TEESSEN CONSULTING


# Insure Add-In

*Quick Guide*

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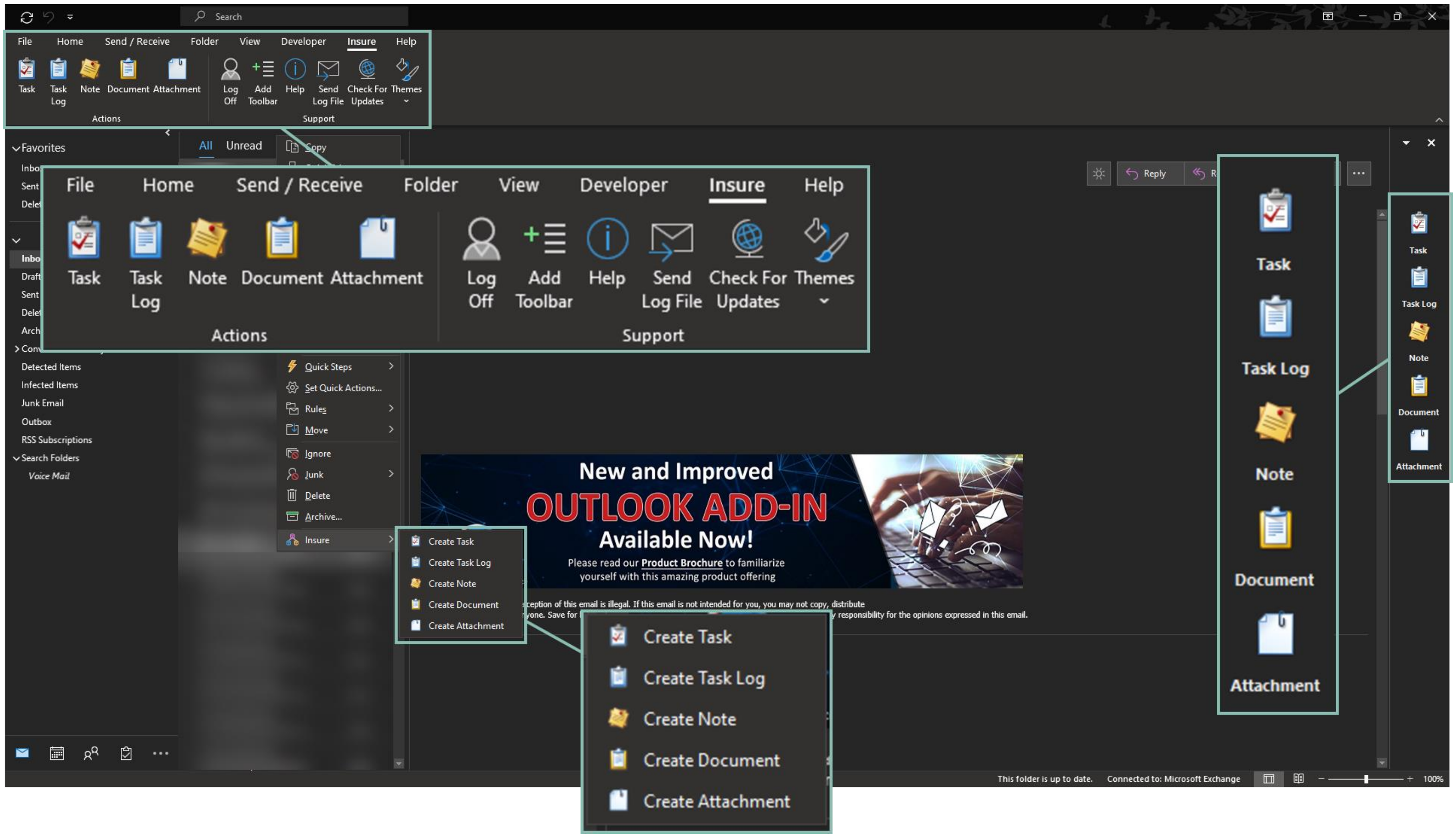
# Table of Contents

The new **Insure Add-in** tool was redesigned to speed up each process, providing the ability for a user to work more efficiently and effectively while still getting all the necessary information required into the Insure system. This was made possible by revisiting each process to reduce the steps required and providing additional enhancements, such as the introduction of the Quick Access toolbar.

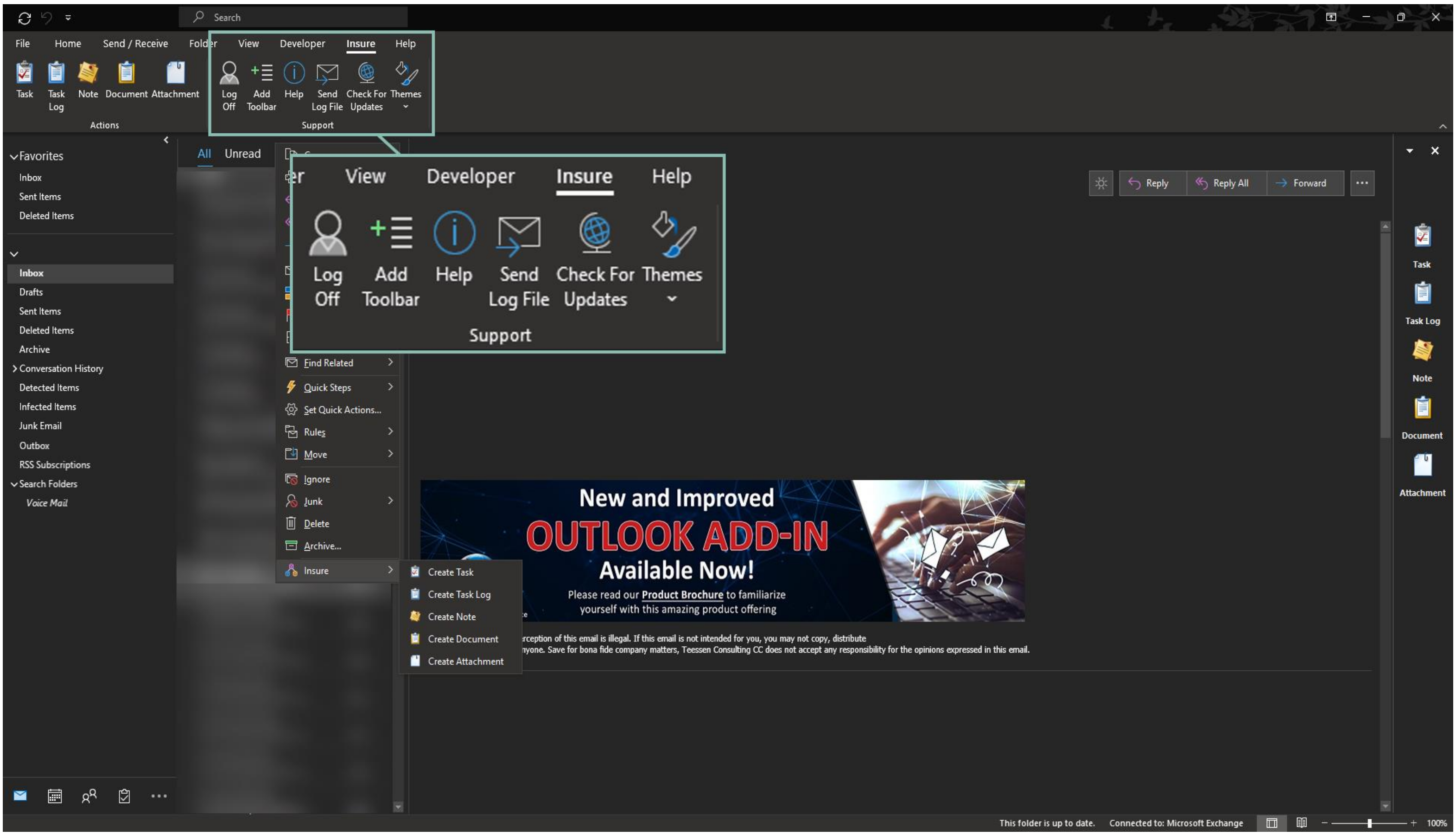
## Quick Access Menu Options




Various options to access the Insure Add-in on your Outlook:

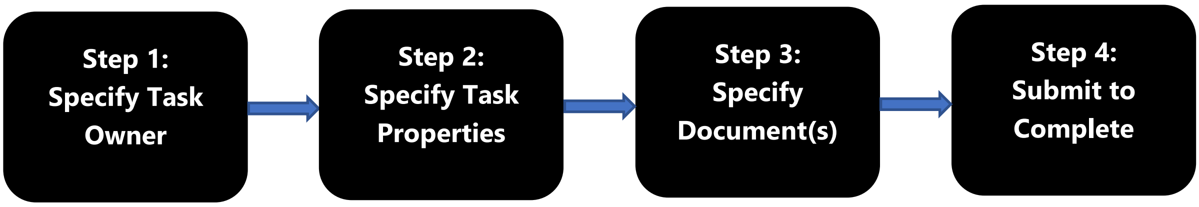
1. Open your email and click the ‘Insure’ menu item on the toolbar to access the Insure Add-in options.
2. Use the Insure Add-in toolbar on the right side of your email list view.
3. Right click on an email and select the ‘Insure’ menu item to access the different processes available.

## Insure Add-in Support Options



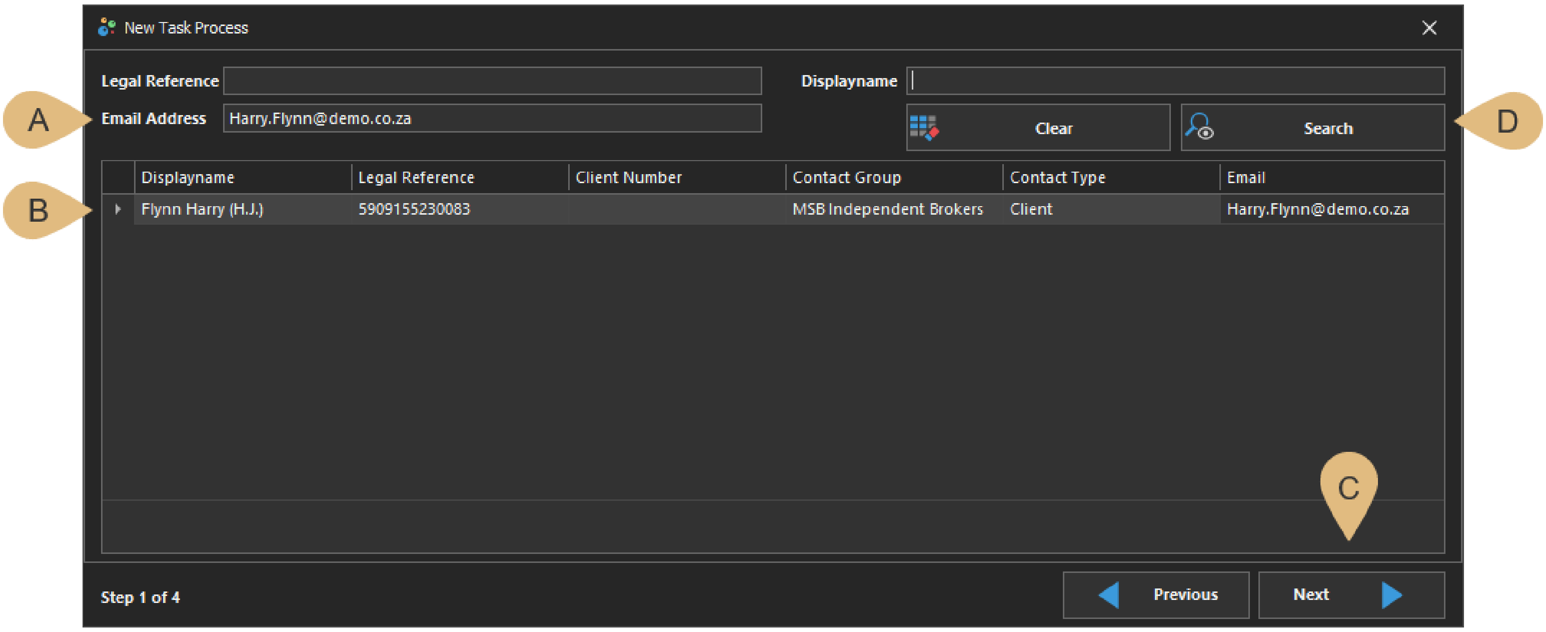

- **Log Off** – to log off from the Insure Add-in service;
- **Add Toolbar** – to re-add the Insure Add-in toolbar to the right side of your Outlook screen;
- **Help** – access the quick user guide;
- **Send Log File** – send log file to support@tconsult.co.za in the event of an error occurring;
- **Check For Updates** – update your Insure Add-in regularly when there is a new release;
- **Themes** – personalize your Insure Add-in by selecting theme

## Task Process Flow




### Step 1: Specify Task Owner

The system will return a maximum of 20 records matching your search criteria.




