Plastic SCM **Office Plugin**

The Plastic SCM guide for the Office plugin

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About this guide

This guide describes the procedures associated with the Plastic SCM plugin for Office.

Audience

This guide is targeted to Plastic SCM users that work everyday with documents and text processors, as well as developers and people who write documentation, memorandums etc., assuming familiarity with Plastic SCM, office suites and operating system concepts.

Online documentation

Besides this document and the rest of the guides, Plastic SCM provides online reference throughout its different client frontends.

On the command line interface, both Windows and Linux, this reference can be obtained with the command:

```
cm help
```

For extended information on a specific command, type:

```
cm help command
```

The graphical interface provides online reference through the Help menu.

Documentation errors

If you find any problem in this guide or any other part of the online reference, please report it using the following email address:

support@codicesoftware.com

1 Introduction

The Plastic SCM plugin for Office is compatible with Microsoft Office 2003 (**Word** and **Excel**) and Microsoft Office 2007 (**Word**, **Excel** and **PowerPoint**).

This guide will help you to work with the plugin for Office in case you are using Office 2007. The differences between the plugin for this version and the plugin for Office 2003 are minimal; basically these differences consist of aesthetic issues.

The Plastic SCM integration with Microsoft Office allows you to manage revisions of Word, Excel and PowerPoint documents in an easy way.

Plastic SCM makes it very easy to compare different revisions of a document, because its versioning capabilities.

Plastic SCM allows you to modify the same document in parallel by different isuers. Thus, several users can modify the same document at the same time, and merge those changes manually afterwards.

1.1 Plastic SCM concepts review

In this section we will review some basic Plastic SCM concepts. In order to get more information, it is recommended to take a look at the User's Manual, which explains every concept in detail.

Plastic SCM provides four basic operations:

- **Add:** It adds a document to Plastic SCM.
- **Check out:** It tells Plastic SCM that the document will be modified.
- **Check in:** To create new revisions of a document controlled by Plastic SCM.
- **Uncheckout:** To undo the changes done on the document.

In most cases, to checkin a document it is necessary to have checked it out previously. Everytime a document is checked in, a history of the revisions created for that document is updated and mantained; this history can be reviewed at any certain moment.

2 Office plugin installation

2.1 Requirements

In order to install the Office plugin for Plastic SCM it is necessary to have the Microsoft .NET Framework v3.5 installed on your machine. You can download and install it by visiting the following link:

http://www.microsoft.com/downloads/details.aspx?familyid=333325FD-AE52-4E35-B531-508D977D32A6&displaylang=en

2.2 Installation

The installation is really straight forward. The first thing to do is to install the Plastic SCM client (or upgrade it from a previous version) and check the appropriate checkbox so that the Office 2003 or 2007 plugin are installed.

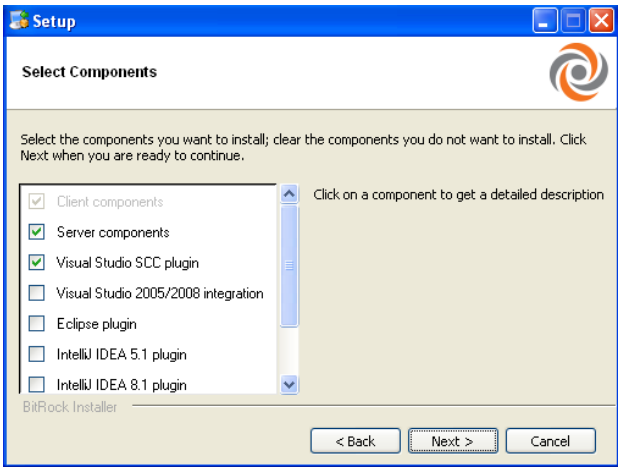


Figure 1: List of components to install with Plastic SCM

Notes: These checkboxes will be disabled if the installer does not detect an Office 2003 or Office 2007 installation on the machine.

Once the client has been installed, the plugin will be registered automatically the first time Word, Excel or Powerpoint are launched. A dialog like the following will be displayed:

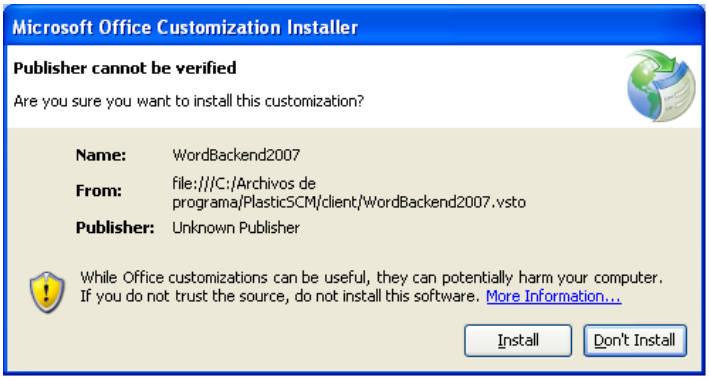


Figure 2: Installation of the Plastic SCM plugin for Office

After clicking on 'Install' the plugin will be registered and you will be able to use Plastic SCM from Microsoft Office.

To get further information about how to install Plastic SCM, see the Administrator's Guide and the User's Guide.

