

# JOIN NOW manual

## Introduction

JOIN NOW is a tool that lets you save files directly from Microsoft Office applications in JOIN – the document management system we use at the UT.

Nowadays, a lot of communication takes place via e-mail. As a result, it is important that e-mail and attachments are registered and archived properly. JOIN is our preferred system for easily saving, opening and retrieving e-mails.

When it comes to saving e-mails, the golden rule is to save the messages that really matter: e-mails in which agreements are made from which the UT or third parties can derive rights.

Archiving e-mail in JOIN is made easy with JOIN NOW. This manual explains which steps to take to save Microsoft Office files

## Contact

If you have any questions or comments about JOIN NOW, or would like to start working with JOIN or JOIN NOW and want more information, please contact JOIN Functional Management ([joinbeheer@utwente.nl](mailto:joinbeheer@utwente.nl))

For more background information, please consult these pages in the JOIN wiki:

- First steps: <https://wiki.decos.com/en/jzd/joinnow/features/firststep>
- Outlook and Groupwise: <https://wiki.decos.com/en/jzd/joinnow/features/outlook>

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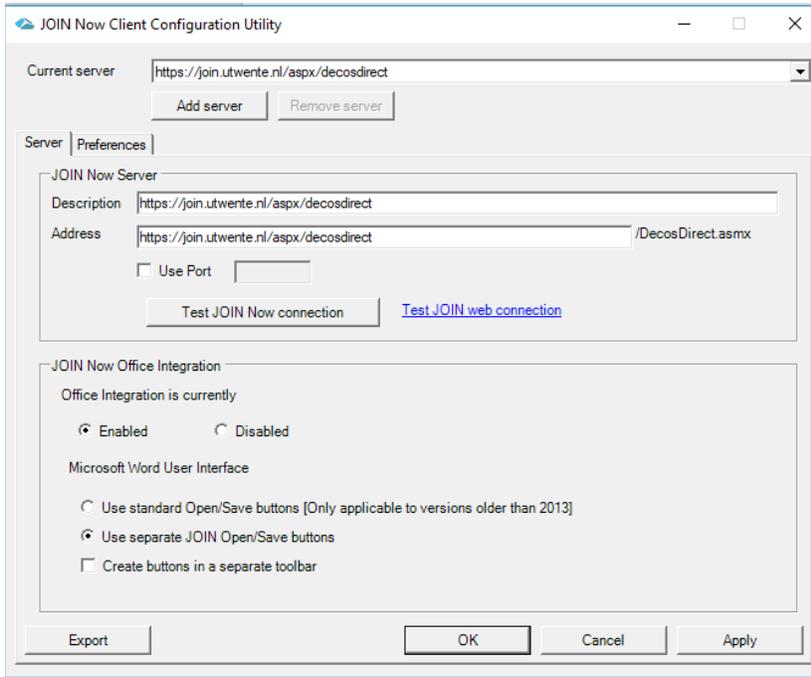
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## 1. Installation and Settings

If you are already a JOIN user, Novell Zenworks will automatically install JOIN NOW on your workstation. If you believe that this was not done properly, please contact the ICT Service Desk.

You can change the settings by going to Start => Programs => Configure JOIN Now:

- Enabling or disabling Office Integration (Enabled – Disabled will toggle whether the JOIN NOW buttons are shown in Office programs.
- We recommend selecting the 'Use separate JOIN Open/Save buttons' option if you want the buttons to be visible in your Office programs.