**A**: The Email Address field is auto populated by default using the from address of the currently selected email. Furthermore, if the Email Address field is not empty, an automatic search will occur for the contact when starting the Task Process.

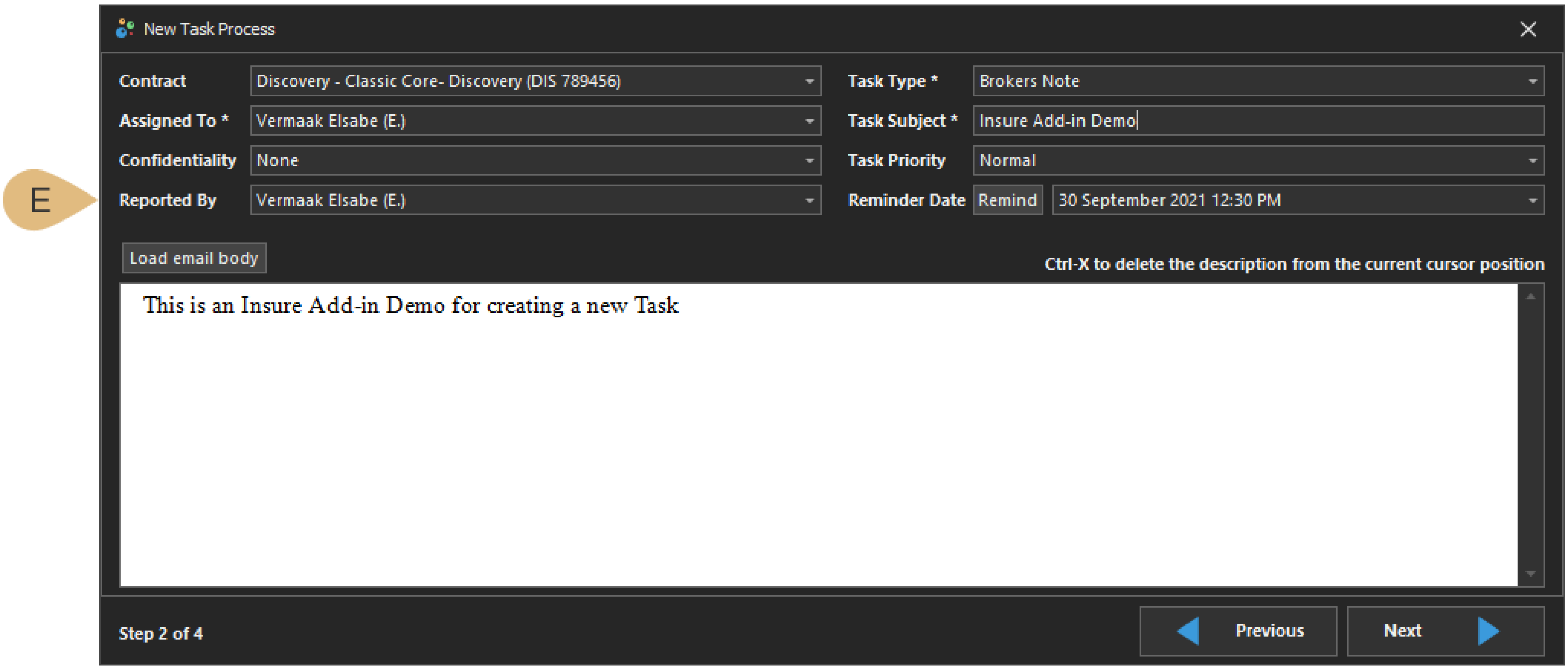
**B**: The results of the search will be displayed in the list view and will always automatically select the first row.

**C**: After a record is found, the user just needs to click the “Next” button if the first value in the list view is correct.

**D**: If a user desires to find a different contact, they can supply the Legal Reference for the most accurate results, Displayname or Email Address.

### Step 2: Specify Task Properties

Select and/or enter all relevant information pertaining to this task.




**E**: The Reported By contact will be automatically searched using the from address of the selected email. If a record is found, it will be displayed in the Reported By field. However, if the Reported By is incorrect, a user can change it by clicking on the field.

The user will be presented with a form and have an option to search for the correct Reported By record by supplying either a Name, Email Address or Cell Number.

The results will be displayed in a list view and a user will be able to select the desired record and click the “OK” button.

**NOTE**: Use Ctrl-X on your keyboard to delete the irrelevant part of the email body from the current cursor position.

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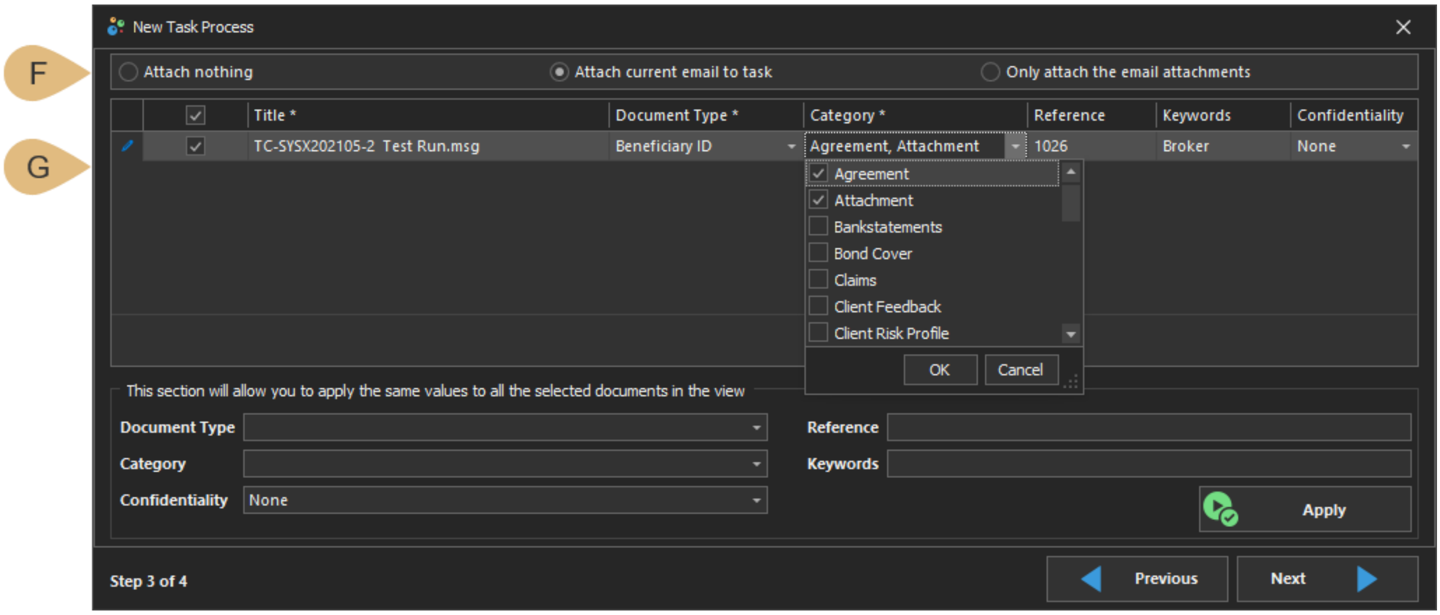
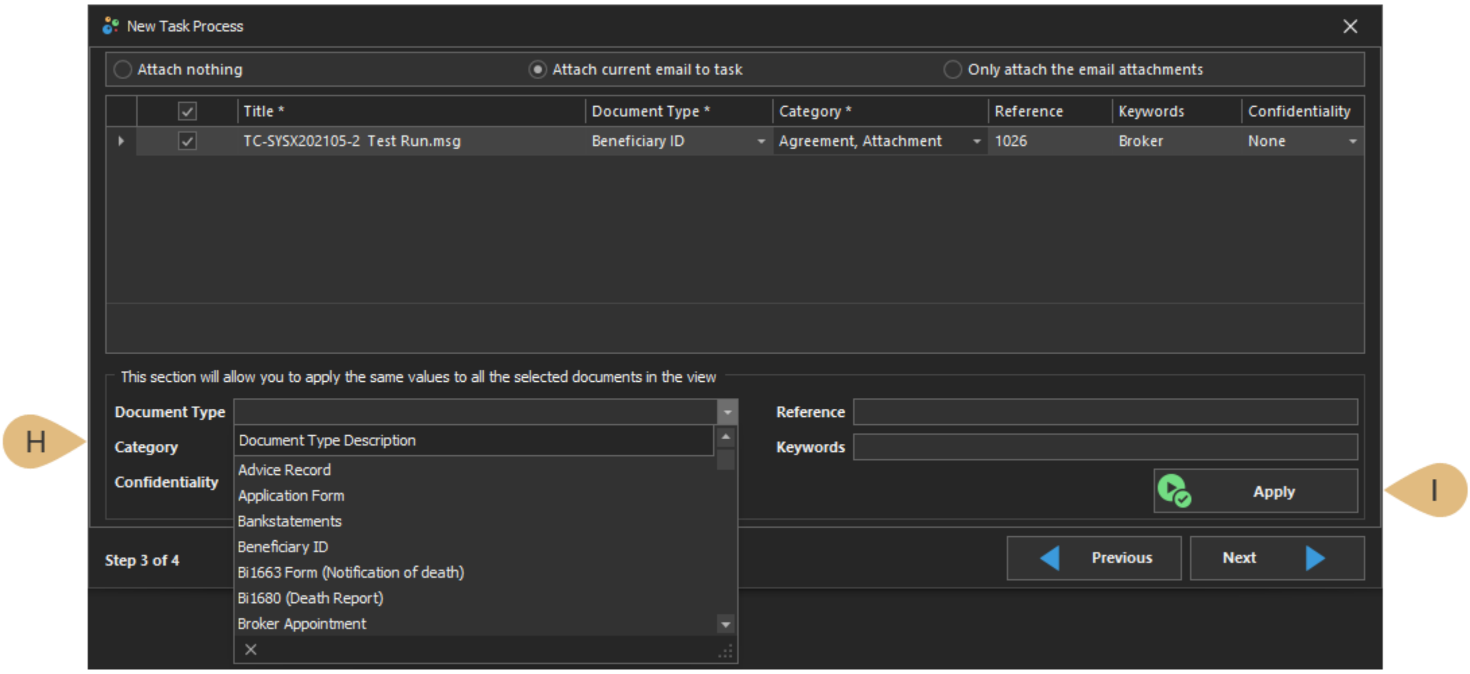
## Step 3: Specify Document(s)

Specify what type of attachment you want to create on the task.




