

Latest update: October 2019

User Manual

Outlook Plug-in

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1 Introduction

In this manual we will focus on the **Outlook plug-in**. With detailed explanation and visualized steps, users will be able to independently:

- Install the **Outlook plug-in**.
- Configure your settings.
- Archive/Save emails and documents to a Legisway Essentials dossier.

The main purpose of the integration is to speed up the process of archiving any relevant email correspondence and/or documents from MS Outlook to Legisway Essentials. It allows users to quickly store important data without the need to log in to your database, then search for the desired dossier in order to finally save any information.

With the Outlook Plugin, you can quickly transfer any legally binding e-mail communication as well as attached documents directly to Legisway Essentials from your MS Outlook.

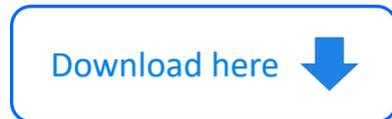
Before attempting to install the plug-in, please verify if you meet the subsequent requirements:

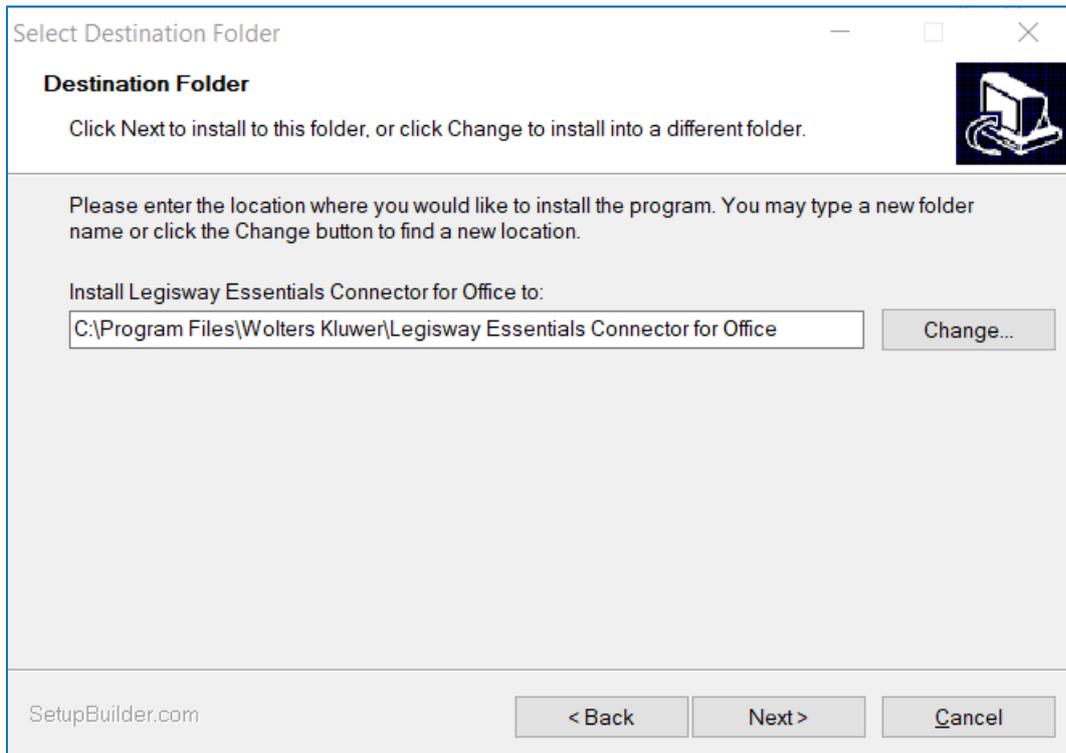
- ✓ Supported MS Outlook versions: 2013, 2016 and 2019.
- ✓ Supported operating system: Windows 10.
- ✓ Administrator or editor account:
 - As an administrator you can view and edit all information in the system.
 - Editors are only able to view, edit and search for dossiers they were granted access to.
 - Viewers will not be able to use the Outlook Plugin due to (editing) limitations of their login role.

