

Surround SCM Microsoft Office Integration

Surround SCM supports integration with Microsoft Excel, PowerPoint, Project, and Word. See [Surround SCM Third-Party Integrations](#) for supported platforms and versions.

Note: See [Surround SCM Microsoft Access Integration](#) for information about integrating with Access.

This article includes information about [installing the Office plug-in](#), [configuring the Surround SCM connection](#), and [performing Surround SCM actions](#).

Note: The following steps use Microsoft Word 2007 on Windows. The steps for other Word versions are similar.

Installing the plug-in

The Office plug-in is installed during the Surround SCM Client installation. If you did not install it, close any Office applications, rerun the installer, and select the Microsoft Office plug-in option.

Configuring the Surround SCM connection

When you start an Office application, the Surround SCM Server address, port, username and password are retrieved from the registry. If the connection is not successful or you need to switch to another server, you can manually configure the connection.

1. In the Office application, click the Office button and choose Surround SCM > Configure Connection. The Surround SCM Login dialog box opens.
2. Select a Server and enter your Username and Password.
3. Select Always login with this username and password to save the information. You will be automatically connected when you start Office applications.
4. Click Connect. You are now logged in and ready to start using Surround SCM.

Performing Surround SCM actions

You can access the following commands from the Surround SCM menu in Office applications: Add, Get, Check Out, Undo Check Out, Check In, History, and Properties.

Adding files

When you complete work on new files in your local working directory, you can add them to Surround SCM to make them available to other users.

Note: If a working directory is not set, you are prompted set it before you can add files to Surround SCM.

1. With the file open, click the Office button and choose Surround SCM > Add. The Add Files dialog box opens.
2. Enter comments, select any additional options, and click OK. The file is added to Surround SCM.

Getting files

Get the latest version of files when you want to update your local copy but do not need to make any changes.

1. With the file open, click the Office button and choose Surround SCM > Get. The Get Files dialog box opens.
2. Click OK. The local read-only copy of the file is replaced with the current version from Surround SCM.

Checking out files

Check out files from Surround SCM to modify them.

1. With the file open, click the Office button and choose Surround SCM > Check Out. The Check Out Files dialog box opens.
2. Enter comments, select any additional options, and click OK. The file is checked out.

Undoing check outs

If you check out and modify a file and then decide you do not want to save the changes, you can undo the check out. This discards any changes made to the file and checks it back in to Surround SCM.

1. With the checked out file open, click the Office button and choose Surround SCM > Undo Check Out. The Undo Check Out Files dialog box opens.
2. Select a File overwrite option and click OK. The file is no longer checked out.

Checking in files

Check in files when you want to update them in Surround SCM and make the changes available to other users.

1. With the modified file open, click the Office button and choose Surround SCM > Check In. The Check In Files dialog box opens.
2. Enter comments, select any additional options, and click OK. The file is checked in.

Viewing file history

You can view a file's history and work with historical file versions.

1. With the file open, click the Office button and choose Surround SCM > History. The History dialog box opens.
2. Click Close when you finish working with the file history.

Viewing file properties

You can view Surround SCM file information, such as when the file was last modified, where it is checked out to, and custom field settings.

1. With the file open, click the Office button and choose Surround SCM > Properties. The Properties dialog box opens.
2. Click the tabs to view general, check out, sharing, and custom fields information.
3. Click OK to save any changes.

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