## 2. Login, screen layout and cancelling

### Login

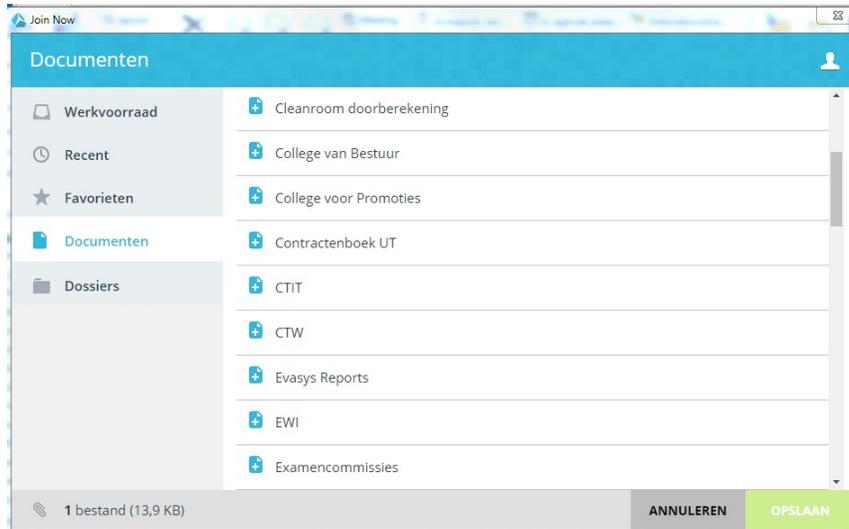
When you click on one of the options of JOIN NOW, you will be prompted to enter a username and password.



## Screen layout

Once you have logged in, you will see:

- The menu on the left
- The contents of a menu item on the right
- At the bottom left, we show the number of files you have selected. This lets you specify what you want to save.
- At the bottom right, you will find the Cancel and Save options



## Step back

You can easily go a step back with the 'crumb path'.

When you are creating a registration and use the crumb path to select a previous item, the program will ask whether you want to leave the registration. Please note that leaving a registration will cancel this action.



## Cancelling

There are two ways to cancel an action:

- clicking the 'cancel' button in the bottom right of the screen
- closing the window by clicking the well-known X at the top-right of the screen



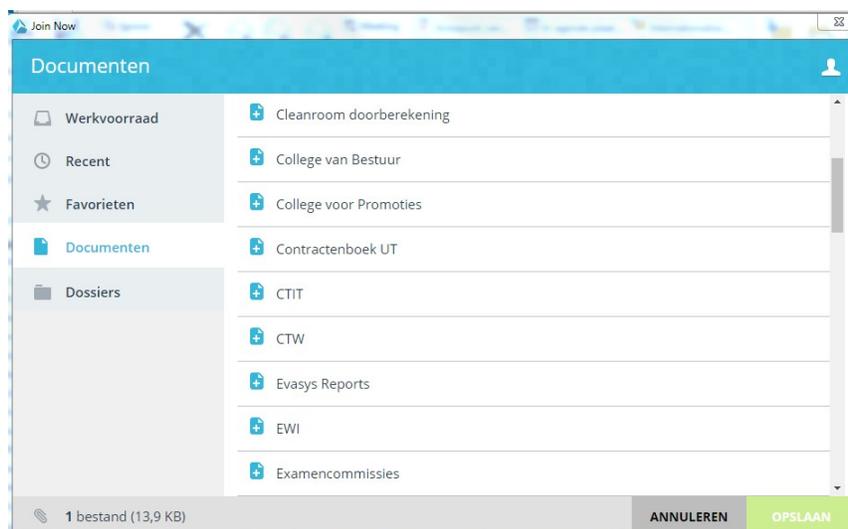
## 3. Outlook

JOIN NOW can do the following when combined with Outlook:

- save an e-mail message (including attachments) in JOIN
- only save files from an e-mail message in JOIN
- attach files to an e-mail message from JOIN
- save a message in JOIN directly after sending an e-mail

When you select the Documents menu item after logging into JOIN NOW, the right-hand window will display a list of collections. This, of course, depends on your rights within JOIN. Depending on your rights, you can:

- Add a new registration
- Add a file to an existing registration
- Select attachments for an e-mail (retrieved from JOIN). These three options are explained in greater detail below.

