# Microsoft Word Add-In

1.   PURPOSE OF THE ADD-IN

1.1   The Add-In provides access to aspects of the Productivity Centre from within Word, and benefits users by enhancing the usability of those aspects in relation to a single document and avoids the need to upload documents into the Productivity Centre.

1.2   Currently, the Add-In can be used in conjunction with a Microsoft 365 subscription only. You may need to engage your administrator centrally to deploy the Add-In so that it is available to users in your organisation. The steps below show how you can deploy the Add-In yourself for your personal use.

2.   INSTALLING THE ADD-IN

2.1   First, you need to upload the Add-In. On the Word toolbar, click on the Insert tab, followed by Add-ins, then Upload My Add-In, and navigate to the location where you have saved the manifest file (which you obtained from us).
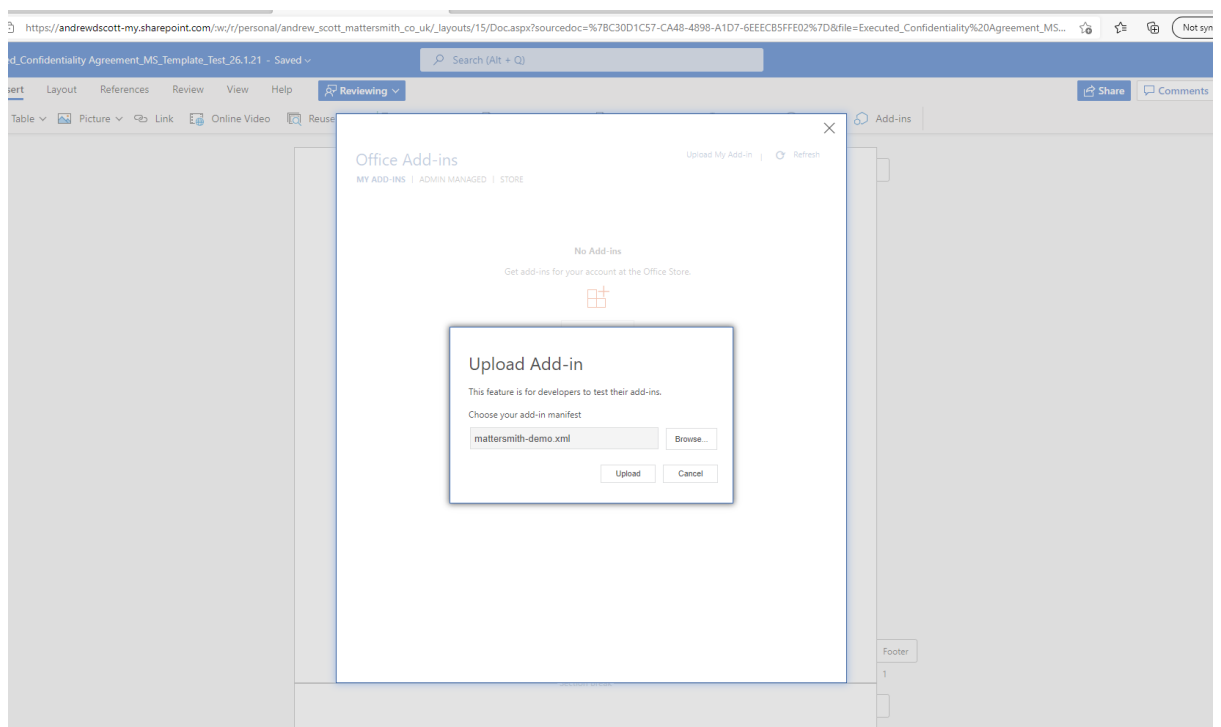
2.2   Select the Home tab and click on the three dots, "…" on the right-hand side. You will see the M logo. Click on the logo and the Add-In opens. When the Add-In is first run, you will see a screen that looks like this:

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Productivity Centre

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Get Started

2.3   Click Get Started and you will be taken to the login screen. Enter your credentials and the server url, which you can copy and paste from here https://mattersmith6.embeddedexperience.com Tick Remember me.

3.   USING THE ADD-IN

3.1   We have included a document here https://mattersmithsupport.com/wp-content/uploads/2021/11/Confidentiality-Agreement_MS_Short-Form.docx to help you learn how to use the Add-In.

