# Register a Document From Word, Excel and PowerPoint
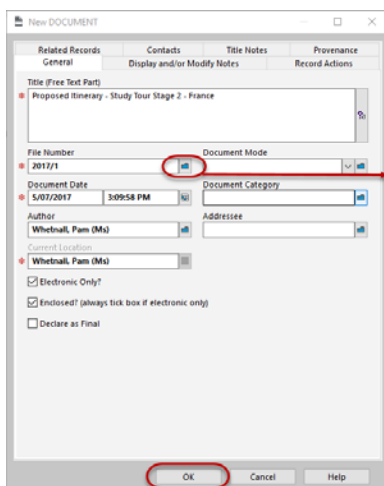
Introduction

Once HPE Content Manager has been integrated with Word, Excel and PowerPoint, these applications will display a HPE Content Manager tab in the ribbon. You can use this integration to work more efficiently with documents that already exist in, or that need to be registered in Content Manager. To turn on HPE Content Manager/Office integration, please refer to the Quick Reference Guide "*How to turn on Integration with Word Excel Powerpoint and Outlook".*

Procedure

1. When ready to save a document from the Microsoft application, select the **HPE Content Manager tab** on the ribbon and click the **Check In** button. A **Select Record Type** window will display, highlight **Document** and click **OK.**
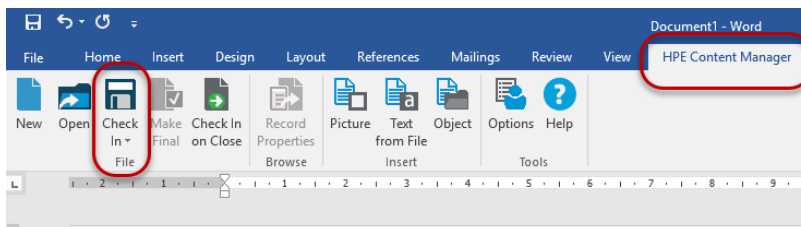
2. A Document Registration form will display. Enter the document title, file number and other required details, mandatory fields*.

Note: By clicking the blue 'KwikSelect' box next to File Number, HPE Content Manager will open and a file may be selected from Favorites/Work Tray/Recent Documents etc.

3. Click **OK** to save the document to Content Manager.

The document will be saved but will remain as edit status **Checked Out**. The document will only be checked in when the document has been closed.

You may continue working on the document; however you must click **Save** again before closing the application in order to capture all changes.

NOTE – Documents saved from Office applications directly to HPE Content Manager using integration cannot be declared as final from the application. The record can only be finalised from within HPE Content Manager. Selecting the Make Final button from the document will result in the document not being saved to HPE Content Manager.

Contact Us

For further support or questions, please contact Records Services on **8313 5334** or records.services@adelaide.edu.au