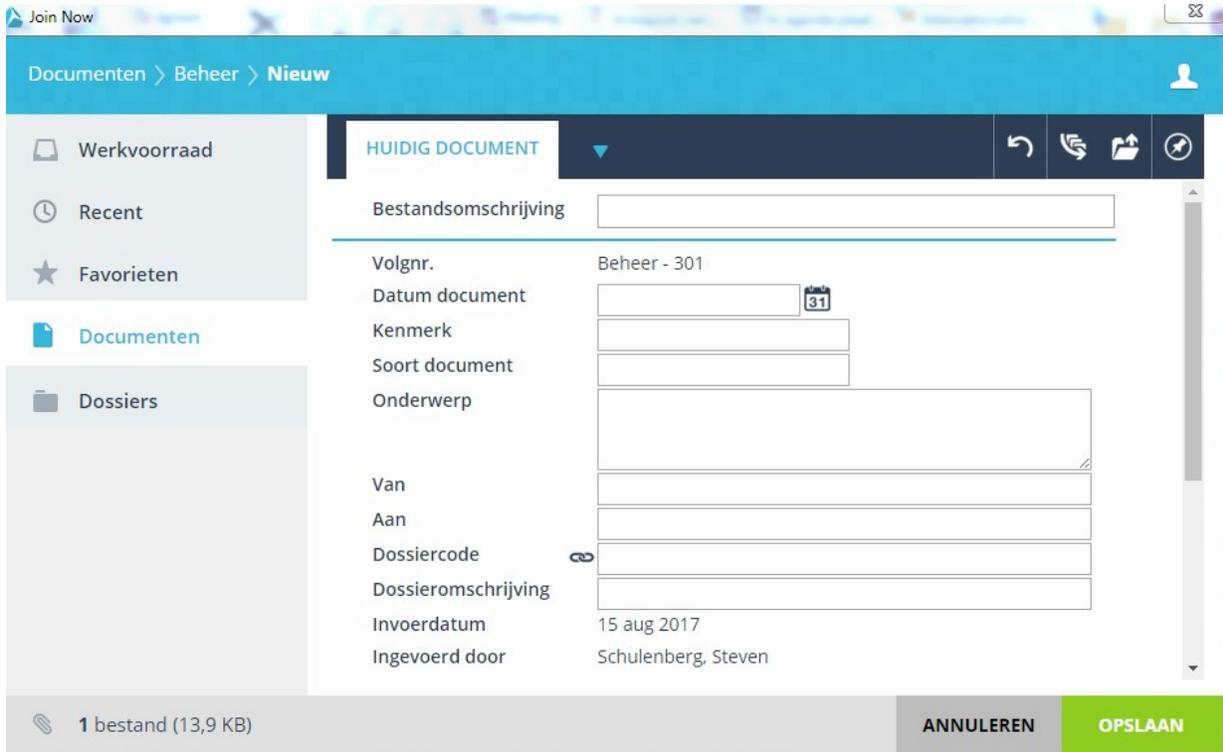


a. Creating a new registration

Clicking the blue document icon marked with a + will create a new document registration.



This will open a registration window, where you complete the necessary fields and click 'Save' in the bottom-right of the screen

