Microsoft Office Add-ins for InfoScreen Quorum® - Guide

Version 2.0.2
November 18, 2010

"*This completes another step towards the seamlessly integrated Document Management System that will follow shortly,*" said Bojan Mijušković the Software Development Manager of InfoScreen. "The released ***Microsoft Office Add-ins*** provide ***InfoScreen Quorum®*** users with the added functionality they had been looking for. Through these Add-ins, users are given access to the filing structure of the entities in ***InfoScreen Quorum®*** directly from within Microsoft Word, Excel and Outlook. With the ***Microsoft Office Add-ins*** it is now possible to Open and/or Save any Document from and to ***InfoScreen Quorum®*.**

The Document Storage facility, that is an integral part of ***InfoScreen Quorum®***, provides the ideal solution for a central location to store all types of documents and automatically relate them to any Contact or Entity in ***InfoScreen Quorum®***.

Using the Add-ins

You can use the **Microsoft Office Add-ins for InfoScreen Quorum® provided that:**

1. **One of the supported versions of Microsoft Office is installed on your computer**
2. **The relevant *Add-in* is installed on your computer**
3. **InfoScreen Quorum is running** i.e. a user is logged-on from your computer

The term ***Add-in*** refers to "small programs that extend the capabilities of an application by adding custom commands and specialized features". As such, it is necessary to install the required Add-ins on each computer to which you wish to provide the added functionality.

<u>Three Add-ins are currently available for Microsoft Office:</u>

1. **Microsoft Word Add-in**
2. **Microsoft Excel Add-in**
3. **Microsoft Outlook Add-in**

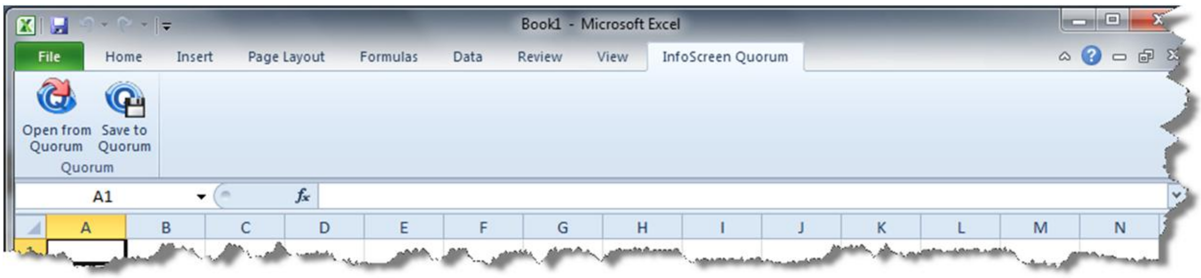
Supported versions: Microsoft Office XP (2002), 2003, 2007 and 2010

Microsoft Word and Excel

InfoScreen Quorum Add-ins for Microsoft Word and Excel offer the same functionality and can be accessed from the **InfoScreen Quorum tab** on the Ribbon (applies to Microsoft Office 2010 and 2007; earlier versions of Microsoft Word and Excel will display the *InfoScreen Quorum group options* as part of the Toolbar).

Microsoft Word 2010 Ribbon

Microsoft Excel 2010 Ribbon



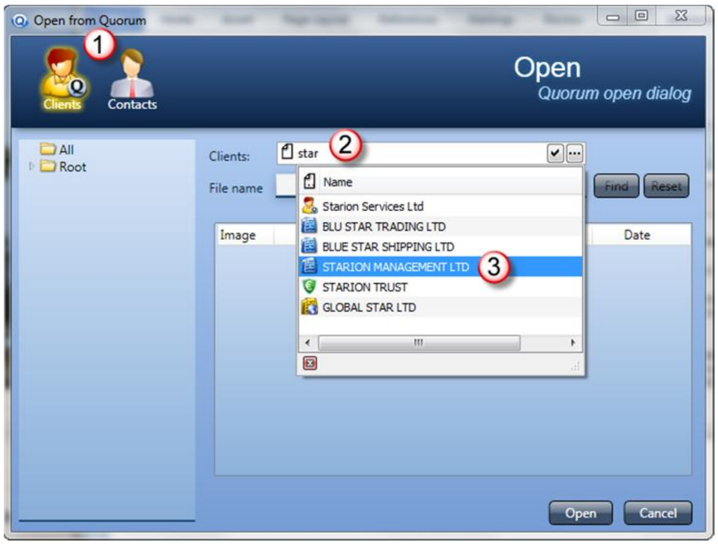
Two functions are available:

1. Open from Quorum
2. Save to Quorum

1. Open from Quorum (Microsoft Word or Excel)

1.1. To Open any Word or Excel document that is currently stored in Quorum *click* on the **Open from Quorum icon**.

1.2. The Open (Quorum open dialog) window opens up.



1.3. *Click on* **Clients** or **Contacts** depending where your document is stored. By clicking on the Clients the system will match clients in the **Corporate module** (Companies, Trusts, Branches, etc) as well as other **Clients** (such those that do not belong to the Corporate services module)**.**

1.4. In the **Clients** field, *type* at least 3 letters from the name of the Client and then *press enter*. The system will match the letters to your Clients and if it finds more than one match it will display a list of results. The icon in front of each Client corresponds to the type of Client i.e. General Client, Company, Trust, Branch, etc.

1.5. *Double click* on a Client to have their Microsoft Word or Excel documents listed. You can also navigate through the Folder list on the left.

1.6. *Select a document* from the list and *click* on the **Open** button. The selected document will open in Word or Excel.

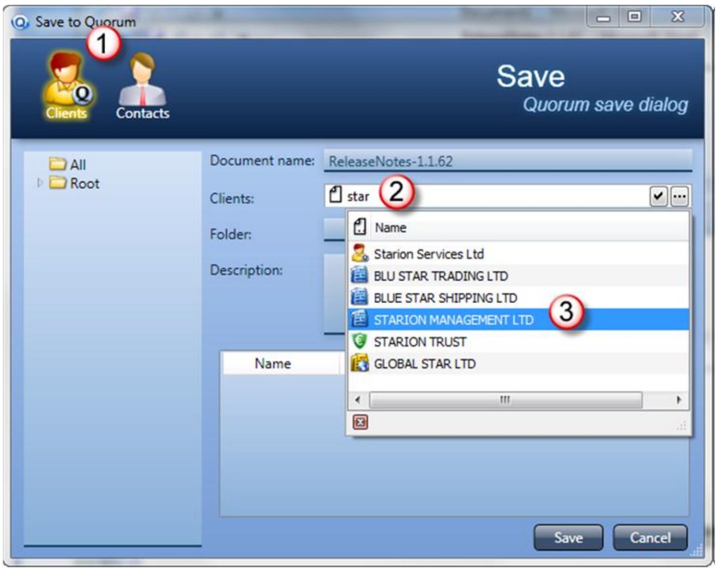
IMPORTANT NOTES:

1.6.1. *To Save* any modifications in the document back to its **original location in InfoScreen Quorum** so that the original document is replaced with the modified document, **use the normal Save button or default Save shortcut in Microsoft Word or Excel**.

1.6.2. *To Save* any modifications in the document to a **NEW location in InfoScreen Quorum** e.g. to a different Client or Contact, *click* on the Save to Quorum icon on the ribbon. The steps are similar to the ones described above but they are also explained further in Section 2 below (Save to Quorum).

2. Save to Quorum (Microsoft Word and Excel)

2.1. To Save an **Opened** or **New Word or Excel** document to InfoScreen Quorum *click* on the Save to Quorum icon. The Save (Quorum save dialog) window opens up.



2.2. *Click on* **Clients** or **Contacts** depending on where you prefer to store your document.

2.3. In the **Clients** field, *type* at least 3 letters from the name of the Client and then *press enter*. By clicking on Clients the system will match clients in the **Corporate module** (Companies, Trusts, Branches, etc) as well as other **Clients** (i.e. that do not belong to the Corporate services module)**.** Clicking on Contacts will match entries in Contacts.
If it finds more than one match it will display a list of results. The icon in front of each Client corresponds to the type of Client i.e. General Client, Company, Trust, Branch, etc.

2.4. *Double* click on the preferred Client.

2.5. *Click* on the **Save** button. The selected document will be saved under the Root folder in the selected Client. Optionally, you may add additional parameters such as:

2.5.1. *Select* a subdirectory from the list to save your document there.

2.5.2. *Add* a Description that provides additional information related to your document.