3.2   Once logged-in, you will see the following screen:
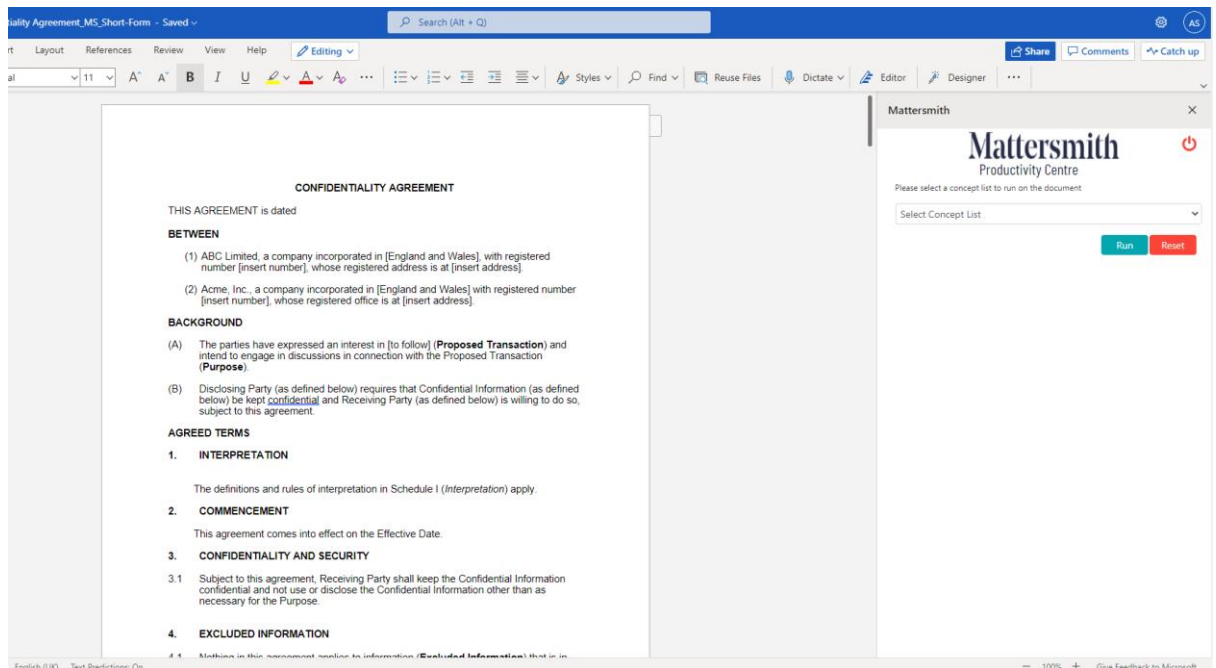
3.3   You can resize the width of the Add-In to suite your needs.

3.4   Select the down-arrow and you will see the concept lists to which you have access. Select BOILERPLATE. Select it, and click run, and the results look like this:
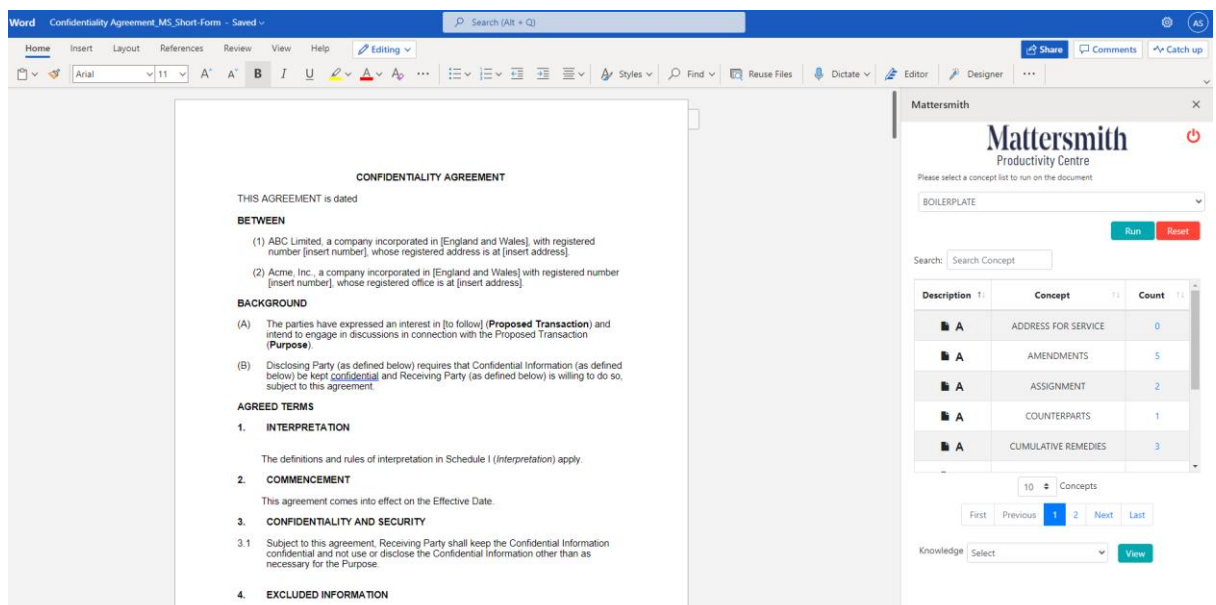
3.5   The Count shows the number of times the key words/phrases that make up the concept list, BOILERPLATE, appear in the document. By clicking on the number of the

count (for example, 2 for ASSIGNMENT), the individual key words/phrases (or "Terms") appear in context of a string comprising of words to the left and right of the Term. By selecting a Term, the user is taken to the Term in the document; for example, please select the first reference to "assign". The results look like this:
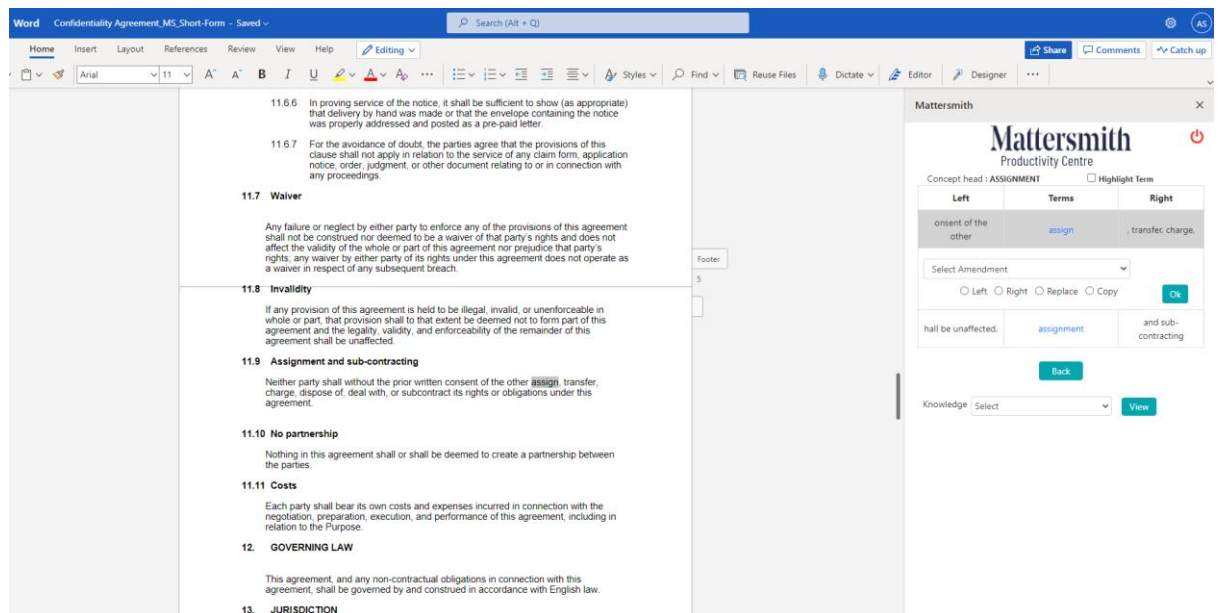
3.6 Below the results pane, there is a dropdown box next to the word, Knowledge. Click the down arrow and you will see the word, Playbook. This indicates that there is a Playbook in Knowledge that corresponds to the concept, ASSIGNMENT. Select the Playbook and click View. After a few seconds, the Knowledge playbook opens in a new tab. You need to answer the questions (if any) to obtain the guidance and contractual language (there are no questions associated with the ASSIGNMENT playbook). Where an attachment is available – indicated by the paperclip icon – the user can download the document by clicking on the down arrow in the circle or view the text in an editor by selecting the eye icon.

