INSTRUCTIONS FOR CSI OUTLOOK ADD-IN

CONTENT

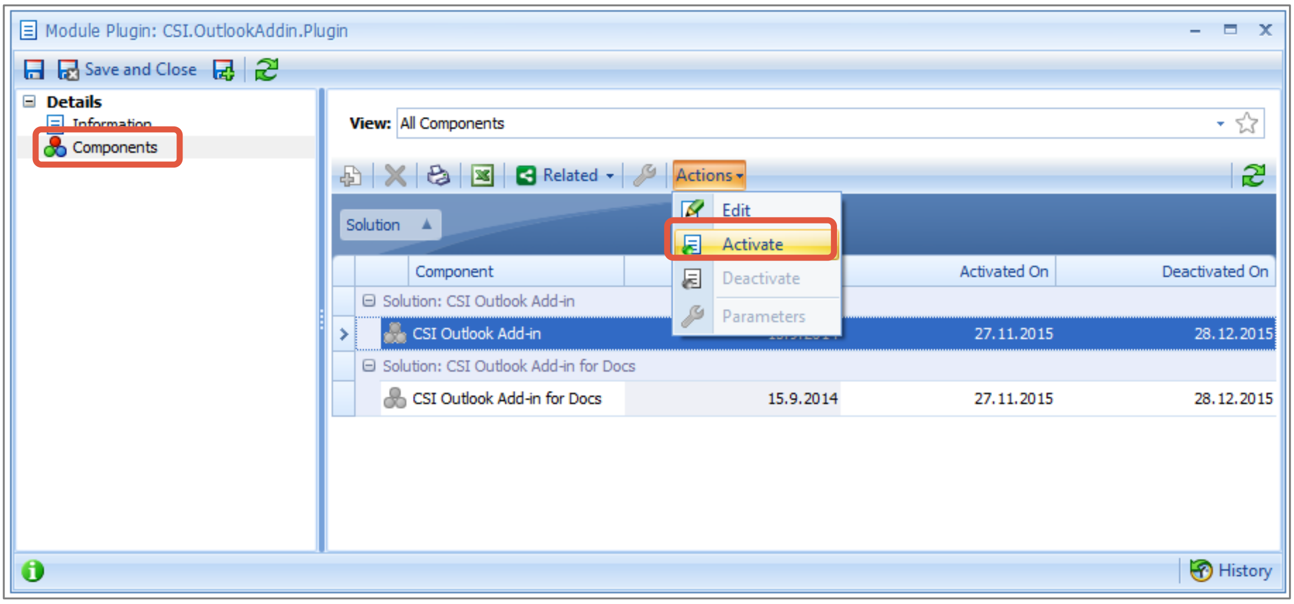
NOTE! To install and implement the CSI Outlook Add-in, all users must have Outlook 2010 or a newer version. Outlook 2007 supports very few of the CSI Outlook Add-in features.

1. INSTALLING CSI OUTLOOK ADD-IN

When a customer takes the CSI Outlook Add-in into use, it has to be installed at the company level first. After this, users can activate the Add-In for their own use.

1.1. ACTIVATING OUTLOOK ADD-IN AT COMPANY LEVEL

The power user is able to activate the CSI Outlook Add-in at the company level in the Settings. Select ”Customization” located in the top left corner. Next, select ”Module Plugins”, and from the list ”CSI.OutlookAddin.Plugin”. In the Module Plugin window, select the ”Components” subfolder, see the picture below.



The Components subfolder contains two parts:

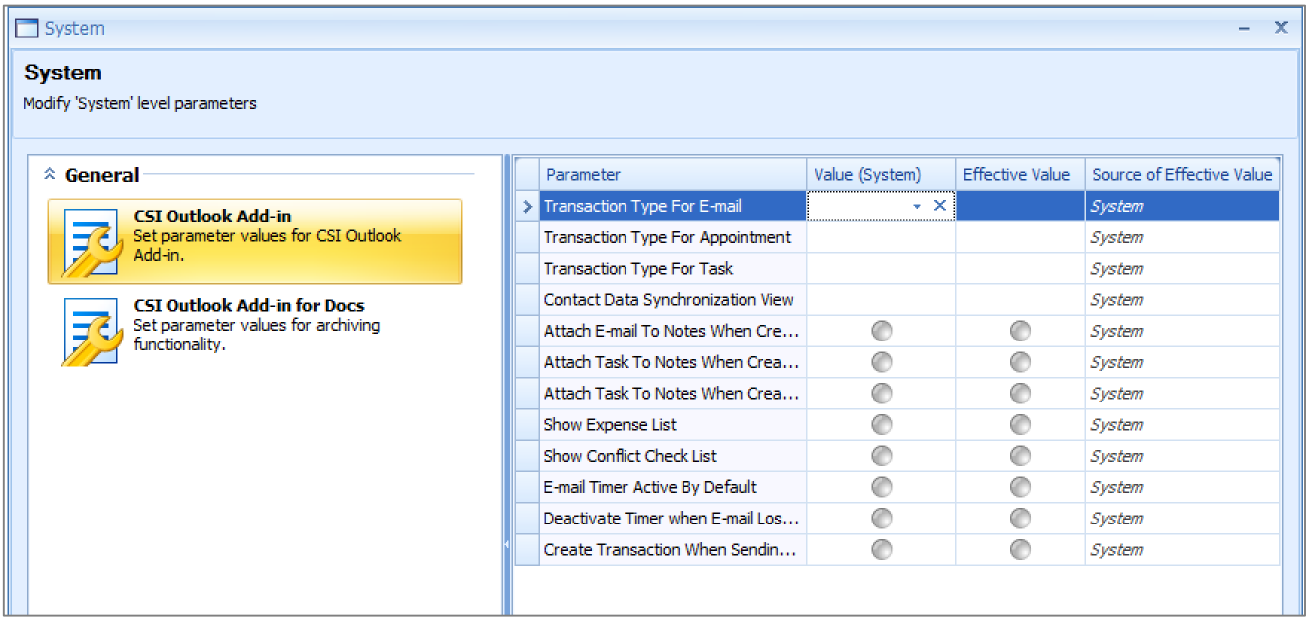
- **CSI Outlook Add-in**. This component contains all the other features of the CSI Outlook Add-in except for archiving.
- **CSI Outlook Add-in for Docs**. This one contains only the archiving feature.

NOTE! In case your office already uses the M-Files document management system combined with Outlook archiving, this feature should not be activated.

The add-ins can be activated individually by right-clicking the row and selecting Activate, see the picture above. If you activate the CSI Outlook Add-in for Docs component first, CSI Outlook Add-in will be activated as well.

The activation will open the System level Parameter window, see the picture below. It enables defining CSI Outlook Add-in default values at the company level. In Outlook, users are able to define similar defaults for their own use. For more information, see the “CSI Lawyer Tab in Outlook”. In the window you can define:

- Default transaction types for e-mail messages, calendar entries and tasks.
- The contact view to be synchronized to Outlook (defining which contact list is displayed in Outlook).
- Whether related e-mail messages, calendar entries, and/or tasks are attached to the Notes tab of a transaction when registering transactions in Outlook.
- Archiving-specifically (can be defined only at the business unit level in the CSI Lawyer business unit parameters)
    - if a related e-mail message is archived automatically when a transaction is created
    - which e-mail archiving prefix is used for the subject of archived messages.

