WHITE PAPER

QuickFile4Outlook

LAW OFFICE EDITION

Setup and Use QuickFile 4Outlook with Microsoft Exchange Server

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Abstract

This paper provides an overview of how QuickFile 4Outlook can be used throughout the organization. It has details of the benefits, setup and deployment instructions.

QuickFile 4Outlook – Lawyers Edition

QuickFile 4Outlook – Lawyers Edition is a special version of QuickFile 4Outlook created specially to meet the needs of Lawyers and Law Firms.

QuickFile 4Outlook – Lawyers Edition works inside Outlook and simplifies the management of both printed and electronic copies of e-mails by:

- Filing incoming e-mails out of the Inbox folder and into dedicated case or project folders at the click of a button.
- Filing outgoing e-mail automatically out of the Sent Items folder and into dedicated case or project folders at the click of a button.
- Ensuring that all important e-mails get printed for filing by printing all incoming and outgoing e-mails at the click of a button at the end of the day.
- Ensuring that printed e-mails get filed into the correct folder by printing extra information identifying the project on the e-mail
- Allowing archiving of e-mails outside Outlook by exporting selected e-mails (or entire folders) to indexed Word or HTML documents.

You can find more information on QuickFile 4Outlook – Lawyers Edition at:
http://www.Outlook4Lawyers.com

QuickFile 4Outlook – Law Office Edition

Does this sound familiar?

"Email is supposed to make things easier around here," a law firm partner complains. "But, all too often, email sent to one of our lawyers is either unknown or inaccessible to others working on the same case."

For organizations with MS Exchange Server, QuickFile can further assist with the *centralized filing* of e-mails.

QuickFile™ 4Outlook—Law Office Edition is not a separate program from the Lawyers Edition. It is in fact the same program with a few extra steps taken on the server.

What additional benefits can QuickFile deliver for the firm using MS Exchange Server?

Public Folders in Exchange Server provide a handy way of saving e-mails to a central place on the server where all authorised users can access them.

Unfortunately Public Folders rarely get used well because of the manual process required to inform all e-mail users in a company where e-mails for particular cases need to be filed.

QuickFile 4Outlook automates this process.

"Shortcuts" are the QuickFile Rules that are set up to identify and route emails to their appropriate folders.

Organizing using MS Exchange can use "shared shortcut" lists. A shortcut on a shared list will be automatically available to all users with access to that list i.e. a QuickFile filing rule created by one user will automatically become available for use by other authorised colleagues.

This ensures that all email communication associated with a particular project or case is placed in the same correct folder on the server – irrespective of who sends or receives the e-mail.

When everyone on a case can share these shortcuts, productivity and accuracy dramatically improve.

Requirements

Microsoft Outlook 2000 or later
QuickFile 4Outlook requires the client computer to have Microsoft Outlook 2000 or later installed. The latest versions of QuickFile will be updated to support all newer versions of Outlook.

Microsoft Exchange Server
QuickFile 4Outlook does **NOT** need Microsoft Exchange Server.

QuickFile 4Outlook can be used on individual computers or throughout the organization with or without Exchange Server.

You only need Microsoft Exchange Server if you wish to use Shared Shortcuts and Public Folders to have common folders in which users can file their e-mails.

Deploying/Installing QuickFile through the Organization

QuickFile 4Outlook is an Outlook add-on product that needs to be installed on each user's computer.

This can be done by:
1. Manual Installation: Installing the program manually on each user's computer
2. Automatic Deployment: Configuring Microsoft Windows Server or Microsoft Small Business Server to automatically install QuickFile on each user's computer.

We only recommend Automatic Deployment if you have more than 20 users and a strong technical expertise of Active Directory in Windows Server.

Details of installations using both methods can be found in:
Appendix I: QuickFile 4Outlook – Manual Installation
Appendix II: QuickFile 4Outlook – Automatic Deployment

Setting up Shared Shortcuts on Exchange Server

QuickFile Shared shortcuts allow you to centralize and simplify the storage and management of e-mails pertaining to a particular project, case or client. This makes it easier for you to track e-mails sent and received for a particular project/case.

Using shared shortcuts, all e-mails received from and sent to a client by different staff members can be stored centrally i.e. in a Public folder. This public folder can be viewed by any staff and thus all correspondence can be kept track of easily.

Creating a Shared Shortcut

A shared shortcut that you create points to a Public Folder that you will use to file your e-mails to. Shared shortcuts are stored in a shared shortcut list.

