

Before You Begin

Quick Reference Guide



Essential steps to ensure your computer is optimised before getting started with FYI

- ✓ Login to FYI
- ✓ Check your FYI Add-ins in Office and Outlook
- ✓ Check your OneDrive
- ✓ Prepare your Browser
- ✓ Setup the FYI Desktop App
- ✓ Check your FYI Status

Microsoft 365

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.



A number of these settings may already be configured by your IT Team. Always check with your FYI Admin if you require clarification or are unsure of any settings.

Login to FYI at go.fyi.app

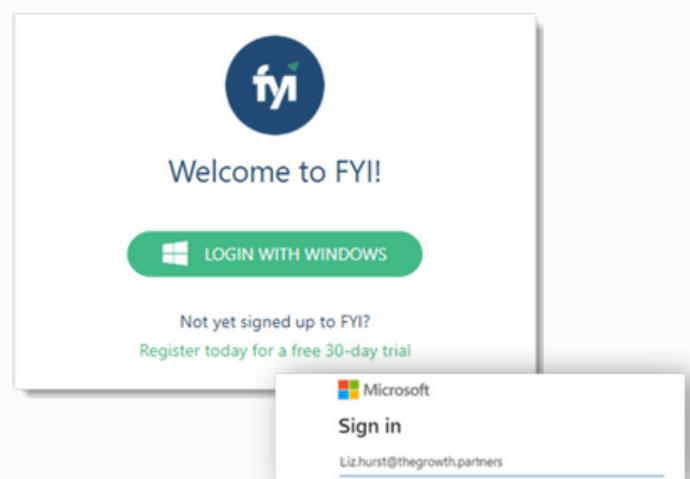
Sign in using your Microsoft 365 email and password.

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](#)



Check your FYI Add-ins in Office and Outlook

Displaying the Drawer in Outlook

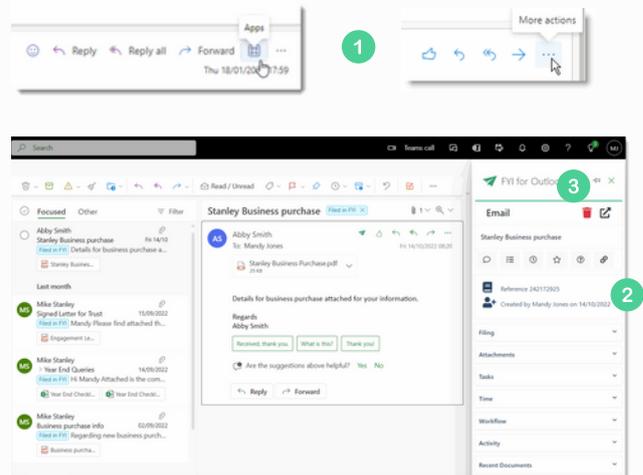
1 To display the FYI Drawer using Outlook Online, select an email. Depending on your Outlook version, this will be located

- In the More Actions (...) menu
- In the Apps menu

2 When using Outlook Desktop, click the FYI icon on your Outlook ribbon menu or alongside the Reply/Forward Buttons

The FYI Drawer will display on the right-hand side.

3 To keep the FYI Drawer open, click the Pin icon. This will save it from reloading each time.

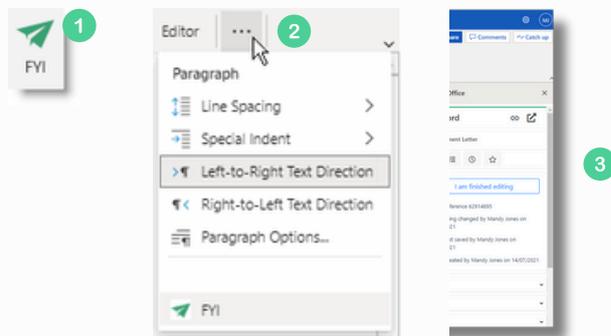


Displaying the Drawer in Office

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.