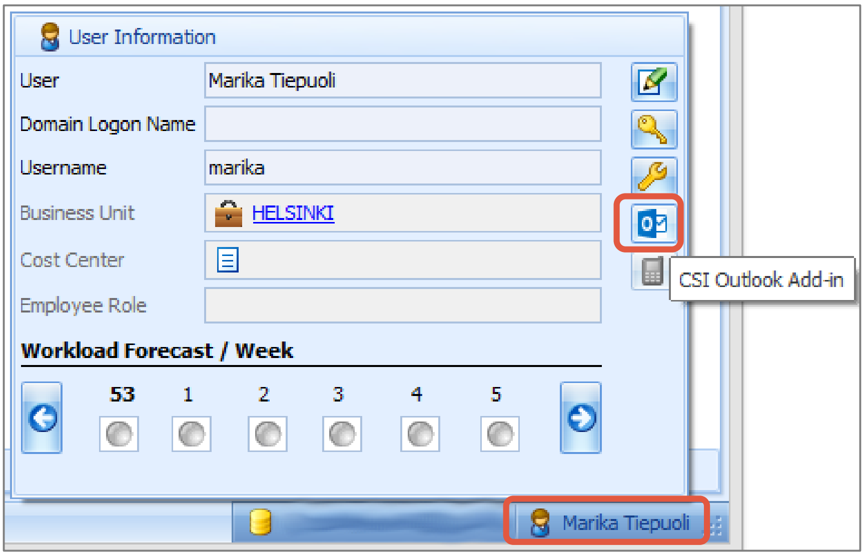


1.2. REMOVING OUTLOOK ADD-IN AT COMPANY LEVEL

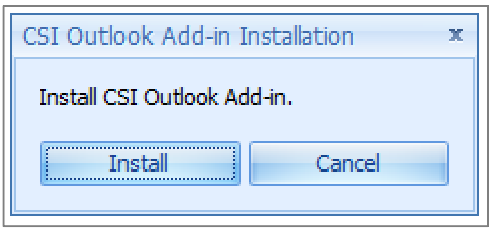
The power user is able to remove the CSI Outlook Add-in from the use in the whole company. In the Settings, select from the top left corner ”Customization” and then ” Module Plugins”. From the list that opens, select the ”CSI.OutlookAddin.Plugin”, and from the next window the ”Components” subfolder. It enables you to remove the add-ins one by one by right-clicking the row and selecting Deactivate. **NOTE!** If you first deactivate the CSI Outlook Add-in, the CSI Outlook Add-in for Docs component is deactivated automatically.

1.3. ACTIVATING OUTLOOK ADD-IN FOR USERS

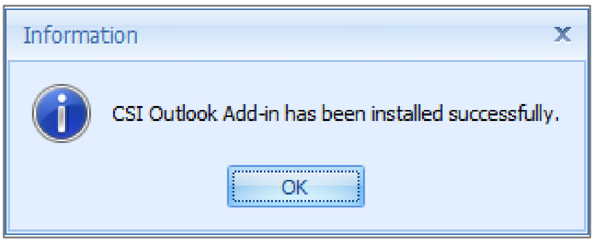
CSI Outlook Add-in can be activated in CSI Lawyer by clicking the user's own name located in the bottom right corner, see the picture below. **NOTE!** Before this action, the power user needs to activate the CSI Outlook Add-in in the Settings, as described earlier.



In the "User Information" window that opens, click the Outlook icon, see the picture above. The system displays the question below, to which you can select Install to start the installation of the CSI Outlook Add-in. Cancel the installation by selecting Cancel.



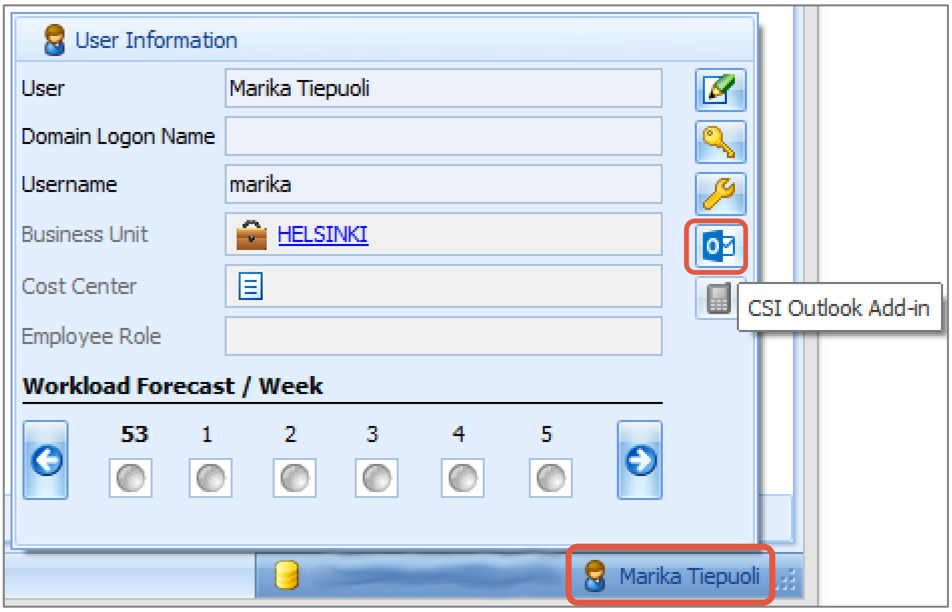
The system informs you when the installation has been finished.



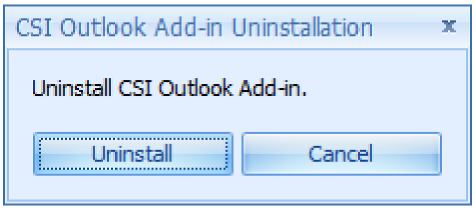
In case Outlook was running during the installation, you have to restart Outlook to take the CSI Outlook Add-in into use.

1.4. REMOVING OUTLOOK ADD-IN FROM USERS

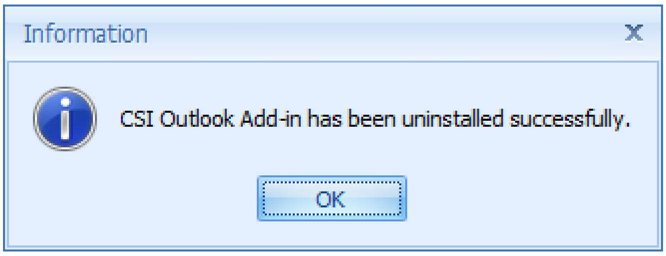
If the user wants to remove the CSI Outlook Add-in, it can be done in CSI Lawyer by clicking the user's own name located in the bottom right corner, see the picture below. **NOTE!** To uninstall the add-in, Outlook must be closed.



In the "User Information" window, click the Outlook icon, see the picture above, to open the question window below. If you select Uninstall, the CSI Outlook Add-in is uninstalled, and its functionality removed from Outlook. You can cancel the uninstallation by selecting Cancel.



The system informs you when the add-in has been uninstalled.



2. USING CSI OUTLOOK ADD-IN IN OUTLOOK

2.1. CSI LAWYER GROUP IN THE HOME RIBBON TAB

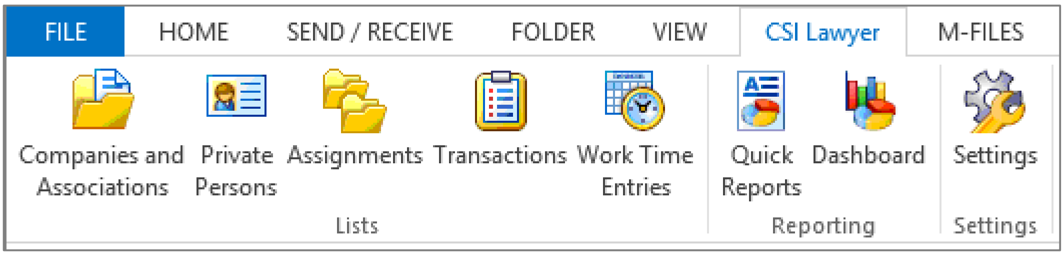
After installing the CSI Outlook Add-in, the Home ribbon tab in Outlook contains a CSI Lawyer group, see the picture below. The commands ”Create Transaction”, ”Open Transaction”, “Create Work Time Entry” and “Open Work Time Entry” are available for e-mail messages, calendar, and tasks. The ”Archive” command, as well as Timer, is available for messages only.

NOTE! These commands are available both for lists, such as an e-mail message list, and for an individual record, such as a message window.

These commands are described in more detail in the following chapters.

2.2. CSI LAWYER RIBBON TAB

Outlook displays a new ”CSI Lawyer” tab with the following features:



Lists Group

- **Companies and Associations**; displays the same list of corporate customers as the Workplace task area in CSI Lawyer. Outlook enables viewing and editing information of existing companies and saving new ones.
- **Private Persons;** displays the same lists of private persons as the Workplace task area of CSI Lawyer. Outlook enables viewing and editing information of existing private persons and saving new ones.
- **Assignments;** displays the same assignment lists as CSI Lawyer. Outlook enables viewing and editing information of existing assignments and saving new ones.
- **Transactions;** displays the same transaction lists as CSI Lawyer. Outlook enables viewing and editing information of existing transactions and saving new ones.