**F**: Attach nothing will ensure that no attachments are created on the newly created task. This option is also selected by default. Attach current email to task will attach the current selected email as an email attachment (.msg) to the task. Only attach the email attachments will attach the items linked to the email as attachments to the newly created task.

**G**: In the document list view, select the documents you wish to attach to the task.
You can edit the values of the documents by using the inline editing option on the list view.

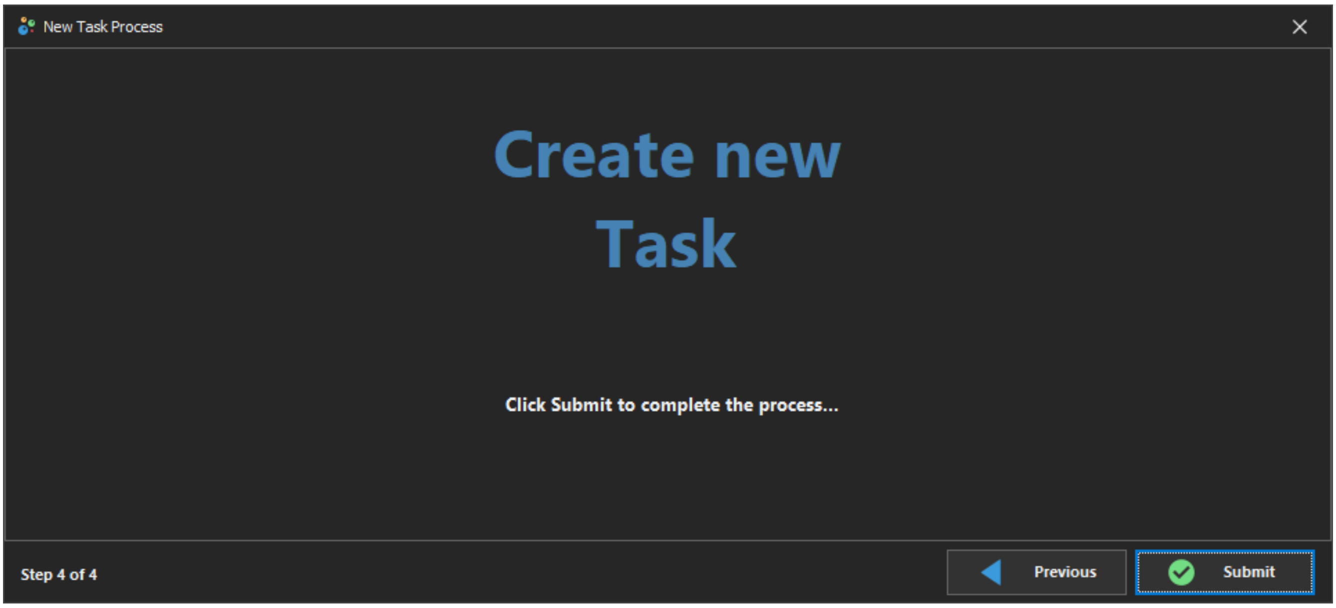



**H**: This section can be used to apply the same values to all the selected documents in the list view. A selected document will have a tick in the first column.

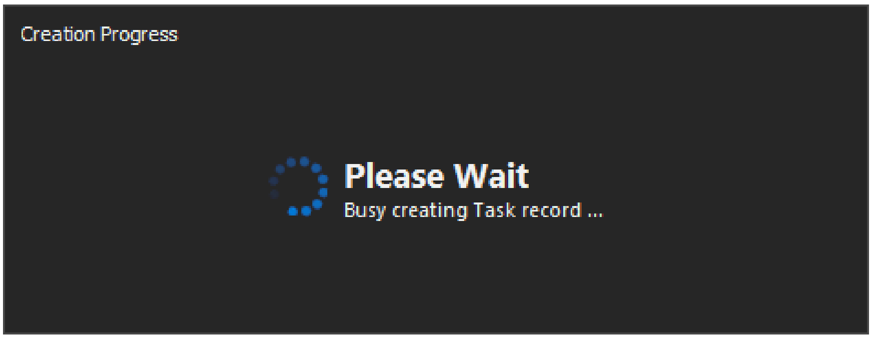
**I**: Click the “Apply” button to apply the changes to all the selected documents in the list view.

### Step 4: Submit to Complete

Click the “Submit” button to create the Task.

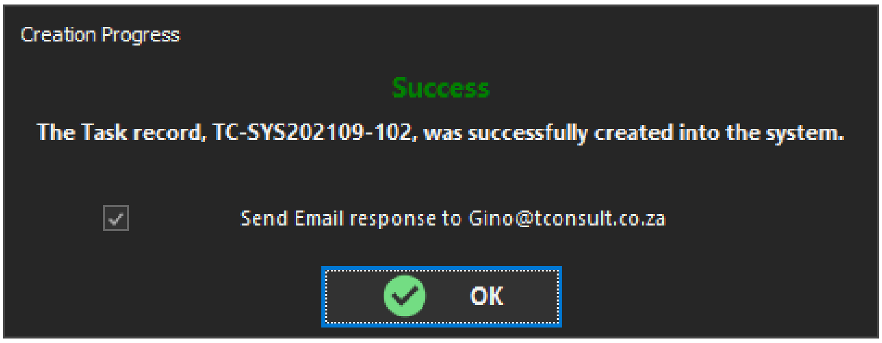



A popup will be displayed indicating the progress.




Once the process is done, a message will be displayed indicating whether the process was successful or not.

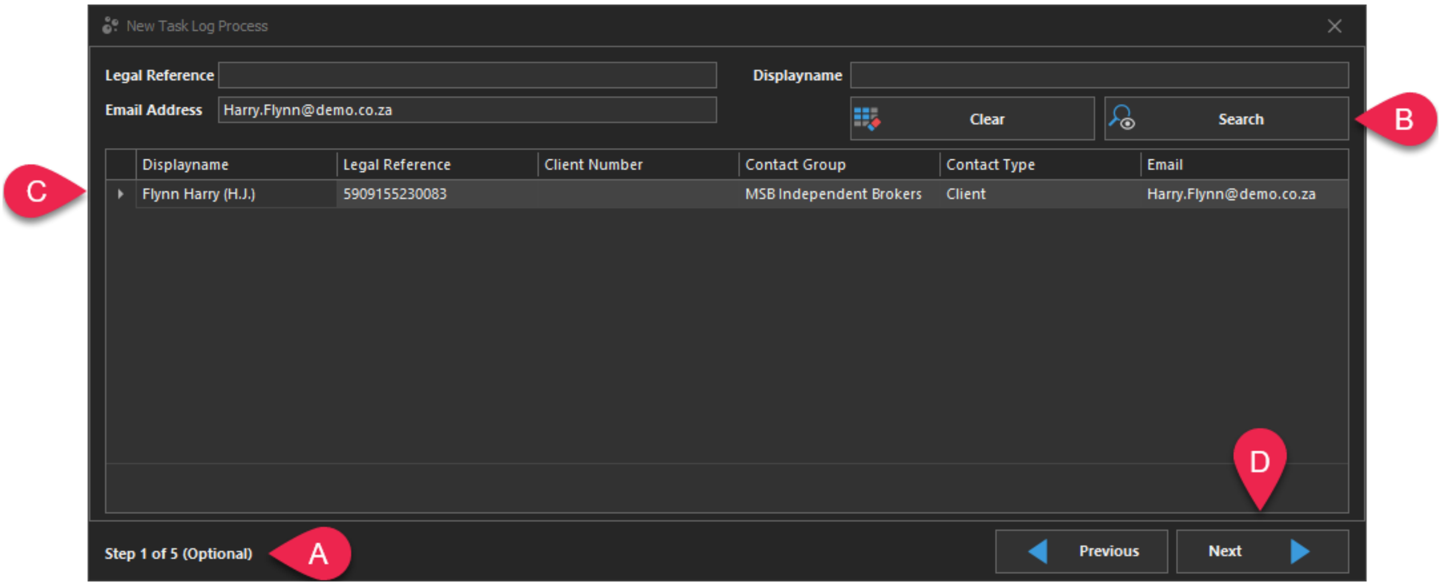
A check box will be shown, “Send Email response to”, that a user can utilise to send an email once the task has been created.



## Task Log Process Flow


## Step 1: Specify Task Owner (Optional)

The system will return a maximum of 20 records matching your search criteria.




**A**: Task Owner is an optional step now for Task Log Step 1. If a user does not want to specify an owner, the user can just click the "Next" button. Additionally, if an owner is not supplied, on Step 2 Task Subject will be disabled, only allowing the user to enter the Task Number.

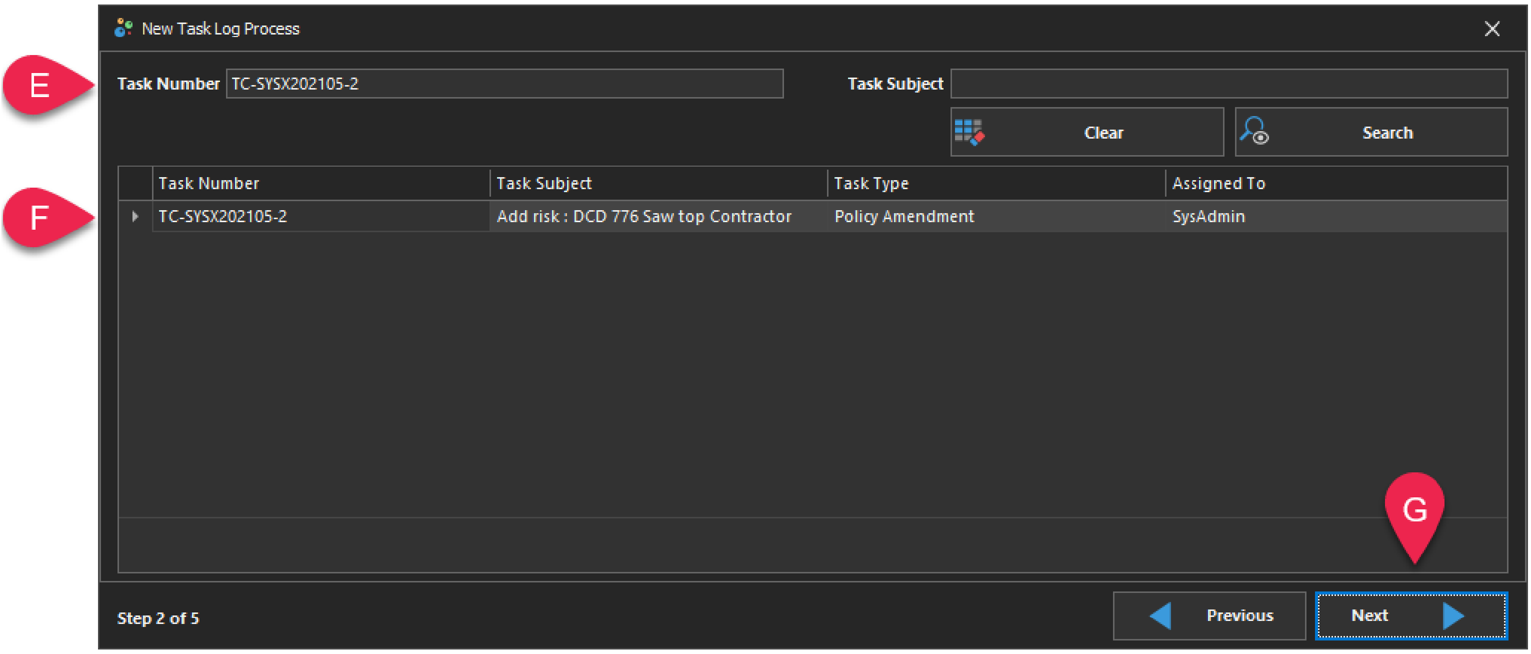
**B**: If a user desires to find a different contact, they can supply the Legal Reference for the most accurate results, Displayname or Email Address.

**C**: The results of the search will be displayed in the list view and will always automatically select the first row.

**D**: The user can click "Next" with or without an Owner being selected.

**NOTE**: This step is optional.

## Step 2: Search for an existing Task




**E**: If the selected email contains a Task Number in the email subject, the Task Number will be auto populated in the Task Number field and an auto search will occur.

**F**: If the task is found, it will be displayed in the list view and automatically selected.

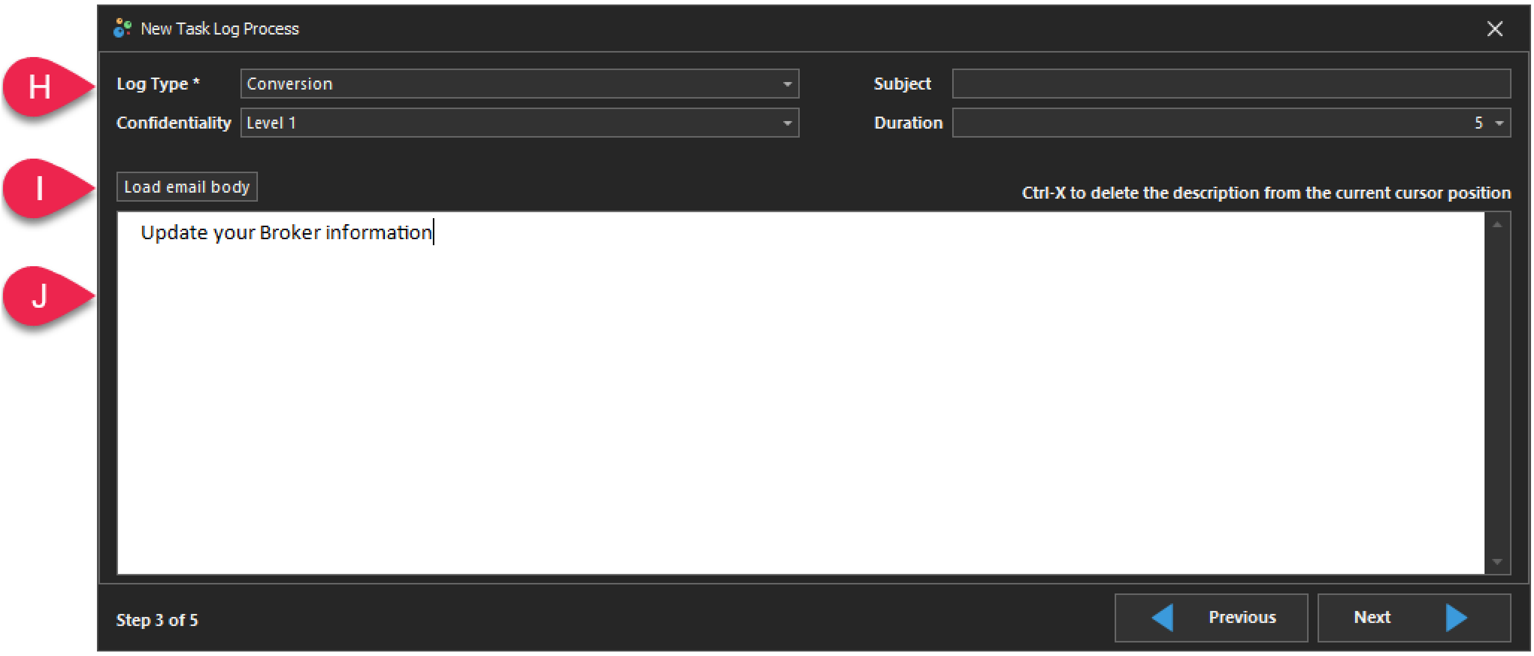
**G**: The user can click “Next” if the first record displayed in the list view is correct as it will be automatically selected.

**NOTE**: If an owner was specified in the first step, the first 20 active Task records for the client will be displayed when you search without a Task Number.

Furthermore, if an owner was not specified in the first step, Task Subject field will be automatically disabled in Step 2 of the Task Log process.

## Step 3: Specify Task Log properties

A Log Type and Log Description is required to proceed to the next step. The Log description can be specified manually, or the email body can be loaded using the “Load email body” action.




**H**: Log type is a required field as this determine what type of task log is being created. Please note that you will only see log types that is linked to the team you are currently in.

**I**: Use the “Load email body” action to load the contents of the email you have currently selected. If you want to remove the email that was loaded, just click the “Load email body” again and it will remove it.

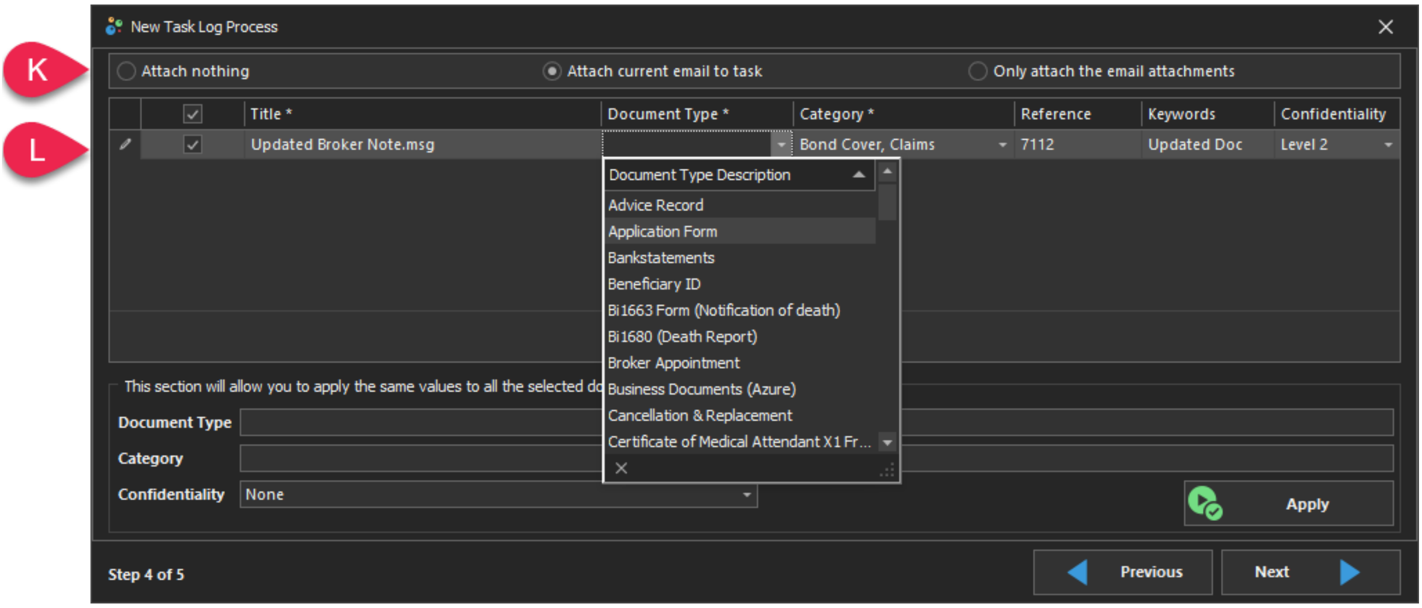
OR

**J**: Type your own body of the task log.

**NOTE**: Use Ctrl-X on your keyboard to delete the irrelevant part of the email body/text from the current cursor position.

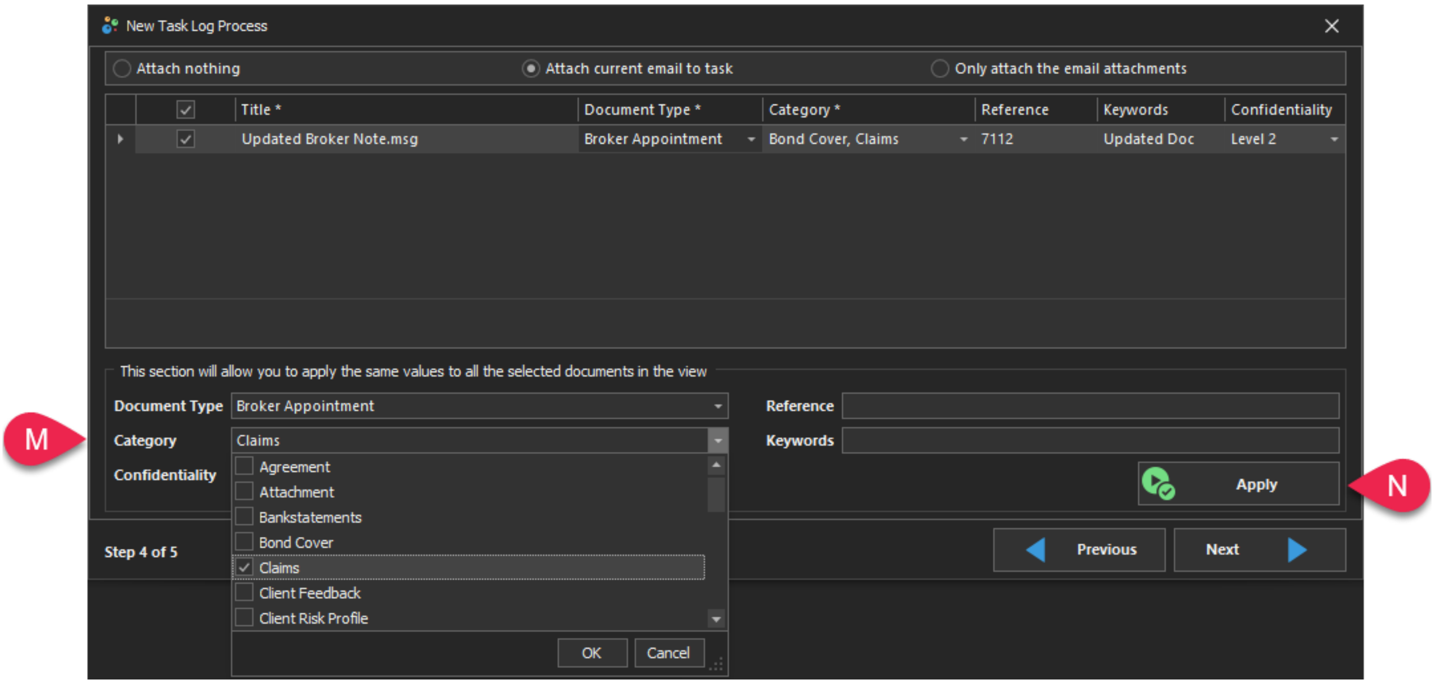
## Step 4: Specify Documents

Specify what type of attachment you want to create when creating the task log.




**K**: Attach nothing will ensure that no attachments are created on the task where the task log is being created. This option is also selected by default. Attach current email to task will attach the current selected email as an email attachment (.msg) to the task. Only attach the email attachments will attach the items linked to the email as attachments to the task.

**L**: In the document list view, select the documents you wish to attach to the task.
You can edit the values of the documents by using the inline editing option on the list view.

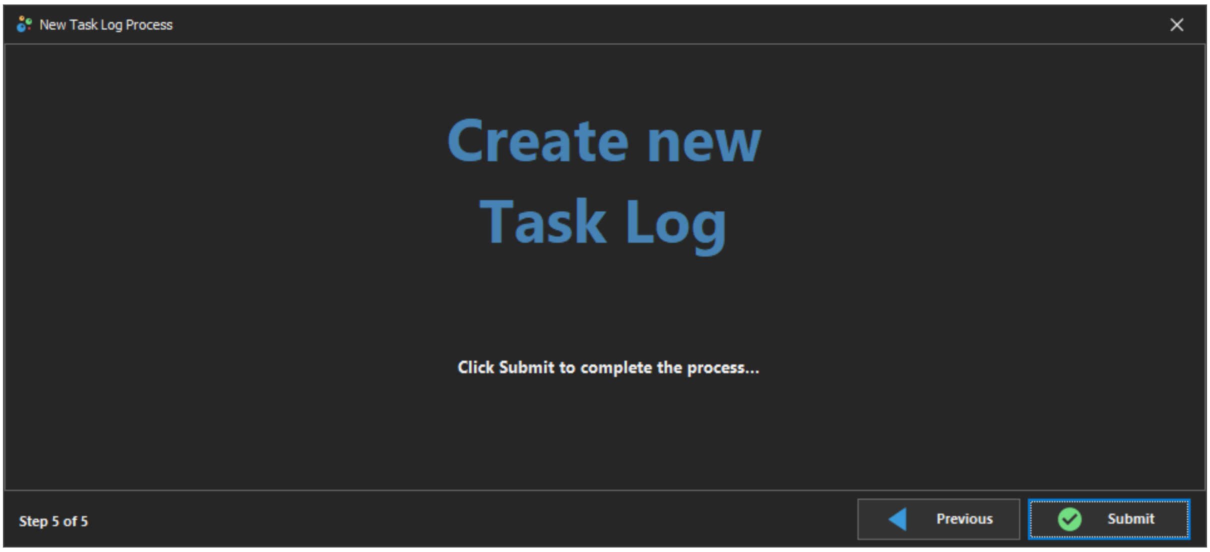



**M**: This section can be used to apply the same values to all the selected documents in the list view. A selected document will have a tick in the first column.

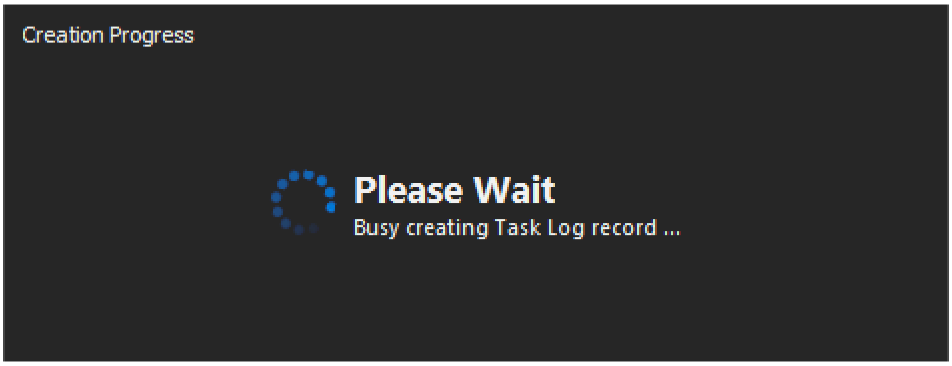
**N**: Click the "Apply" button to apply the changes to the selected documents in the list view.

### Step 5: Submit to Complete

Click the “Submit” button to create the Task Log.

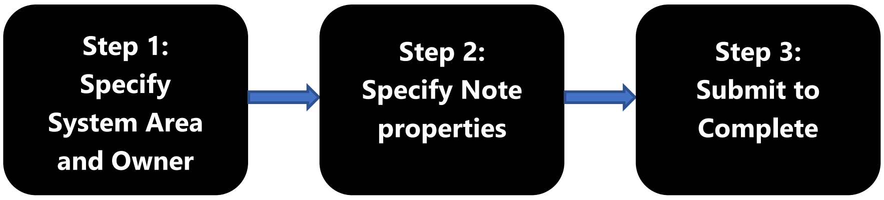



A popup will be displayed indicating the progress.



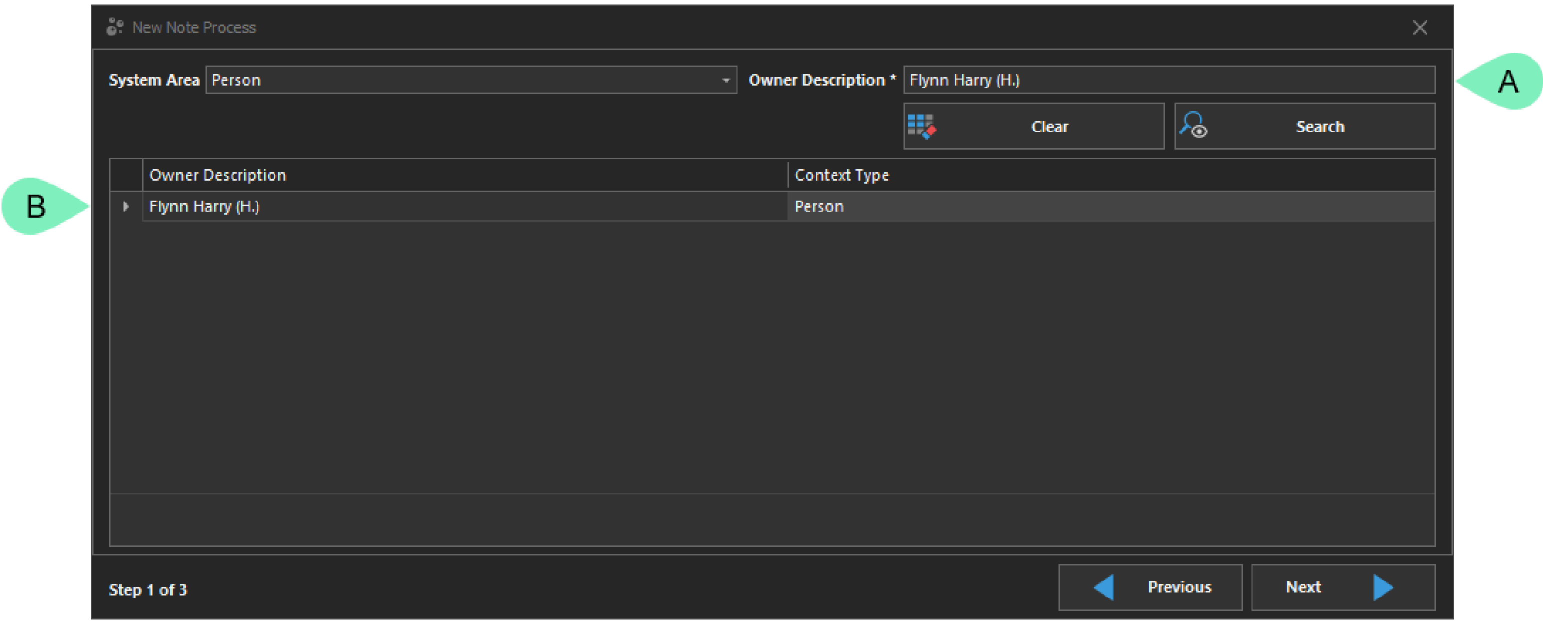

Additionally, once the process is done, a message will be displayed indicating whether the process was successful or not.

## Note Process Flow




## Step 1: Specify System Area and Owner

Search for an owner in a specific System Area.

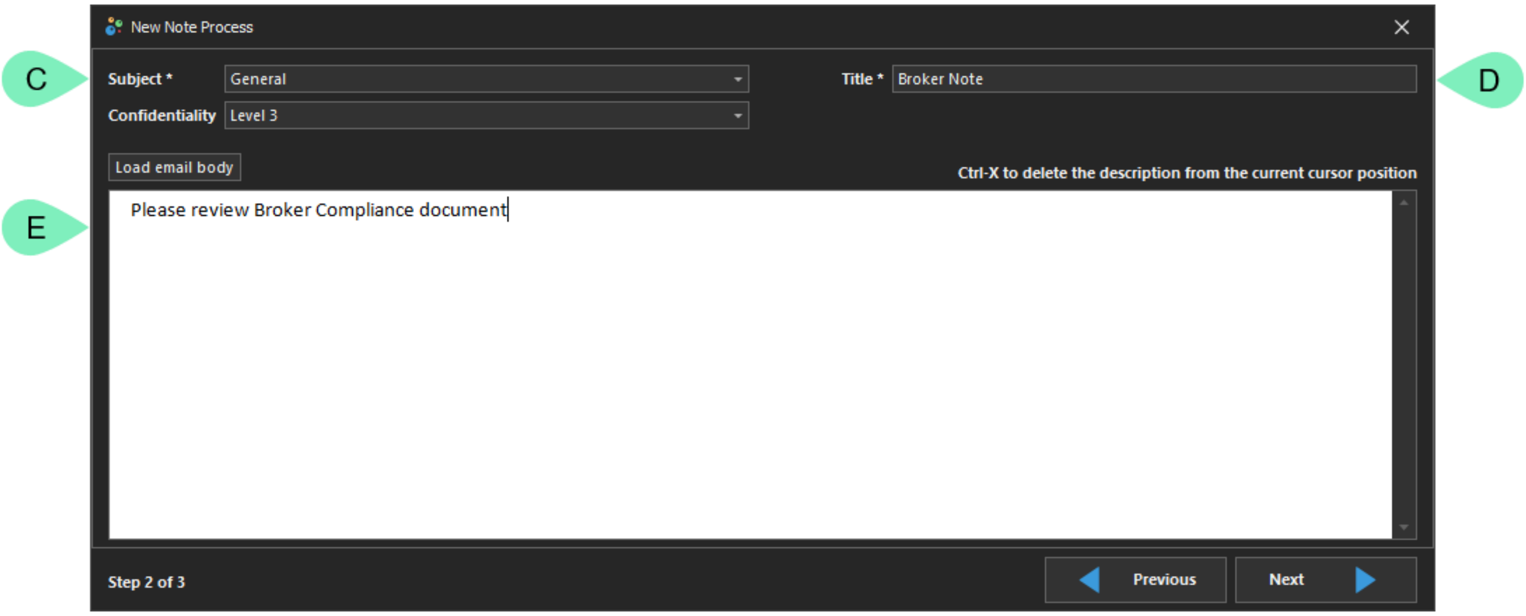



**A**: Search for an Owner in a specific System Area. When doing the search, please start with specifying the Owner's surname.

