

# HoudiniESQ Add-in For Microsoft Word

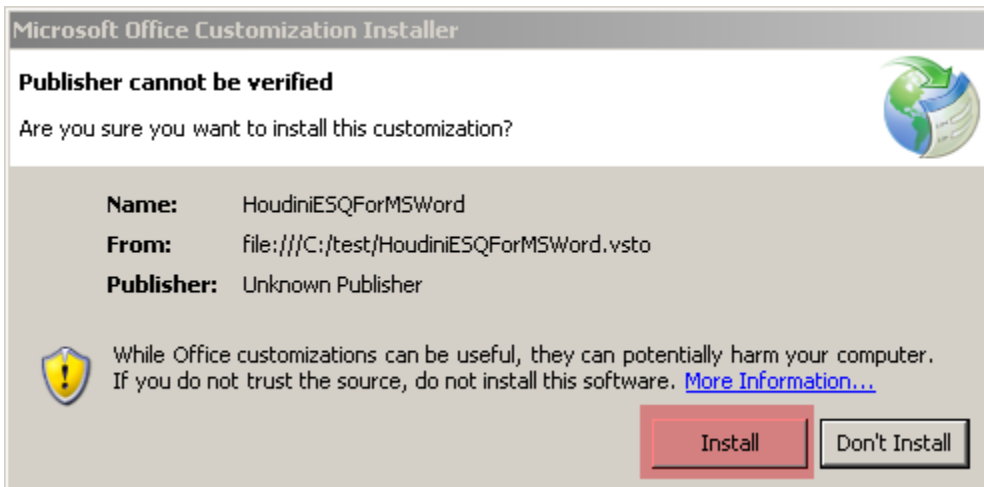
## Quick Start

### To Install:

Make sure Microsoft Word is closed.

Go to <http://www.houdiniesquire.com/esgwordinstall.htm> and follow the instructions to install.

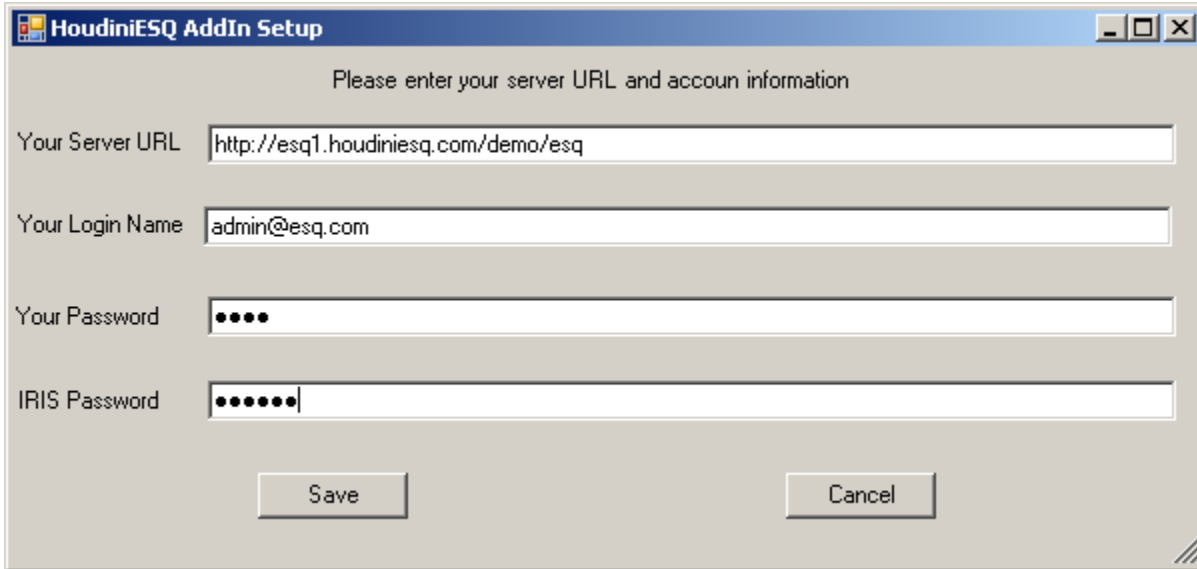
This is the window that may come up, click “**Install**” button if it does come up.



