

Microsoft Outlook Plugin – A User Guide

Welcome to the accessplanit Microsoft Outlook plugin guide, the following information will talk you through the setup of the tool, the various functions that the tool has in a simple to follow visual guide.

The purpose of the Microsoft Outlook Plugin is to capture information from emails that are sent and/or received from people that have a corresponding record that exists within your accessplan system, this information is then stored under 'user communications' and 'company communications'.

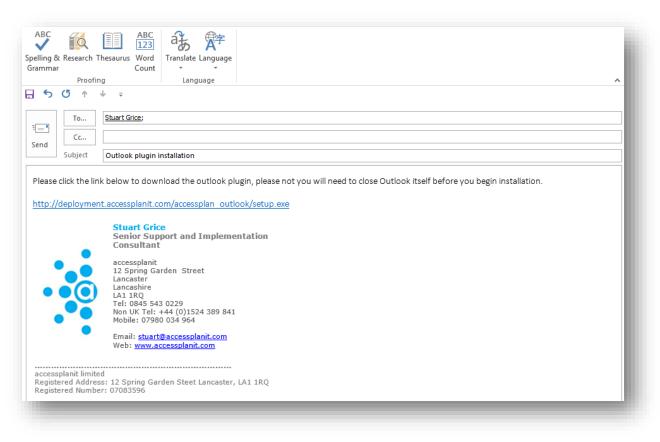
This means that providing the tool is installed on your computer, when a user or company is searched within your accessplan system selecting the 'view communications' option will show any emails sent or received to or from the selected user or company, this gives everyone who has access to your accessplan system a full communication trail between the customer and your own team.

Please Note: the plugin is not Mac compatible and you will need to be running Outlook version 2010 or later to use the plugin.

Section 1 – Download and installation.

The plugin is downloaded via a simple link that will be sent to you via email via the sales or support team, to install the plugin you will need to click the supplied link and follow the on screen instructions.

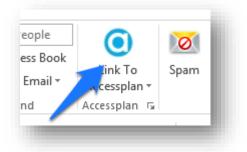
To install the plugin you will need to make sure that your version of Outlook is closed during the actual installation process.





Section 2 – Setup

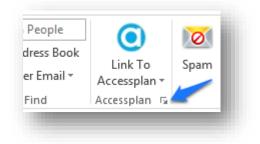
Once you have downloaded and installed the plugin simply open Outlook as usual, the plugin itself will check for any updates in the background but your email will open as usual, if there are any updates to the plugin you will be prompted to update it.



The first thing you will need to do with the plug in is to log into accessplan via the tool itself, this is a onetime set up procedure but it is vital for the tool to actually do its job.

To set up the tool click the small square icon to the very bottom right of the word name 'Accessplan' it looks like a square with an arrow pointing down and to the right as pointed out here.

Clicking this button will open up the main settings panel that has all the options you need to get the tool up and running so that it actively logs emails within the communication sections within your accessplan system.



		Setti	ngs				
Main	Auto Link						
Acc	essplan Url:	http://coursemanage	erdemolaccessp	anit.com/	/accessplan		
	User ID:	stuart	Password:		**		
Using this feature any emails that make up a conversation can share the same Link To information. If you compose a new email and link that email to Accessplan then any replies to that email will be automatically linked to the same Link To details as the original message.							
The Work offline feature enables the Accessplan Outlook utility to keep on working even when there is no connection to Accessplan. To enable this feature to work the utility builds up a local cache of the necessary dat							
on we	orking even v	when there is no conn k the utility builds up	ection to Acces a local cache (splan. Ť	o enable		
on we this for Enab havin	orking even v eature to wor ling debuggir	when there is no conn k the utility builds up	ature Enabled	splan. Ť of the nec recorded.	o enable essary dat If you're		
on we this for Enab havin	orking even v eature to wor ling debuggir	when there is no conn k the utility builds up Work Offline Fe	ature Enabled onal data to be ccessplanit may	splan. Ť of the nec recorded.	o enable essary dat If you're		
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There are two tabs at the top of the settings, the 'Main' tab is where you enter your system URL, you only need to enter the first word then click or tab out of the text box, for example entering 'coursemanagerdemo' is the only typing required for the course manager demo system that is used here.

