

QUICK EDIT INSTALLATION AND USER'S GUIDE

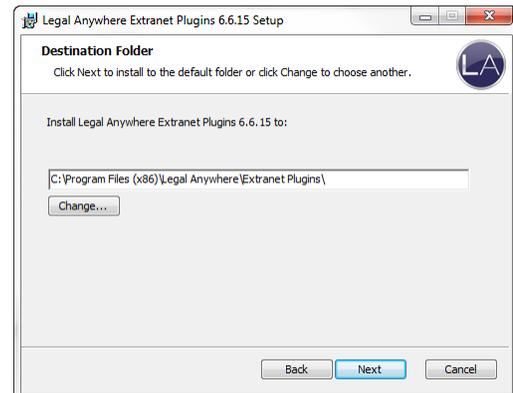
Overview

Quick Edit gives the user the ability to edit files offline and save them back to the extranet. If versioning is turned on, the revised file will be saved to the Extranet as a new version. Quick Edit is a client-side tool that must be installed on the user's local computer. Any file for which you have an application, can be edited through the Quick Edit function, as long as the ability to Check-Out documents is permitted in your Security Profile and your Member Profile is set to allow Quick Edit. Quick Edit is designed for making quick changes to the file, not lengthy edits.

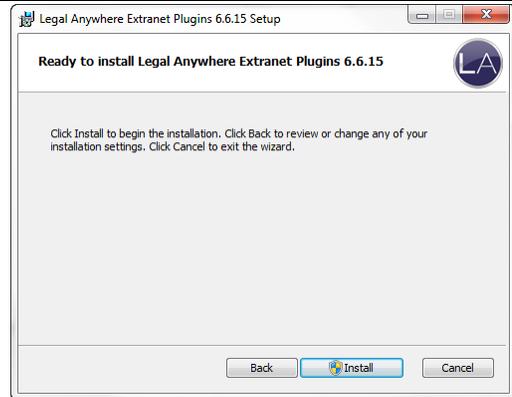
To Install Quick Edit:

Quick Edit is included in the Extranet Plugins installation that is automatically triggered for Multi-File Upload or Multi-File Download. If you do not have the Extranet Plugins installed, you will be automatically prompted the first time you attempt to use the functionality, or you can install the Extranet Plugins manually from the MSI file. The instructions below take you through the MSI installation.

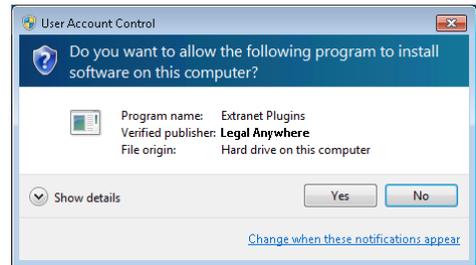
1. Double-click on the **Extranet Plugins 6.6.x.msi** icon.
2. Click the **Next** button to start the installation process.
3. Click the **Next** button to accept the default installation location; or you can change the location for installation, and then click the **Next** button.



4. Click the **Install** button to start the program installation.



5. Click the **Yes** button, if you receive the **User Account Control (UAC)** popup.
NOTE: The UAC only appears for Windows 7 and higher.



6. Click the **Finish** button to complete the installation.



To Enable Quick Edit via Member Administration:

Before you can use Quick Edit, you need to enable the Quick Edit option in Member Preferences. This option is most commonly made available only to Member Administrators; though it can be made available to Internal and/or External Members by a Site Administrator.

1. Navigate to **Administration > Member Administration**.
2. Modify the selected Member's Profile.
3. Expand the **Member Preferences** section.
4. Select **Yes** for **Quick Edit Integration** in the **Document Settings** section.