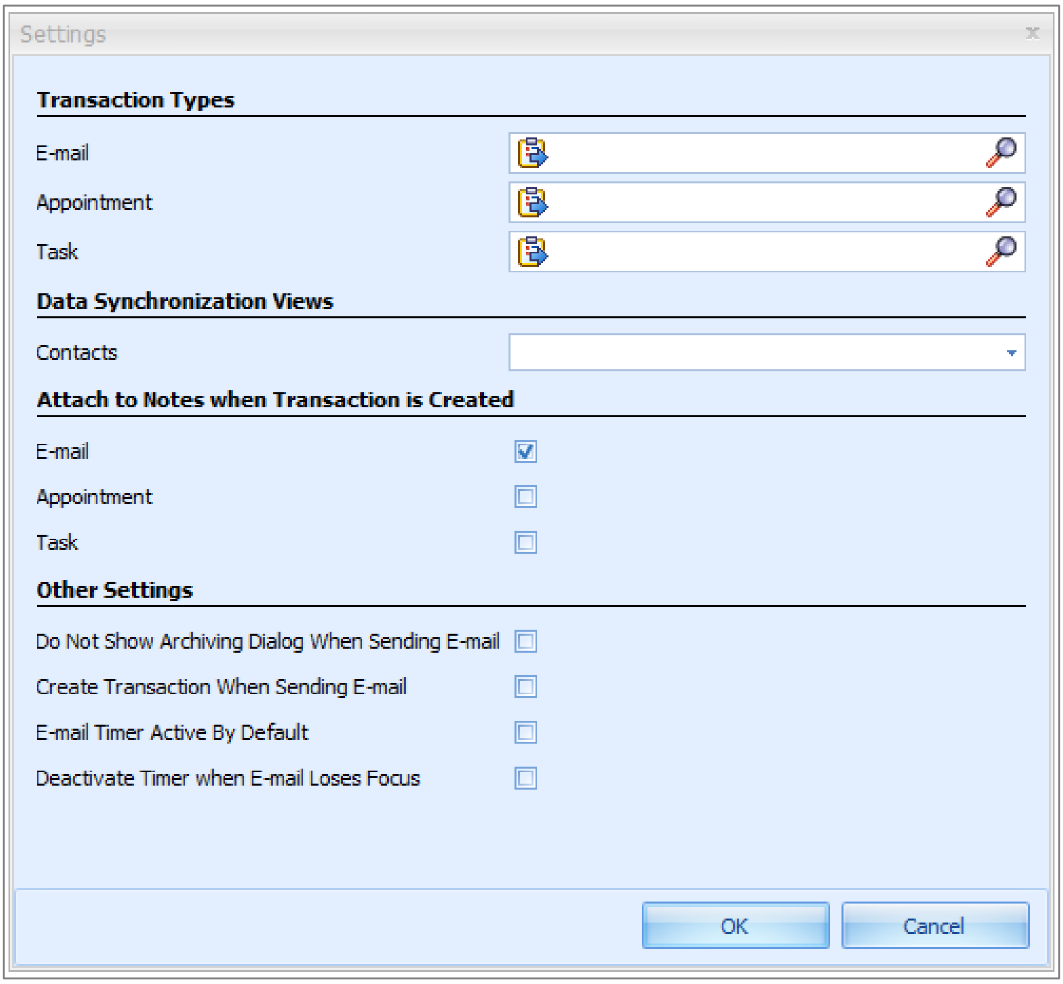
- **Work Time Entries;** displays the same work time entry lists as CSI Lawyer. Outlook enables viewing and editing information of existing work time entries and saving new ones.

Reporting Group

- **Quick Reports;** displays the same reports which are available in the CSI Lawyer Workplace task area.
- **Dashboard;** enables viewing the same dashboard charts as in CSI Lawyer. **NOTE!** To have access to dashboards, they must be in use in CSI Lawyer (not available automatically). In case your office is interested in dashboards, please contact CSI Helsinki.

Settings Group

NOTE! This group is accessible to the CSI Lawyer power users only. The Settings group opens the dialog (see below) for managing the CSI features in Outlook.



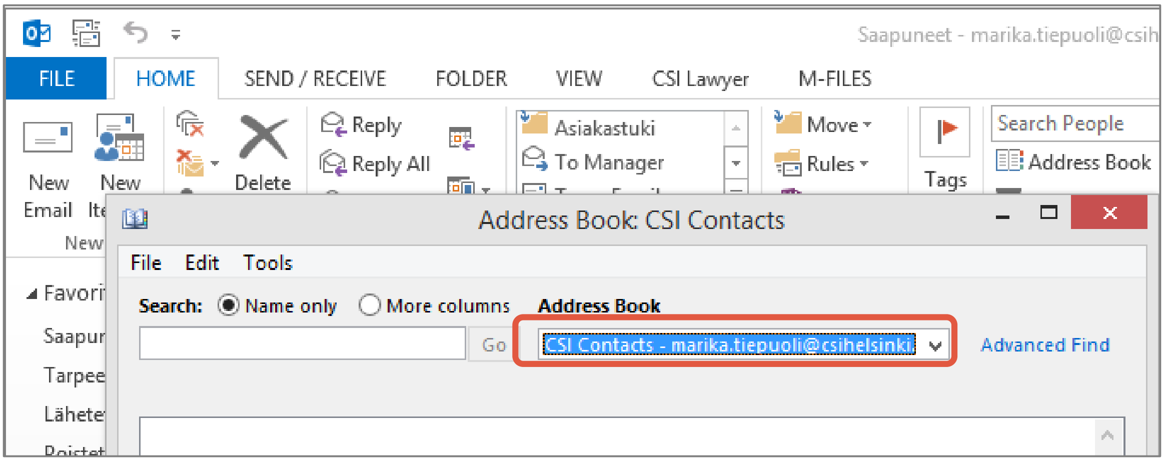
Transaction Types, see the picture above

- To the **Email** field you can select a default transaction type to be used whenever a transaction is registered for a specific e-mail. Once the default transaction type has been defined, the transaction type list no longer opens when you create a transaction for an e-mail. However, it is possible to change the transaction type in the Transaction window.

- To the **Appointment** field you can select a default transaction type to be used whenever a transaction is registered for a specific calendar entry. Once the default transaction type has been defined, the transaction type list no longer opens when you create a transaction for a calendar entry. However, it is possible to change the transaction type in the Transaction window.
- To the **Task** field you can select a default transaction type to be used whenever a transaction is registered for a specific task. Once the default transaction type has been defined, the transaction type list no longer opens when you create a transaction for a task. However, it is possible to change the transaction type in the Transaction window.

<u>Data Synchronization Views, see the picture above</u>

- To the **Contacts** field you can select the default view to be used in Outlook. This defines which list of persons is displayed:
  - Selecting the **Address Book** button (in the Home ribbon tab of Outlook, see the picture below) opens a window where you can select “CSI Contacts” as the address list, see the picture below.



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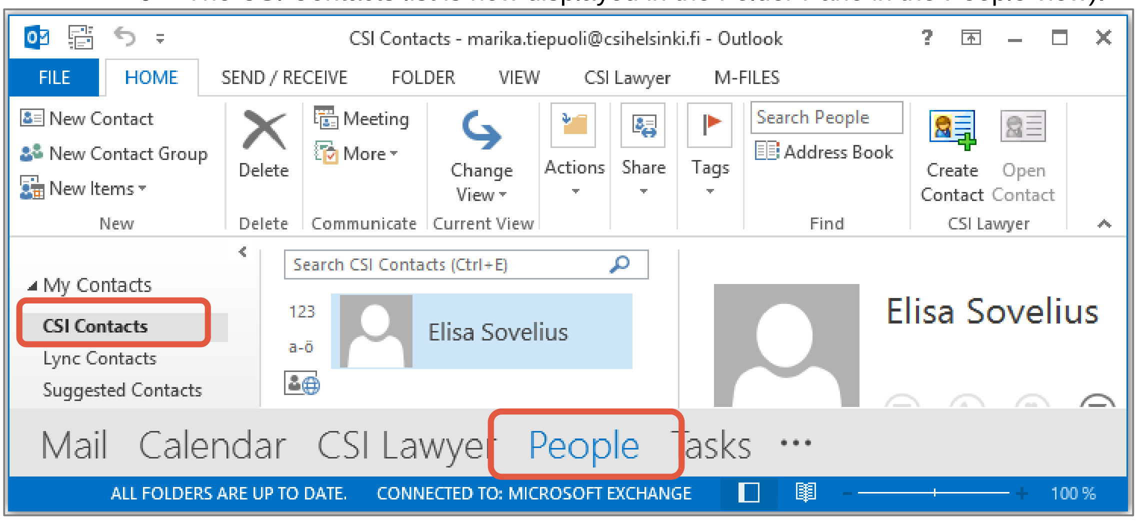
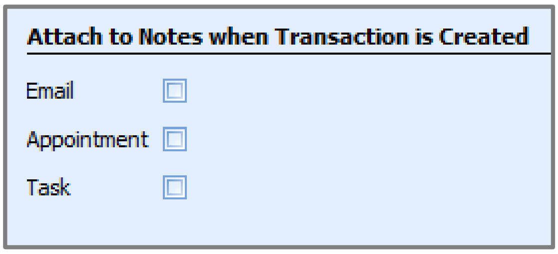
  - The CSI Contacts list is now displayed in the Folder Pane in the People view).