The next section is asking for your accessplan user ID and password, once this is entered the 'validate' button at the bottom left needs to be clicked to check your url, username and password, if the validation is successful the option to save the details (at the bottom right) then becomes available, click save to save your progress.

The other options on the main tab are 'Auto Link Conversations Enabled', 'Work Offline Feature Enabled' and 'Debugging Enabled' the auto link option means that the system will link any emails together that have the same subject or that are all replies to the same original email (conversation linking) the 'work offline' feature is not yet available.

The final option 'Debugging Enabled' will record additional data and send update emails through to accessplanit daily, this mode is used if you are having any issues or difficulties with the tool.



The second tab, named 'Auto Link' has two purposes.

The first option is a simple tick box called 'Auto Link Enabled' if this option is selected the plugin will automatically find your contacts within your accessplan system when emails are sent and received without you having to do anything manually to enable linked communications, in order for this to work the email address(s) must exist within your accessplan system already.

Main Auto Link The Auto Link feature tries to automatically link emails with an individual or organisation within Accessplan if the recipient or sender corresponds to a single match within Accessplan. Image: Auto Link Enabled Use this field to define the email addresses that the Auto Link feature should ignore. Wildcards are supported so *@accessplanit.com is valid. Please use a new line to define each of the email address patterns to be excluded by the Auto Link feature.	
or organisation within Accessplan if the recipient or sender corresponds to a single match within Accessplan.	
Use this field to define the email addresses that the Auto Link feature should ignore. Wildcards are supported so "@accessplanit.com is valid. Please use a new line to define each of the email address patterns to be	_
should ignore. Wildcards are supported so *@accessplanit.com is valid. Please use a new line to define each of the email address patterns to be	
Validate Save Canc	el

The second option is used in conjunction with the first option and is a large free text box, this text box

> is used to 'ignore' any email domains that are entered into it, for example '@accessplanit.com' this is simply because you are highly likely to have your own company email in your system along with all your colleagues, the auto link feature would capture your emails to each other and save them in the communication section of the system, this would mean that each time anyone in the office emailed each other, accessplan would capture a long string of emails under both the sender and the recipient's communications.

Any updates to the setting would need to be saved by clicking the save button at the bottom right, if the save button is greyed out then the validate button will need to be clicked first.

Once these options have been saved

the tool is ready to use, remember the tool will not do anything on its own if auto link isn't enabled, also, the email address(s) of the users/candidates must already exist within your accessplan database in order for auto link or to manually link a user.

Section 3 – linking emails

There are two ways to link to email addresses, the auto link that is set up in section 2, or if the auto link option is left de-selected manually linking emails.

This section covers how both modes work.

Auto linking.

To auto link an email you simply send or receive an email from anyone who has an existing email address within your accessplan database, this method is the quickest and easiest way of using the tool.



- *		Untitle	ed - Message (HTML)	?	† –		×
FILE MESSAG	E INSERT	OPTIONS FOR	RMAT TEXT REV	IEW				
Paste ▼ ◆ ◆	- 11 <u>U</u> := - i= - A - ≡ = =	Names	 Attach File Attach Item * Signature * 	 Follow Up * High Importance Low Importance 	Zoom	Link T Accesspl		
Clipboard 🗔	Basic Text	G	Include	Tags 🕞	Zoom	Accesspla	n G	~
Image: Send Subject Test email								
Test email to Jen	na							

In the example above I have started to compose an email to Jenna, the plugin automatically searches the system that I am logged in to, in this case 'http://coursemanagerdemo.accessplanit.com' it sees that Jenna's email address exists and puts a small chain icon in the bottom right hand corner of the accessplan logo to show that this users email has been linked to accessplan.

Now when I send the email the content of the email will be logged under Jenna's name in the user communication section of the course manager demo accessplan system.

This is accessed by opening the system, logging in then performing a user search on Jenna.

earch Criteri	a	
User ID:		Detailed Results? Search
Title:	Y	Gender: 🗸
Forenames:	Jenna	Surname:
Address:		County:

Once the name is returned in the search a right mouse click brings up a contextual menu with a series of options, selecting 'User Communications' will open the communications section.