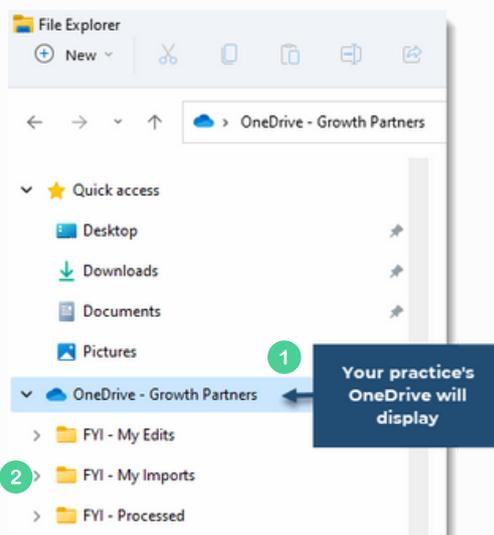
Check your OneDrive Folders are Setup

1 From File Explorer, navigate to your practice's OneDrive folder.

2 Confirm the following "FYI-" folders display:

- FYI - My Edits
- FYI - My Imports
- FYI - Processed *

* Note: this folder will only display when you use the My Imports for the first time.



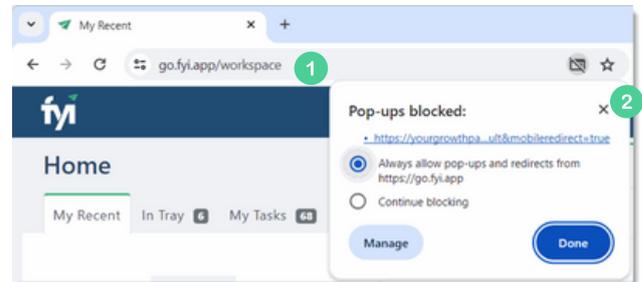
Prepare your Browser

Ensure Pop-ups are allowed

- 1 In order to select documents in FYI and edit them in your browser, pop-ups must be allowed from your browser from: <https://go.fyi.app>.
- 2 If you see a Pop-ups Blocked icon in the URL bar in your browser, click and select "Always allow pop-ups and redirects".

If you do not see the Pop-ups blocked icon, adjust your settings, depending on your preferred browser.

Refer to [Preparing your Browser for FYI](#)



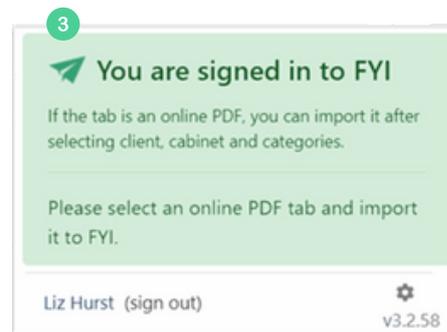
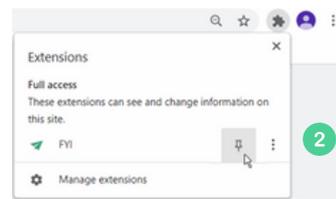
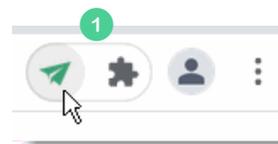
Check your FYI Browser Extension

If instructed by your FYI Admin, first Install the FYI Browser Extension [here](#). Refer back to this guide to check it has been installed successfully.

- 1 At the top of the Chrome Browser, click the FYI icon to login to the FYI Browser Extension.
- 2 When using the extension for the first time, accept the permissions message that displays.

If you do not see the FYI Browser Extension, check it has been pinned for quick access. Click the Chrome Extensions icon, then click the Pin next to the FYI Extension.

- 3 Log in with your Microsoft 365 login. A confirmation displays that you are signed into FYI.

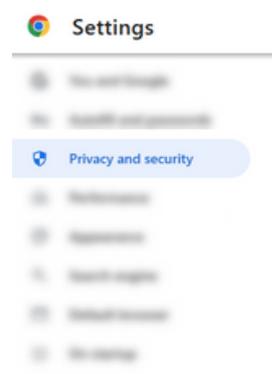


Check SharePoint as a Site can always use Cookies

When previewing documents in FYI, you are prompted in the Preview pane to sign in.

