

WorkSite 8.5 Quick Reference Sheet – MS Office 2010



1. FIND A MATTER (Workspace)

Outlook	Word, Excel, PowerPoint
<ol style="list-style-type: none"> Click on the button in the Outlook toolbar. Fill in the appropriate field(s) or use the buttons to select from a list. Click the button. Double-click on the desired Matter (workspace) from the list that appears. The Matter should be added to your Recent Matters list. 	<ol style="list-style-type: none"> Select File then Open or CTRL+O. Click on the Search button and select Advanced Workspace Search. Click to clear the previous search. Enter the client group or code information or use the button(s) to select from a WorkSite list. Click on the button.

To add the Matter to your **My Matters**, right-click on the Matter and select **Add to My Matters**.

2. FIND A DOCUMENT

Outlook	Word, Excel ...
<ol style="list-style-type: none"> Click on button. Click to clear previous search criteria. Fill in the appropriate fields. Click the button. Double-click on the desired document. <p>Use the Quick View tab if you wish to view the highlighted document content prior to opening it.</p>	<ol style="list-style-type: none"> Select File then Open or CTRL+O Click on the dropdown arrow beside the Search button and select Search Documents Fill in the desired fields, Click on the button. <p>Right-click on the document and select View to view the document prior to opening.</p>

A **shortcut** can be created to the document by right-clicking on the document and selecting **Add to My Favorites** at any time.

3. OUTLOOK WORKSITE EMAIL MANAGEMENT TOOLBAR

Outlook

Labels for toolbar buttons: Suggestion/Search Field, Suggestion/Search Dropdown, File Email, Attachment Saving Options, Search Docs, Search Workspace, Refresh, Database Selection, Recent Searches, Resize Slider, Delete and File, Print and File, Make Email private when Filed, Email and Document Actions, Help.

4. SAVE MY DOCUMENT

Overwrite Original	Save As Options
<ol style="list-style-type: none"> Select File then Save As or CTRL+S. Select Replace Original. Click the button. 	
<p>Note: The Replace Original option will overwrite the document that is saved on the WorkSite server whereas, clicking Save, or clicking Ctrl+S alone will not overwrite the server copy until it is closed.</p>	
Saving New Versions	Save As Options
<ol style="list-style-type: none"> Select File → Save As or F12. Select New Version. Click the button. Verify / modify profile information. Click . 	
Saving New Documents	Save As Options
<ol style="list-style-type: none"> Select File then Save or CTRL+S. Locate a Matter (refer to "1. FIND A MATTER (Workspace)"). Browse to your desired folder within the Matter (workspace). Enter the file description and author information. Click the . 	


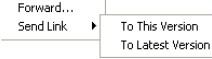
5. EXPRESS SEARCH PANEL

Word, Excel ...
<p>To open the Express Search Panel click on the button on the Open or Save dialog box in MS Word, Excel or PowerPoint and select Express Search Panel</p>
<p>Labels for Express Search Panel: Database Selection, Document / Workspace Selection, Query Box, Clear Search, Recent Searches</p>


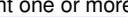
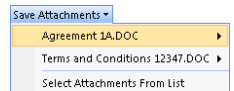
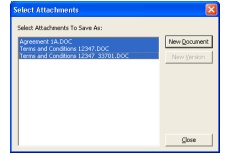

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


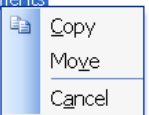
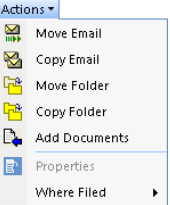


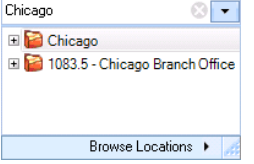
6. ADD A WORKSITE ATTACHMENT TO AN EMAIL

