

LITIGATION

Installing the Primafact Add-In for Microsoft **Outlook**

Revision: 2018/11/13 Copyright © 2018 - Sandcat Software Inc.

The Primafact Add-In for Microsoft Outlook allows users to send e-mails and attachments directly to Primafact. This document guides users on how to install this Add-In.

Table of Contents

Table of Contents	. 3
Overview	. 5
Installation	7
Appendix A : Making a Support Request	. 11

Overview

The Primafact Add-In for Microsoft Outlook allows users to send e-mails and attachments directly to Primafact. E-mails and attachments are automatically converted to PDF and imported to a user's Document Intake folder.

This functionality generally eliminates the need to print e-mail materials to the Primafact printer, provides an easier method than drag and drop, and allows sending new e-mails and attachments directly to other users.

These steps should not be performed by an Administrator – they need to be performed by each Primafact user. Instructions for installing the Add-In can be provided by email. Additionally, you may want to consider creating a link on each user's desktop to run the installation.

Installation

1. Navigate to the PfApps share on the Primafact application server. Open the Office Plugin folder, and run Setup.exe.

🔜 I 🖸 🔜 🔻 I	Application Tools	Office P	lugin				×
File Home Share View	Manage						~
Pin to taskbar Run as administrator Compatibility							
← → 🎎 Run as anothe user	w2016srv-ngvm >	PfApps →	Office Plugin >	~	Ō	Search Office Plugin	,c
Name	Date mod	ified	Туре	Size			
About.txt	11/17/201	7 5:05 PM	Text Document	1 KB			
🔂 PfOffice.Setup.msi	11/17/201	7 5:05 PM	Windows Installer	7,483 KB			
PfOffice.zip	11/17/201	7 5:05 PM	Compressed (zipp	6,381 KB			
🔁 PfOutlook Upgrade Instructions.pd	f 11/17/201	7 5:05 PM	Adobe Acrobat D	40 KB			
🔄 setup.exe	11/17/201	7 5:05 PM	Application	502 KB			
5 items 1 item selected 501 KB							III 🖿

2. Click Next on the Welcome dialog.



3. Click Next on the Installation Folder dialog.



4. Click Next on the Confirm Installation dialog.



5. There will be a quick progress bar followed by the Installation Complete dialog. Click Close to finish the installation.

🙀 Primafact Office Addin	—		×
Installation Complete			5
Primafact Office Addin has been successfully installed. Click "Close" to exit.			
Please use Windows Update to check for any critical updates to the .NET	Framev	vork.	
Cancel < Back		(

6. To test, open Outlook. Select the Primafact tab on the ribbon, and click the Send button.

😤 5 🗧 Inbox - catherinealexandrahoward@outlook.com - Outlook	n			×
File Home Send / Receive Folder View Help Primafact 🗘 Tell me what you want to do				
Image: Send Send As Message and Attachments Image: Send As One Document Image: Primatace Me Primatace Default Send Settings				~
Drag Your Favorite Fol K				
> sandcatsoftware@ All Unread By Date * Newest + Outlook Team <no-reply@mic< td=""> 4 Today Welcome to your new Outlook</no-reply@mic<>	rosof k.com a	ڈے accou	1 • ÷ nt	1:59 PM
A catherinealexandr Outlook Team Welcome to your new Outlook.com account 3:59 PM Inbox 1 Hi Catherine, 3:59 PM				^
Drafts				
Sent rems				
Archive Hi Cather	ine	<u>,</u>		
b Conversation History		1		
Junk Email Welcome to your r	new			
Outbox Outlook.com account.	Outloc	ok		
Quick Step Settings let's you stay conne	cted.			
Search Folders	tive;	at		
work at home and eve	nwho	ro		
work, at home, and	lywne	ie		
in between.				
				Ou -
Items: 1 Unread: 1 All folders are up to date. Connected to: Microsoft Exchange 🔲 🖷			-+ 1	00%

7. You should see a notification above the system tray in the taskbar:



8. If you switch to Primafact and go to your Document Intake area, you should see the e-mail you sent from Outlook:

🗾 Intake			-			
Destination		Document Queue	Details			
🛐 🗀 🛛 🗠 👻 👘 Show Documents		Quick Filter × Ⅲ ▼ 𝔅 𝔤 ▼ 🖡 🔊 >	Preview Messages			
Select a case		Thumb Title / Added Page	EMail from Outlook Team to Catherine Howard dated January 4, 2018 re: Welcome to your new Dutlook.com account			
Select a binder		dated January 4, 2018 re: Welcome to your new Outlook.com account 2018-01-04 04:32 pm	Show Profile Info 🗸			
No Binder Selected	√ Move KCopy Ωndo	Image: Some document.				
Binder AutoSort is OFF						

Appendix A : Making a Support Request

Customers can greatly assist in expediting the requests for technical support by providing as much relevant information as possible at the time of the request:

- Name of Firm.
- Individual Contact Information (Name, Telephone Number, e-mail).
- Primafact Version (open Primafact, select the menu Help | About).
- Hardware Involved :
 - o Server
 - o Desktop or Notebook
 - Scanner and / or Scanner Workstation.
- Operating System.
- Description of problem and how to reproduce it.
- The (approximate) number of users affected (one user, some users, all users).

Any supporting files and screen shots: In general, screen shots can be captured by pressing the Shift and PrintScreen keys (which copies an image of the desktop to the Windows clipboard). You can paste the screen shot into an e-mail message. Alternatively, you can paste the image into Microsoft Paint, or a Word Processor, save it, and send it as an attachment.





Sandcat Software Inc.

2 Pardee Ave, Suite 203 Toronto, ON, M6K 3H5

Website:	www.primafact.com
E-mail:	support@primafact.com
Telephone:	416.531.0891
	888.881.0891 - option 1

Technical support staff are available during business hours, Eastern Standard Time. Requests for technical support can be made via e-mail or telephone.

Follow us on social media for updates:

