Guide to Configuring Outlook For Use with DocuBrain® TechDoc
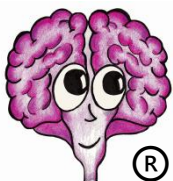
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Adding and Removing Connections to TechDoc using Office 365

Office 365 is a subscription version of Office that provides you with access to the latest Office products. To add or remove a connection to TechDoc, simply determine which version of Outlook is on your system and follow the directions below for that version of Outlook.

To determine the version of Outlook that you have:
1. Run Outlook.
2. On the "File" tab, click "Office Account" on the left side menu.
3. Click the "About Outlook" button under the Product Information section.
4. When the about dialog is displayed, you will see the version number after the text "Microsoft® Outlook®".

Adding a Connection to TechDoc using Outlook 2019

Before adding a connection to Outlook, you should review the steps below to determine if there are any settings that you don't know the correct value(s) for. If so, you should contact your local help desk of TechDoc Admin to assistance.

1. Run Outlook 2019.
2. On the "File" tab, click "Info", and then click "Add Account".
3. When the dialog comes up, click "Manual setup or additional server types" and click "Next >".
4. On the next screen, click "POP or IMAP" and click "Next >".
5. On the next screen, enter your settings as follows:
    a. For "Your Name", type your normal name, i.e. *Mary Smith*
    b. For "E-mail Address", type your normal email address, i.e. *Mary.Smith@example.com*
    c. For "Account Type", select "IMAP" from the dropdown list.
    d. For "Incoming mail server:", type the full host name of the TechDoc server you are connecting to, i.e. *techdoc.example.com*
    e. For "Outgoing mail server (SMTP)", type the full host name of your SMTP server, i.e. *smtp.example.com*
    f. For "User Name", type the username that you log into the TechDoc server with.
    g. For "Password", type in the password you use to log into the TechDoc server with.
    h. Optionally, leave the "Remember password" checkbox checked.

      i.   Make sure to leave the "Require logon using Secure Password Authentication (SPA) checkbox unchecked.

      j.   Click "More Settings…"

      k.   Once the new dialog opens, on the "General" tab, under "Mail Account", it will suggest a name, usually you're email account. We suggest you change this to something more meaningful, i.e. "*My TechDoc Server*" without the quotes or something similar.

      l.   While on the "General" tab, you can decide if you want to change any of the other settings.

     m.   Now click on the "Advanced" tab.

     n.   Below and to the right of "Incoming Server (IMAP)" change the dropdown to "SSL". If you change the right one, "Incoming Server (IMAP)" should now show 993, which is correct.

     o.   If necessary, change any other setting on the tabs on the dialog to support your environment.

     p.   Click "OK" to close the dialog.

     q.   Now click "Next >" on the previous dialog, which should be titled "Add Account"

6. A new dialog titled "Test Account Settings" should show two tasks that are completed. If so, click "Close" and go to the next step. If not, go back and change settings to fix any problems.

7. A new dialog should say "You're all set!" Click "Finish". If not, go back and change settings to fix any problems.

Now you should be able to copy Emails to one of your folders under the TechDoc server mail folder that you just created. Note that any Emails moved or copied to the Records folder will automatically be tagged as folders. Also, you are free to create additional folders under the TechDoc server mail folder. If you create a folder under the Records folder, any Email placed into that folder will automatically be tagged as records too.

Removing the Connection to TechDoc in Outlook 2019

1. Run Outlook 2019.
2. On the "File" tab, click "Info", click "Account Settings ▾", and then click "Account Settings…"
3. When the dialog comes up, the "E-mail" tab should be selected.
4. Click on the name of the E-mail account that connects to TechDoc and then click on "Remove".
5. When prompted if you want to continue, click "Yes".
6. You should now be returned to the "Accounts Settings" dialog. Click "Close".

Keep in mind that deleting the account does not delete the Emails that are stored on the TechDoc server. This allows you to delete the account from one PC or device, recreate the

account on another PC or device, and still retain all of the Emails that are on the TechDoc server.

Adding a Connection to TechDoc using Outlook 2016

Before adding a connection to Outlook, you should review the steps below to determine if there are any settings that you don't know the correct value(s) for. If so, you should contact your local help desk of TechDoc Admin to assistance.