Installation should only take seconds.

## HoudiniESQ Add-in Setup

Start Microsoft Word, you should see this window pop up for HoudiniESQ setup information:



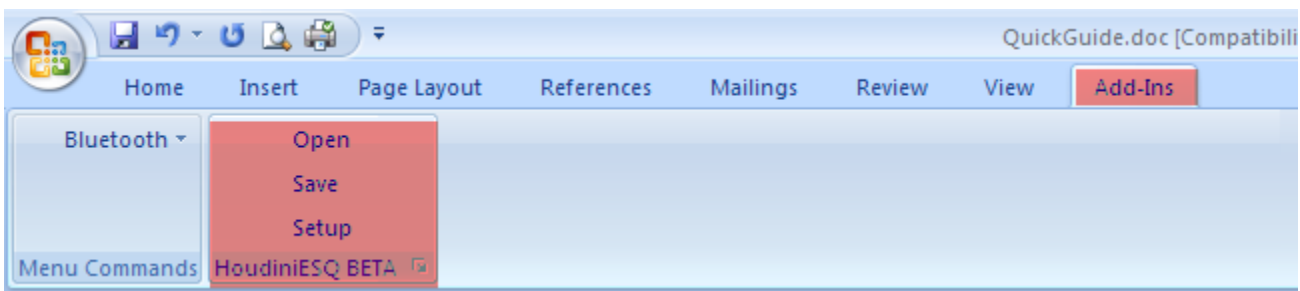
The screenshot shows a dialog box titled "HoudiniESQ AddIn Setup" with a close button in the top right corner. The main text inside the dialog reads "Please enter your server URL and account information". There are four input fields: "Your Server URL" containing "http://esq1.houdiniesq.com/demo/esq", "Your Login Name" containing "admin@esq.com", "Your Password" with four dots, and "IRIS Password" with six dots. At the bottom, there are two buttons: "Save" and "Cancel".

You must specify your HoudiniESQ server URL (see example above), your username, your password and your IRIS password. You will get a confirmation message if setup is successful.

Setup is required only once and you should never have to do it again.

## HoudiniESQ Add-in Menu

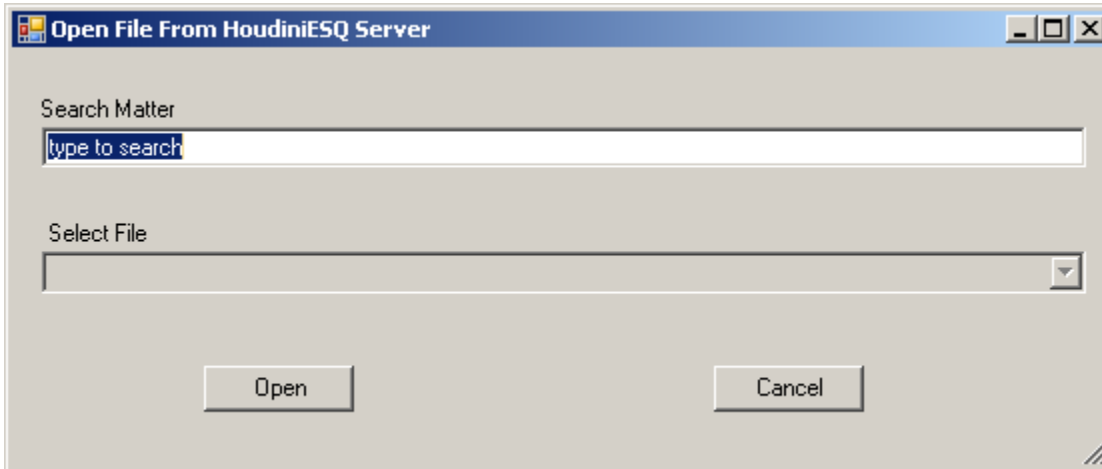
If setup is successful, you can open and save documents from HoudiniESQ server right inside Word. To access HoudiniESQ menu, Select **Add-ins** from Microsoft Word Menu, and then select **Open** or **Save** in HoudiniESQ group.