2 Installation

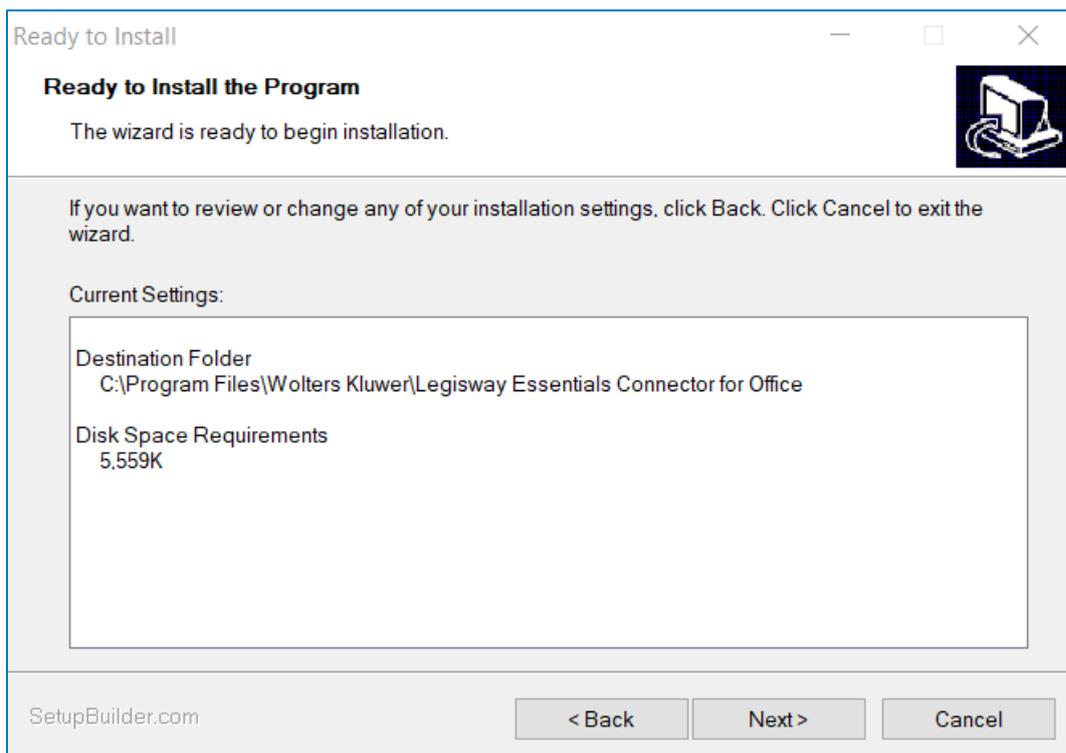
The plug-in can be installed on PC's with Outlook versions 2013/2016/2019 and Windows 10. Please be aware that a multi-language version of MS Outlook is recommended (English + German + French + Spanish + all languages supported by Legisway Essentials).

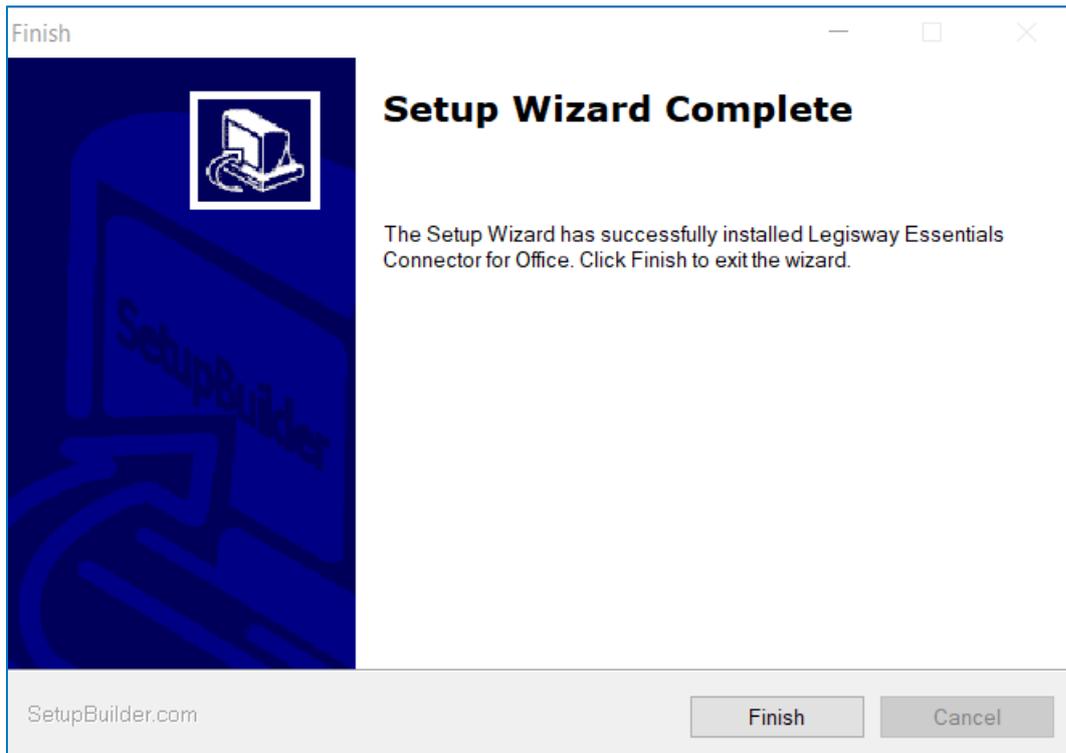
To install, download the provided zip-archive and run the executable to install the plug-in.