To create a Shared Shortcut, you need to:
1. Create appropriate public folders to store your shared shortcut list and your e-mails
2. Create shared shortcut

Create appropriate public folders

(Seek assistance from your Exchange Administrator)
1. Create a folder named **QuickFile** in your Public Folders.
2. Under the QuickFile folder that you or your Administrator has created on Exchange, create another folder and give it a suitable name.

   Any folder created under the QuickFile folder will store a shared shortcut list. The name that you give to this Public Folder will represent your shared shortcut list.

   We recommend that you do not save any e-mails into this folder.

   At a minimum the following permissions must be assigned to any user allowed to use a shared shortcut list using QuickFile

   Read Permissions, Synchronize, List Contents, Read Attributes, View Item, Read Body, Write Property, Write Attributes, Write Body, Write Own Property

3. Create a separate folder in Exchange where you want to file all your e-mails into. Do NOT create this folder under the QuickFile folder.

You Exchange folders will look similar to this:
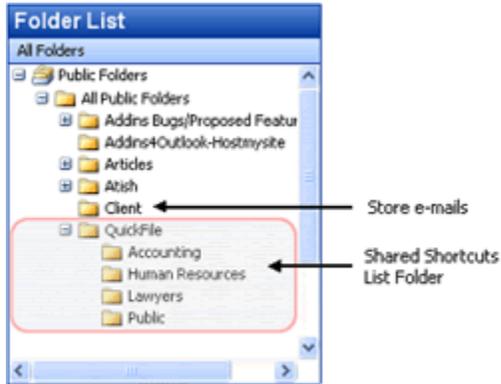
As an example I have created some folders under the QuickFile folder. Shared shortcut lists will be stored in these folders. I have also created a **Client** folder in Exchange where all client e-mails will be filed to.

You can create folders to suite your needs.

Create Shared Shortcut

A shared shortcut points to a Public folder, you will use for filing e-mails. It can be used department or company wide for storing e-mails centrally.

1. Go to the Inbox. Select an e-mail you received from a client.
2. Click the **QuickFile** button. The QuickFile screen will open.
3. Click **Add** to add a new shortcut to the list.
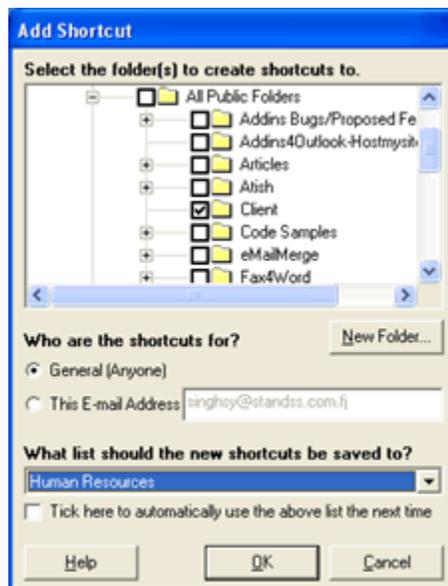
4. Select the exchange folder(s) that you want to store e-mails to. I have selected the Client folder.
5. Select the **General Option** or enter an e-mail address if you select This E-mail Address.
6. From the drop down list pick a shared shortcut List. I have picked the **Human Resources** shared shortcut list I have created already.

7. Click **OK**. A shared shortcut will be added to your shared shortcut list.

All shared shortcuts can be identified by the (). The () contains the Exchange folder where your shared shortcut is saved. The name in front of the brackets refers to the folder that the e-mail will be filed to.

NOTE: If you create a General shortcut instead of a shortcut specific to an e-mail address, you will be able to file any e-mail from anyone to the public folder pointed to by this shortcut.

Using Shared Shortcuts Department Wide to file e-mails

If you want to file a received e-mail into the Exchange folder for which you have created a shared shortcut, all you need to do is:

1. Click on an e-mail that you or anyone within the department has received.
2. Click **QuickFile** button. The QuickFile screen will be displayed with the shared shortcut that you have created.
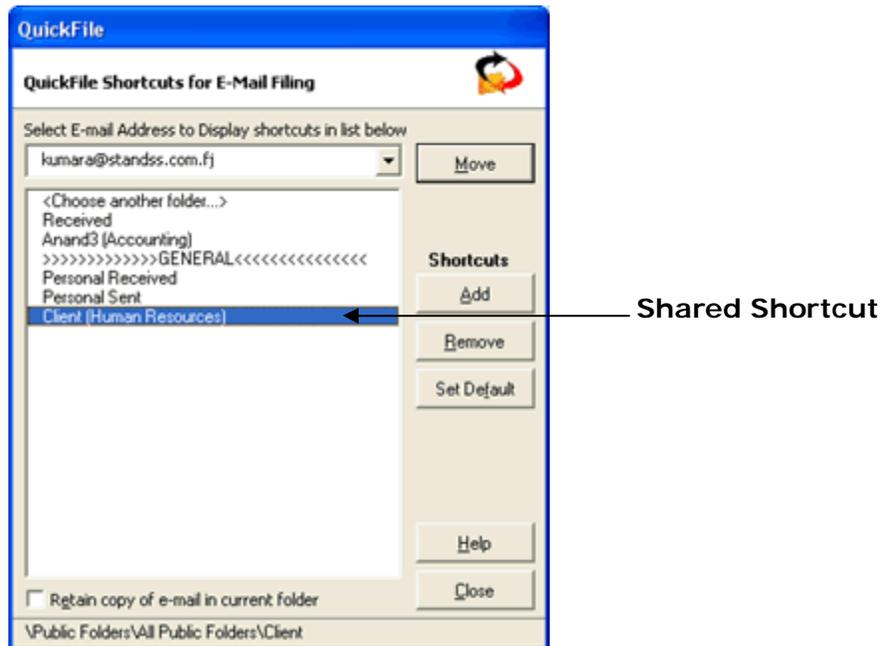
3. Select the shared shortcut you have created and Click **Move** on the QuickFile screen.

The e-mail will be moved to the exchange folder named Client.

File an outgoing e-mail to an Exchange folder using shared shortcuts
1. Compose an e-mail as you normally would.
2. Click **Send&File** on the QuickFile toolbar. The QuickFile screen will open.
3. Select a shared shortcut and Click **Send**.

The sent e-mail will be filed to the folder the shared shortcut points to as soon as the e-mail leaves your Outbox.

Appendix I: QuickFile 4Outlook – Manual Installation

You will need administrative rights to install QuickFile 4Outlook on a computer. The installation process does not take much time.

Before you run the setup file, ensure that Microsoft Outlook is closed.

There is no need to reboot, so you can run the program right after it is installed on your computer.

All you need to do is double click the setup file that you downloaded and follow the simple on-screen instructions. If you have not already downloaded the setup file then you can do so from the following link:
http://www.outlook4lawyers.com/downloadprocess.asp

After installation is complete, start Microsoft Outlook. A trial screen should be displayed. You should see the QuickFile toolbar within Outlook. If the toolbar does not appear, restart your computer and then re-open Outlook. Windows sometimes has a hidden copy of Outlook running which prevents QuickFile from starting.

Using QuickFile as a Non-Admin user

In order to use QuickFile 4Outlook as a non-admin user you will have to do the following:

1. Install QuickFile 4Outlook as an administrator on the computer using the instructions mentioned in the above section. Note the installation directory that you picked while installing.
2. Log-on to the computer as the non-admin user. Navigate to the QuickFile installation directory. By default QuickFile will be installed in C:\Program Files\QuickFile 4Outlook folder.
3. Double click the "**QuickFileVB.reg"** file which should be in the installation directory.
4. Click Yes. Click OK.

A non-admin user will be able to use QuickFile when Microsoft Outlook is started.

Appendix II:
QuickFile 4Outlook – Automatic Network Deployment

When you buy multiple licenses, you often face the problem of installing add-ins on separate network computers. Installing the software and registering it for a large number of users takes a lot of time and becomes quite difficult to manage.

In this guide we will show you an easy way to manage add-in deployment and licensing over a corporate network silently.

To get started, download a single zip file that contains all the files you will require to carry out a network install from the following URL:
http://www.outlook4lawyers.com/Files/qflaw.zip

Note: You will require a program such as WinZip to extract the files from the Zip archive.

Create Network share for installation
Firstly, create a network share where all the installation files will be saved for installation.

Unzip the downloaded file into the Network Share.

To automatically deploy License information
It becomes a tedious task to manually enter license information for the add-ins installed on client computers by going to each computer and typing it in.

In order to automatically register the add-in with the license information that you received when you purchased, you need to enter the license information into **QuickFile 4Outlook.ini** file which you have extracted into the network share. All you need to do is:

1. Open QuickFileVB.ini (You can use notepad to open this file)
2. Replace **Name** with the name that you registered with
3. Replace **Unlock Code** with the unlock code that you received in the confirmation e-mail you received after purchasing the add-in

Important Note:
Enter the registration information exactly as you received in your confirmation e-mail.

Configure Active Directory Users and Computers

Active Directory Users and Computers utility which is part of any Windows Based Server will be used together with Group Policy Objects to perform a network install.