Document Settings

Multi-File Upload	<input checked="" type="radio"/> Yes <input type="radio"/> No
Select Yes to enable Multi-File Upload. Members using Internet Explorer will be able to use the Multi-File Upload ActiveX control to upload several files at once. Select No to upload one file at a time.	
Activate DMS Plugin Installation	[None]
Checks the local computer to see if the DMS Plugin is installed already. If not, it will push the selected DMS plugin. The DMS Plugin option requires Multi-File Upload to be set to Yes.	
Multi-File Download	<input checked="" type="radio"/> Yes <input type="radio"/> No
If set to Yes, this option allows Members to download multiple Documents simultaneously. Requires a client-side installation.	
Quick Edit Integration	<input checked="" type="radio"/> Yes <input type="radio"/> No
If set to Yes, this option allows Members to use the Quick Edit tool and requires a client-side installation.	

5. Scroll to the bottom of the page.
6. Click the **Submit** button.

NOTE: To make this option available to your individual Members, you can modify the Site level Member Preferences:

1. Navigate to **Administration > Member Administration > Member Preferences**.
2. Scroll down and expand the **Document Settings** section.
3. Change the **Display in User Profile (Internal)** and/or **Display in User Profile (External)** options to **Yes**.

Quick Edit Integration

Display Name	Quick Edit Integration
Description	If set to Yes, this option allows Members to use the Quick Edit tool and requires a client-side installation.
Default Value (Internal)	<input type="radio"/> Yes <input checked="" type="radio"/> No
Default Value (External)	<input type="radio"/> Yes <input checked="" type="radio"/> No
Default Value (Self-Reg)	<input type="radio"/> Yes <input checked="" type="radio"/> No
Display in Member Administration	<input checked="" type="radio"/> Yes <input type="radio"/> No
Display in User Profile (Internal)	<input type="radio"/> Yes <input checked="" type="radio"/> No
Display in User Profile (External)	<input type="radio"/> Yes <input checked="" type="radio"/> No
Member Defaults	<input type="checkbox"/> Apply default to existing members

4. Scroll to the bottom of the page and click the **Submit** button.

Once this is complete, Internal and/or External Members will be able to change this setting for themselves through their User Profile.

To Use the Quick Edit Utility:

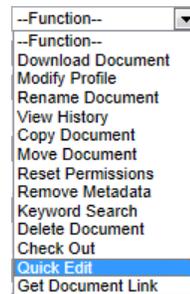
With Quick Edit Integration set to **Yes** and the Quick Edit Utility installed on the local computer, you can now use the Quick Edit functionality.

NOTE: If you use Worldox, you will need to completely exit out of Worldox in order for Quick Edit to work properly. If you do not completely close out of Worldox, the file will not be able to be updated in the Extranet.

1. Navigate to the **Documents** feature of your Matter.
2. Select **Quick Edit** from the Function drop-down to the right of the document you wish to edit.

NOTE: Your list of options may be different from the list displayed to the right, depending on the Security Profile to which you are assigned.

NOTE: If you do not see the option for Quick Edit, it has not been enabled in your Member Preferences, or the document may be set to not allow Check-Out.



3. Make your changes to the document.

NOTE: This tool is designed for making quick changes to the file. Having the file open during editing longer than your Extranet Automatic Logoff time (30 minutes standard), could cause you to be **unable** to return the file to the Extranet through this functionality. If this occurs, save your file locally, and then Check-Out the document. Check in the modified file you saved locally.

4. Perform one of the three following options:
 - A. Select **File > Close**; or
 - B. Select **File > Exit**; or
 - C. Click the **X** to close the window or application.
5. Click the **Save** button to save the changes.

NOTE: It is possible that the prompt will be from Microsoft, the application you are using to edit the file or your document management system. Regardless of the application listed in the title bar, click the **Save** button.

The only exception to this is Worldox. If the Save dialog is from Worldox, the changes will NOT be saved into the Extranet. You need to completely exit Worldox, so that it does not attempt to intercept the Save process.

NOTE: You may receive a popup similar to the one to the right. If this happens, it is because Windows is not able to track the program being used to edit the file. Office 2007 and 2010 both cause this message to display. Apparently, Windows is looking for a program id (PID), and it is not recognizing what is being passed to it, so it pops up this message.

6. Enter the appropriate version check-in comments in the **Check In** popup. The **Check In** dialog will only appear, if the **Must Save Old Versions** option is set to **Yes** for the document.
7. Click the **OK** button to check in your changes.