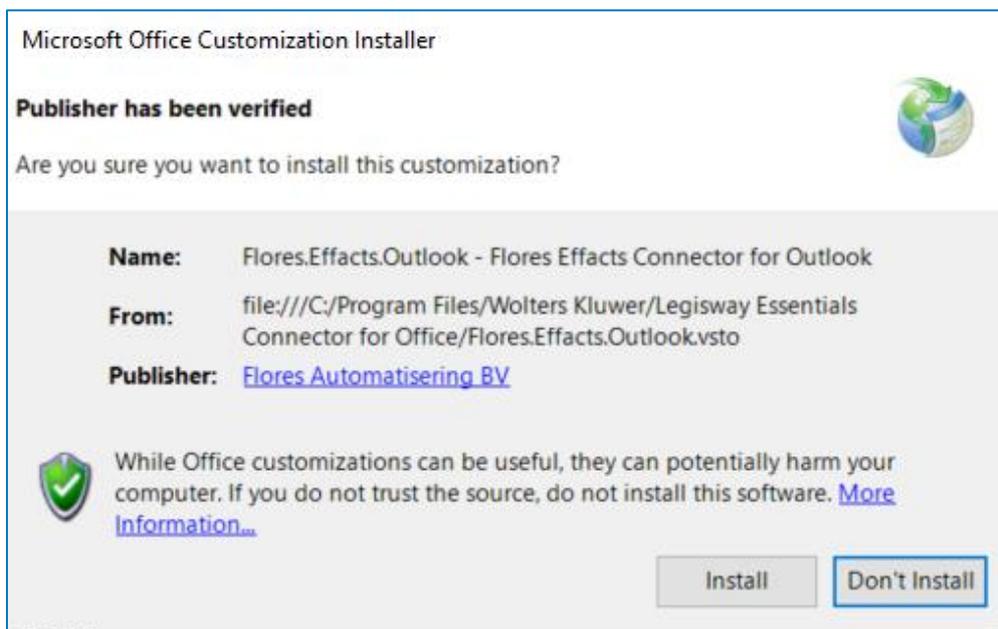


Click on 'Next' when prompted with Ready to Install.





After this, when you (re-)open Outlook, you might get the following pop-up, asking you whether you indeed want to add the plug-in to your Outlook, click Install to add it.



Subsequently, you should now see the Legisway Essentials Logo in MS Outlook.

