

# TeamMate Document Linker

Release Notes

Version 1.0

Release August 2023

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This is the initial release of TeamMate Document Linker. TeamMate Document Linker enables linking of data in an Excel worksheet to text in PDF and other image files.

## Adding documents

From within Excel, users can specify the documents that they want to use with the tool and link to data in Excel Worksheets. Accepted document formats include .pdf, .jpeg, .jpg, .tiff, .bmp, or .png and can be organized into groupings, such as *Invoices* or *Purchase orders*. TeamMate Document Linker extracts text, numbers, dates and currency information from the documents and enables them to be viewed within the TeamMate Document Linker pane within Excel.

When viewing documents in the TeamMate Document Linker pane, users can zoom and rotate documents, navigate through pages and search for text contained within the documents.

The documents can also be embedded within the Excel workbook. This allows the documents and associated links to be shared along with the workbook without needing access to the original location of the documents.

- Supported languages: English
- Supported currency symbols: \$, €, £
- Supported numeric formats: 9,999.99 and 9.999,99
- Supported date formats:
  - month, day, year
  - day, month, year
  - year, month, day

## Linking documents

Users can see how many links each document has in the Documents view. There are two ways to create links between an Excel worksheet and documents.

### Auto-link

Auto-link requires the user to specify columns in a spreadsheet that contain values to search for within the documents – these values can be text, numbers, currencies or dates. A link will be created to the best matching documents in new columns in the worksheet.

This is a quick and easy way to match many rows and columns of data to many scanned documents with a link in the worksheet that, when clicked, will open the associated document in the TeamMate Document Linker pane within Excel and highlight the matching value.

## Links

Users can view documents in TeamMate Document Linker and create individual links from any cell in a worksheet to an area in the associated document.

- **Text links** Highlight text in a document to create a blue link in the selected cell, containing the highlighted text and linking to the area where the text appears.
- **Verification links** Highlight any area in a document to create a green link in the selected cell, linking to the area selected. This can be used to confirm the expected information exists, such as a signature or stamp on a document.
- **Anomaly links:** Highlight any area in a document to create a red link in the selected cell, linking to the area selected. This can be used to signify that the information differs to the expectation or represents an anomaly.