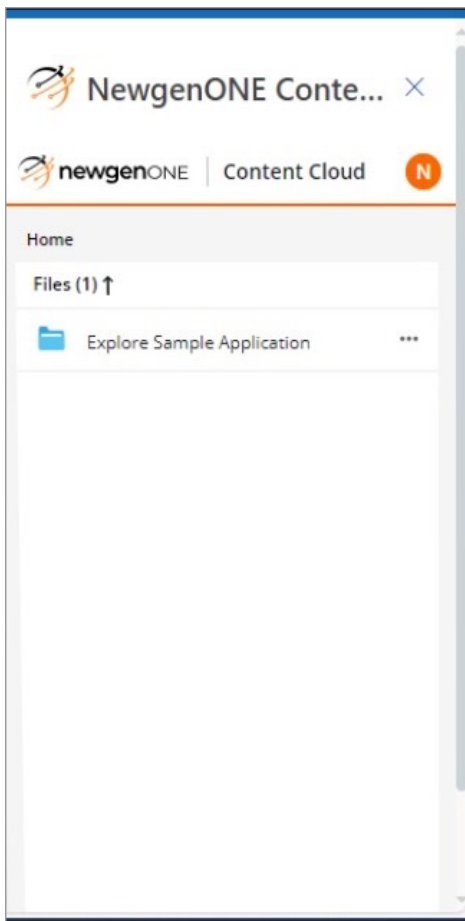1. Open an email to upload it and its attachments to the NCC repository.

2. Select the default folder *Explore Sample Application* or click **New Folder** to create a new folder. The New Folder dialog appears.
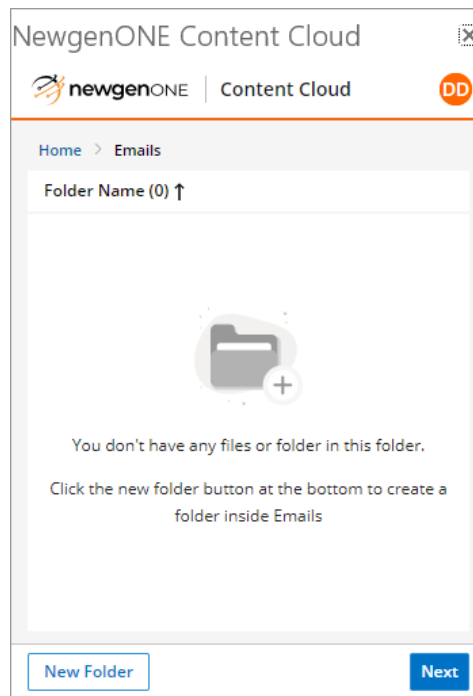
> ⓘ Ensure that the folder name does not contain any special characters except hyphens (-) and underscores (_).
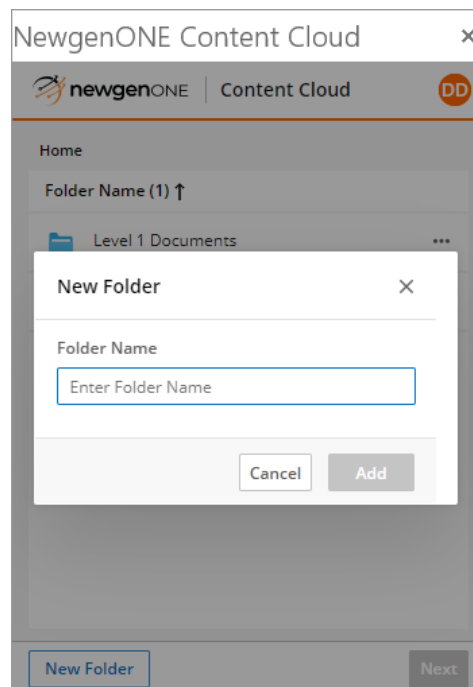
3. Enter the folder name and click **Add**. The folder gets added.

4. Double-click the folder to open it.

5. Click **Next**, the email and attachments are ready to upload. The email name is set according to its subject line.

Hover over the email or attachment name, click the [pencil] icon to edit it, and then click the [checkmark] icon to save. To delete the attachment or email click [X] the icon. Ensure that the email and attachment names do not contain any special characters except hyphens (-) and underscores (_).

6. Click the **Dropdown** and select the required Security Class, Global Tag, and Data Class.

7. Once all the properties are set, click **Upload**. The "File uploaded successfully" message appears. It creates a new folder with the username of the email and uploads the email and its attachments to that folder.

   Every time a new user uploads an email, a new folder is created with their username, and the email and its attachments are uploaded to that folder. You are also able to upload the new.