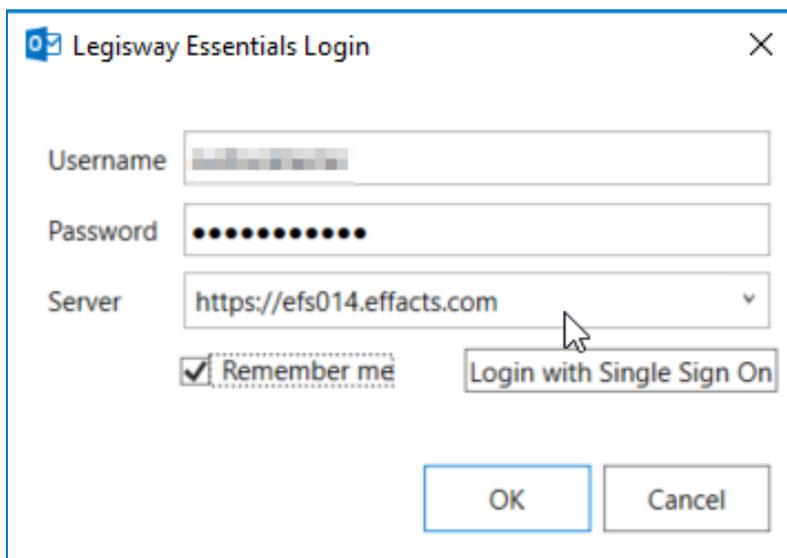


3 Getting Started

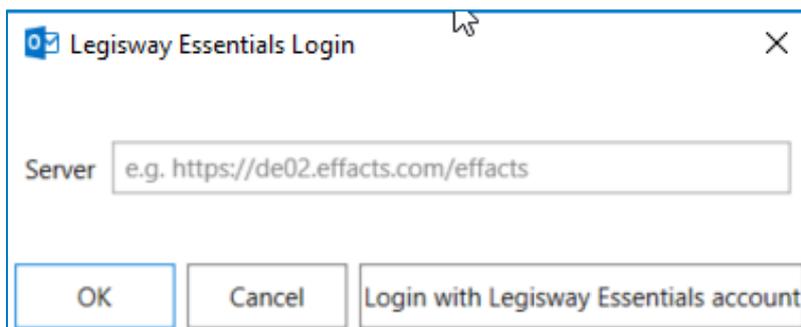
When the Legisway Essentials button is clicked, a login screen appears. The Legisway Essentials user must input the username and password and fill in the server address. This server address should be the same as the address of the database when you are logged in through your browser (e.g. <https://de02.effacts.com> or <https://efs014.effacts.com>).



To make sure the next time you use the plug-in you won't have to enter this information again, please click the 'Remember Me' checkbox.



When you are using Single Sign On to log in to Legisway Essentials, you can click on SSO and you are be prompted to enter server name and rest steps remain the same. You will automatically be logged in. Once again this should be the same address as when you login in to your browser (e.g. <https://sso.effacts.com/effacts>). This URL is customer specific.



4 Using the plug-in

After you are successfully logged in, the 'Archive email and attachments' screen appears. Please discard the **Advanced Search** button in the images below and refer to the regular **Search** button to use the Outlook Plugin.

Step 1:

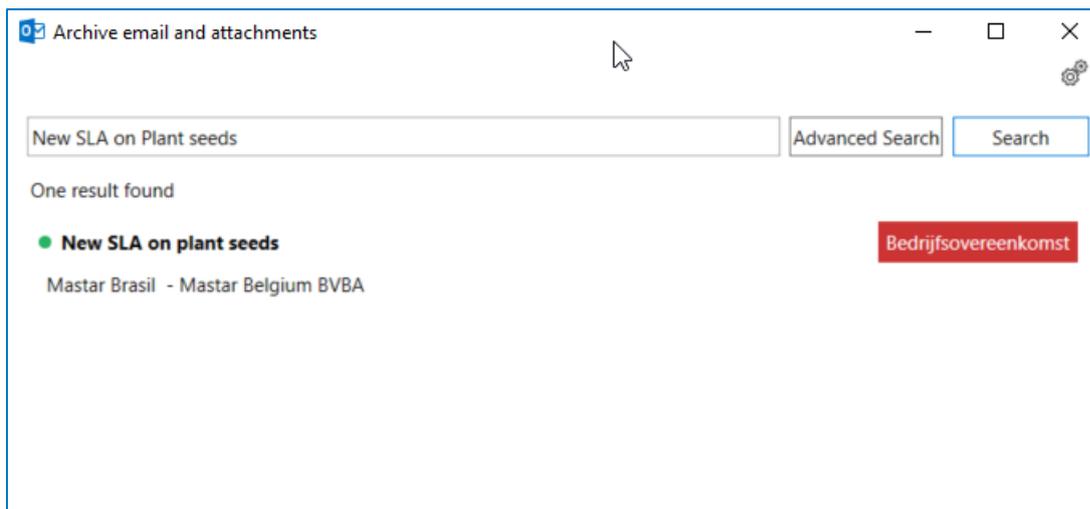
Enter a desired keyword for the search in Legisway Essentials and click on 'Search'. The search functionality will show any existing dossiers that match the keyword used. The more specific your search is, the more accurately you can file your e-mail and attachments to the correct dossier in Legisway Essentials.