User Search Results		
Displaying 1 to 2 of 2		
Name	Company	
Jenna Culshaw	accessplanit ltd	
Course		63 View User Details
Accession Jatraduction Fac	Administration	Edit User Details
Accessplan - Introduction Fo	r Administrators	🚊 User Notes
Accessplan - Introduction Fo	r Administrators	1 User Communications
Accessplan LMS Brochure		Email User

The communications section will contain any system emails or elements that have been sent to the user and now also any email that has been sent to or from the user by anyone running the outlook plugin.

:: Filter Communications Filter the communications by type by selecting the options below: Communication Linked To: ✓ User ✓ Candidate ✓ Invoice/Credit Note ✓ Opportunity Communication Type: ✓ Communication Category ✓ Content Craig Dobson Technical Director 12 S Created: 02/07/2013 Craig Dobson Ichnical Director 12 S User Outlook Subject Test 6 Craig Dobson Technical Director Created: 02/07/2013 Craig Dobson User Outlook Subject Test 6 Created: 02/07/2013 Craig Dobson User > Outlook Subject Test 6 Craig Dobson Technical Director Created: 02/07/2013 Craig Dobson User > Subject Test 6 Craig Dobson Technical Director Created: 02/07/2013 Craig Dobson User > Subject Test email to Jenna Stuart Grice Seni Grice director Year >	Show all	how all communications text								
Communication Linked To: User Candidate Invoice/Credit Note Opportunity Communication Type: Communication Type: Content Test 2 Created: 02/07/2013 Craig Dobson Created: 02/07/2013 Craig Dobson Content Test email to Jenna Stuart Created: 22/08/2013 Stuart User Content Test email to Jenna Stuart Created: 22/08/2013 Stuart User Content Test email to Jenna Stuart Created: 22/08/2013 Stuart User Content Test email to Jenna Stuart Created: 22/08/2013 Stuart User Content Test email to Jenna Stuart Created: 22/08/2013 Stuart User Content Test email to Jenna Stuart Created: 22/08/2013 Stuart User Content Test email to Jenna Stuart Created: 22/08/2013 Stuart User Content Test email to Jenna Stuart Created: 22/08/2013 Stuart User Content Test email to Jenna Stuart Created: 22/08/2013 Stuart User Content Test email to Jenna Stuart Created: 22/08/2013 Stuart User Content Test email to Jenna Stuart Created: 22/08/2013 Stuart User Content Test email to Jenna Stuart Created: 22/08/2013 Stuart User Content Content Test email to Jenna Stuart Created: 22/08/2013 Stuart User Content Content Test email to Jenna Stuart Created: 22/08/2013 Stuart User Content Content Test email to Jenna Stuart Created: 22/08/2013 Stuart User Content Content Con	:: Filter (Communica	ations							
Communication Type: Image:	Filter the	Filter the communications by type by selecting the options below:								
Outlook Subject Test 2 Created: 02/07/2013 Craig User Outlook Craig Dobson Technical Director 12 S Dobson User Outlook Subject Test 6 Created: 02/07/2013 Craig User Outlook Subject Test 6 Created: 02/07/2013 Craig User Outlook Subject Test 6 Craig Dobson Created: 02/07/2013 Craig User Subject Test 6 Craig Dobson Created: 02/07/2013 Craig User Subject Test email Created: 02/07/2013 Craig User Subject Test email Created: 02/07/2013 Stuart User Test email to Jenna Stuart Grice User Start Start	Communication Type:									
Content Craig Dobson Technical Director 12 S Dobson Outlook Subject Test 6 Content Created: 02/07/2013 Craig Dobson User Subject Test 6 Craig Dobson Technical Directo Created: 02/07/2013 Stuart Grice User								Filter		
Content Test 6 Craig Dobson Technical Directo Dobson Subject Test email Created: 22/08/2013 Stuart User Content Test email to Jenna Stuart Grice	Outlook	Content	Craig Dobson Technical	Created: 02/07/201		User		· · ^		
Content Test email to Jenna Stuart Grice	Outlook	Content	Test 6 Craig Dobson	Created: 02/07/201		User		>		
()		Content	Test email to Jenna Stuart			User		> ,		
	<							>		

In this example you can see that the last communication was the example sent from outlook, the first column says 'Outlook' and all the information from the email is contained within the row, right clicking this row gives you the option to view, edit or delete the communication.

Manual linking

The manual link gives you more control over what emails are stored on accessplan, the process takes slightly longer but gives you the choice per email to store it on accessplan or not.