3 Before start working…

Once the Plastic SCM client has been correctly installed and properly configured and the Plastic SCM plugin for Office has been installed, you can use Plastic SCM from Office. The typical scenario is the following:

1. To add a document to Plastic SCM.
2. To create new revisions of that document, by means of check in operations.

In order to add a new document to Plastic SCM, that document must be stored on a Plastic SCM workspace. See the User's Guide to learn about creating workspaces and managing them.

In the special case of the Office plugin, the checkout operation has been omitted, due to the write protection of the documents. When an Office document is opened with the write protection established, the changes done on the document cannot be saved, even if we change the write protection manually while the document is open. It is necessary to close the document (losing the changes done on it or saving them to a temporary copy) and reopen it.

The Plastic SCM plugin for Office solves the problem in two ways:

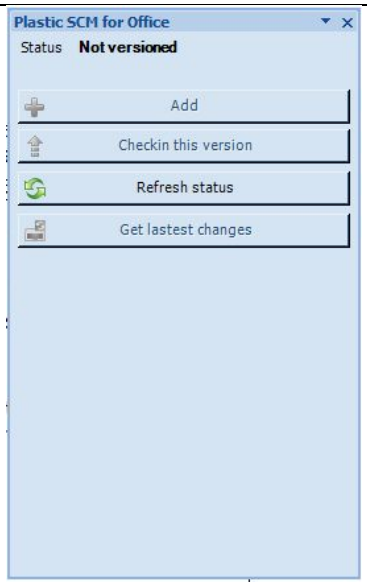
- On the one hand, the Office Plastic-plugin warns the user automatically when he or she tries to open a document if it is write protected and Plastic-plugin will offer the option of removing that protection. If that protection is not removed, Office will not allow the user to save the changes done on the document.
- On the other hand, it is possible to avoid that Plastic SCM leaves the documents with the write protection activated. By default some Plastic SCM operations such as the update operation and the check in operation leave the documents as write protected. If you change this option you will avoid having documents write protected in most cases. To delete the write protection in Plastic SCM, open the 'Preferences' on the GUI tool and select the 'Other options' tab. Uncheck the checkbox that appears in the following image, in case that it was checked previously. Thus Plastic SCM will not leave the controlled documents as write protected.

Figure 3: How to avoid that Plastic SCM leaves the documents as write protected when they are checked in or when the workspace is updated.

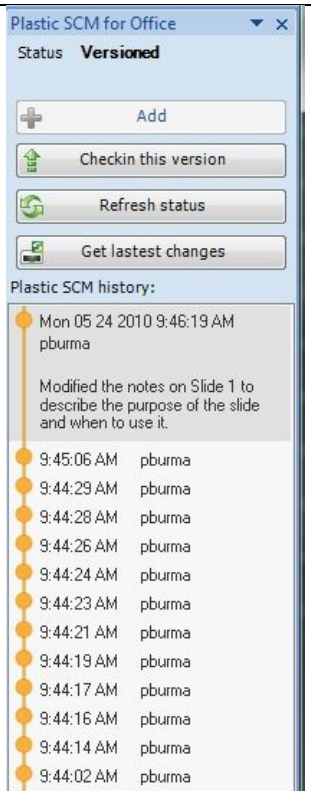
4 How to use the plugin

4.1 Operations summary

The available operations from the Office plugin are shown in an attachable window in the right edge of the document. This window has the following appearance:

	**Add:** To add the document to Plastic SCM. **Checkin**: To create a new revision of the document in Plastic SCM. It is necessary to have the document added previously in order to create revisions of it. **Update status:** It updates the status of the document in case that it has been modified externally (for example, from the Plastic GUI. **Obtain the last changes:** It updates the document so that it shows the last revision of the document stored in Plastic SCM.

Once a check in operation has been performed, the appearance of the window varies slightly, showing a pane with the available revisions of the opened document. Selecting the available revisions you can perform the following actions:

	**Diff with current version**: It shows the differences between the selected revision and the current revision of the document. **Compare revisions**: When two revisions are selected, it shows the differences between both revisions. **Open a revision** (double click on a revision): it opens a new Office window with the selected revision opened.

4.2 Adding a document

A document cannot be controlled by Plastic SCM until it has been added to it.

In order to add documents to Plastic SCM, they must be saved in a Plastic SCM workspace. If the document is not stored inside a workspace, it cannot be added.

4.3 Checking in a new revision

Once the document has been added, you can work with it as usual. You can save your changes as frequently as you want, but until a checkin operation has not been performed, Plastic SCM will not store a new revision of the document.

Every time that a new revision is created, the history of the document will be updated, showing all the revisions for that document.

4.4 Updating the status

This operation is only useful when you perform changes on the document outside the Office plugin, for example from the GUI of Plastic.

4.5 Obtaining the last changes

When this action is performed, the last version of the document is loaded on the workspace and opened in Office. This operation is very useful when someone has changed the document you are working on, so that you can obtain his or her changes.

4.6 Comparing revisions

There are several options to compare revisions:

- **To compare the current document with a previous version**. In order to do that it is necessary to select a revision on the history pane and click on **Diff with current version.**
- **To compare two selected revisions.** In order to do that it is necessary to select two revisions to compare in the history pane and click on **Compare revisions**.

Notes: To select several revisions in the history pane it is necessary to click on the first revision and then press Ctrl and click on the second revisión without releasing the Ctrl key.