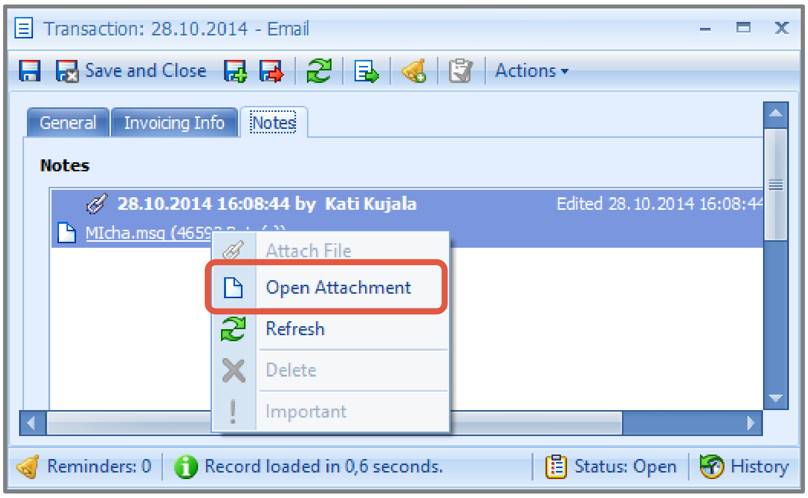


Attach to Notes when Transaction is Created

This part contains three check boxes; E-mail, Appointment, and Task, see the picture below.

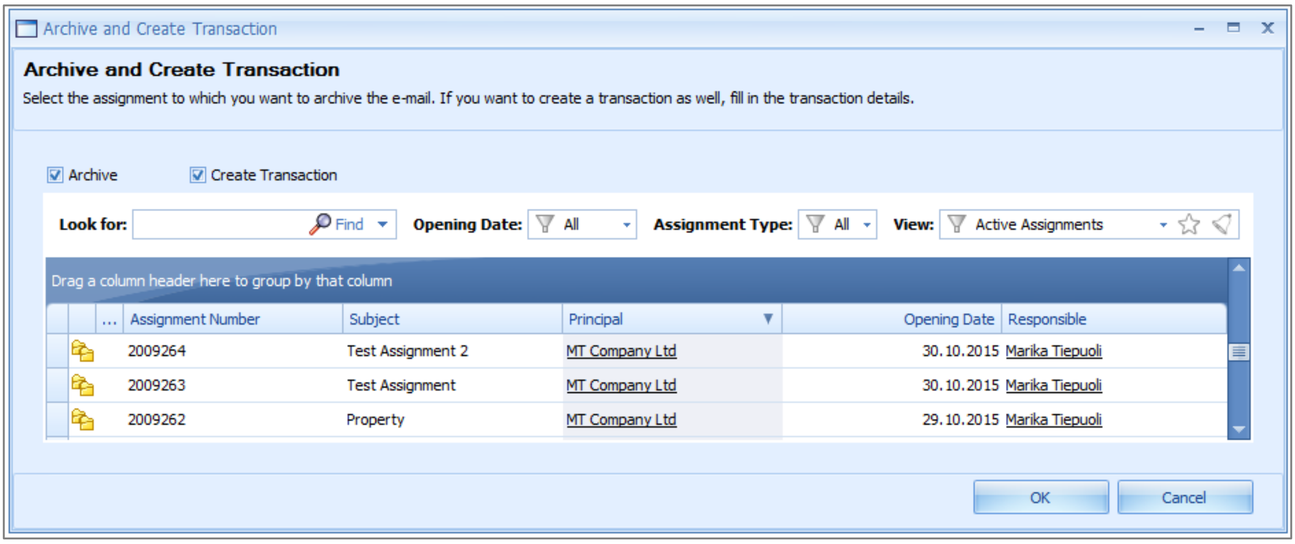


If the E-mail box, for example, is checked, and a transaction created from an e-mail message in Outlook, the message is automatically saved to the Notes tab of that particular transaction in CSI Lawyer. To open the message in CSI Lawyer, open the transaction, go to the Notes tab, right-click the attachment, and select “Open Attachment”.



Other Settings, see the picture above

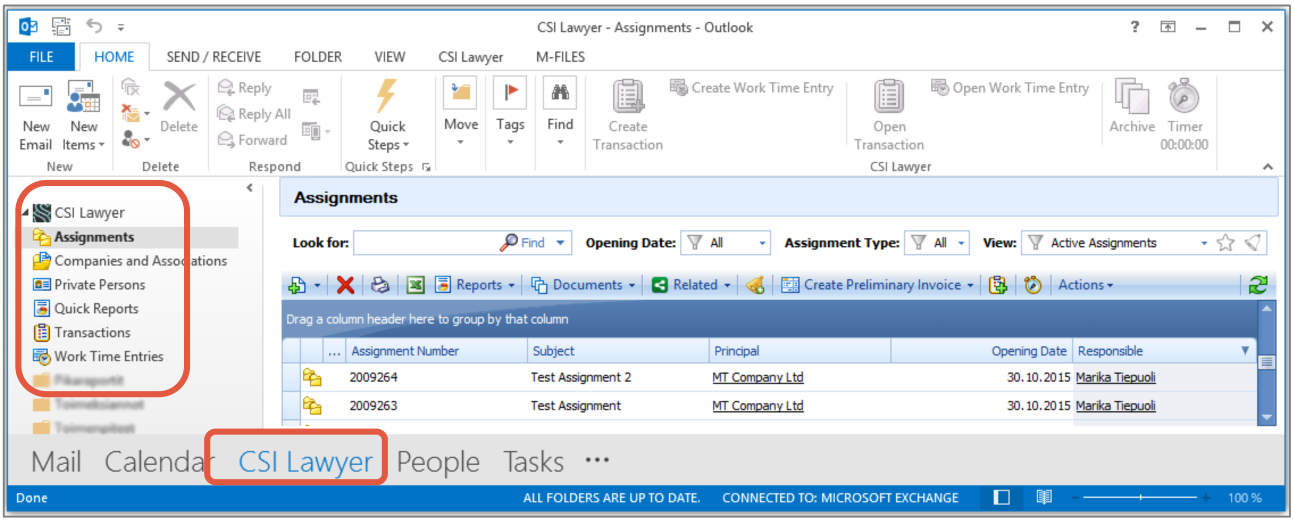
- **Do Not Show Archiving Dialog When Sending E-mail** If selected, the Archiving checkbox in the Look Up Records window won’t be pre-selected. Provided that Create Transaction When Sending E-mail is not selected either, the Look Up Records window won’t be displayed at all.



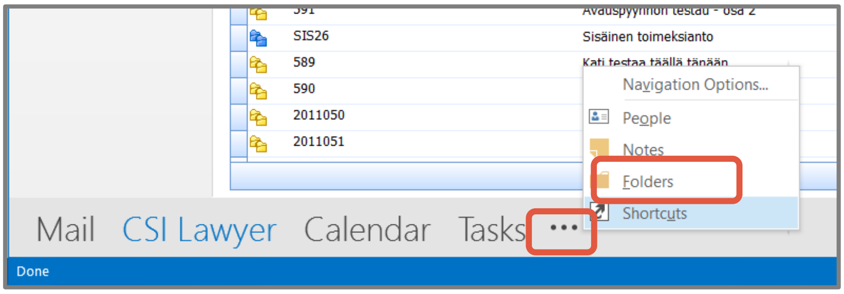
- **Create Transaction When Sending E-mail** If selected, the Create Transaction checkbox in the Look Up Records window will be pre-selected.
- **E-mail Timer Active by Default** If selected, the timer starts automatically when a new message window opens.
- **Deactivate Timer When E-mail Loses Focus** If selected, the timer pauses when the message window loses focus, and continues when focus is regained.

