

Before You Begin

Quick Reference Guide



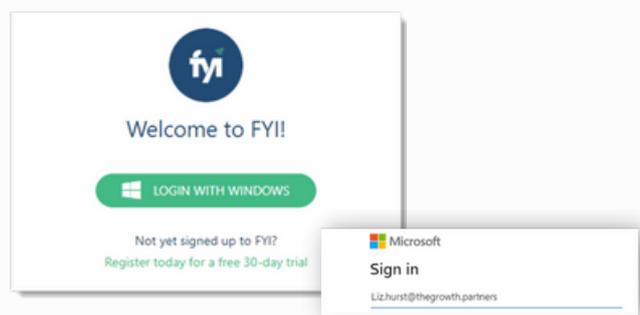
Login to FYI and access the Drawer

Use your Microsoft credentials to login and access the FYI Drawer from Outlook, Word, Excel and PowerPoint.

- ✓ Login to FYI
- ✓ Display the Drawer in FYI
- ✓ Display the Drawer in Outlook
- ✓ Display the Drawer in Office

Microsoft 365 Integration

FYI is deeply integrated with Microsoft 365 to provide the back-bone to intelligent auto-filing features, the ability to edit documents using Microsoft's desktop apps, and an additional layer of security.



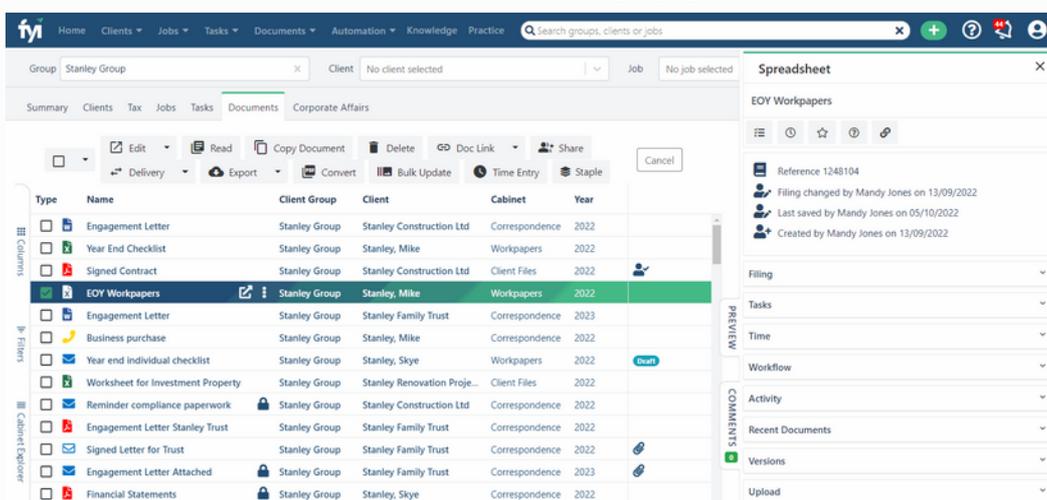
Login to FYI at app.fyidocs.com

- Sign in using your Microsoft 365 email and password.
- You will be required to login after being inactive for eight hours (or as specified in your practice settings).
- Home is your personal view of information in FYI. This is where you will find your recent documents, your FYI In Tray, and the jobs and tasks you are working on.
- Bookmark this page for easy access.

[Click here for help logging in](#)

