



INSTRUCTIONS FOR OUTLOOK ADD-IN: INSTALLATION AND DAILY USAGE

I. BASIC ASSUMPTIONS

The Outlook add-in was developed for A1A, Inc. to meet the technical challenge of sales representatives working in hospitals without Internet or email connectivity. It is a supplement to the website, and not meant to replace the same. To be specific, the A1A website operates in real-time. Therefore all surgeries, once updated, are changed on the server immediately, thus giving consistently accurate data. The Outlook add-in does not have an equal level of sophistication. It serves simply to bridge the gap between the website and a total lack of access.

The add-in functions as follows: One connects to the A1A website and searches his/her schedule. He/she downloads an export file, and then imports it into Outlook. In order for the data to be current and therefore useful, this routine will need to be performed, manually, at least one time per day. We have attempted to make the process as simple as possible, but it does still require human intervention.

But, because the add-in application is directly interfaced with the website, no data entry into Outlook is required. All users will be able to a) gather their own scheduling information from their personal or office computer; b) update Outlook at any time while simultaneously c) maintaining their own personal appointments.

Instructions for individual users are as follows:

II. INSTALLATION INSTRUCTIONS

1. First, verify which version of Outlook you are using. To do so, open Outlook, then click on Help | About Microsoft Office Outlook, and notice the version number (2003 or 2007) in the first line.
2. Close Outlook.
3. Download the appropriate installation file from the A1A website, under Resources, Outlook Add-in Application.
4. Double click the installation file. Depending on your computer, you may receive a security warning. If so, please click Run.
5. If prompted to verify that you wish to install the BCM 2007 Microsoft Office PIA component, please respond by clicking the Install button.
6. A setup wizard will launch. Simply follow the Next buttons after specifying where you would like the application to reside on your local machine.
7. As part of the installation process, some additional Microsoft Outlook components may be required. If so, the application will direct you to the Microsoft website wherein the pieces can be saved and installed.
8. Please reboot your machine.
9. Your add-in should be complete and ready for use.

III. DAILY USAGE INSTRUCTIONS

1. First, start by exporting the desire data. To do so, login to the A1A website using your established username and password.
2. Click on Schedule, then Search.
3. NOTE: If you do not already know how to build and save a website search, now is a perfect time to learn. By inserting search parameters one time, you may return to them, easily, on a daily basis and the dates – including the DePuy month- will be adjusted for you.

BONUS INSTRUCTIONS: HOW TO CREATE A SAVED SEARCH:

- A. From the Search screen, click on the Save Search button.
 - B. Name your search, e.g., OUTLOOK EXPORT
 - C. By default, all of your teams will be included. If you want the search to give you comprehensive data, then you do not need to change anything. However, if you want to customize the search based on given teams, then you need to specify a filter. To do so, click on the dropdown in Add Search Filter and choose Sales Team. Select the desired team. If you wish more than one, just repeat the process.
 - D. Select your date range. You can view cases within the DePuy month parameters (select, under Date Range, to End of DePuy Month) or for a given period (e.g., 30 days out).
 - E. When you are finished setting all of your search filters, click the Save Customized Search button.
 - F. Click on the Search link
4. Once you have the desired search returned to you (i.e., the data you requested is displayed in the Search results), then click on the Outlook Export link. Save the file to your local machine in a desired location (e.g., the Desktop).
 5. Open Outlook.
 6. Click the Import Surgery Schedule button.
 7. The application will look for the export file. Use the Browse button to find the file, always named as follows: Schedule_Outlook_(a date).csv.
 8. After your first import, you will receive a message about deleting files. Basically the application is telling you that, in order for it to function properly, it has to a) look for website surgeries for future dates and b) replace them with website surgeries from the current export, and therefore the deletion is to be expected. As such, you can click the Yes button.
- NOTE: Please be informed that only your surgeries schedule will be deleted and replaced. Your personal appointments will be left alone entirely.
9. Your surgeries are imported and in Outlook! If you desire, you can compare Outlook to the export file. You will find that they match precisely.
 10. Repeat as often as desired. As mentioned, the Outlook representation of the website is only as current as your imported file. So, it is advised that you run the import at least daily, and more often if necessary.

Thank you, and good luck.