

# Outlook add-in user manual



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## About Outlook add-in

Outlook add-in is a tool that allows saving emails directly to Hyarchis and attaching documents from Hyarchis to emails. It allows to automatically save manually saved email replies to Hyarchis as well. This functionality can be used for user mailbox and shared mailbox.

## Add-in header

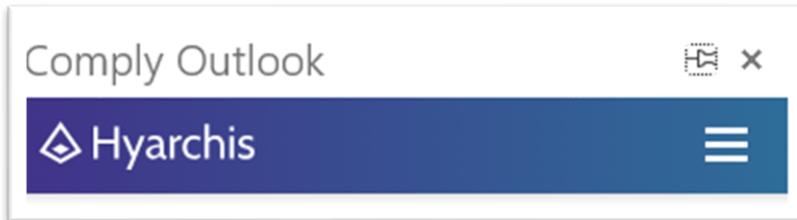


Image 1 Header

Action	Description
	The pin icon allows to keep the Outlook add-in open and easily accessible. Once pinned, the add-in stays visible and available, eliminating the need to reopen it each time you need to use it.
	Close add-in.
	This icon opens a menu with two options: <ul style="list-style-type: none"> <li>• <b>Settings</b> – configurations that connect add-in and Hyarchis.</li> <li>• <b>Search documents / Save to dossier</b> – navigate to the main add-in screen. Search documents are shown when the add-in is opened from a new email form. Save to dossier is shown when the add-in is opened to save sent or received email.</li> </ul>