2.3. CSI LAWYER VIEW ON THE NAVIGATION BAR

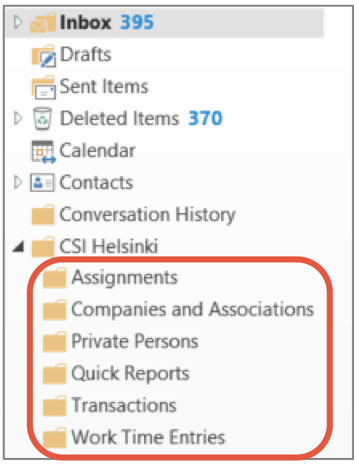
The Navigation Bar at the bottom of the Outlook main window displays the CSI Lawyer view, see the picture below. When you select the view, the Folder Pane on the left shows a list of the same folders (or commands, if you like) as on the CSI Lawyer tab, except for Settings.



You can also access the folders by clicking the ellipsis (three dots) on the Navigation Bar, and then selecting Folders (see the picture below).

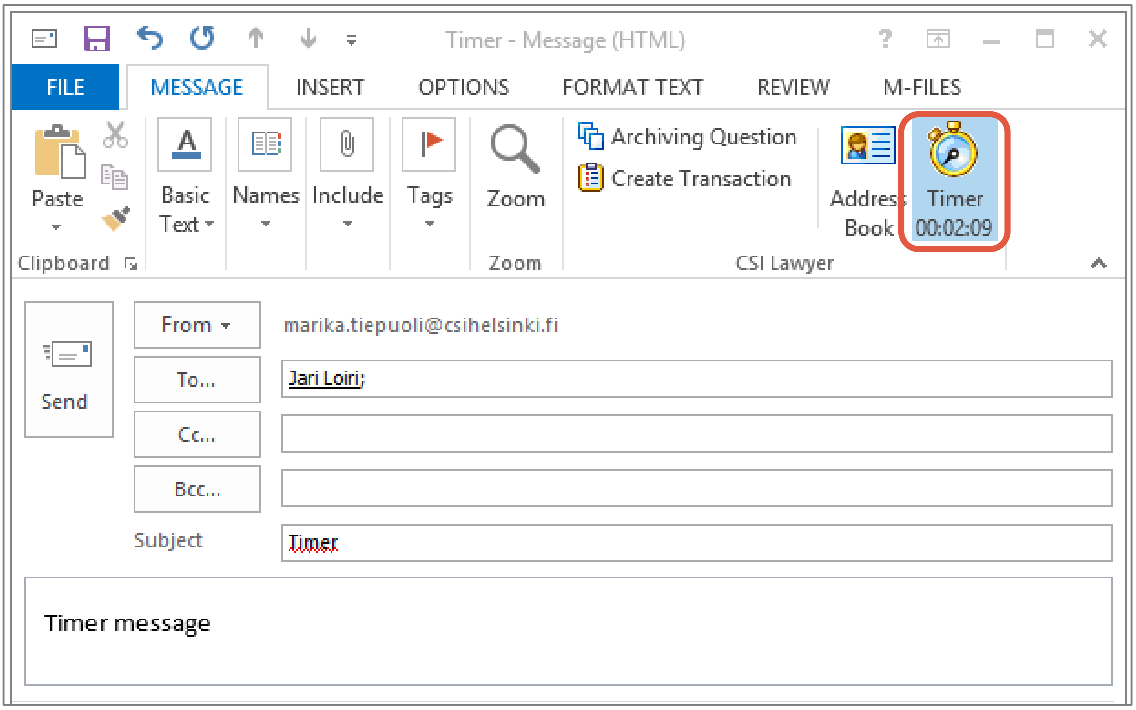


Furthermore, the folders are available in the Mail view, on the Folder Pane.



3. USING TIMER FOR BILLABLE HOURS

The e-mail message window contains a timer with which both the worked and the billable hours of a transaction created for a message will be prefilled.

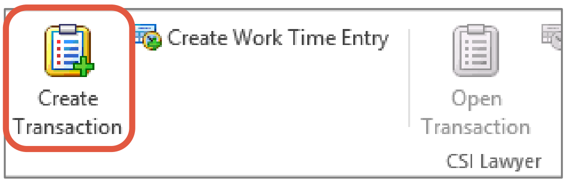


Start and stop the timer manually by clicking the Timer button.

To start the timer automatically when a new message is created, click Settings on the CSI Lawyer tab, and select “E-mail Timer Active by Default”. Select “Deactivate Timer When E-mail Loses Focus”, if you want the timer to pause when the message window loses focus.

4. MANAGING TRANSACTIONS IN OUTLOOK

4.1. CREATING TRANSACTIONS IN OUTLOOK



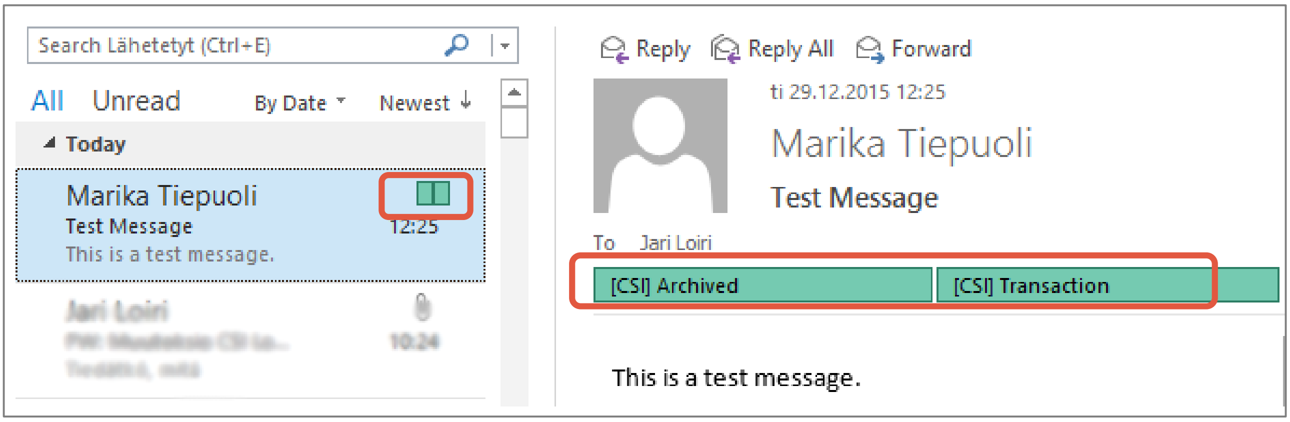
A transaction can be created from an e-mail message, a calendar entry or a task.

4.1.1 CREATING TRANSACTIONS FROM E-MAIL MESSAGES

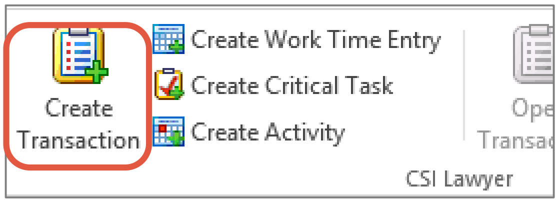
You can create a transaction from an e-mail message either directly from the message list or from an individual message window.

- Select one or more messages.
- Click the ”Create Transaction” button in the ribbon, see the picture above.

- The Transaction Type selection list opens, provided that no default transaction type has been defined (for more information, see CSI Lawyer Tab in Outlook > Settings > Transaction Types).
- A transaction entry window opens. It is identical to the one in CSI Lawyer. Enter the required information and save the transaction.
- Besides creating a billable transaction to CSI Lawyer, this action archives the e-mail message to the Documents folder of the assignment. **NOTE!** To enable this, the Archiving functionality must have been activated at the company level in CSI Lawyer. For more information, see chapter “Company-level Activation of Outlook Add-in”.
- In the message list, messages with transactions are indicated by a green category mark. Moreover, the message contains information about archiving and transaction, see the picture below.

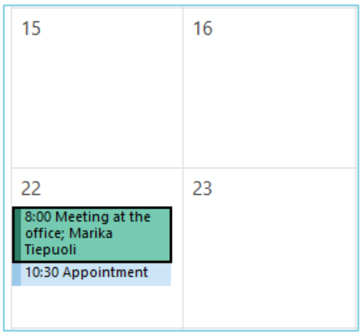


4.1.2 CREATING TRANSACTIONS FROM CALENDAR ENTRIES

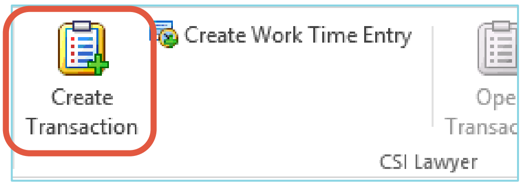


You can create a transaction from a calendar entry either in the calendar view or in the window of an individual calendar entry.

- Click the calendar entry.
- Select the ”Create Transaction” button located in the ribbon, see the picture above.
- The Transaction Type selection list opens, provided that no default transaction type has been defined (for more information, see CSI Lawyer Tab in Outlook > Settings > Transaction Types).
- A transaction entry window opens. It is identical to the one in CSI Lawyer. Enter the required information and save the transaction.
  - The calendar entry subject is displayed as the transaction text.
- In the calendar, the events with transactions are indicated by green color, see the picture below.

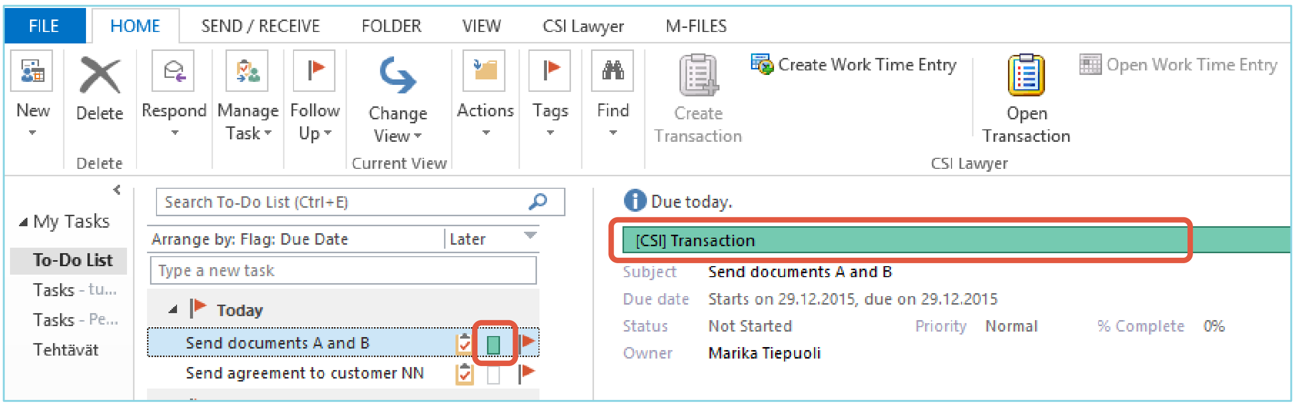


4.1.3 CREATING TRANSACTIONS FROM TASKS



You can create a transaction from a task either directly in the task view or in the window of an individual task.

- Click the task.
- Select the ”Create Transaction” button located in the ribbon, see the picture above.
- The Transaction Type selection list opens, provided that no default transaction type has been defined (for more information, see CSI Lawyer Tab in Outlook > Settings > Transaction Types).
- A transaction entry window opens. It is identical to the one in CSI Lawyer. Enter the required information and save the transaction.
    - The task subject is displayed as the transaction text.
- In the task list, the tasks with transactions are indicated by a green category mark, see the picture below.



4.2. VIEWING AND EDITING TRANSACTIONS IN OUTLOOK

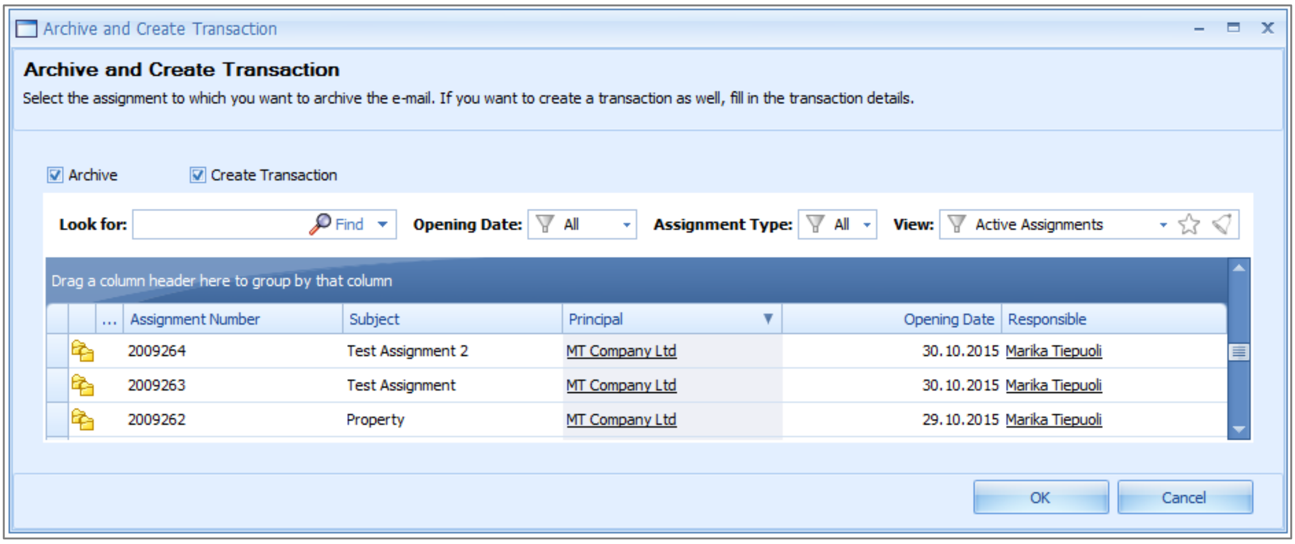
- A transaction created in Outlook can be viewed and edited in Outlook as well.
- Select the message, calendar entry, or task.
- Select the ”Open Transaction” button, see the picture above.
- The Transaction window opens, and you can modify the transaction information.
- The changes are saved to CSI Lawyer.
- If a transaction created in Outlook is later modified in CSI Lawyer, the changes can be viewed in Outlook by clicking ”Open Transaction”.

5. ATTACHING E-MAIL MESSAGES TO ASSIGNMENTS / ARCHIVING

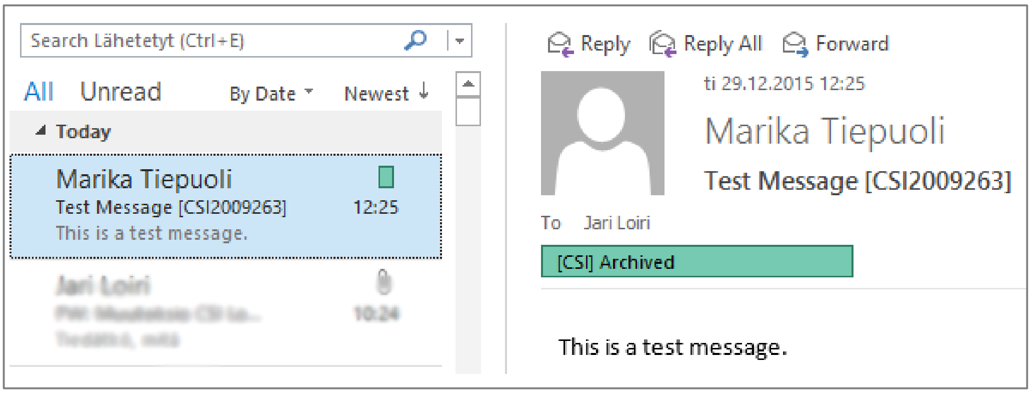
For archiving Outlook e-mail messages, the Archiving settings must be defined in CSI Lawyer (in business unit parameters) and the CSI Outlook Add-in for Docs must be activated in collaboration with CSI Helsinki when installing CSI Outlook Add-in.