3.7 Within the Add-In, the box entitled, Select Amendment, contains (where they exist) links to templates in Precedents and text with which the document can be amended. Amendments comprising text can be viewed by selecting View.
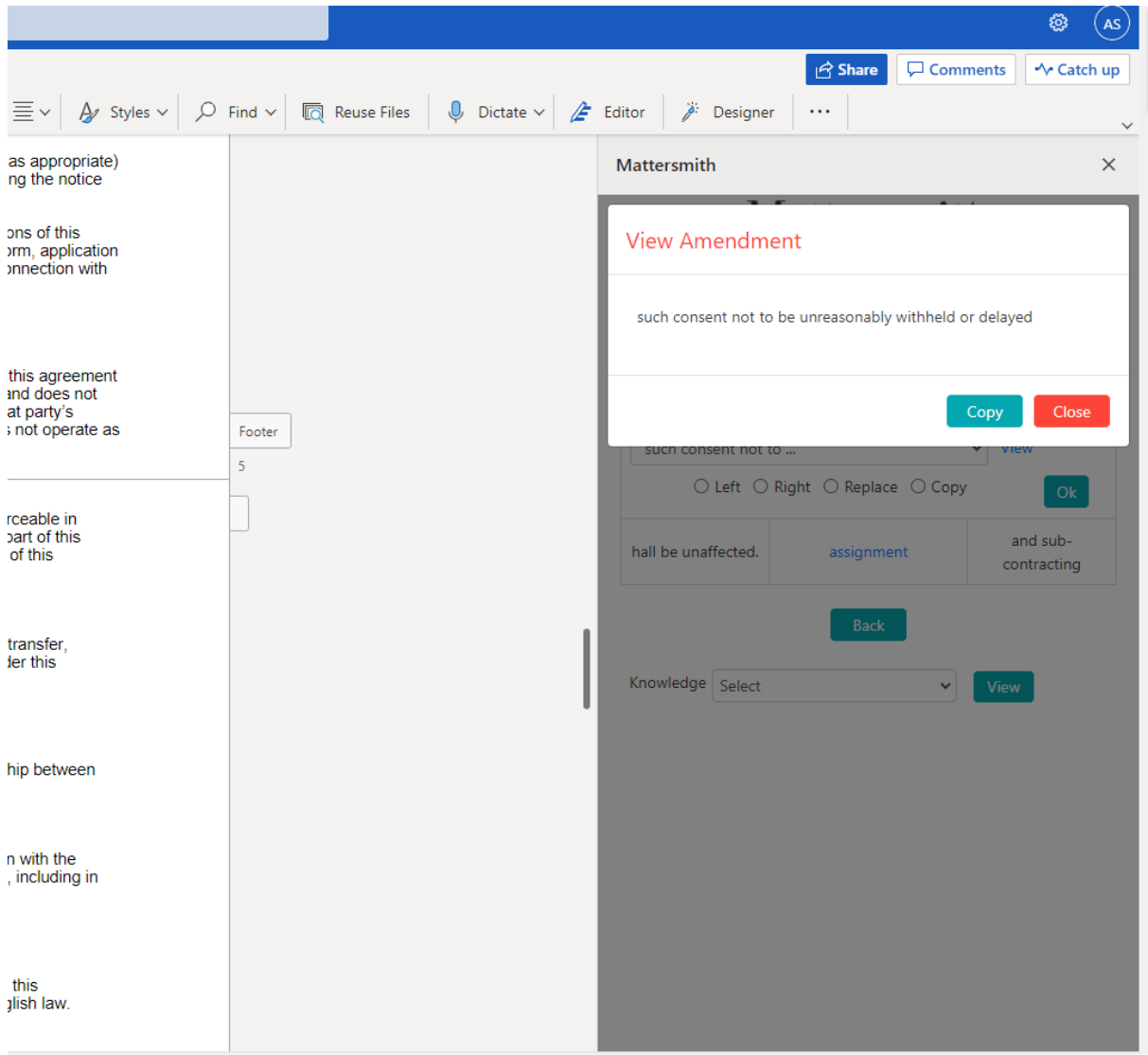
3.8 Selection of the radio buttons below the Amendment box determine where the text is inserted – to the left or right of the Term, or to replace the Term; selection of the Copy button, copies the text to the clipboard so that it can be inserted anywhere in the document. When an amendment is made, the search results revert to the previous pane.

3.9 Where a change is made to the document, the results refresh and, if the change includes a key term, the results are automatically updated.

3.10 When a Term is selected, it can be highlighted by clicking on the Highlight Term box. However, if you move to another Term which you want to highlight, the Highlight Term box needs to be unticked and then ticked again. This removes previous highlighting. If you wish to retain highlighting, you must apply the highlight using the Highlight feature in Word.

3.11 The user may revert to the original results pane by clicking the Back button and reset the search by clicking on Reset.

3.12 The Add-In also operates in tracked change mode.

3.13 Log off by clicking on the red button in the top right-hand corner.