## Search for documents in Hyarchis and Save sent email

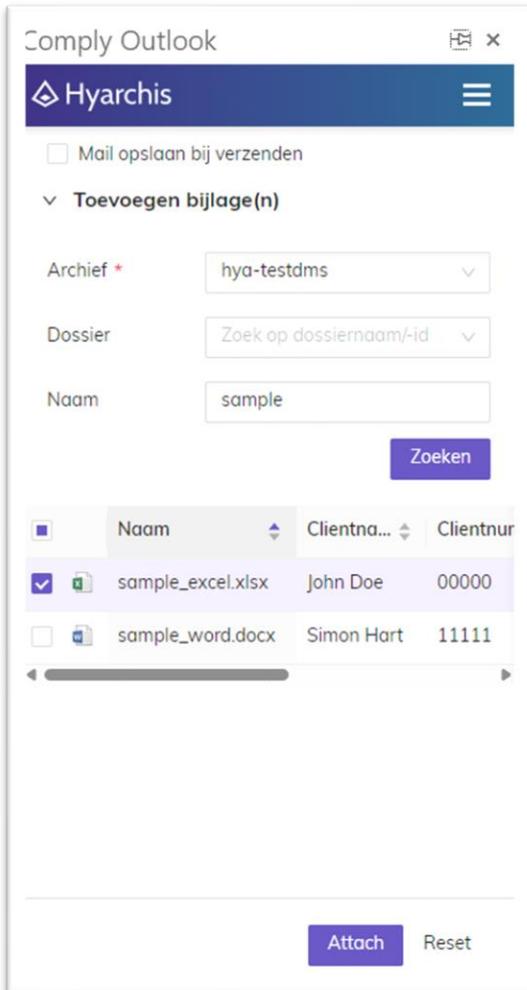


Image 2 Search for documents to attach

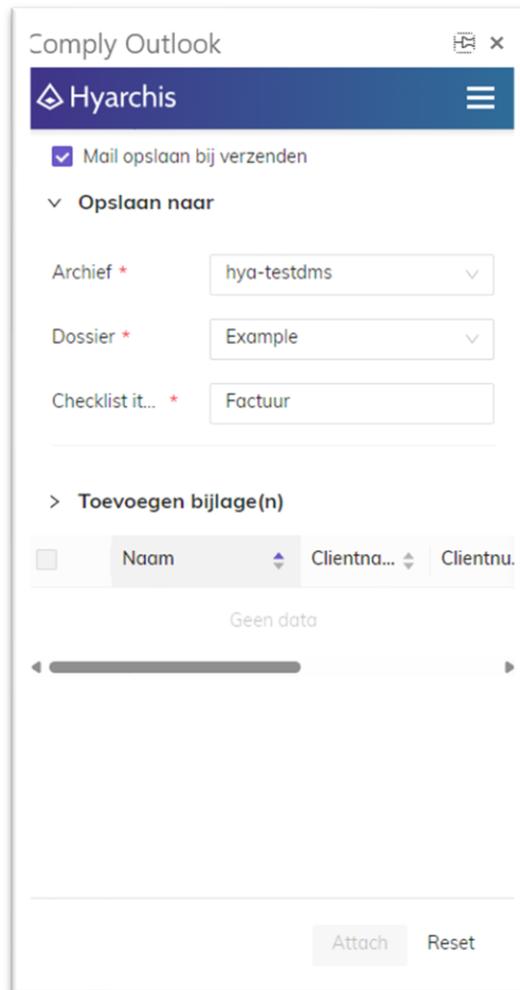


Image 3 Choose where to save email

Field	Description
Archief	Dropdown with the list of archives
Dossier	Search for dossier
Checklist item	Dropdown with the checklist items list from selected dossier
Naam	Search by document name

Open a new email writing form and open Outlook add-in. There are two parts:

- **Toevoegen bijlage(n)** – search for documents in Hyarchis and attach them to an email (Image 2). If a dossier is selected, then all documents from that dossier will be shown in the results table. If search is executed by name, it will show those documents whose name or client name match given name.
- **Opslaan naar** – save email to Hyarchis ( Image 3). Once dossier and checklist item are selected, sent email will be saved to it. All incoming and outgoing replies to the sent email will be automatically saved to the same dossier and checklist item.

## Sort search results

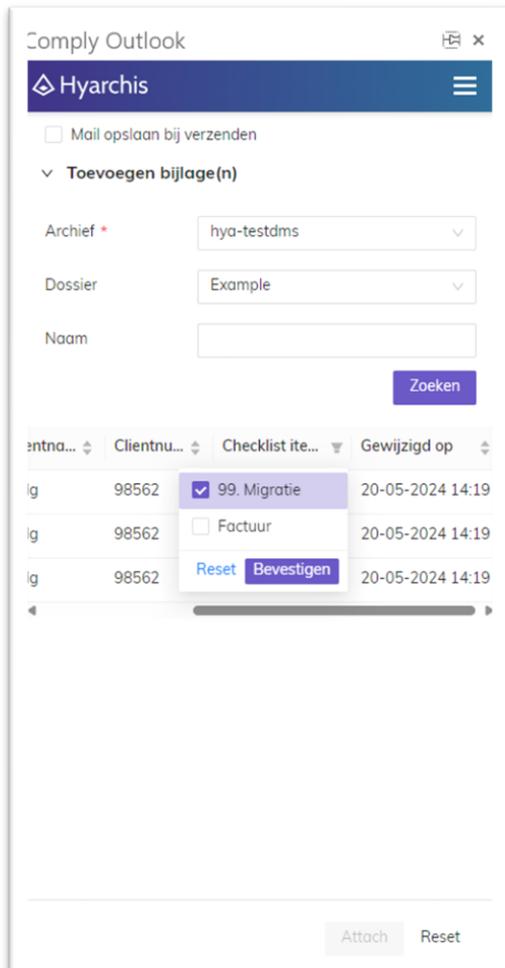


Image 4 Filter by checklist items

Documents in the table can be sorted by pressing on column.

If there's a need to filter checklist item, it can be done by pressing the icon and selecting which checklist items should be shown (Image 4).