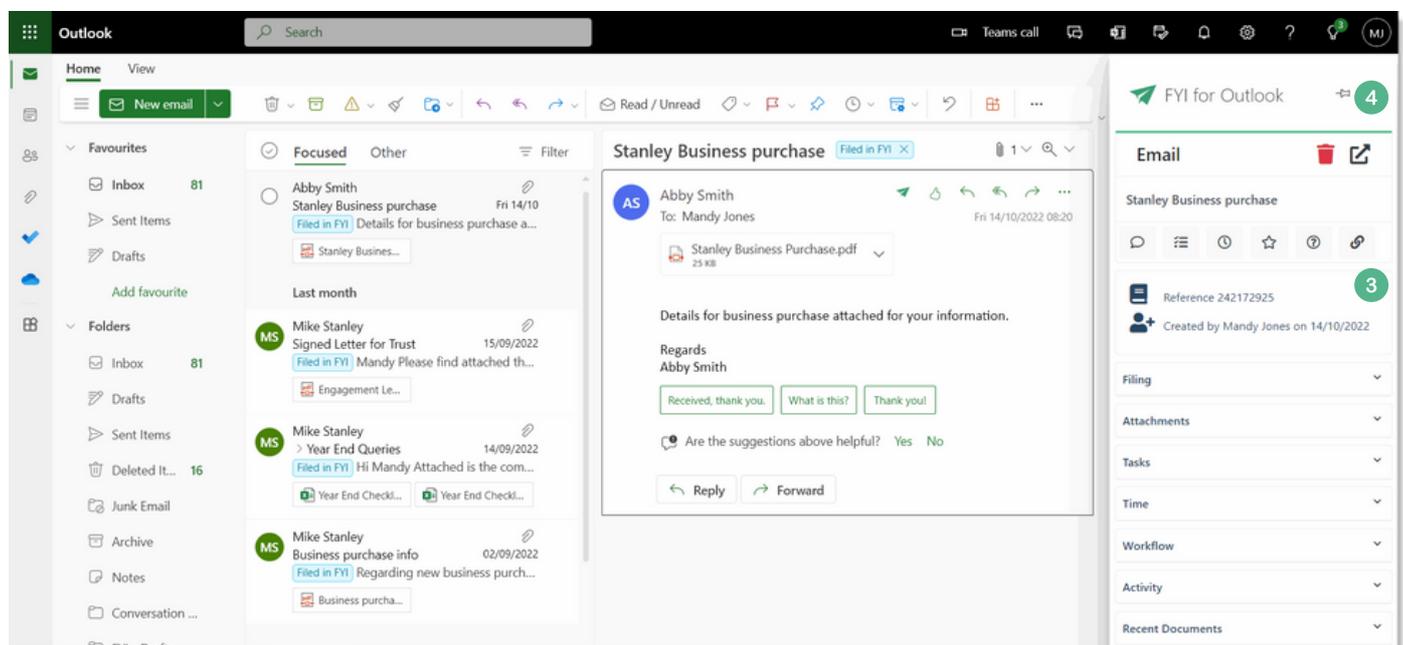
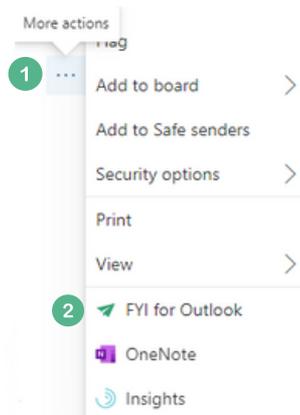
Displaying the Drawer in FYI

Click on an email or document in a list to display the Drawer. The Drawer holds information on Filing, Tasks, Comments and other Activity related to the email or document.



Displaying the FYI Drawer in Outlook

- 1 To display the FYI Drawer using Outlook Online, select an email and click More Actions (...)
- 2 Select FYI for Outlook. from the drop-down menu (it is usually located at the bottom of the list). If it does not appear, click Get Add-ins to add it.
- 3 The FYI Drawer will display on the right-hand side.
- 4 To keep the FYI Drawer open, click the Pin icon. This will save it from reloading each time.



Quick Tips:

- When using Outlook Desktop, click the FYI icon in your Outlook ribbon menu.
- To keep the FYI Drawer always open, click the Pin icon.