For manual linking to work you must make sure that the auto link tick box is de-selected from the settings page (see section 2)

In this example I have composed an email to Matthew, the auto link chain image hasn't' appeared because I am in manual mode, I have decided to link this email to accessplan manually.



Paste B I	(Body) \cdot 11 \cdot A A U $=$ \cdot $=$ \cdot	FORMAT TEXT REV	 Follow Up • High Importance Low Importance 	Zoom	Link To Accessplan •		
Clipboard 🗔	Basic Text 🕞	Include	Tags 🕞	Zoom	Link To User	•	Select User
🖬 🔊 🖉 🗅	ψ =				Link To Company	y 🕨	
То	Matthew Goddard;				- Try Auto Link		
					Settings		
Send Cc							
Subject	Test to Matthew						
Test email using	manual linking.						

This time, because this is a manual link I have to click the accessplan logo, select link to user, then click select user, this will present you with a drop down list of all the companies on your system which will then show a list of all users and their email addresses listed below, the task is then to manually select who this email will be stored against in the communications section.

If you select a different person to the name you have entered into your email the system will not correct so be careful when selecting the user.

Com	pany: access	planit Itd			<u>ہ</u>
Surn	ame:				Refresh
	Forenames	Sumame	Email	Company	^
	Andrew	Baxter		accessplanit Itd	
	Jenna	Culshaw	jenna.culshaw@hotmail	accessplanit Itd	
Γ	Craig	Dobson		accessplanit ltd	
	Bill	Evans		accessplanit ltd	
	Dave	Evans		accessplanit ltd	
Γ	Julie	Evans		accessplanit ltd	
Γ	Andrew	Flook		accessplanit Itd	
Γ	Matthew	Goddard	matthew.goddard@acce	accessplanit Itd	
	Stuart	Grice	stuartgrice@accessplanit	accessplanit Itd	
	Richard	Hoare		accessplanit Itd	
	Richard	Hoare		accessplanit Itd	
	Chris	Hotchkiss		accessplanit Itd	
	Laurie	lbbs		accessplanit ltd	
	Robert	Leack2		accessplanit ltd	
	Test	Manager		accessplanit ltd	
	John	Stokes		accessplanit Itd	
	APIT	Trainer		accessplanit Itd	
	Test	Trainer1		accessplanit ltd	
	Test	Trainer2	testtrainer2@accessplani	accessplanit ltd	~
				ок	Cancel



Section 4 - Viewing Communications

This section has been touched on in section 3 but here follows a recap.

To view any communication linked to a user or company simply perform a user search or company search for the user or company that you are looking for.

User Search	User Search	
Course Search	:: Search Criteria	
Course List	User ID:	Detailed Results? Search
🐞 Course Calendar 🍓 Training Providers	Title:	Gender:
Course Directory	Forenames:	Surname: goddard

Then use the right click on the users name and select 'User Communications' or 'Company Communications' the difference is that the company communications will display any emails that have been sent to users within the company, the user communications will only show communications with the currently selected user.

Company Search	User Search Results				
g Course Search Product Search	Displaying 1 to 1 of 1				
🙀 Course List	Name			Company	
Course Calendar	Matthew Goddard			accessolanit Itd	
n Training Providers	Course		View User Details		
Help	E-Learn 2	X	Edit User Details		
My Account	L LCom 2	Ē	User Notes		
🕉 My Company	Test Course		User Communications		

Below is the view of all company communications with accessplanit. The top section actually allows you to enter manual communications but this does not interact with outlook at all.

Communication	ns Content					
Subject:			Type: * SMS	~	Category:	~
Body:						
		-				
Date Created:	22/08/2013 11:45					
how all communic	ations text 🗌				New	Update
Filter Commun	cations					
Iter the communic	ations by type by select	ing the options below:				
Communication	Linked To: Com	pany 🗹 Invoice/Credit C	ommunication 🗹 Opport	tunity		
Communic	ation Type:	~				
Communicatio	on Category	~				
						Filter
/pe Deta	ils		Date	User	Linked To Cat	egory
Con		uiry: Accessplan - Int ry The user Dave Evan	Created: 28/03/2011		Company	,
Cont	ject Invoice - RE: Trai tent Credit Note Dear tus: Unread		Created: 07/04/2011			,