**B**: The search result will be displayed in the list view and the first record will be automatically selected for the user.

## Step 2: Specify Note Properties

Subject, Title and Note Description are required fields before moving to the next step.




**C**: The "Subject" field is the type of Note you are going to create. You can select a type from the drop-down list of values. These values are the same as in the Insure system.

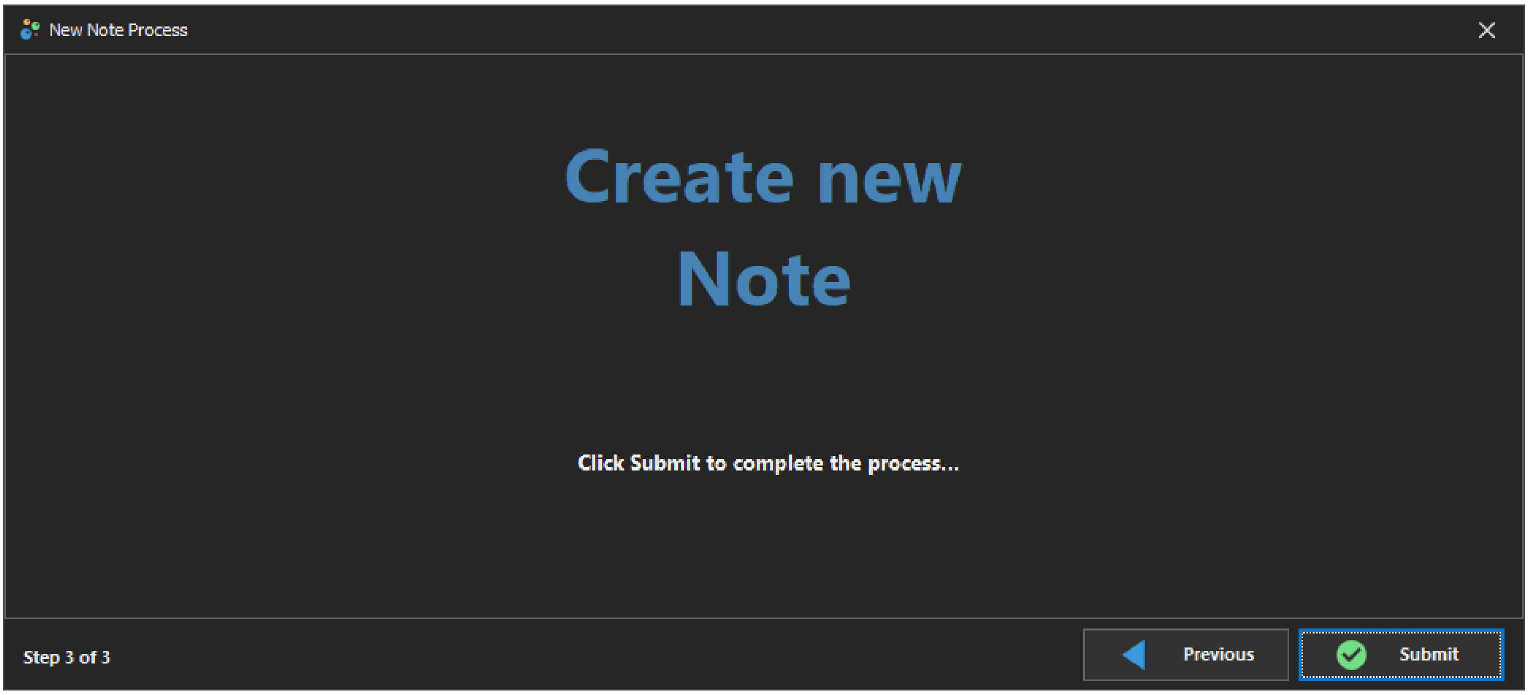
**D**: Title is a required field.

**E**: Use the "Load email body" action to load the contents of the email you have currently selected. If you want to remove the email that was loaded, just click the "Load email body" again and it will remove it.

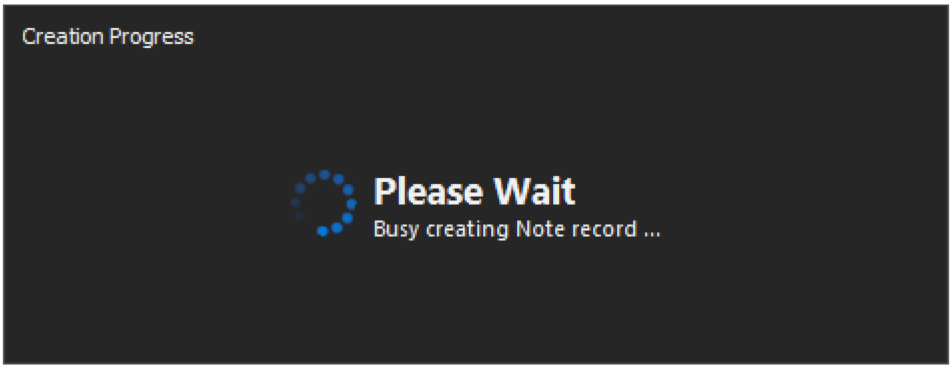
**NOTE**: Use Ctrl-X on your keyboard to delete the irrelevant part of the email body from the current cursor position.

### Step 3: Submit to Complete

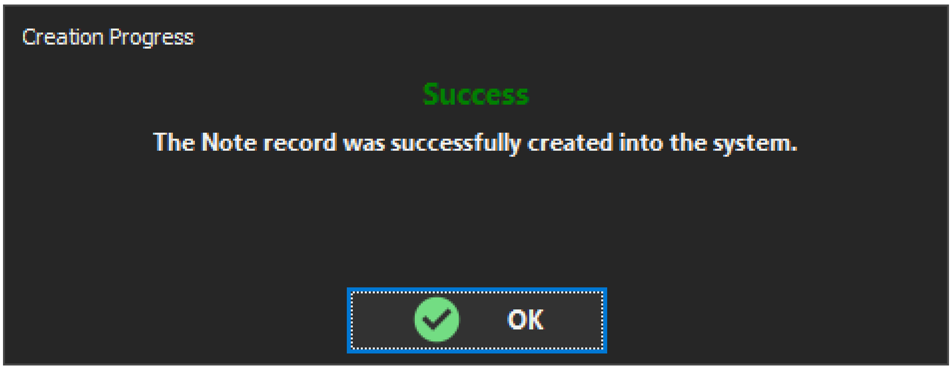
Click the “Submit” button to create the Note.




A popup will be displayed indicating the progress.



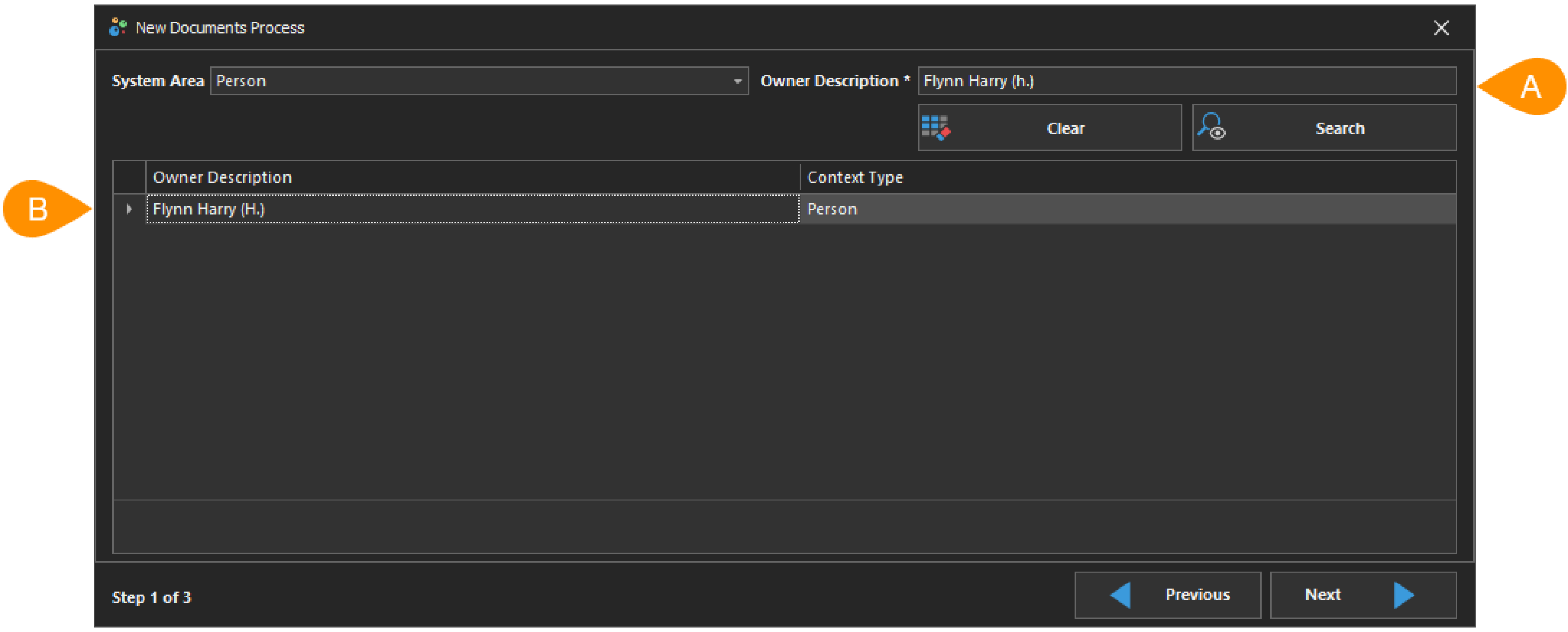

Additionally, once the process is done, a message will be displayed indicating whether the process was successful or not.



## Document Process Flow


## Step 1: Specify System Area and Owner

Search for an owner in a specific System Area.