Depending on the type of dossier you are looking for, it is sensible to be as specific as possible. If you search for Agreement, all items in the database that have either the word agreement in their title or somewhere in the form, this will come back as results:

The screenshot shows a web application window titled "Archive email and attachments". At the top, there is a search bar containing the text "agreement". To the right of the search bar are two buttons: "Advanced Search" and "Search". Below the search bar, it indicates "45 results found". A list of search results is displayed, each with a colored dot, a title, a subtitle, and a red button labeled "Bedrijfsovereenkomst". The third result, "New License Agreement", is highlighted with a light blue background and a mouse cursor is pointing at it.

Result Title	Subtitle	Action
Mastar Agreement Lease-Agreements offices NL	Mastar United States Services Ltd. - Mastar International Holding N.V.	Bedrijfsovereenkomst
Newer agreement	Alivated Corporation - Mastar Barcelona sa	Bedrijfsovereenkomst
New License Agreement	ABC Inc. - Mastar Germany GmbH	Bedrijfsovereenkomst
Supplier agreement	ABC Inc. - Mastar Netherlands B.V.	Bedrijfsovereenkomst
Loan Agreement with ABC Inc.	ABC Inc. - Master Holding International Corp	Bedrijfsovereenkomst
New agreement	ABC Inc. - Mastar Norway BB	Bedrijfsovereenkomst
Example Agreement	Blessed Corp. - Mastar Scandinavia BA	Bedrijfsovereenkomst
Service Level Agreement	Blessed Corp. - Mastar Spain BA	Bedrijfsovereenkomst

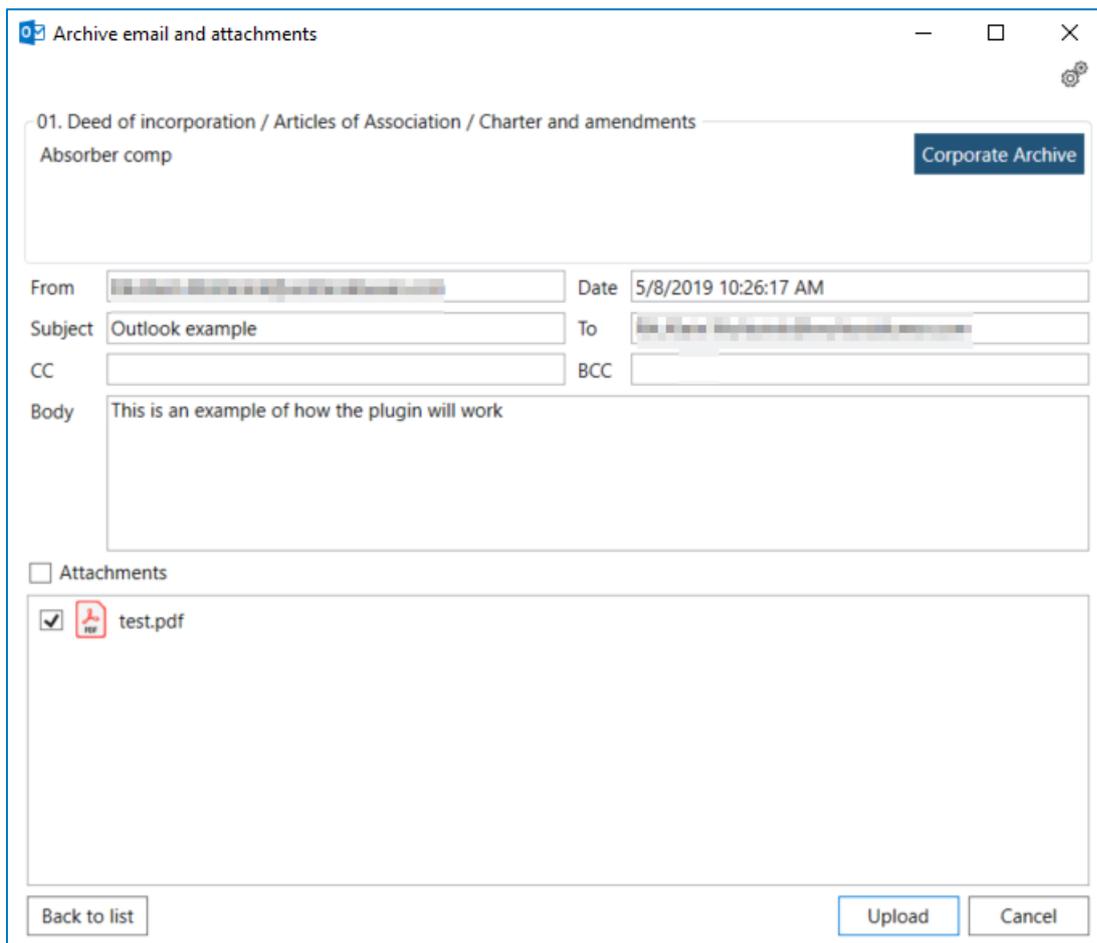
In order to narrow down the search results, use more specific keywords such as: “New SLA on Plant Seeds”:



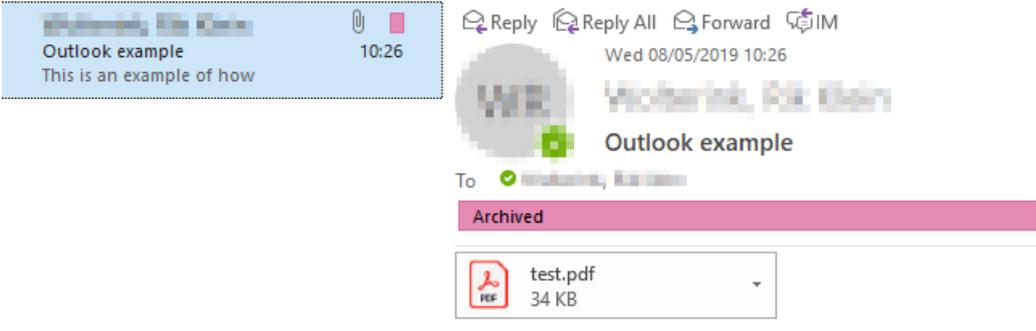
STEP 2:

Once you have selected a dossier, another screen will appear that allows you to add additional information to the email before saving it to Legisway Essentials. Change the subject or add relevant notes to the body of the email. In case any stakeholders need to be included, please add them to the CC or BCC if desirable.

Furthermore, you can choose to include or exclude attachments as well as the email. Finally, proceed by clicking **Upload** to archive the email and attachments



Once the email has been uploaded, it will be marked with a pink mark-up in MS Outlook.