When clicking the Sign in button, if the Preview does not display and you are not signed in to SharePoint check your browser settings to ensure cookies are not blocked.

Refer to [Preparing your Browser for FYI - Setting SharePoint as a Site that can always use Cookies](#)

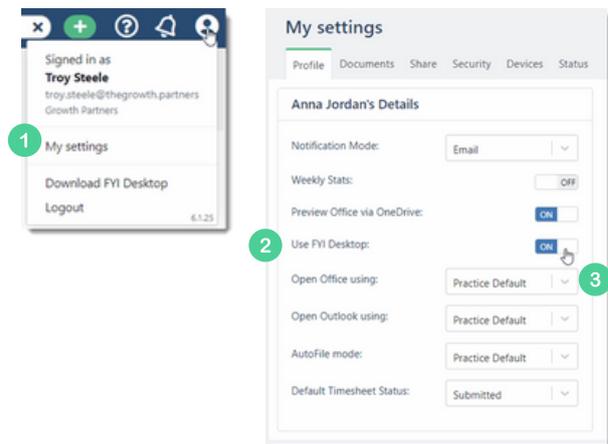


Setup the FYI Desktop App

Enable the FYI Desktop App

Before following these steps, check with your FYI Admin if the FYI Desktop App is to be installed to your individual device.

- 1 From FYI, click the User Menu in the top right-hand corner, and select My Settings.
- 2 On the Profile tab, set Use FYI Desktop to "On".
- 3 Check with your FYI Admin as to the default for your practice, when selecting "Open Office using".

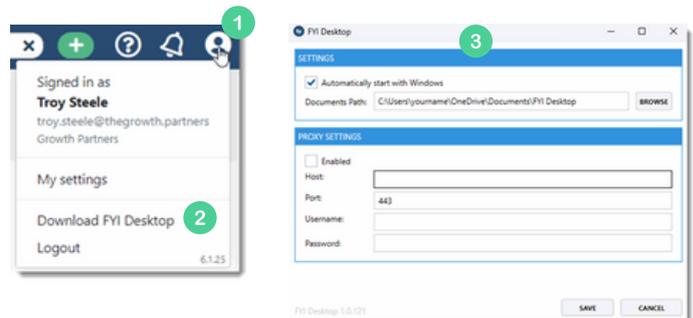


Download and Install the FYI Desktop App

- 1 From FYI, click the User Menu in the top right-hand corner.
- 2 Select Download FYI Desktop. The setup.exe file will download.
Run the Setup.exe, from either the bottom of your browser, or your default download location. A progress bar will display.
- 3 Once complete, the FYI Desktop Settings will open. The Document Path is the temporary storage location for documents opened in FYI Desktop.

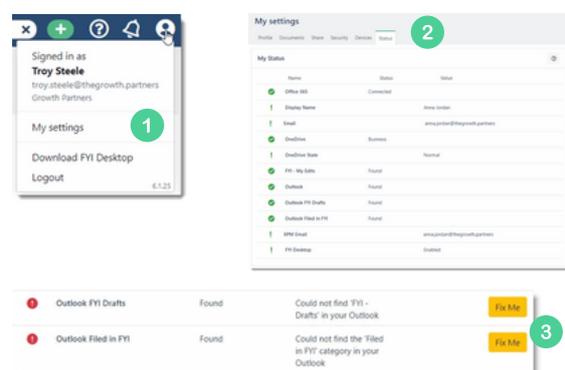
Refer to [Step 2 for FYI Desktop](#)

- 4 When prompted, Log in to the FYI Desktop app using your Microsoft 365 login.



Check your FYI Status

- 1 From FYI, click the User Menu in the top right-hand corner, and select My Settings.
- 2 Open the Status Tab. All items in this tab should have green ticks or markers.
- 3 Any items requiring an action, a message will show with a short explanation and action. Where you see a Fix Me button, click this to fix the issue.



What's Next? Complete the [Learning the Essentials Learn course](#) and learn how to navigate FYI.

If you require further assistance with your computer setup, refer to your FYI Admin.

To learn more about FYI, visit [fyi.app](#)

For more information on getting started with FYI, visit the [FYI Help Centre](#)