



Excel Add-In

Integrate Content Manager into Microsoft Excel



Excel Add-In

Work smarter. Streamline your spreadsheets.

Kapish Excel Add-In allows users to insert Content Manager (CM) Properties directly into new and existing Microsoft® Excel Workbooks. It takes the metadata details in real-time and allows the user to place those details in the body, header and footer of the Workbook. Excel Add-In template building capabilities give corporate templates a professional and accurate representation of the information stored on the Records. By using the metadata stored against the record to populate the information in the Workbook, not only improving efficiencies but also increasing accuracy. Work smarter, not harder.

Key Features

- Generate permanent hyperlinks to your CM
- Integrate seamlessly between CM and hyperlink supported applications
- One-click direct access to CM Documents
- No need to update links as CM versions change
- Link to entire CM Containers. Great for HR & Project Folders!
- Reduce file sizes by linking to other documents
- Create links to Renditions, Workflows, Activities and Actions
- Maintain full CM access controls and security of records
- Customise your Easy Link labels / display text
- Link to latest Finalised versions of documents
- Build your own customised links
- Embed your links within SharePoint, Intranet sites or web pages

Specs

Operating System Requirements

- Records Manager 8.1 or later (including Content Manager) installed on the PC
- Microsoft® Office 2010, 2013 or 2016
- Windows® 7, 8 or 10 (32-bit or 64-bit)
- Microsoft® .NET Framework 4.5.2 or later
- The minimum requirements set by your current version of Records Manager / Content Manager

Information for IT Department

Kapish Excel Add-In is a client-side application that works in conjunction with Microsoft® Excel and Content Manager to improve the user experience by inserting Content Manager record details into Microsoft® Excel Workbooks. Software installation is via a Microsoft® Installer (MSI) file, this can be run manually on each PC or via common network installation methods (e.g., SCCM, ZENworks, Group Policy etc.).

Talk to us today to find out how our suite of products & services can help you get the most out of Content Manager