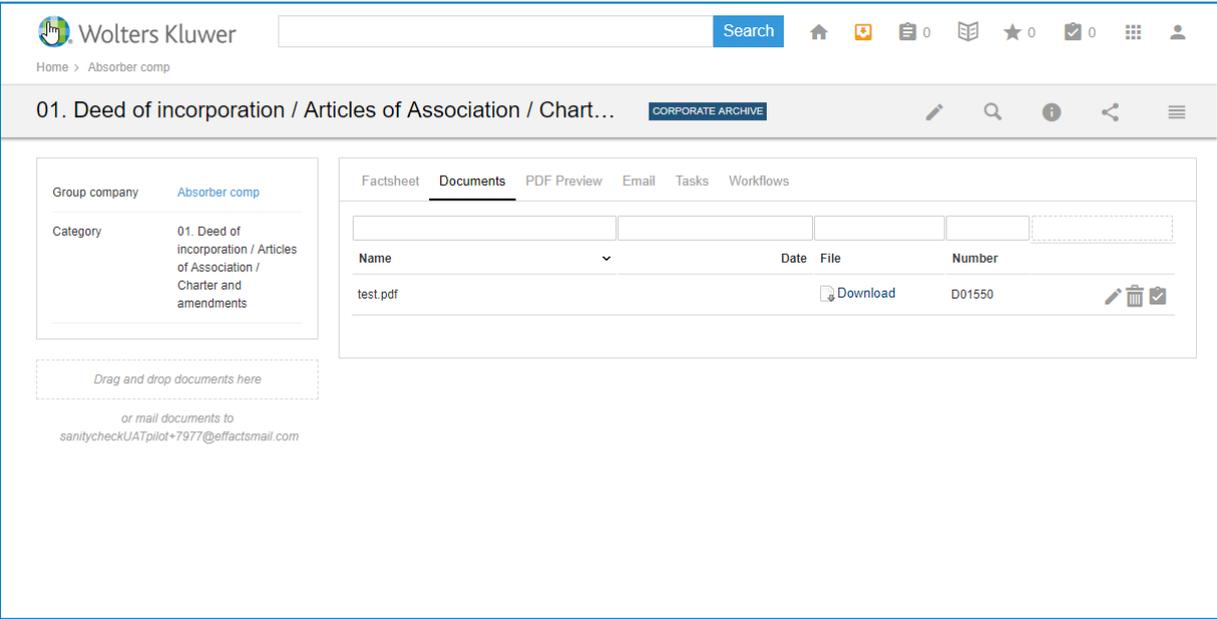


This is an example of how the plugin will work

In Legisway essentials data of the initial email that will be imported and displayed are:

- Sender.
- Subject.
- Received [date + time].
- Attachments [number of imported documents].

The uploaded example in Legisway Essentials will now look like this:



With the upload information regarding the e-mail displayed in the 'Email' tab:

The screenshot displays the Wolters Kluwer Corporate Archive interface. At the top, the logo and name 'Wolters Kluwer' are visible, along with a search bar and navigation icons. The breadcrumb trail shows 'Home > Absorber comp'. The main header displays the document title '01. Deed of incorporation / Articles of Association / Chart...' and a 'CORPORATE ARCHIVE' label. Below this, a navigation bar includes tabs for 'Factsheet', 'Documents', 'PDF Preview', 'Email', 'Tasks', and 'Workflows'. The 'Email' tab is active, showing a table with one entry. The table has columns for 'Sender', 'Subject', 'Attachments', and 'Date'. The entry shows a redacted sender, the subject 'Outlook example', 1 attachment, and the date '08-05-2019'. A trash icon is present at the end of the row. On the left side, there is a sidebar with 'Group company' set to 'Absorber comp' and 'Category' set to '01. Deed of incorporation / Articles of Association / Charter and amendments'. Below the sidebar is a dashed box with the text 'Drag and drop documents here' and an email address 'sanitycheckUATpilot+7977@effectsmail.com'.

Wolters Kluwer

Home > Absorber comp

01. Deed of incorporation / Articles of Association / Chart... CORPORATE ARCHIVE

Factsheet Documents PDF Preview **Email** Tasks Workflows

Sender	Subject	Attachments	Date
[Redacted]	Outlook example	1	08-05-2019

Drag and drop documents here

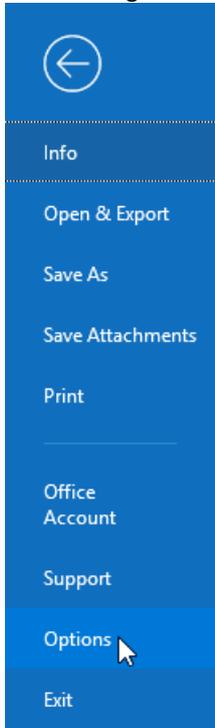
or mail documents to
sanitycheckUATpilot+7977@effectsmail.com