1. Run Outlook 2016.
2. On the "File" tab, click "Info", and then click "Add Account".
3. When the dialog comes up, click "Manual setup or additional server types" and click "Next >".
4. On the next screen, click "POP or IMAP" and click "Next >".
5. On the next screen, enter your settings as follows:
   a. For "Your Name", type your normal name, i.e. *Mary Smith*
   b. For "E-mail Address", type your normal email address, i.e. *Mary.Smith@example.com*
   c. For "Account Type", select "IMAP" from the dropdown list.
   d. For "Incoming mail server:", type the full host name of the TechDoc server you are connecting to, i.e. *techdoc.example.com*
   e. For "Outgoing mail server (SMTP)", type the full host name of your SMTP server, i.e. *smtp.example.com*
   f. For "User Name", type the username that you log into the TechDoc server with.
   g. For "Password", type in the password you use to log into the TechDoc server with.
   h. Optionally, leave the "Remember password" checkbox checked.
   i. Make sure to leave the "Require logon using Secure Password Authentication (SPA) checkbox unchecked.
   j. Click "More Settings…"
   k. Once the new dialog opens, on the "General" tab, under "Mail Account", it will suggest a name, usually you're email account. We suggest you change this to something more meaningful, i.e. "*My TechDoc Server*" without the quotes or something similar.
   l. While on the "General" tab, you can decide if you want to change any of the other settings.
   m. Now click on the "Advanced" tab.
   n. Below and to the right of "Incoming Server (IMAP)" change the dropdown to "SSL". If you change the right one, "Incoming Server (IMAP)" should now show 993, which is correct.
   o. If necessary, change any other setting on the tabs on the dialog to support your environment.

      p. Click "OK" to close the dialog.

      q. Now click "Next >" on the previous dialog, which should be titled "Add Account"

6. A new dialog titled "Test Account Settings" should show two tasks that are completed. If so, click "Close" and go to the next step. If not, go back and change settings to fix any problems.

7. A new dialog should say "You're all set!" Click "Finish". If not, go back and change settings to fix any problems.

Now you should be able to copy Emails to one of your folders under the TechDoc server mail folder that you just created. Note that any Emails moved or copied to the Records folder will automatically be tagged as folders. Also, you are free to create additional folders under the TechDoc server mail folder. If you create a folder under the Records folder, any Email placed into that folder will automatically be tagged as records too.

Removing the Connection to TechDoc in Outlook 2016

1. Run Outlook 2016.
2. On the "File" tab, click "Info", click "Account Settings ▾ ", and then click "Account Settings…"
3. When the dialog comes up, the "E-mail" tab should be selected.
4. Click on the name of the E-mail account that connects to TechDoc and then click on "Remove".
5. When prompted if you want to continue, click "Yes".
6. You should now be returned to the "Accounts Settings" dialog. Click "Close".

Keep in mind that deleting the account does not delete the Emails that are stored on the TechDoc server. This allows you to delete the account from one PC or device, recreate the account on another PC or device, and still retain all of the Emails that are on the TechDoc server.

Adding a Connection to TechDoc using Outlook 2013

Before adding a connection to Outlook, you should review the steps below to determine if there are any settings that you don't know the correct value(s) for. If so, you should contact your local help desk of TechDoc Admin to assistance.

1. Run Outlook 2013.
2. On the "File" tab, click "Info", and then click "Add Account".

3. When the dialog comes up, click "Manual setup or additional server types" and click "Next >".
4. On the next screen, ensure that "POP or IMAP" is selected and click "Next >".
5. On the next screen, enter your settings as follows:
    a. For "Your Name", type your normal name, i.e. *Mary Smith*
    b. For "E-mail Address", type your normal email address, i.e. *Mary.Smith@example.com*
    c. For "Account Type", select "IMAP" from the dropdown list.
    d. For "Incoming mail server:", type the full host name of the TechDoc server you are connecting to, i.e. *techdoc.example.com*
    e. For "Outgoing mail server (SMTP)", type the full host name of your SMTP server, i.e. *smtp.example.com*
    f. For "User Name", type the username that you log into the TechDoc server with.
    g. For "Password", type in the password you use to log into the TechDoc server with.
    h. Optionally, leave the "Remember password" checkbox checked.
    i. Make sure to leave the "Require logon using Secure Password Authentication (SPA) checkbox unchecked.
    j. Click "More Settings…"
    k. Once the new dialog opens, on the "General" tab, under "Mail Account", it will suggest a name, usually your email account. We suggest you change this to something more meaningful, i.e. "*My TechDoc Server*" without the quotes or something similar.
    l. While on the "General" tab, you can decide if you want to change any of the other settings.
    m. Now click on the "Advanced" tab.
    n. Below and to the right of "Incoming Server (IMAP)" change the dropdown to "SSL". If you change the right one, "Incoming Server (IMAP)" should now show 993, which is correct.
    o. If necessary, change any other setting on the tabs on the dialog to support your environment.
    p. Click "OK" to close the dialog.
    q. Now click "Next >" on the previous dialog, which should be titled "Add Account"
6. A new dialog should say "You're all set!" Click "Close". If not, go back and change settings to fix any problems.
7. You should now be returned to the "Add Account" dialog. Click "Finish".

Now you should be able to copy Emails to one of your folders under the TechDoc server mail folder that you just created. Note that any Emails moved or copied to the Records folder will automatically be tagged as folders. Also, you are free to create additional folders under the TechDoc server mail folder. If you create a folder under the Records folder, any Email placed into that folder will automatically be tagged as records too.