Uploading attachments from NCC to mail
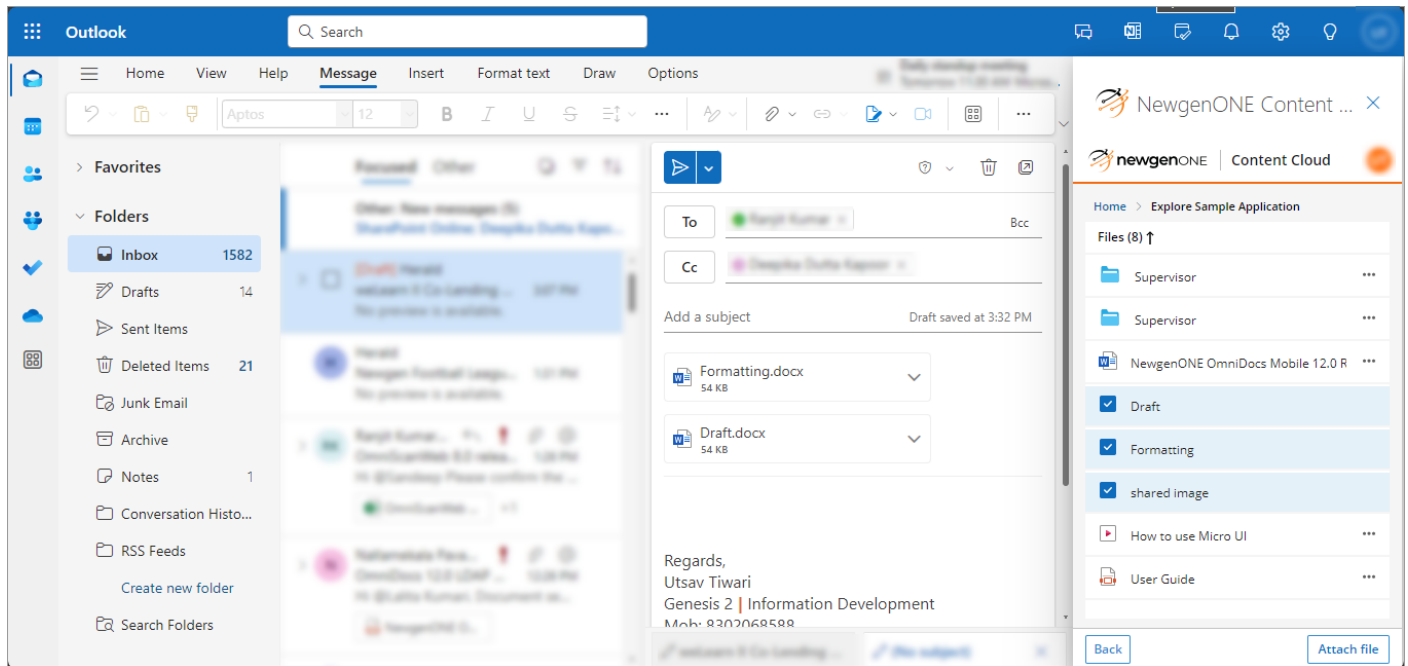
To upload the attachments from NCC to mail, perform the following steps:

1. Open a new mail or reply to existing mail and open the NCC platform.
2. Hover over to the file and select the files that you want to attach in the mail.
3. Click **Attach file**. The selected files are attached in the mail.

Checking out document

The check-out functionality locks the document, allowing only you to make changes. Other users may view the checked-out document but cannot modify it. This feature applies exclusively to Word, Excel, and PowerPoint documents in the NCC add-in.

To check out a document, perform the below steps:

1. On the Document Viewer Micro UI page, click the **Actions** icon ….
2. Select **Check Out**. The Checkout screen appears.
3. Click **Checkout** to checkout the document.

Undo Checkout

It allows you to cancel the checkout. On doing so, the checkout is canceled and the document is checked in again without the creation of a new version

To undo checkout, perform the following steps:

1. On the Document Viewer Micro UI page, click the **Actions** icon ....
2. Select **Undo Checkout**. The Undo checkout dialog box appears.
3. Click **Undo Checkout**, to cancel the checkout. or click **Cancel**.

Check-In document

The Check-In function allows you to upload the checked-out document back into the repository (in the same folder from where it was checked out). Once checked in, the lock is released, and a new document version is created. It is only applicable to Word, Excel, and PowerPoint documents.

To check in a document, perform the below steps:

1. On the Document Viewer Micro UI page, click the **Actions** icon ....
2. Select **Check In**. The Check-In screen appears and changes made in the current file is uploaded as the new file.

   > ❗ The Check-In option displays only when the document's older version is checked out. For details on checking out the document, refer to the Checking out document section.

3. Select from the Checkin As from the following:
   - Minor Version: If the new version is selected as Minor then it is marked as 1.1, 1.2, 1.3, and so on.
   - Major Version: If the new version is selected as Major then it is marked as 1.0, 2.0, 3.0, and so on.
4. Enter the **Version Comment**.
5. Click **Checkin**. The document is checked in successfully.

Viewing version history

Viewing version history allows you to view the existing versions of the document. By default, the latest version is displayed and it cannot be deleted. It is only applicable to Word, Excel, and PowerPoint documents.

To view the version history, perform the following steps:

1. On the Document Viewer Micro UI page, click the **Actions** icon ⋯.
2. Select **View Version History**. The Version History screen appears.
3. Click **Done**.

Set as Latest

To set any previous version as the latest, perform the following steps:

1. Hover over to the version that you want to edit and click ⋯.
2. Click **Set As Latest**.
3. Click **Done**.

Editing the comment

To edit the comment, perform the following steps:

1. Hover over to the version that you want to edit and click ⋯.
2. Click **Edit Comments**.
3. Enter the comment.
4. Click ✔ to save the comment or click ✕ to cancel.

Deleting the version

1. Hover over to the version that you want to delete and click ⋯.
2. Click **Delete**. The Delete confirmation screen appears.
3. Click **Delete** to confirm the deletion or click **Cancel**.

> • In Outlook, the NCC add-in permits viewing the version history, editing comments, and deleting versions only.
> • In the version history, open any previous version by double-clicking on it.