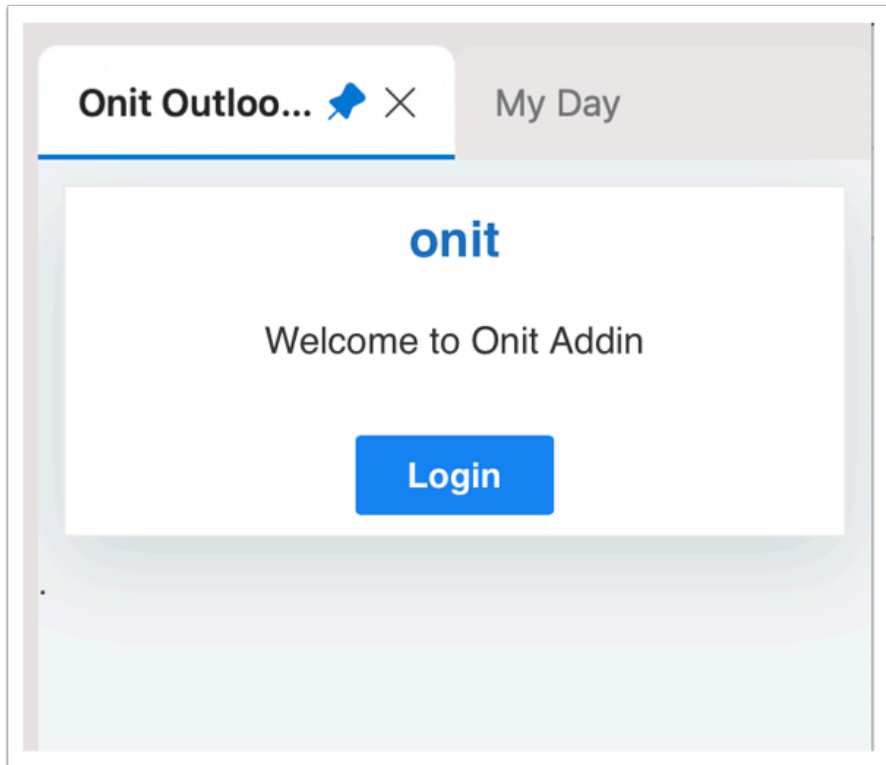# ONIT Outlook Add-In 2.1 End User Guide
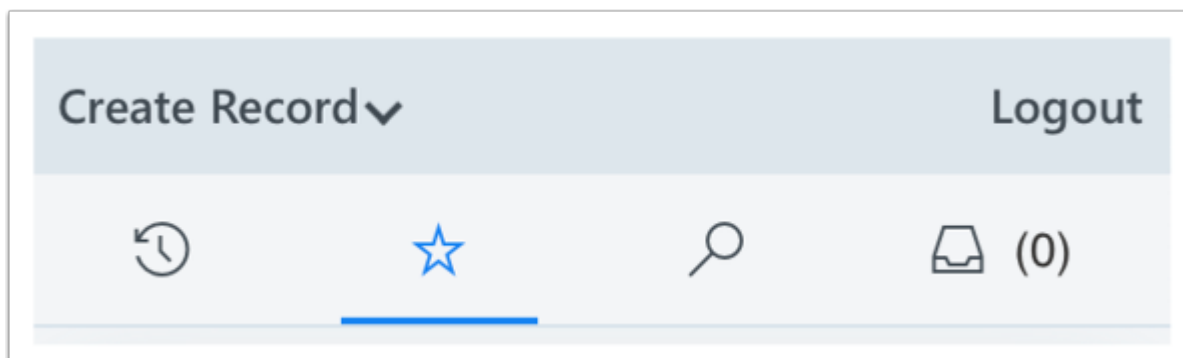
1. Logging In

When first opening the add-in, it will appear on the right side of the screen with a login prompt as shown below.

Click 'Login' to authenticate as you normally would to any Onit instance.
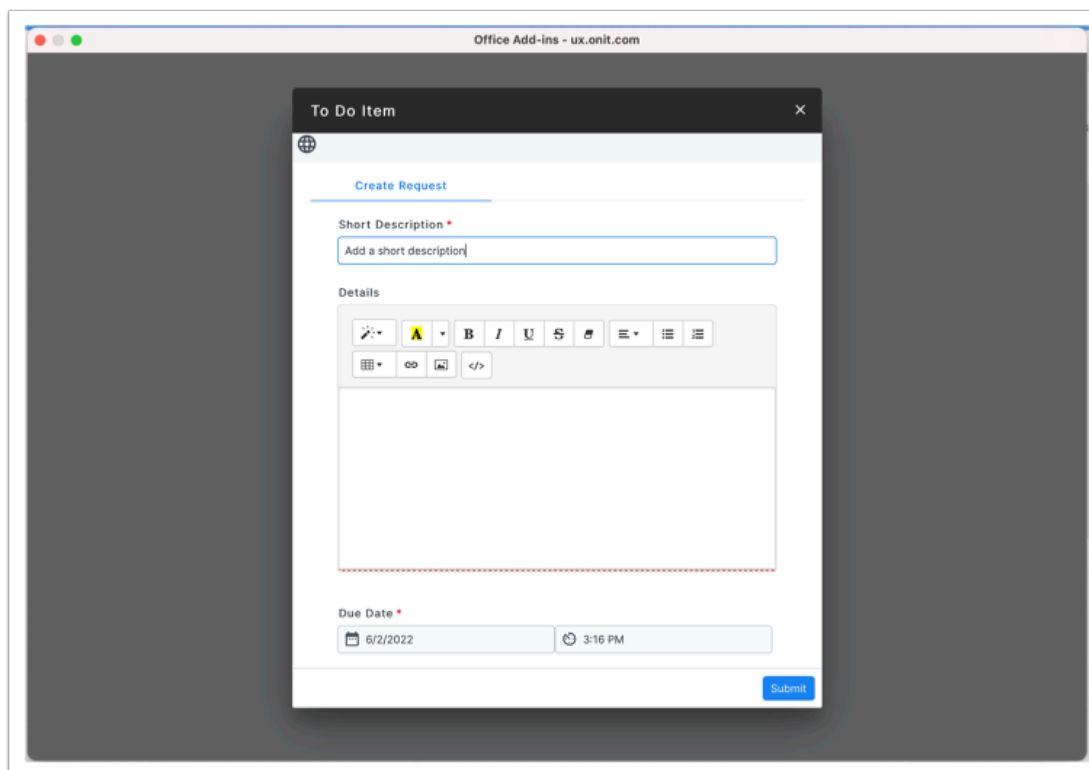
2. Add-In Main Menu