In order to deploy the add-in across multiple users and computers, these must be placed into one **O**rganisational **U**nit (OU). If you already have all users and computers in an OU then you may skip the steps below and go directly to **Create Group Policy Object** (GPO) **for remote installation** further below.

To open the Active Directory Users and Computers utility on your Windows based server:

1. Go to Control Panel.
2. Double Click Administrative Tools.
3. Double Click **Active Directory Users and Computers**. The Active Directory Users and Computers utility will open as shown below:
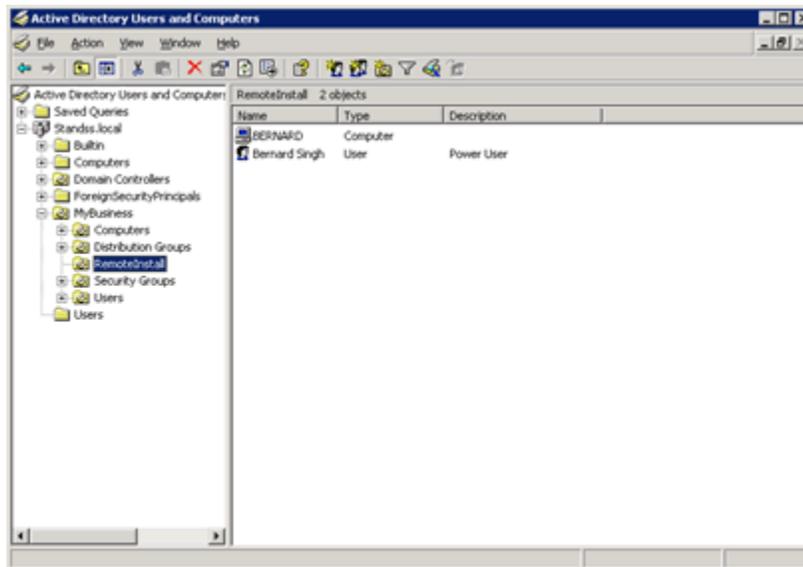
Next add all Domain Computers and Domain Users that you want to install the add-in for into an OU as shown above.

To create an OU:

1. Right Click the node in the list where you want to create the OU – Go to New –Click Organisational Unit.
2. Enter a name for the Organisational Unit. Click OK.

To add a domain user or computer to an OU:

1. Right click the User or Computer and click Move.
2. Select the Organisational unit you created to move to.
3. Click OK.

Create Group Policy Object for remote installation

To carry out the actual installation Group Policy Objects will be used.

In order to create and edit Group Policy Objects you would use Group Policy Management Utility.

To open Group Policy Management Utility:

1. Go to Control Panel.
2. Double Click Administrative Tools.
3. Double Click Group Policy Management. The following screen will open:
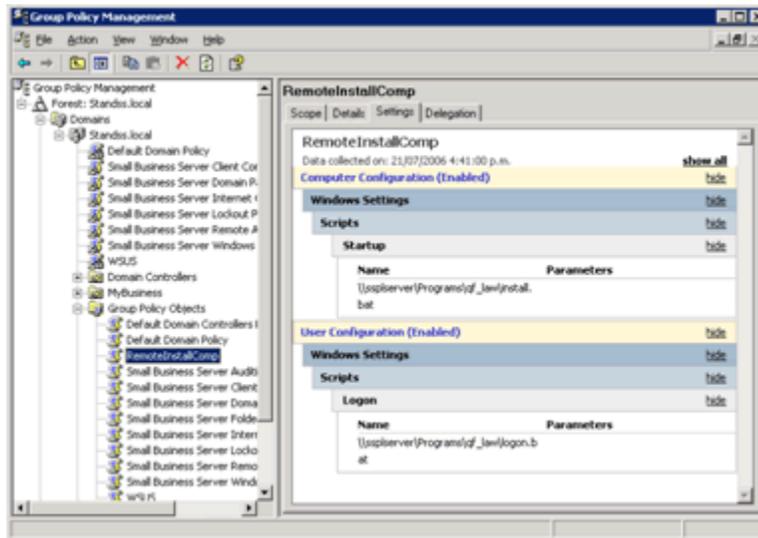
Create a **New Group Policy Object**

1. Right Click Group Policy Objects - Click New.
2. Enter a name for your Group Policy Object.
3. Click OK. A group policy object by the name you entered will be created.
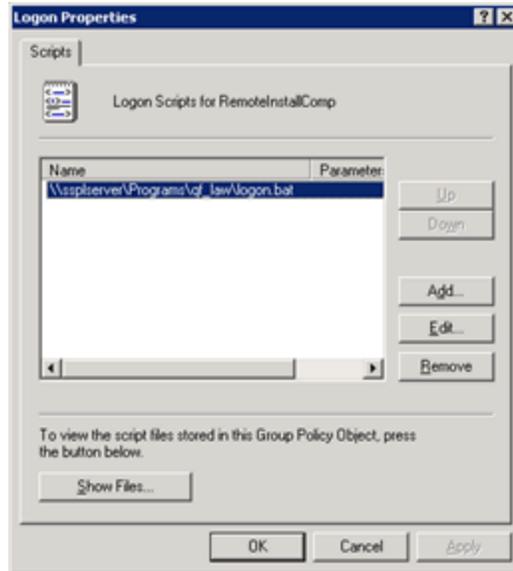
To **Configure Group Policy Object**

1. Right Click the GPO you created above – Click Edit. The following screen will open:
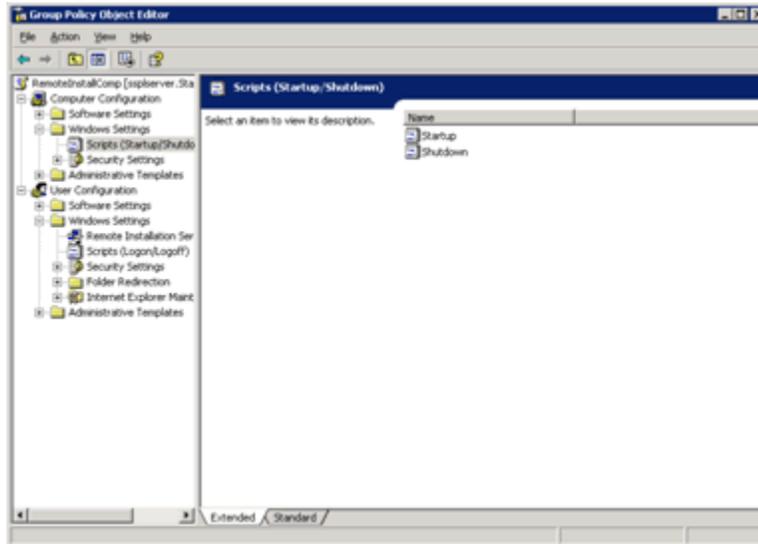
2. Under Computer Configuration – Windows Settings – Scripts (Startup/Shutdown), Double click Startup to open the following screen:
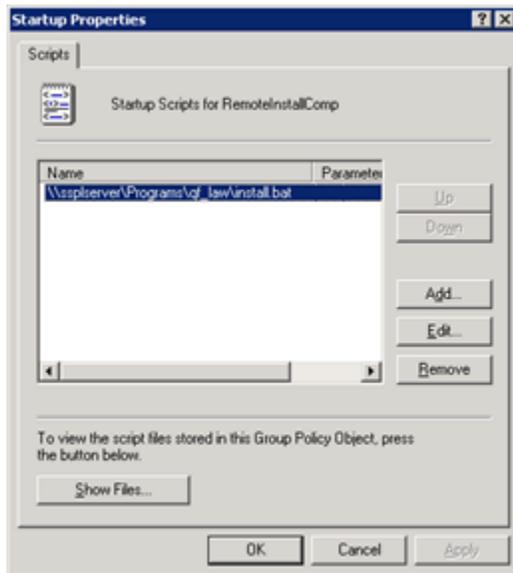
3. Click Add. Browse for the **install.bat** script that has been extracted from the downloaded zip file onto the network share.
4. Click OK.
5. Under User Configuration – Windows Settings – Scripts (Logon/Logoff), Double Click Logon to open the following screen.

6. Click Add and Browse for the **logon.bat** script that has been extracted from the downloaded zip file from the network share.
7. Click OK.

Link the Group Policy Object to the Organisational Unit

The last step for completing a successful network installation is to link the GPO you created to the organisational unit created.

1. Go to Control Panel – Administrative Tools – Double Click Group Policy Management utility.
2. In the Group Policy Editor find the Organisational Unit that you created. Right Click the OU and Click Link an Existing GPO…
3. From the List select the GPO that you created and Click OK.

Post-Installation Tasks

The add-in will be installed the next time the domain computer is started and it will be activated as soon as the user logs in.

After the installation over the network is completed, you should do the following:

1. Remove the group policy object created on the server.
   a. Right Click the Group Policy Object.
   b. Click Delete.
2. Move the domain computers and users back to as they were organised if you changed the structure.
   a. Right Click the User or Computer in the Organisational Unit.
   b. Click Move and select the original location to move to.
3. Remove the Organisational Unit created on the server.
   a. Right Click the Organisational Unit created and Click Delete