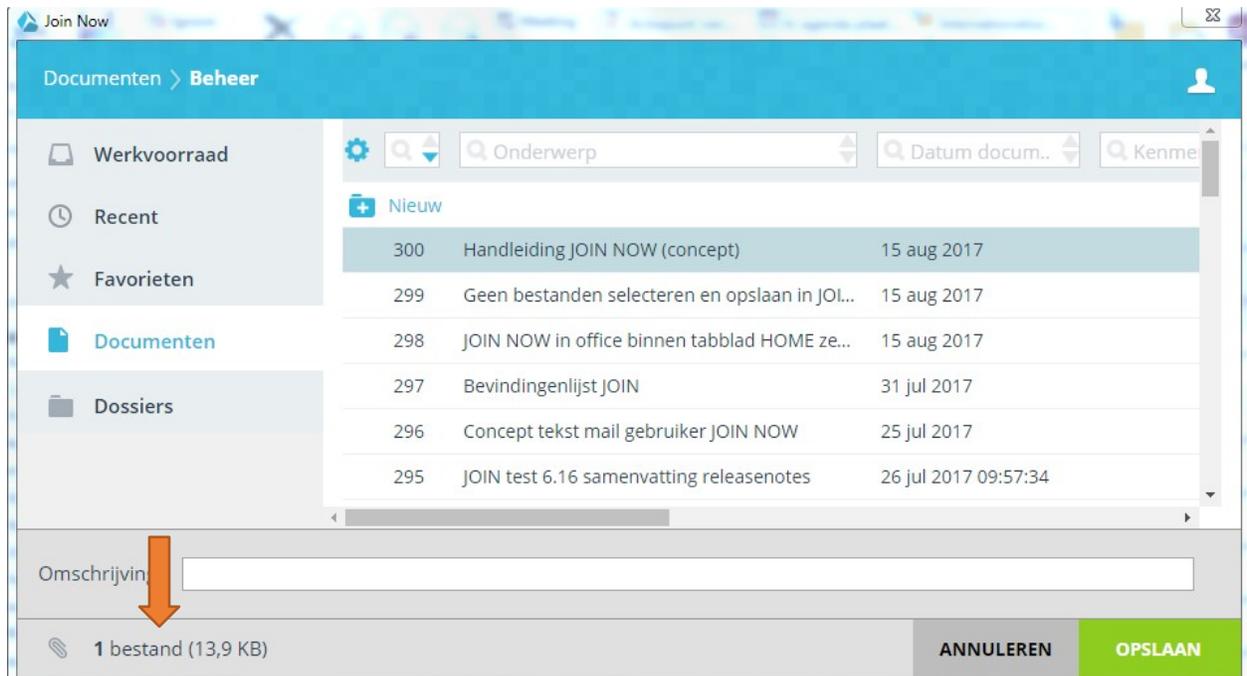


## b. Adding a file to an existing registration

Clicking on the name of the document collection will open the list of registrations. (You can still click new at the top of the list if you want to add a new registration).



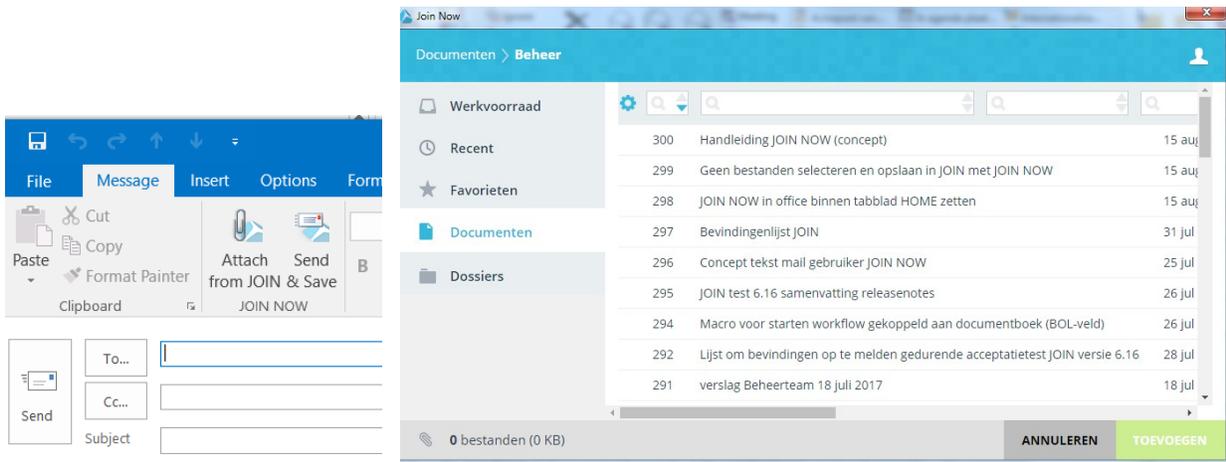
When you have found an existing document, click on the line. The line will be highlighted in gray. At the bottom of the page, you can select which files you want to save by clicking Files. You can also add file descriptions at the bottom of the page. When you have completed all steps, click 'Save' at the bottom-right of the screen.



### c. Selecting attachments for an e-mail

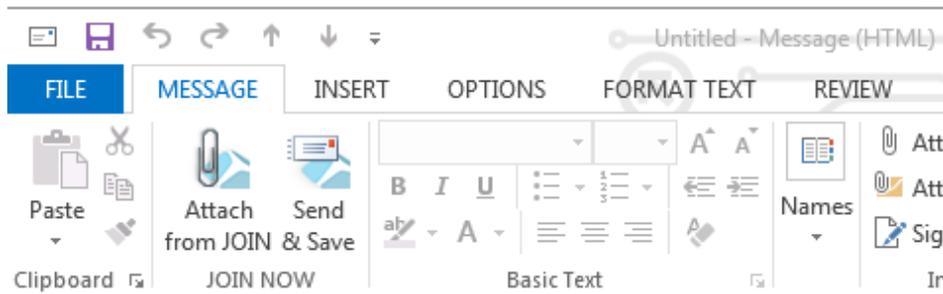
In addition to saving e-mail messages, you can add attachments to a new e-mail directly *from* JOIN. In Outlook, open a new e-mail and select 'Attach from JOIN'. This will open JOIN NOW, giving you access to the full menu. The menu items are described in the 'Screen layout' section at the start of this manual.