After logging in, you will automatically be redirected back to the add-in where you will see a header menu of options, shown below.

NEW: Creating a Record

In the latest version of Outlook, the 'Create Record' functionality has been moved from the Search tab to the main menu, pictured above.

To create a record, open the dropdown to select the type of record to create from the list of apps that have been configured to work with the add-in. An embedded browser will open to give you access to a typical Onit 'Create Record' dialog, shown below.
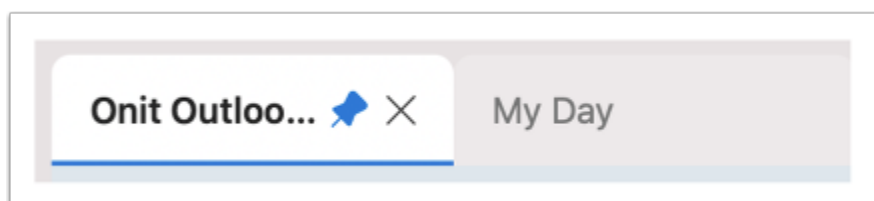

NEW: Logging out

In the latest version of Outlook, the 'Logout' functionality has been moved from the Search tab to the main menu, pictured above. Click this link to logout of the add-in.

The main menu tabs are described in more detail in section six of this document.

3. Pinning The Add-In Open

To always keep the add-in open as you navigate between e-mails, click the push pin icon next to the add-in name as shown below. (The location of the pin icon will vary between versions of Outlook).

4. Accessing Records In ONIT

The following functionality to allow access to Onit records is available from the main menu:


After a successful login, you will be navigated automatically to a list of your 'Recently Viewed' records. This list is generated automatically as you access records within the Onit system.
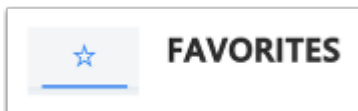
The 'Favorites' list contains links to records that you want easy access to. A record can be favorited directly from within Onit or from the add-in.
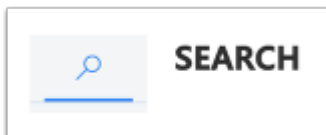
If you are looking for an Onit record that is not available from the 'Recently Viewed' or 'Favorites' tabs, you can use 'Search' to locate it. See below for additional documentation on the add-in's search capabilities.
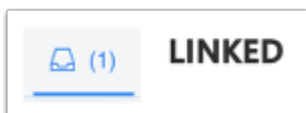
The 'Linked' tab shows all the records that have been linked to the email current visible within Outlook. An email can be linked to multiple records, so the toolbar menu item displays with the count of connected records.

No matter which method above is used to locate a record in Onit, the result will display as shown below.

The user can click on "See more..." to see additional fields that have been configured to display on the record.

The following actions can be taken directly from each result record:

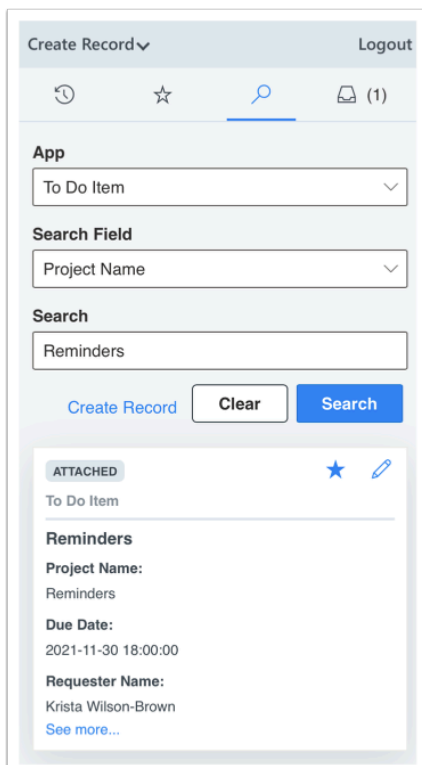|	Linking	Use the link icon to send a copy of the current email to the selected record. Emails may be linked to multiple records. Once a link has been made, navigating to this email in Outlook will automatically retrieve the details for all records linked to the email and show them in the linked emails tab. If the current email has already been linked, this icon will not appear, and the following graphic will display instead.
		ATTACHED
★	Favoriting	Use the star icon to add this to your list of favorites.
✎	Editing	Use the pencil icon to open Onit in a browser embedded into Outlook. You will be automatically navigated to the current record where you can edit it, add child records or take other available actions.

5. Searching For Records

You can search for records in your system by navigating to the Search tab, pictured below.

Searches can be performed one app and one field at a time. The available search fields will vary based on the configuration described in section one of this document.

To start a search, enter a value in the 'Search' field and click 'Search'. All matching results are returned as shown.

If you are unable to find a match and would like to create a new record, click the 'Create Record' link from the main menu. This functionality is discussed in more detail in section four of this document.