ProSystem *fx* Plug-ins for Microsoft® Office

Administrator's Guide

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ProSystem fx Plug-ins for Microsoft® Office

The ProSystem *fx* Plug-ins for Microsoft® Office allow you to publish documents from several common Microsoft Office applications directly to ProSystem *fx* Document and to ProSystem *fx* Portals, among other features. This integration reduces the amount of time required to create, distribute, and track documents. The plug-ins are compatible with Microsoft Office 2010 and Microsoft Office 2007.

About This Guide

This guide provides information for staff members who are responsible for managing your firm's software installations. In particular, it describes how to:

- Access the plug-in framework installation files
- Install the framework for the ProSystem *fx* Plug-ins
- Configure firm settings and defaults for the plug-ins
- Select the plug-ins that should be available to your firm's staff
- Install, update, and uninstall plug-ins on individual workstations

ProSystem *fx* Plug-ins Available

The ProSystem *fx* plug-ins can be used with both Microsoft Office 2010 and Microsoft Office 2007. The plug-ins that are available for Portal and Document are as follows:

- ProSystem *fx* Document Email Management (plug-in to Microsoft Outlook)
- ProSystem *fx* Document Plug-in to Microsoft Excel
- ProSystem *fx* Document Plug-in to Microsoft Word
- ProSystem *fx* Portal Email Management (plug-in to Microsoft Outlook)
- ProSystem *fx* Portal Plug-in to Microsoft Excel
- ProSystem *fx* Portal Plug-in to Microsoft Word
- ProSystem *fx* Portal Plug-in to Microsoft PowerPoint

Installing the Plug-in Framework

The ProSystem *fx* Plug-ins for Microsoft Office share a basic framework that must be installed on each computer where the plug-ins will be used. The plug-in framework installation file, named Office 2007us.msi, can be found in one of the following locations, depending on which ProSystem *fx* products you have licensed and installed:

- If you purchased and installed ProSystem *fx* Document, the framework installation file is available in the following location on your computer: **x:\Program Files\WK\ProSystem fx Suite\Smart Client\ OfficeFramework**, where x is the drive where Document is installed.
- If you purchased ProSystem *fx* Portal without Document, the framework installation file is available via download from the CCH Customer Support Web site.
    a. Navigate to **http://support.cch.com** using your Internet browser.
    b. Enter your CCH login ID and password, and then click **Login** to view the CCH Customer Support home page.
    c. Select **ProSystem *fx* Suite** in the Product Support section of the page.
    d. Select **ProSystem *fx* Suite Portal** in the Products in this category section of the page.
    e. Select the link to install the Office Plug-in framework.

Once you have located or downloaded the framework installation file, do the following to install the framework:

1. Double-click the **Office2007us.msi** file to launch the installation wizard.
2. Click **Next** on the wizard's Welcome screen.
3. Select **I Agree** after reviewing the license agreement.
4. Click **Next**.
5. If needed, click **Browse** to locate and select a different installation directory for the framework.
   Note: You can verify that there is enough disk space available in your selected installation location by clicking **Disk Cost**.
6. Click **Next**.
7. Click **Next** on the Confirm Installation window to begin the installation process. A status bar displays the progress of the installation.
8. Click **Close** to exit the installation wizard when the process is completed.

Selecting Microsoft Office Plug-ins Available to Staff Members

As the administrator of the ProSystem *fx* Plug-ins for Microsoft Office, you can regulate which plug-ins your firm's staff can install. Once you have approved a plug-in for installation, the individual staff members can choose to install the files on their workstations as needed.

To select the plug-ins available to your firm's staff, do the following:

1. Open ProSystem *fx* Dashboard.
2. Select **Configuration** on the navigation panel.
3. Select **Firm settings and defaults** in the Firm section to display the Firm - ProSystem *fx* Suite window.
4. Click **Office Plug-in Configuration**.

5. Click **Check for New Plug-ins** to query the installation server for an updated list of plug-ins. The list of available plug-ins at the bottom of the window is updated.
6. Select the box beside each plug-in that you want to make available to your firm's staff.
7. Click **OK**. Individual staff members can now install the plug-ins you selected.

Installing and Updating the Plug-ins on Individual Workstations

You can use the following procedure to install, uninstall, or update the ProSystem *fx* Plug-ins for Microsoft Office on an individual workstation.

1. Open Dashboard, and then click **User Options** on the navigation panel to display the User Options window.
2. Select **Office Plug-ins** on the window's navigation panel. Information about the plug-ins that are available display in grids in the main part of the window.
3. Review the information in the grid to determine which plug-ins you want to install or update.
4. To install, update, or uninstall a plug-in, select the link in the Install column.
   - **Install**. A plug-in is installed for the first time on your local workstation.
   - **Update**. A plug-in previously installed on your local workstation is updated to the most recent version.
   - **Uninstall**. A previously installed plug-in is removed from your local workstation.
5. When the install, update, or uninstall completes, click **Close** on the message that displays.
6. Click **OK** to close the Office Plug-ins user options window.