## HoudiniESQ Open

To open a file from HoudiniESQ server, you need to start typing a matter reference; the system will return matters that match the searching criteria. After you select a matter from the list, the file drop down list will be enabled with a list of files for the selected matter. Select a file and click **Open**.

**Note: you should only open Microsoft Word files.**



The image shows a dialog box titled "Open File From HoudiniESQ Server". It has a search field labeled "Search Matter" containing the placeholder text "type to search". Below this is a "Select File" dropdown menu. At the bottom of the dialog are two buttons: "Open" and "Cancel".

## HoudiniESQ Save

To save a file to HoudiniESQ server, click **Save** from HoudiniESQ group, the following dialog box will be displayed.

**Regarding** field will be filled in automatically if the file is already linked to a matter in HoudiniESQ. Otherwise, please search for the matter that this file is related to.

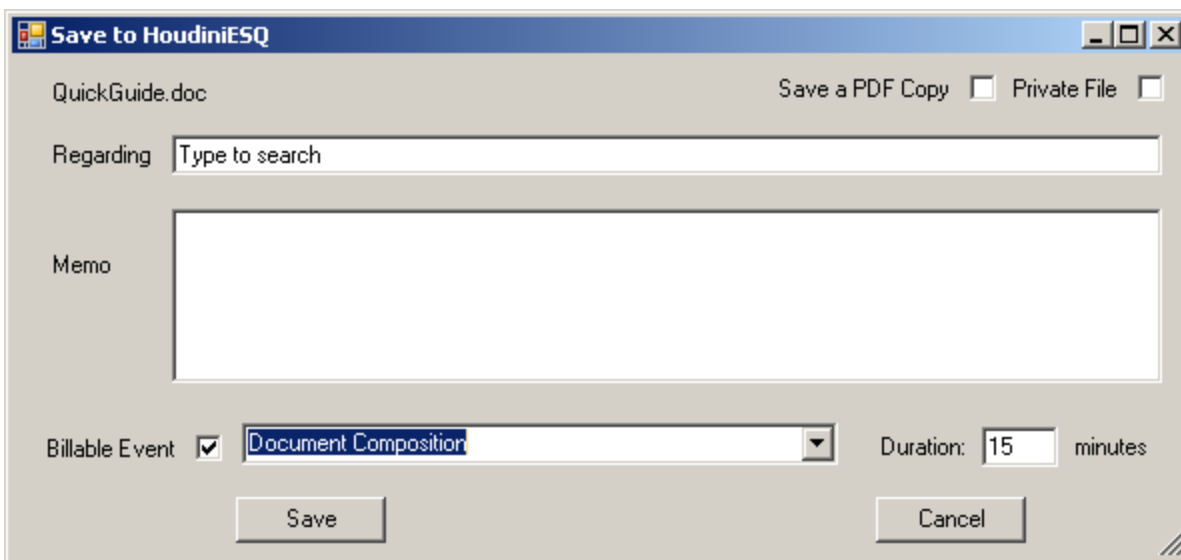
You can add text in the **Memo** field.

Check “**Save a PDF Copy**” checkbox if you want the system to automatically save a PDF version of the document on the server.

Check “**Private File**” checkbox if this file is private.

Check “**Billable Event**” checkbox and select a task name and the time you spent if this is a billable event. The system automatically creates a time entry for you.

Click **Save** to save the file. You will get confirmation if it is saved successfully.



Save to HoudiniESQ

QuickGuide.doc Save a PDF Copy  Private File

Regarding

Memo

Billable Event   Duration:  minutes