5 FAQ

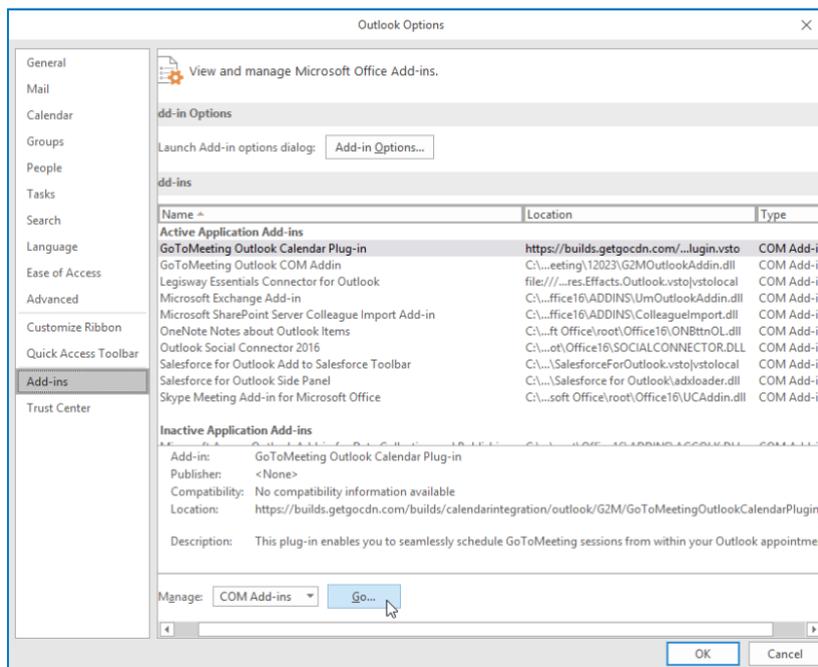
5.1 Question 1: I cannot see the Legisway Essentials button when I open outlook.

A1: This is due to the plug-in not being enabled. You can set this by doing the following:

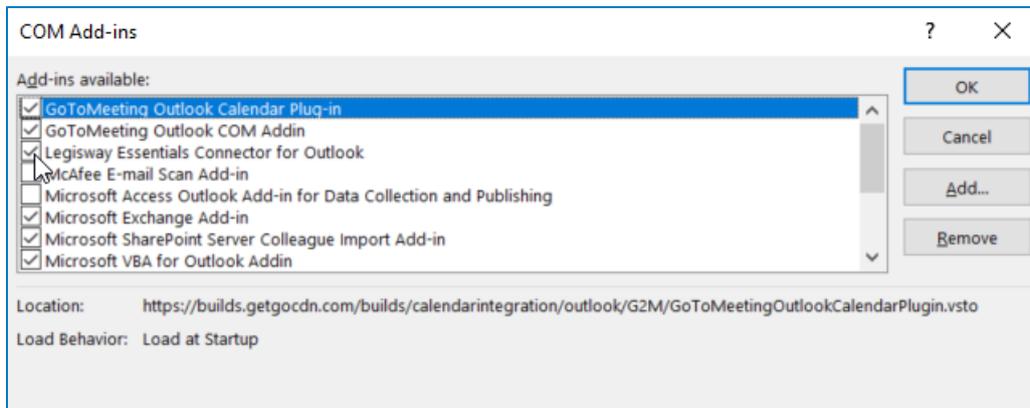
Please navigate to **File** → **Options**



From the Options screen to **plug-ins**. At **plug-ins**, search for disabled plug-ins. If that is the case, select in the drop-down behind *Manage the Disabled items* and click **Go**:



Now a popup appears in which it allows you to enable the Legisway plug-in by clicking the checkbox in front of the Legisway Essentials Connector for Outlook plug-in. Now restart Outlook and the WK logo should appear in the ribbon.



5.2 Question 2: An error appears when using the plug-in

A2: As indicated in the error message, if this error persists, please contact our support desk and share the logfile so that your issue can be investigated.

5.3 Question 3: I do not see the uploaded information in the system

A3: If you were viewing Legisway Essentials next to Outlook, you might need to refresh the page in Legisway Essentials in order to see the uploaded document and/or e-mail appear in the system.

5.4 Question 4: The language of the plug-in is different than that of Outlook

A4: The language of the plug-in is based on the language settings of your system; to amend this go to your language settings in Windows.

5.5 Question 5: My e-mail was not added

A5: Only the selected e-mail from which you opened the Legisway Essentials an plug-in is added to the system. Therefore, repeat the step with the e-mails you would like to archive in the system as well.