Microsoft Outlook

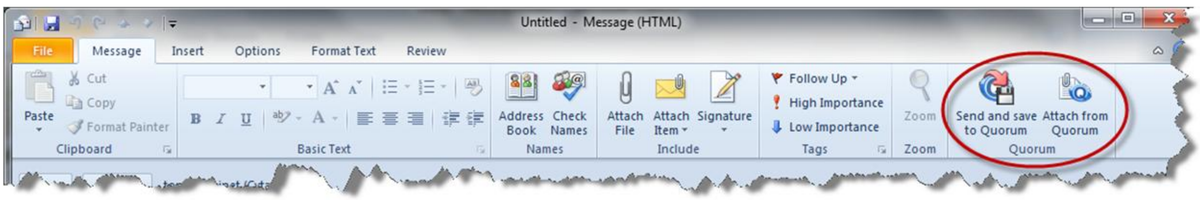
InfoScreen Quorum Add-ins for Microsoft Outlook offer similar functionality like their counterparts in Word and Excel and can be accessed from the Ribbon (earlier versions of Microsoft Word and Excel will display the *InfoScreen Quorum group options* as part of the Toolbar) in a new or opened email.

Microsoft Outlook 2010 Ribbon (received and opened email)

Three functions are available:

1. Save to Quorum
2. Save attachments to Quorum
3. Create a task in Quorum

Microsoft Outlook 2010 Ribbon (new email)

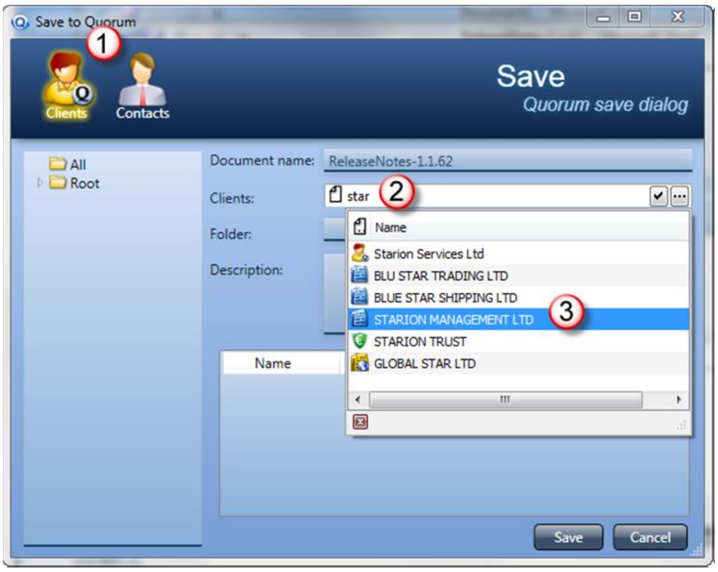


Two functions are available:

4. Send and Save to Quorum
5. Attach from Quorum

1. Save to Quorum (Microsoft Outlook)

1.1. To Save an **Opened** email to InfoScreen Quorum *click* on the Save to Quorum icon. The Save (Quorum save dialog) window opens up.



1.2. *Click on* **Clients** or **Contacts** depending on where you prefer to store your email.

1.3. In the **Clients** field, *type* at least 3 letters from the name of the Client and then *press enter*. By clicking on Clients the system will match clients in the **Corporate module** (Companies, Trusts, Branches, etc) as well as other **Clients** (i.e. that do not belong to the Corporate services module)**.** Clicking on Contacts will match entries in Contacts.

If it finds more than one match it will display a list of results. The icon in front of each Client corresponds to the type of Client i.e. General Client, Company, Trust, Branch, etc.

1.4. *Double* click on the preferred Client.

1.5. *Click* on the **Save** button. The selected document will be saved under the Root folder in the selected Client. Optionally, you may add additional parameters such as:

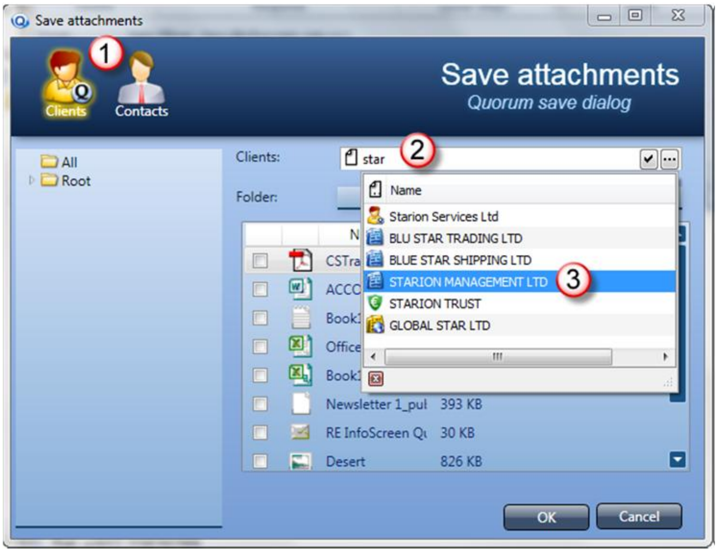
1.5.1. *Select* a subdirectory from the list to save your document there.