fyi

Filing Emails from Outlook

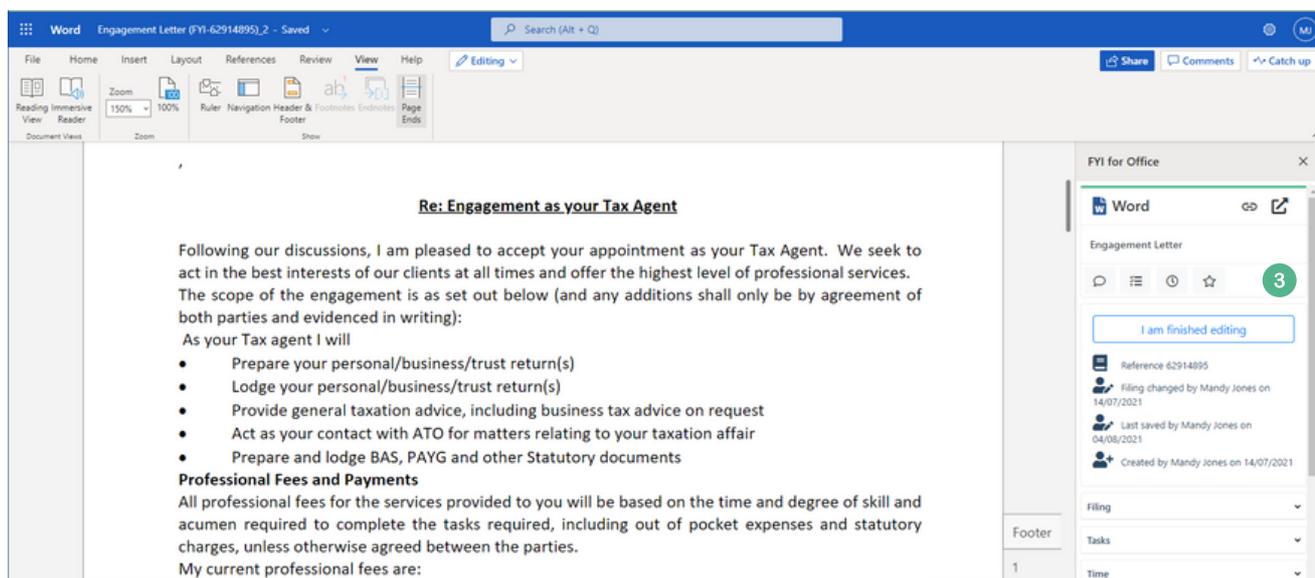
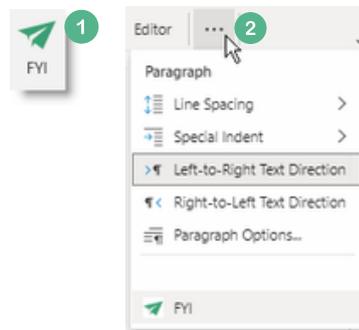
See how easy it is to file your first email from Outlook

- Access the FYI Drawer in Outlook
- Change the name of an email
- File it to a Client and Cabinet in FYI
- Access the email in FYI.

 [Watch the Tutorial](#)

Displaying the FYI Drawer in Office

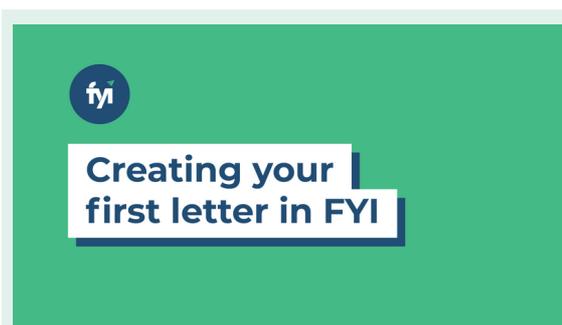
- 1 To display the FYI Drawer using Office Online, click the FYI icon in your Office ribbon menu.
- 2 If the FYI doesn't appear, click More Options (...) to find it.
- 3 The Drawer will display on the right-hand side. This applies from within Word, Excel and PowerPoint.



Quick Tips:

Ensure your FYI Add-ins are installed and your computer is set up correctly before you start using FYI.

- The FYI Add-ins can be added to your practice Microsoft 365 account, or as a user within Office and Outlook. [Find out how.](#)
- Start by checking you can display the Drawer in both desktop and online versions of Office and Outlook. [Find out how.](#)
- Your Outlook, OneDrive and browser settings all need to be optimised to ensure you can display the FYI icon in Outlook, and preview and edit Office documents seamlessly. [Find out how.](#)



See how easy it is to create your first letter in FYI

- Use the + new button to create a letter in FYI
- Use the FYI Drawer to apply practice stationery
- File the letter to a Client and Cabinet
- Preview the letter in FYI.



To learn more about FYI, visit fyidocs.com
For more information on getting started with FYI, visit the [FYI Help Centre](#)