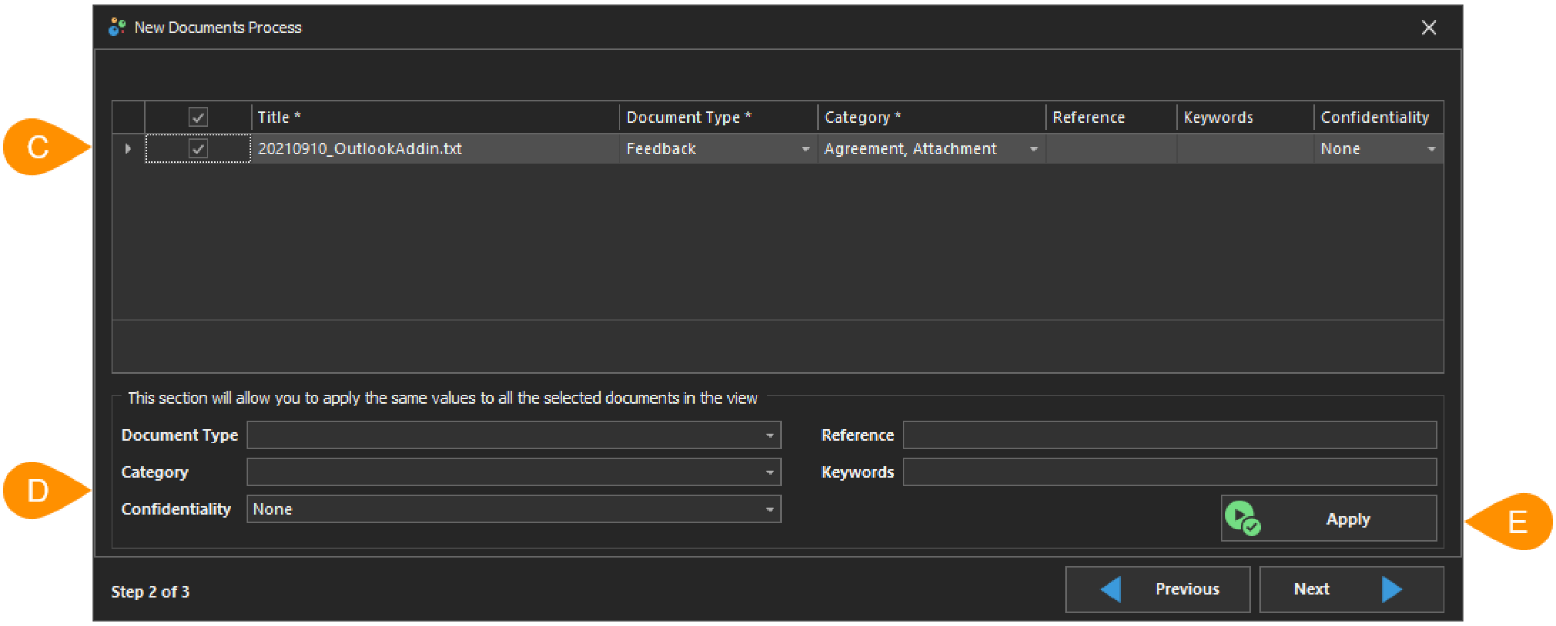



**A**: Search for an Owner in a specific System Area. When doing the search, please start with specifying the Owner's surname.

**B**: The search result will be displayed in the list view and the first record will be automatically selected for the user.

## Step 2: Specify Document Properties

In the document list view, select the documents you wish to attach to the Document Library.




**C**: You can select which documents you wish to create to the Document Library using the check box. Additionally, you will be able to do inline editing for each Document in the list view.

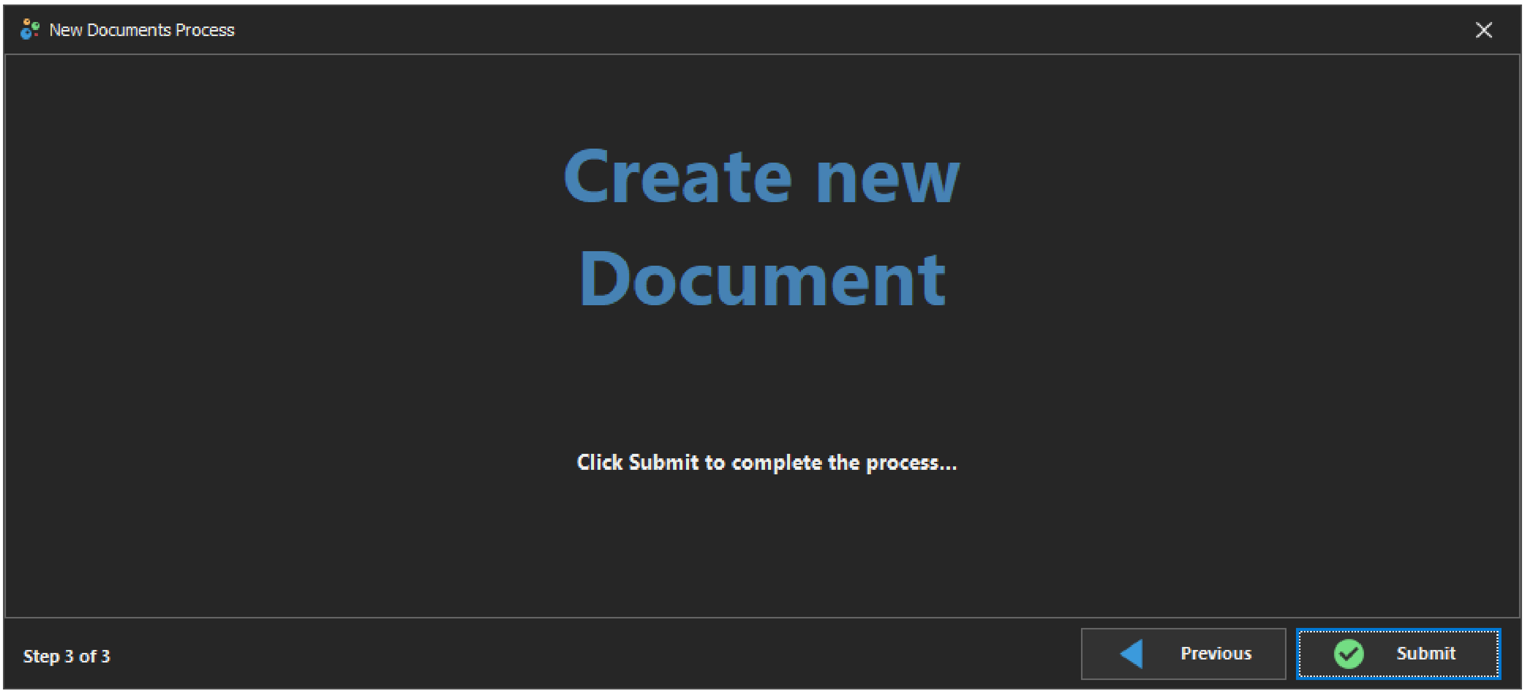
**D**: Apply changes to all documents selected in the list view, indicated in the check box. This will allow for changes to occur quicker if there are multiple documents that require the same information.

- Document Type
- Category
- Confidentiality
- Reference
- Keywords

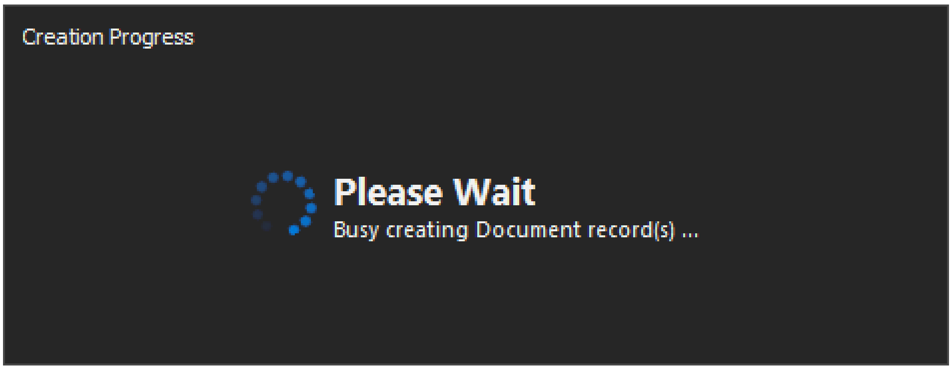
**E**: Click the "Apply" button to apply the changes to all the documents selected in the list view.

### Step 3: Submit to Complete

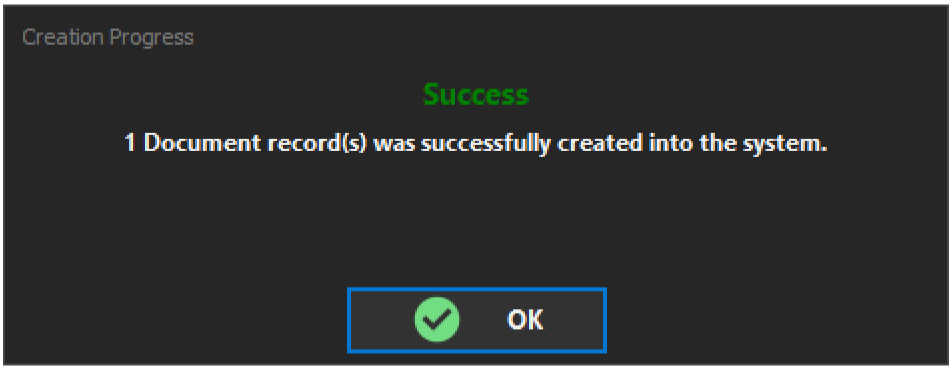
Click the “Submit” button to create the Document(s).




A popup will be displayed indicating the progress.



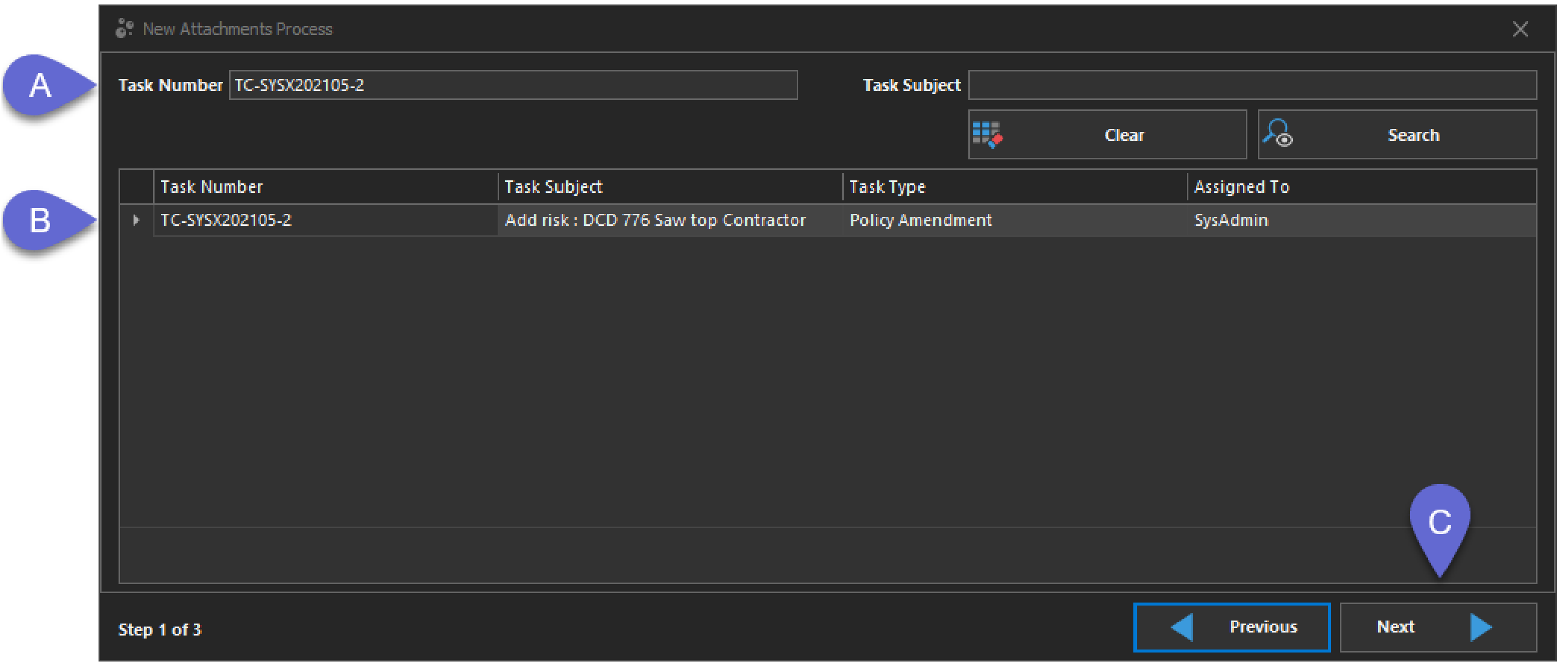

Additionally, once the process is done, a message will be displayed indicating whether the process was successful or not.