Outlook	
<ol style="list-style-type: none"> Method 1 – <u>Email First</u> <ol style="list-style-type: none"> Open a blank email. Click on the Insert WorkSite Attachment button. Locate document(s) (refer to “2. FIND A DOCUMENT”). Highlight the document(s) to be inserted. Use the down arrow, select Insert Copy or Insert Link, <u>OR</u> right-click and select Insert Link or Copy. Method 2 – <u>Document First</u> <ol style="list-style-type: none"> Locate the document(s) (refer to “2. FIND A DOCUMENT”). Highlight the document(s) to be inserted. Right-click, select Forward... or Send Link. If Send Link is chosen, select the appropriate version. 	 
<ul style="list-style-type: none"> Forward is normally used when sending an attachment(s) to external parties. Send Link is used when sending an attachment(s) to internal parties. This ensures duplication is minimized within the firm and that the appropriate security remains intact. 	

7. FILE ATTACHMENT(S)

Outlook	
<ol style="list-style-type: none"> Method 1 – <u>Drag & Drop to multiple folders</u> <ol style="list-style-type: none"> Locate the destination Workspace (refer to “1. FIND A MATTER(Workspace)”). Ensure the desired folder is visible in the left hand tree structure. Open or preview the email containing the attachment. Select and Hold the attachment(s). Drag the attachment(s) to the folder in the tree structure Release the attachment(s) Review and modify the suggested document fields Click  Repeat steps “g” and “h” for each additional attachment Method 2 – <u>Multiple attachments to one document folder</u> <ol style="list-style-type: none"> Highlight one or more email(s) with attachments Click  from the Worksite toolbar Click on “Select attachments from list” on the drop down menu. Highlight all the desired attachments Click the New Document button Follow steps “g” through “i” in Method 1 	 
<ul style="list-style-type: none"> Individual attachments can also be saved by opening it in its native application and utilizing the save functions. Occasionally the  button remains “grayed out” even after all the profile fields are complete. P press the [Tab] button on your keyboard once to activate it. Method 2: the profile dialog window will only be displayed once. All additional attachments will copy the metadata approved for the first attachment. 	

8. FILE AN EMAIL

Outlook	
<ol style="list-style-type: none"> Method 1 – <u>Drag & Drop</u> <ol style="list-style-type: none"> Locate the Matter (workspace) in the FileSite listing. Highlight Email(s) in Outlook. Right-click and HOLD mouse button. Drag the pointer to the document folder. TIP: Hover the mouse pointer over a folder to have it expand automatically. Let go of the right-click mouse button. Verify the proper document folder is highlighted. Select Move to transfer the Email(s) from Outlook to the Matter (workspace) folder, <u>OR</u> select Copy to retain a copy in Outlook and place a copy on the Matter folder. Method 2 – <u>Email Buttons</u> <ol style="list-style-type: none"> Highlight the Email(s) in Outlook for filing. Click on the Actions button from the Worksite toolbar Select the Move Email  or Copy Email  button. Locate the Matter (workspace) (refer to “1. FIND A MATTER (Workspace)”). Double-click on the desired document folder. Click Save. Method 3 – <u>Automatic Suggestion</u> <ol style="list-style-type: none"> Highlight the E-mail(s) in Outlook for filing. Refer to the “Suggested File Location / Search” field IF the suggested file location is correct, click on the  button. <u>OR</u> Click the Down arrow beside the “Suggested File location / Search” field to view other recently filed locations. Review the profile metadata fields. Click  Method 4 – <u>Searching for File Location</u> <ol style="list-style-type: none"> Highlight the E-mail(s) in Outlook for filing. Enter a word or phrase into the “Suggested File Location / Search” field. Expand the desired matter to view its document folders Select the appropriate document folder for your E-mail Click the  file button and select the desired filing option. Follow steps “e” and “f” from Method 3. 	    
<ul style="list-style-type: none"> Emails filed utilizing Method 3 can also be deleted, printed, or marked as private at the time of filing. Click on one or more of these buttons before clicking the File button to include the action. The appropriate dialog windows will be activated. Browsing to a folder is also an option in Method 4. To browse click on the “Browse Locations” button located at the bottom of the suggested files list. 	