A new feature of JOIN NOW is that you can select several attachments at once, adding them to a e-mail as a single batch. After selecting all the files you want from various document collections (e.g. a report from a dossier and a contract from the contract book), click the green 'add' button in the right-bottom corner.



### d. Send & Save

The 'Send & Save' button lets you save an e-mail in JOIN immediately after sending it. This will automatically start JOIN NOW. Select the document collection in which you want to save the e-mail and follow the steps described above.



## 4. Word, Excel and PowerPoint

Word, Excel and PowerPoint use exactly the same JOIN NOW features. The integration of JOIN NOW with the Office suite leads to the following options:

- opening an existing file from JOIN and editing it in MS Office
- saving an existing file in JOIN
- only with Word can you register a new file in JOIN (and merge it with a template, if you want).

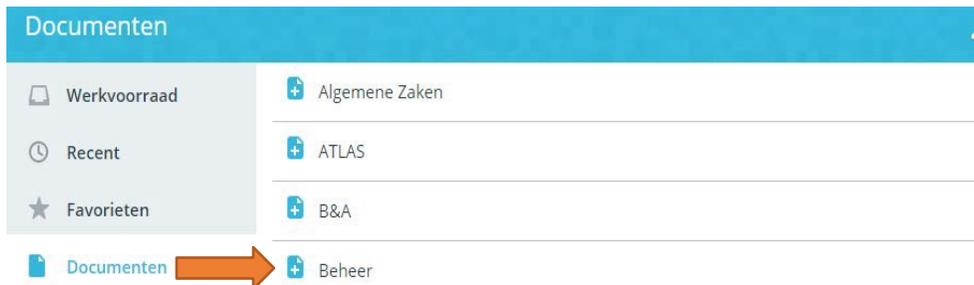
Depending on the settings (see page 2 of this manual), JOIN NOW may start up automatically with 'standard' use of the open and save button. If you want to save files *locally* (on a network drive), close JOIN NOW to open the standard save window.



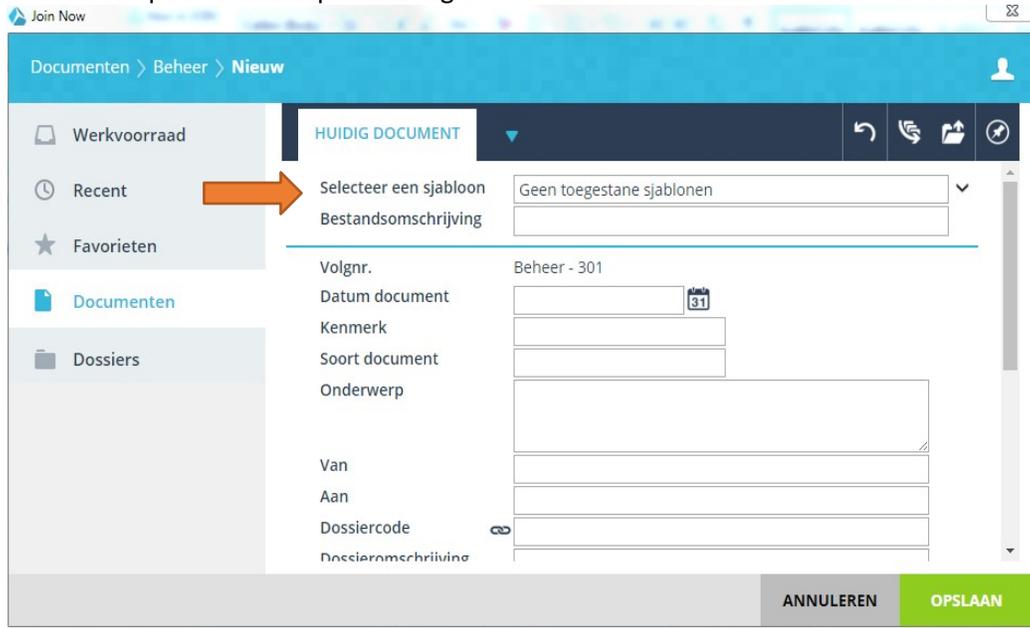
### a. New in JOIN (incl. templates)

With the 'New in JOIN' feature, you can save a WORD document in JOIN and merge it with a WORD template available to you. You may first have to log in with an employee number and password.

Clicking the blue document icon marked with a + will create a new document registration. This will open a registration window. Complete the requisite fields and click 'Save' in the bottom-right of the screen.



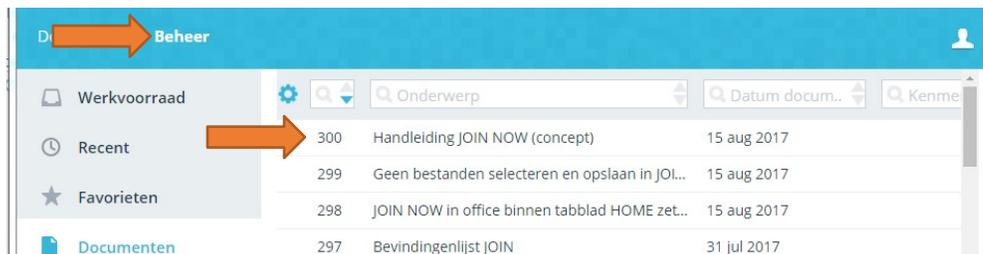
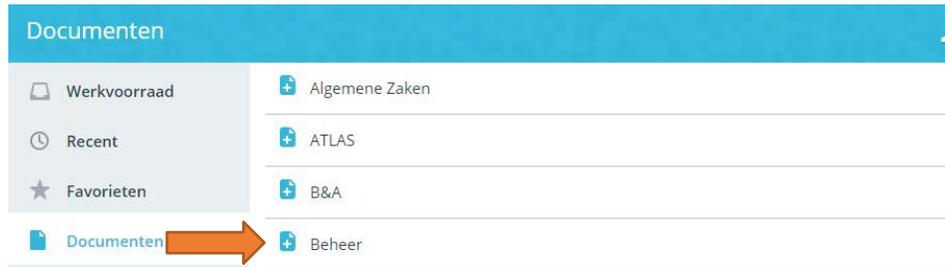
You can select a template at the top of the registration window.



### b. Open in Word

The 'Open in JOIN' option lets you look up a Word file in JOIN directly from word and open it. If you are logged in, you will be taken straight to the menu.

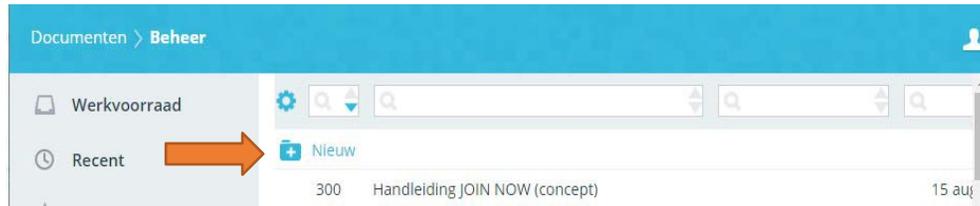
Select Documents on the left of the screen. Select a document collection at the right-hand-side of the screen. Click the registration to open it.



### c. Save to JOIN

The 'Save to JOIN' option works exactly the same as 'New in JOIN'. The difference is that this option does not let you merge a document with a template, but saves the Word document in question.

- You can choose to save the file with an existing registration. Select a document collection and specify the registration in which you want to save the file.
- To create a new registration, select a document collection and click New.



## 5. New options in JOIN NOW

### a. Saving in Dossiers

New in JOIN NOW (not supported by JOIN Direct) lets you register your dossiers yourself. You no longer have to create the dossier in JOIN first.

JOIN NOW lets you do the following with dossiers:

- register a new document in a newly created dossier
- register a document in an existing dossier
- add a file to an existing document in an existing dossier

To create a new dossier, select the Dossiers menu item. Click on 'New'.