Emails from sent items or inbox folder can be saved to Hyarchis to desired dossier and checklist item. In **Selecteer documents** dropdown are shown attachments from email that can be saved as separate documents (Image 5). **Mail opslaan** checkbox means that email with all attachments will be saved (Image 6).

## Save sent or received email

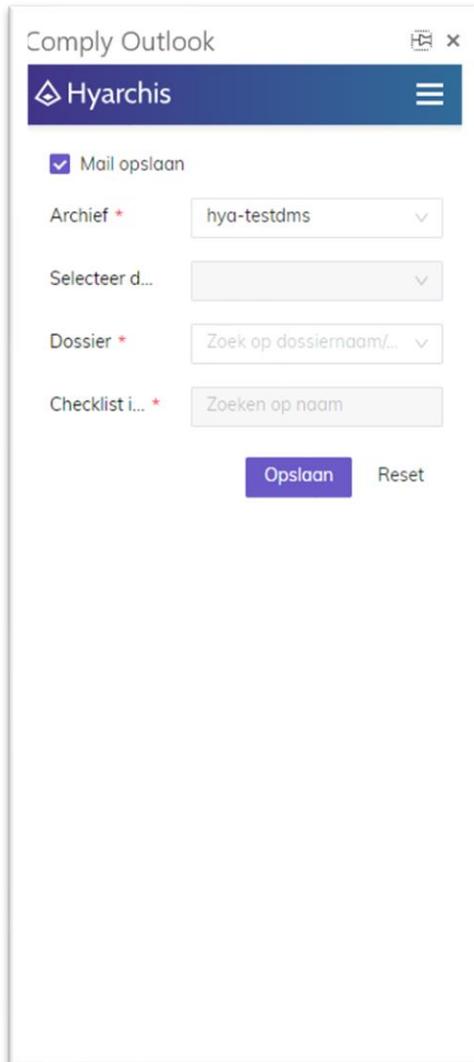


Image 6 Save email

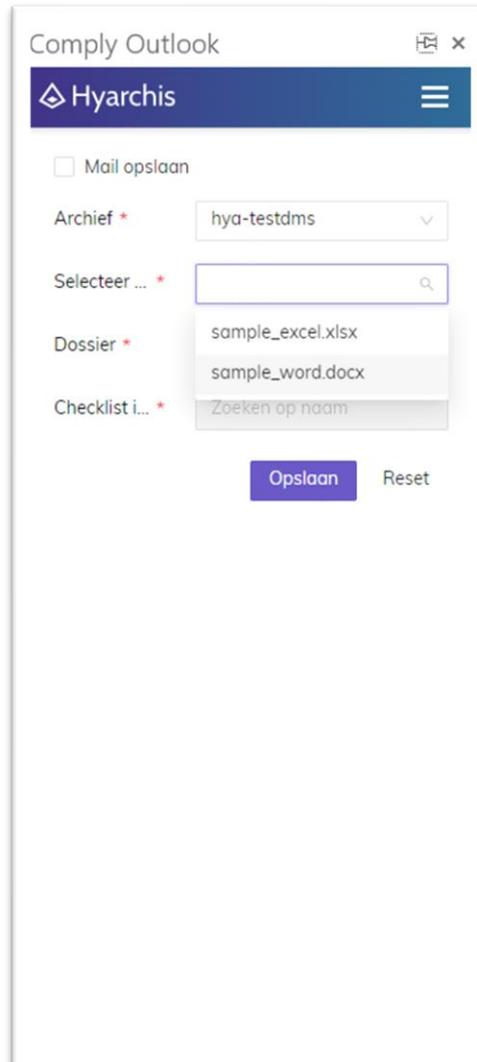


Image 5 Save selected attachments

Emails from sent items or inbox folder can be saved to Hyarchis to desired dossier and checklist item. In **Selecteer documents** dropdown are shown attachments from email that can be saved as separate documents (Image 5). **Mail opslaan** checkbox means that email with all attachments will be saved (Image 6).