5.1. ARCHIVING MESSAGES TO BE SENT

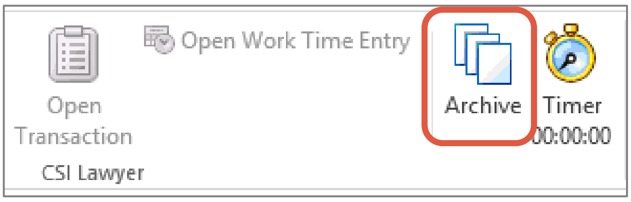
When you send a message, the Archive and Create Transaction window (see below) opens.



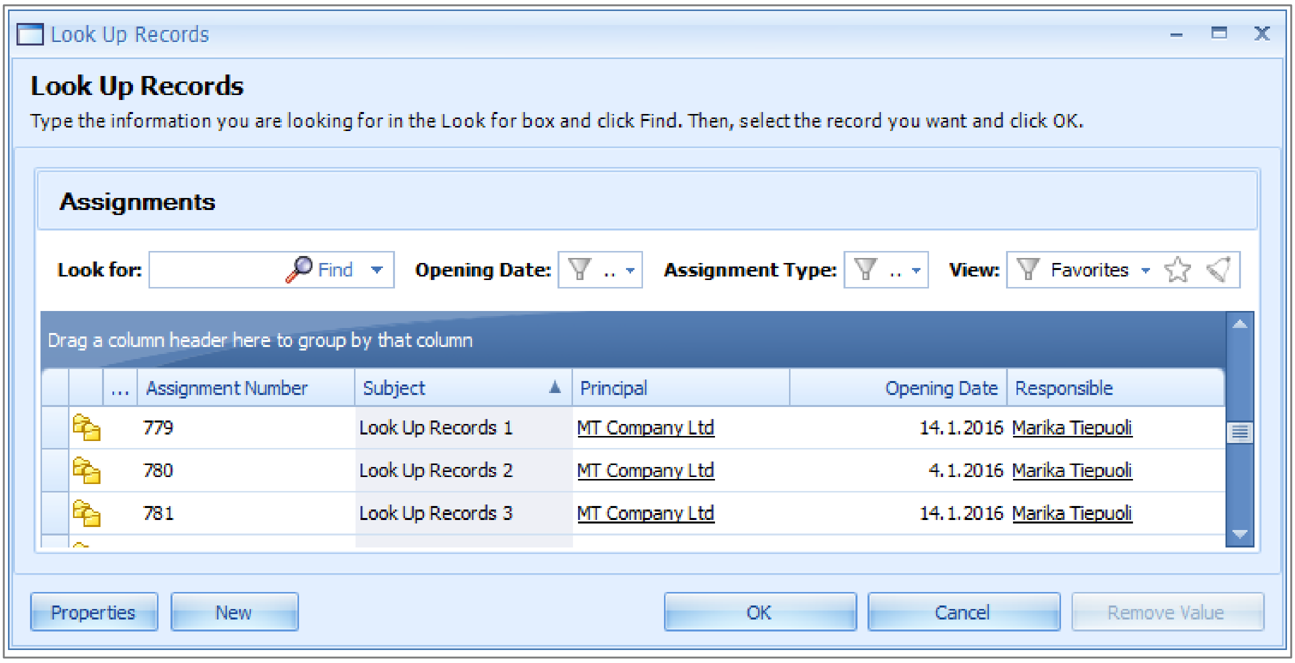
- Select the Archive checkbox.
- Select the assignment to which you want to archive the message, and click OK.
- If you do not want to archive the message you are sending, click Cancel.
- If the message is sent outside the own office, the recipient's replies and the other messages in the same thread will be archived under the selected assignment.
- **NOTE!** If a message is sent inside the user's own office, the recipient's reply is not saved to the assignment.
- Provided that an archive prefix for the message subject has been defined in the archiving component parameters, the prefix and an assignment number are added to the end of the subject of the archived message. For example, in "CSI2000", "CSI" is the prefix and "2000" the assignment number.
- **NOTE**! Avoid using very generic prefixes, such as "CASE". A unique prefix – the (abbreviated) name of the business unit, for example – is recommended.
- The archived message is tagged with the green color code and the text "[CSI] Archived", see the picture below.



5.2. ARCHIVING EXISTING E-MAILS



- Select a message on the list, or open a message to a new window. You can archive multiple messages into one assignment simultaneously, provided that none of the messages has been archived yet.
- Click “Archive” in the ribbon, see the picture above. The ”Look Up Records” window opens.

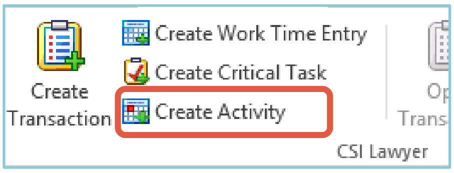


- The message has a green category mark and a tag [CSI] Archived. Additionally, provided that an archive prefix for the message subject has been defined in the archiving component parameters, the prefix and an assignment number are added to the end of the subject of the archived message.

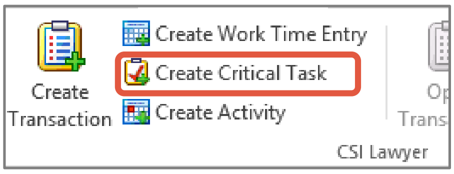
6. CREATING ACTIVITIES FROM CALENDAR ENTRIES

With the Outlook Add-in it is possible to add an activity to a calendar appointment. This enables utilizing activities for CRM kind of purposes.

Select first the appointment from the Outlook calendar. Then click the Create Activity button in the CSI Lawyer group in the ribbon.



7. CREATING CRITICAL TASKS FROM CALENDAR ENTRIES

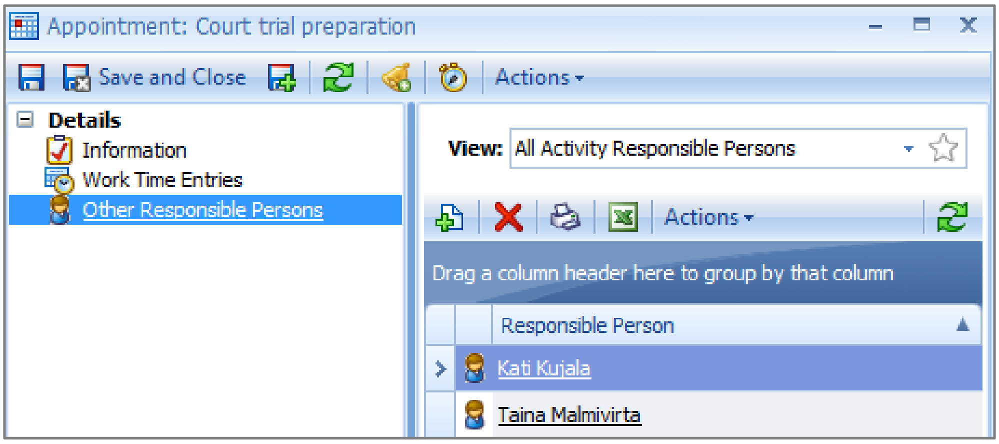


Besides transactions, you can create critical tasks from calendar entries. Select a calendar entry and then click ”Create Critical Task” in the ribbon, see the picture above. A critical task activity window opens.

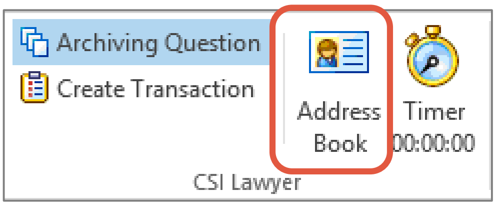
Once saved and closed, a critical task is visible in CSI Lawyer. To prevent duplicates of critical tasks, the ”Create Critical Task” button will be disabled.

In case the calendar entry concerns other CSI Lawyer users, they are linked to the critical task. The list of other persons can be viewed in CSI Lawyer in the critical task information. In the Critical Task window, select the ”Other Responsible Persons” subfolder. There you can find a list of CSI Lawyer users involved in the calendar entry, see the picture below.