The screenshot shows the 'Join Now' application window. The breadcrumb navigation indicates 'Dossiers > College van Bestuur'. On the left, a sidebar menu contains 'Werkvoorraad', 'Recent', 'Favorieten', 'Documenten', and 'Dossiers'. An orange arrow points to the 'Dossiers' menu item. The main area displays a list of dossiers with columns for ID, classification, and name. At the top of this list is a '+ Nieuw' button, which is also highlighted by an orange arrow. Below the list, a status bar shows '1 bestand (31,7 KB)' and two buttons: 'ANNULEREN' and 'OPSLAAN'.

ID	Classificatie	Naam
645	.07.57	Stichting NanoLabNL
644	.02	Visitatie opleiding Bedrijfskund
643	.07.58	Commissie OER-herziening
642	.07.852	Erasmus+ KA107 2016 en Amer
641	.07.23	Stichting Vluchteling-Studente
640	.07.23	Stichting Carmelcollege
639	.07.23	Stichting Medisch Spectrum Tw
638	.07.2	Lidmaatschap Euraxess Service
637	.07.23	Aramco Overseas Company B.V
636	.02.451	Erkenning (Accreditatie) als inst

Complete the dossier registration and click the green 'Next' button (bottom right).

The screenshot shows the 'Nieuw' (New) dossier registration form. The breadcrumb navigation is 'Dossiers > College van Bestuur > Nieuw'. The form is titled 'HUIDIG DOSSIER'. The left sidebar contains navigation options: Werkvoorraad, Recent, Favorieten, Documenten, and Dossiers. The form fields are as follows:

- Volgnr.: College van Bestuur - 040
- Classificatie: .07.23
- Dossieromschrijving: Samenwerking
- Subomschrijving: Voorbeeld
- Aktief van: 22 nov 2017
- Aktief tot: (empty)
- Bewaartermijn (jaar): (empty)
- Vernietigingsdatum: (empty)
- Archiveren:

At the bottom, there is a status bar showing '1 bestand (31,7 KB)' and two buttons: 'ANNULEREN' and 'VOLGENDE'.

Now select the document book in which you want to register the document. Complete the document registration and click 'save'.

The screenshot shows the 'Nieuw' (New) document registration form. The breadcrumb navigation is 'Dossiers > College van Bestuur > .07.23 > Nieuw'. The form is titled 'HUIDIG DOCUMENT'. The left sidebar contains navigation options: Werkvoorraad, Recent, Favorieten, Documenten, and Dossiers. The form fields are as follows:

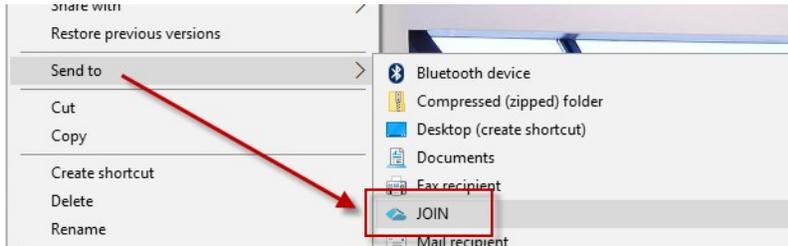
- Bestandsomschrijving: (empty)
- Volgnr.: Post CvB UIT - 3042
- Datum document: 22 nov 2017 16:02:59
- Ons Kenmerk: (empty)
- Uw kenmerk: (empty)
- Onderwerpsomschrijving: Voorbeeld
- Naam: (1) H. Martinus
- Afdeling: Archive
- Postadres: LISA
- Contactpersoon: (empty)

At the bottom, there is a status bar showing '1 bestand (31,7 KB)' and two buttons: 'ANNULEREN' and 'OPSLAAN'.

## b. Saving from the network drive

Thanks to network drive integration, you can now select one or more files on a network drive and save them in JOIN. Select the file and right-click. This will open a menu with the following JOIN options (depending on your settings):

- send to -> JOIN
- save with JOIN NOW



If you have selected multiple files in the explorer/network drive, you can select or deselect them with the files element (at the bottom left of the screen).

In addition, you can choose to save all files in 1 registration in JOIN, or to create a separate registration for each individual file (see arrow to make a choice).



A quick way to link a file to an existing registration is to drag it from Windows Explorer to the block in question during the registration process.