## Attachment Process Flow


## Step 1: Specify Task

Specify the task by supplying the Task Number or Task Subject.




**A**: For a more accurate result, supply the Task Number. However, you are allowed to search based on the Task Subject and a maximum of 20 task records will be returned that contains the specified subject.

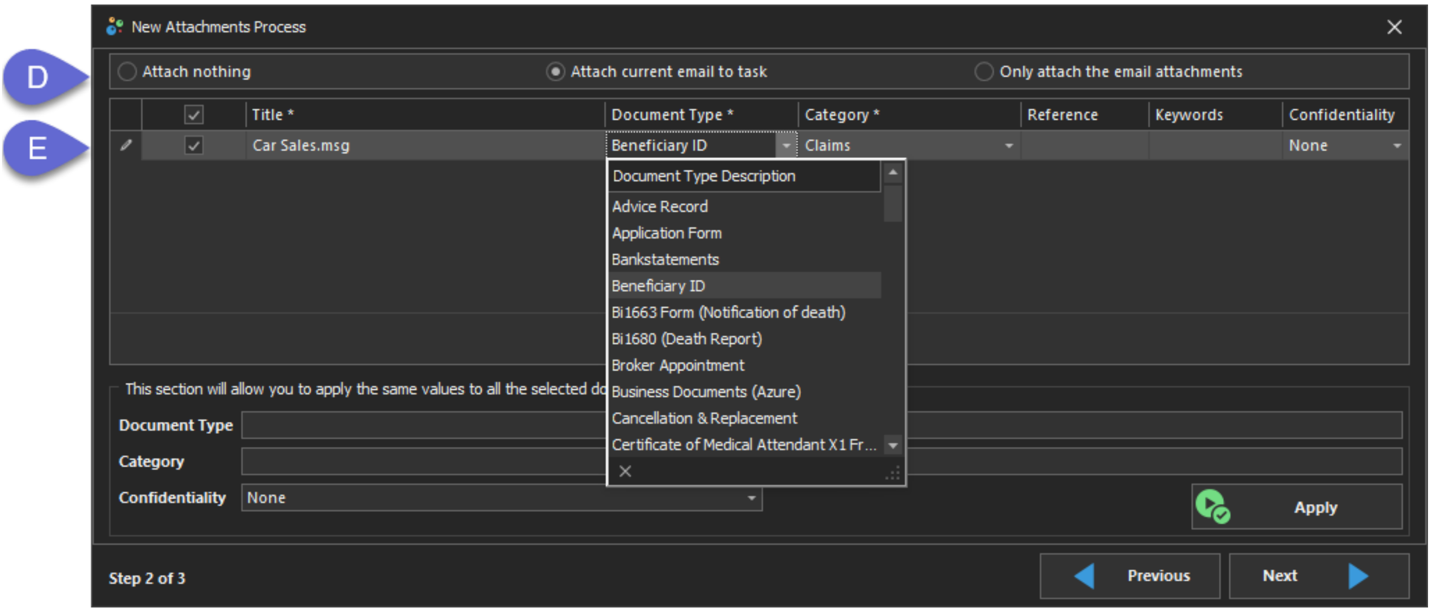
If the selected email contains a Task Number in the email subject, the Task Number will be auto populated in the Task Number field and an auto search will occur.

**B**: The first record in the list view will be automatically selected for the user, which is why it is very important to be as accurate as possible when searching for the task.

**C**: Click “Next” if the task record that is automatically selected in the list view is correct.

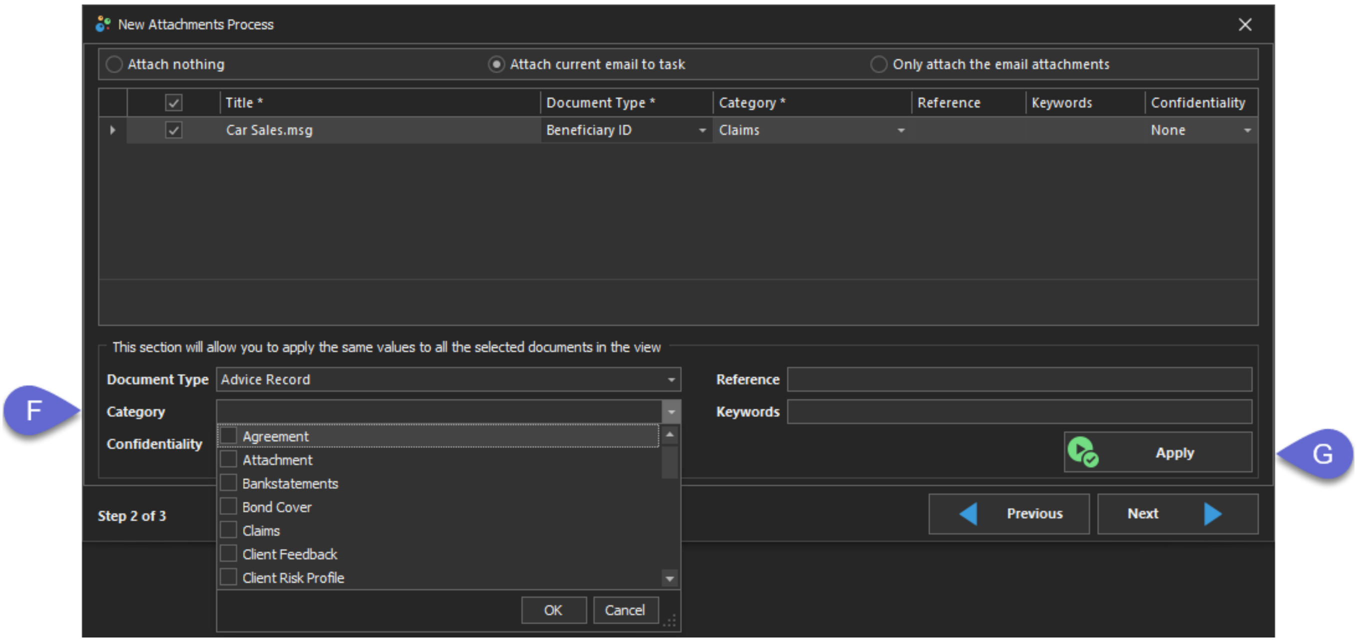
## Step 2: Specify Document Properties

Specify what type of attachment you want to create for a task.




**D**: Attach nothing will ensure that no attachments are created on the task. This option is also selected by default. Attach current email to task will attach the current selected email as an email attachment (.msg) to the task. Only attach the email attachments will attach the items linked to the email as attachments to the task.

**E**: In the document list view, select the documents you wish to attach to the task.
You can edit the values of the documents by using the inline editing option on the list view.

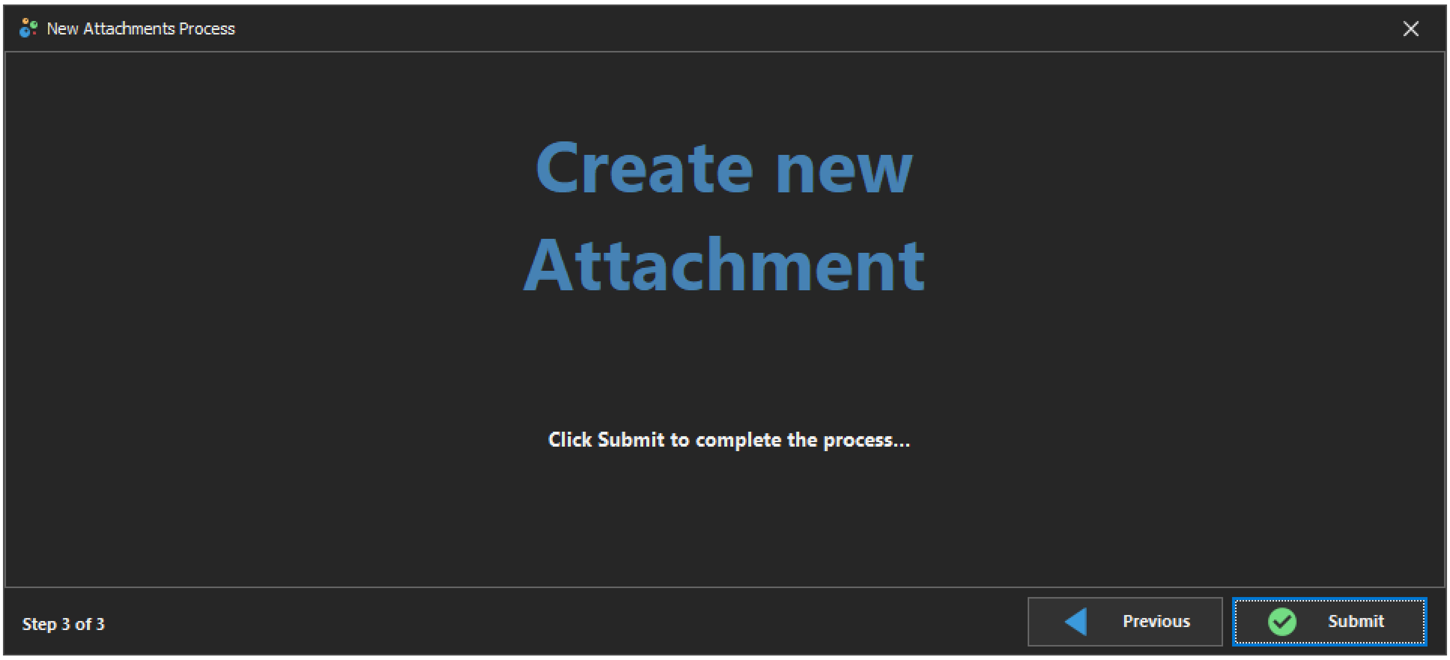



**F**: This section can be used to apply the same values to all the selected documents in the list view. A selected document will have a tick in the first column.

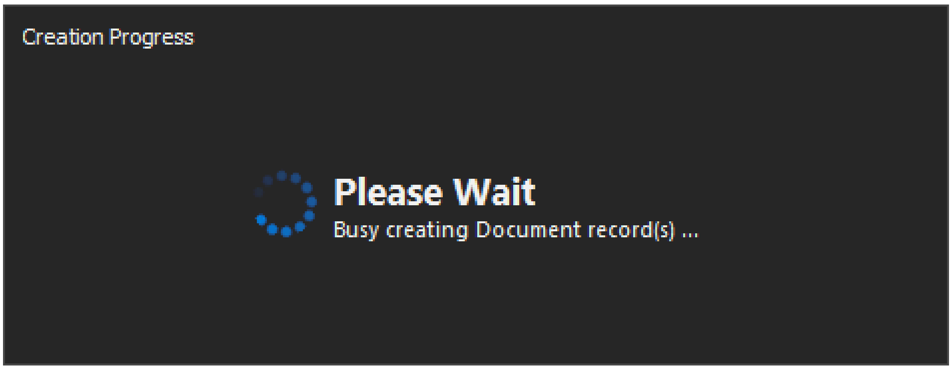
**N**: Click the "Apply" button to apply the changes to the selected documents in the list view.

### Step 3: Submit to Complete

Click the “Submit” button to create the Attachment(s).




A popup will be displayed indicating the progress.




Additionally, once the process is done, a message will be displayed indicating whether the process was successful or not.