1.5.2. *Add* a Description that provides additional information related to your document.

2. Save attachments to Quorum (Microsoft Outlook)

2.1. To Save the attachments from an **Opened** email to InfoScreen Quorum *click* on the **Save attachments to Quorum** icon. The Save (Quorum save dialog) window opens up.

2.2. *Click on* **Clients** or **Contacts** depending on where you prefer to store the attachments.

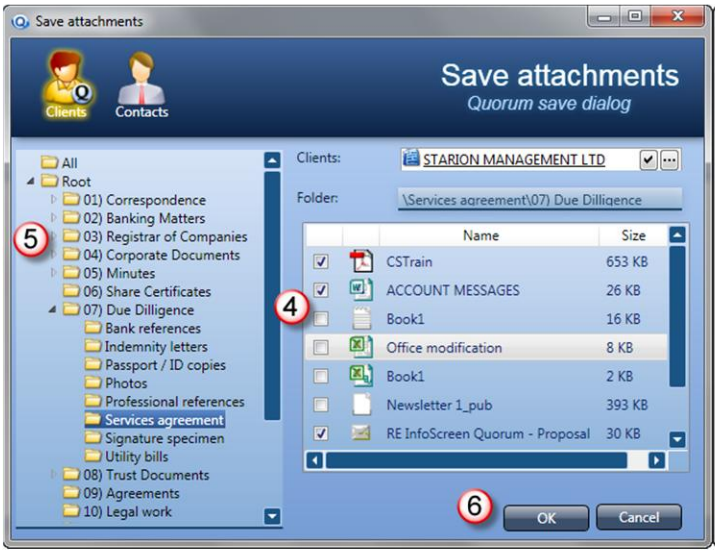


2.3. In the **Clients** field, *type* at least 3 letters from the name of the Client and then *press enter*. By clicking on Clients the system will match clients in the **Corporate module** (Companies, Trusts, Branches, etc) as well as other **Clients** (i.e. that do not belong to the Corporate services module)**.** Clicking on Contacts will match entries in Contacts.
If it finds more than one match it will display a list of results. The icon in front of each Client corresponds to the type of Client i.e. General Client, Company, Trust, Branch, etc.

2.4. *Double* click on the preferred Client.

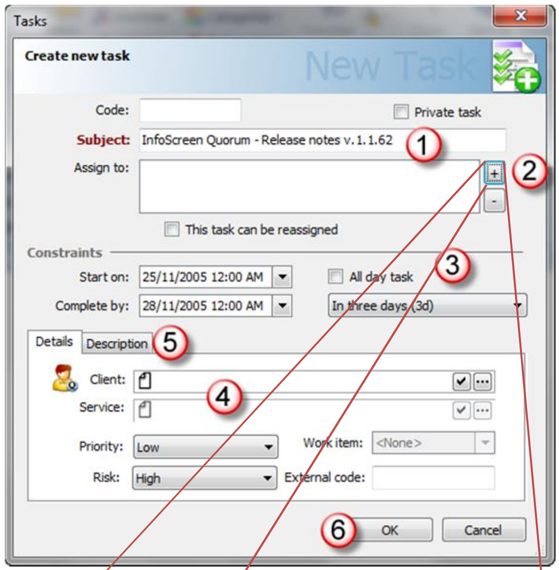
2.5. *Click* on the check box at the front of each attachment in the list to select it for saving and *click* on the **OK** button. The selected document will be saved under the Root folder in the selected Client.

Optionally, you may also *Select* a subdirectory from the list to save your document there.



3. Create a task in Quorum (Microsoft Outlook)

3.1. To **Create a task** in InfoScreen Quorum and assign it to users immediately, *click* on the **Create a task in Quorum** icon. The **Create new task** window opens up.



3.1.1. The Subject is taken automatically from the email itself. Change it if necessary.

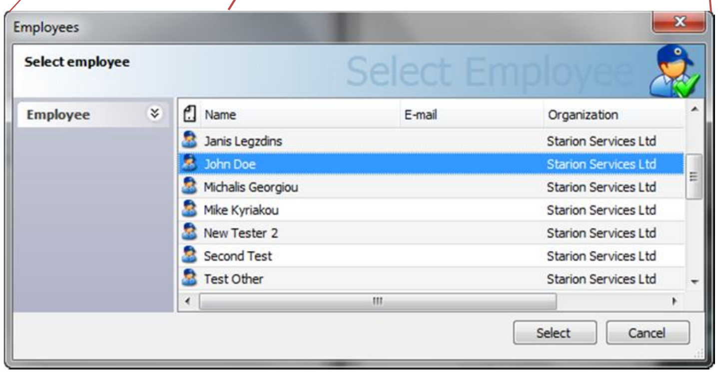
3.1.2. *Click on* the Plus button to select one or more users to assign the task to.

3.1.3. Adjust *the* time Constraints for the completion of the task.

3.1.4. In the **Client** field, *type* at least 3 In the **Client** field, *type* at least 3 letters *from* the name of the Client and then *press enter*. The system will match clients in the **Corporate module** (Companies, Trusts, Branches, etc) as well as other **Clients** (i.e. that do not belong to the Corporate services module)**.** If it finds more than one match it will display a list of results. The icon in front of each Client corresponds to the type of Client i.e. General Client, Company, Trust, Branch, etc. *Double* click on the preferred Client.

3.1.5. *Click* on the **Description tab** and complete any further information or instructions.

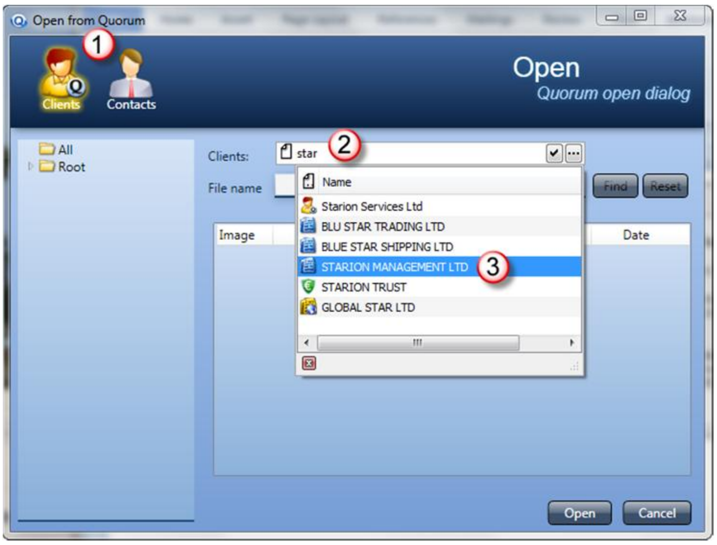
3.1.6. *Click* on **Save** to complete the operation.



4. Attach from Quorum (Microsoft Outlook)

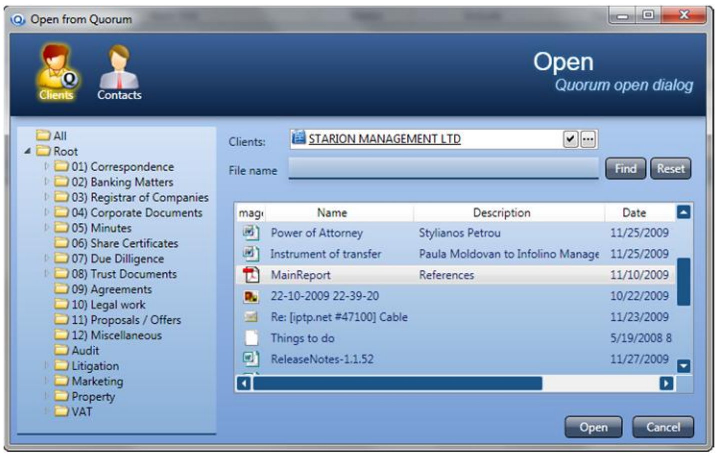
4.1. To Attach to a **New** email any document that is currently stored in Quorum *click* on the **Attach from Quorum** icon.

4.2. The Open (Quorum open dialog) window opens up.



4.3. *Click on* **Clients** or **Contacts** depending where your document is stored. By clicking on the Clients the system will match clients in the **Corporate module** (Companies, Trusts, Branches, etc) as well as other **Clients** (such those that do not belong to the Corporate services module)**.**

4.4. In the **Clients** field, *type* at least 3 letters from the name of the Client and then *press enter*. The system will match the letters to your Clients and if it finds more than one match it will display a list of results. The icon in front of each Client corresponds to the type of Client i.e. General Client, Company, Trust, Branch, etc.



4.5. *Double click* on a Client to have their documents listed. You can also navigate through the Folder list on the left.

4.6. *Select a document* from the list and *click* on the **Open** button. The selected document will be attached to your email.

4.7. *To Attach* multiple documents to your email repeat the above steps. [A multi-selection feature will follow in forthcoming releases.]