Removing the Connection to TechDoc in Outlook 2013

1. Run Outlook 2013.
2. On the "File" tab, click "Info", click "Account Settings ▾", and then click "Account Settings…"
3. When the dialog comes up, the "E-mail" tab should be selected.
4. Click on the name of the E-mail account that connects to TechDoc and then click on "Remove".
5. When prompted if you are sure, click "Yes".
6. You should now be returned to the "Accounts Settings" dialog. Click "Close".

Keep in mind that deleting the account does not delete the Emails that are stored on the TechDoc server. This allows you to delete the account from one PC or device, recreate the account on another PC or device, and still retain all of the Emails that are on the TechDoc server.

Adding a Connection to TechDoc using Outlook 2010

Before adding a connection to Outlook, you should review the steps below to determine if there are any settings that you don't know the correct value(s) for. If so, you should contact your local help desk of TechDoc Admin to assistance.

1. Run Outlook 2010.
2. On the "File" tab, click "Info", and then click "Add Account".
3. When the dialog comes up, click "Manually configure server settings or additional server types" and click "Next >".
4. On the next screen, ensure that "Internet E-mail" is selected and click "Next >".
5. On the next screen, enter your settings as follows:
   a. For "Your Name", type your normal name, i.e. *Mary Smith*
   b. For "E-mail Address", type your normal email address, i.e. *Mary.Smith@example.com*
   c. For "Account Type", select "IMAP" from the dropdown list.
   d. For "Incoming mail server:", type the full host name of the TechDoc server you are connecting to, i.e. *techdoc.example.com*
   e. For "Outgoing mail server (SMTP)", type the full host name of your SMTP server, i.e. *smtp.example.com*
   f. For "User Name", type the username that you log into the TechDoc server with.
   g. For "Password", type in the password you use to log into the TechDoc server with.
   h. Optionally, leave the "Remember password" checkbox checked.

      i.   Make sure to leave the "Require logon using Secure Password Authentication (SPA) checkbox unchecked.

      j.   Click "More Settings…"

      k.   Once the new dialog opens, on the "General" tab, under "Mail Account", it will suggest a name, usually you're email account. We suggest you change this to something more meaningful, i.e. "*My TechDoc Server*" without the quotes or something similar.

      l.   While on the "General" tab, you can decide if you want to change any of the other settings.

      m. Now click on the "Advanced" tab.

      n.   Below and to the right of "Incoming Server (IMAP)" change the dropdown to "SSL". If you change the right one, "Incoming Server (IMAP)" should now show 993, which is correct.

      o.   If necessary, change any other setting on the tabs on the dialog to support your environment.

      p.   Click "OK" to close the dialog.

      q.   Now click "Next >" on the previous dialog, which should be titled "Add New Account"

6.   A new dialog should say "Congratulations!" Click "Close". If not, go back and change settings to fix any problems.

7.   You should now be returned to the "Add New Account" dialog. Click "Finish".

Now you should be able to copy Emails to one of your folders under the TechDoc server mail folder that you just created. Note that any Emails moved or copied to the Records folder will automatically be tagged as folders. Also, you are free to create additional folders under the TechDoc server mail folder. If you create a folder under the Records folder, any Email placed into that folder will automatically be tagged as records too.

Removing the Connection to TechDoc in Outlook 2010

1.   Run Outlook 2010.

2.   On the "File" tab, click "Info", click "Account Settings ▾", and then click "Account Settings…"

3.   When the dialog comes up, the "E-mail" tab should be selected.

4.   Click on the name of the E-mail account that connects to TechDoc and then click on "Remove".

5.   When prompted if you are sure, click "Yes".

6.   You should now be returned to the "Accounts Settings" dialog. Click "Close".

Keep in mind that deleting the account does not delete the Emails that are stored on the TechDoc server. This allows you to delete the account from one PC or device, recreate the

account on another PC or device, and still retain all of the Emails that are on the TechDoc server.

Deleting documents using IMAP

If you want to delete the Emails stored on the TechDoc server, you can delete them before you delete the connection. Remember that when you delete Emails stored on a server using IMAP that the Emails are not immediately deleted.

IMAP servers don't delete Emails the same way that Outlook normally deletes them. This difference is not caused by TechDoc but is actually a requirement of the IMAP protocol that TechDoc uses to communicate with Outlook.

When you delete an Email residing on an IMAP server, you will notice that Outlook draws a line through the Email you just deleted (meaning that it has been marked for deletion). To actually delete it, you can click on "Edit" on the main Outlook menu, click on "Purge" and then click on the desired purge option. Likewise, you can select the Email, then click on "Edit" on the main Outlook menu, and then click on "Undelete" if you change your mind and want to keep the Email.

You can also use a web browser to log in to the TechDoc server and delete the emails from there. You can also make a help desk request to have a TechDoc Librarian or Admin delete them for you.

Other Email Products

These instructions specifically describe how to configure Outlook to connect to TechDoc. However, TechDoc has been written to follow the IMAP standard. Therefore, this capability should work with most other Email clients that support IMAP too (whether on Windows, Mac, Linux, Mobile Devices, etc.)