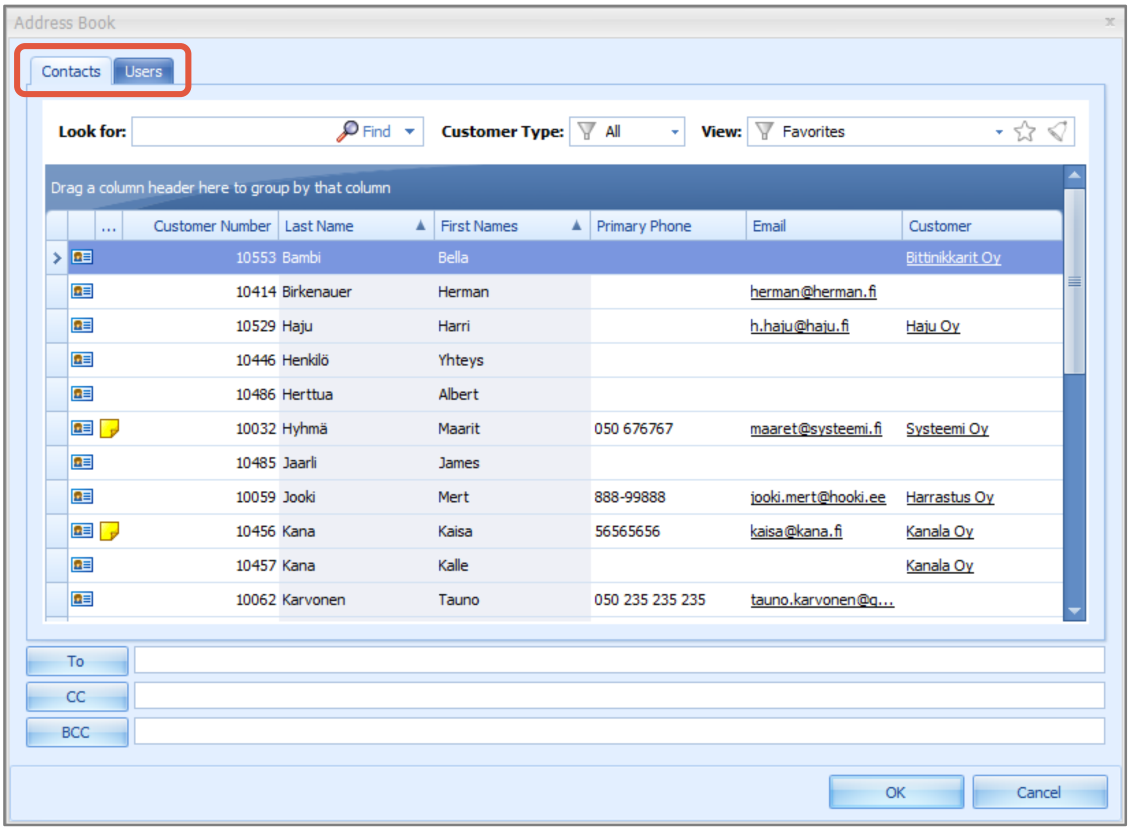
NOTE! To benefit from this functionality, e-mail addresses must be saved for these users in CSI Lawyer. You can save them to user information in the Settings (Settings > Business Unit Parameters > User Parameters > Users).



8. USING CSI LAWYER E-MAIL ADDRESSES IN OUTLOOK



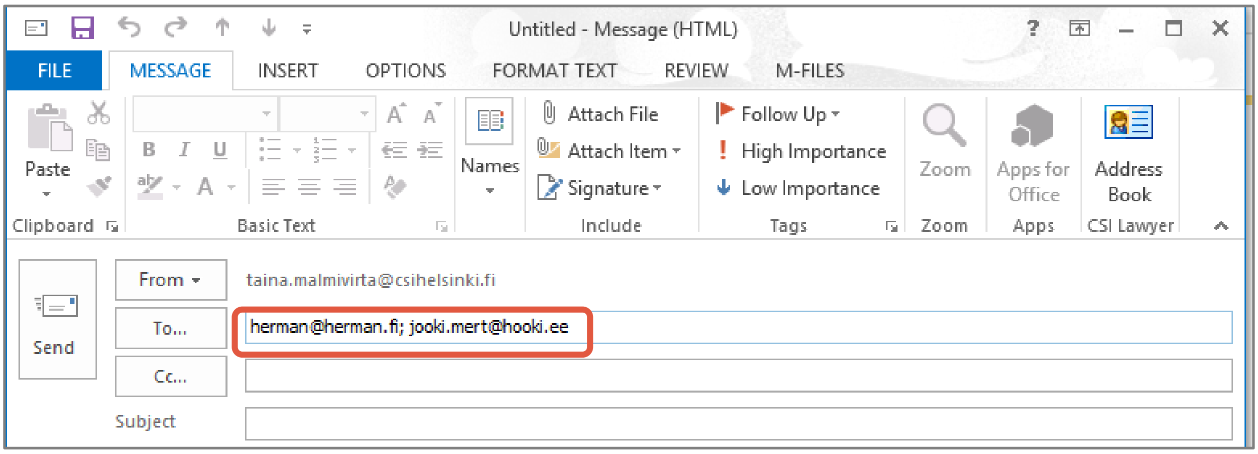
In the new message window, the CSI Lawyer group in the ribbon contains the ”Address Book” command, see the picture above. It enables you to select private persons or users in CSI Lawyer as e-mail recipients, see the picture below.



In the Contacts tab, see the picture above, you can change the list view from the upper right corner.

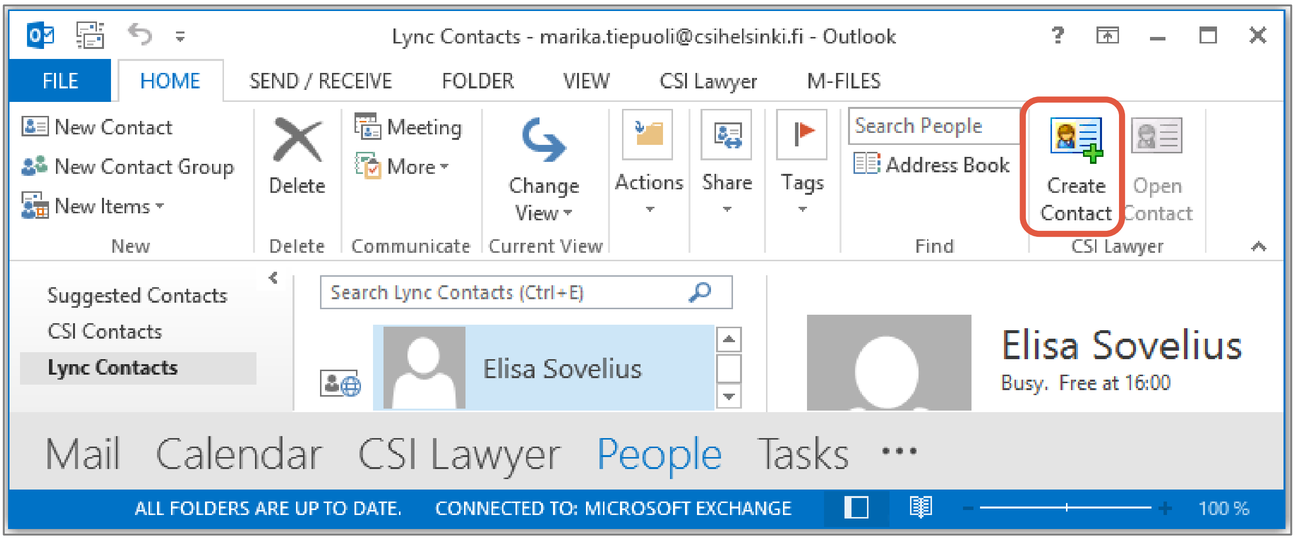
In the Users tab, you can also add CSI Lawyer users to e-mail recipients. **NOTE!** To benefit from this functionality, e-mail addresses must be saved for these users in CSI Lawyer. You can save them to the user information in the Settings (Settings > Business Unit Parameters > User Parameters > Users).

After entering the required addresses, click OK. The Address Book dialog closes and the selected e-mail addresses are displayed in the e-mail recipient information, see the picture below.



9. SAVING OUTLOOK CONTACT AS CSI CONTACT

In the Outlook People view, a contact can be added as a CSI contact person.



Select the People view in Outlook. From the contact list, select the person you want to add as a CSI contact. Then click the Create Contact button (see the picture above) in the ribbon to open a pre-filled contact information window.

To view or edit an existing CSI contact, click the Open Contact button.