

Novabrain Business Explorer 4.0 Beta Release – Quick Start Tips

The Novabrain Repository

Once the application is installed; you will notice that a new folder called “My Business Objects” was created under your ‘My Documents’ directory. This is the default location where all Novabrain Folders are stored.

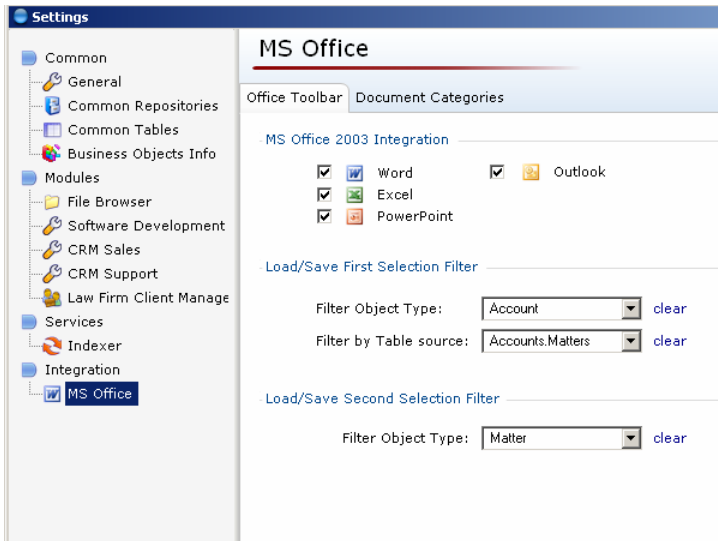
You can change the location at any time to another by navigating to the edit/settings tab in Novabrain Business Explorer. Click settings and then click client management. This interface allows you to define the new path.

How to Enable the Novabrain Tool Bar for MS Office Integration:

1. Launch Application
2. Click Edit – Settings

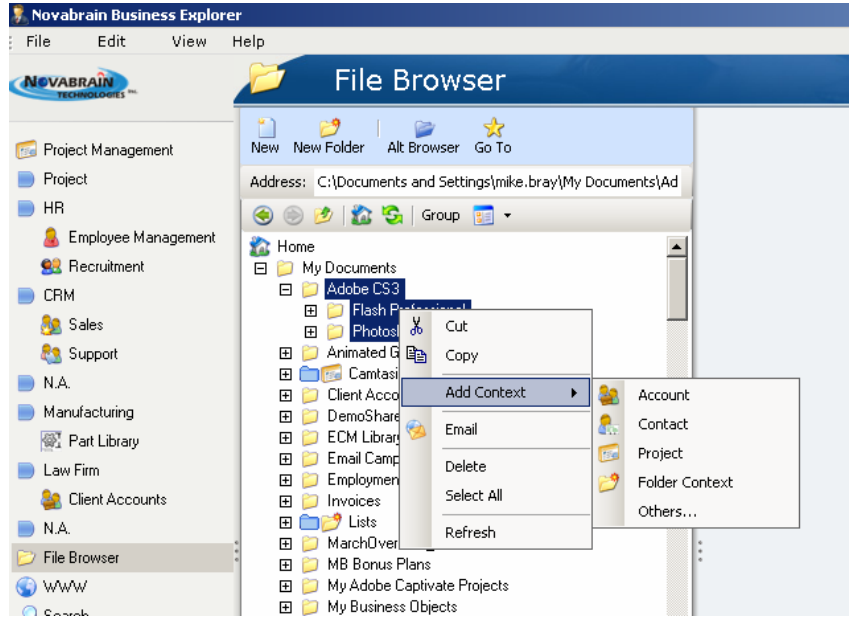
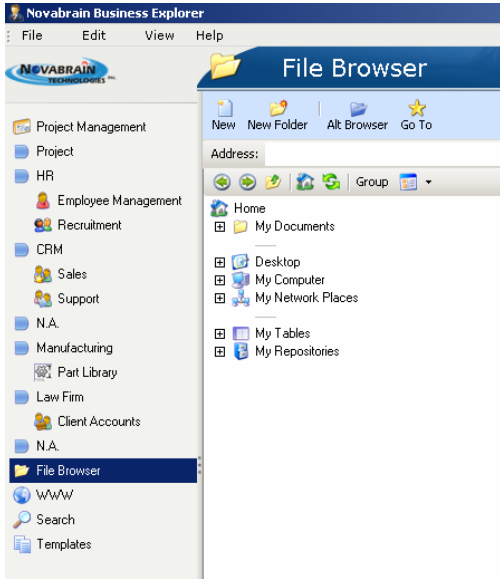


3. Click Integration – MS Office: Check off Applications (Word, Outlook etc) and click Apply. Re-launch Outlook, Word etc and the tool bar will appear.

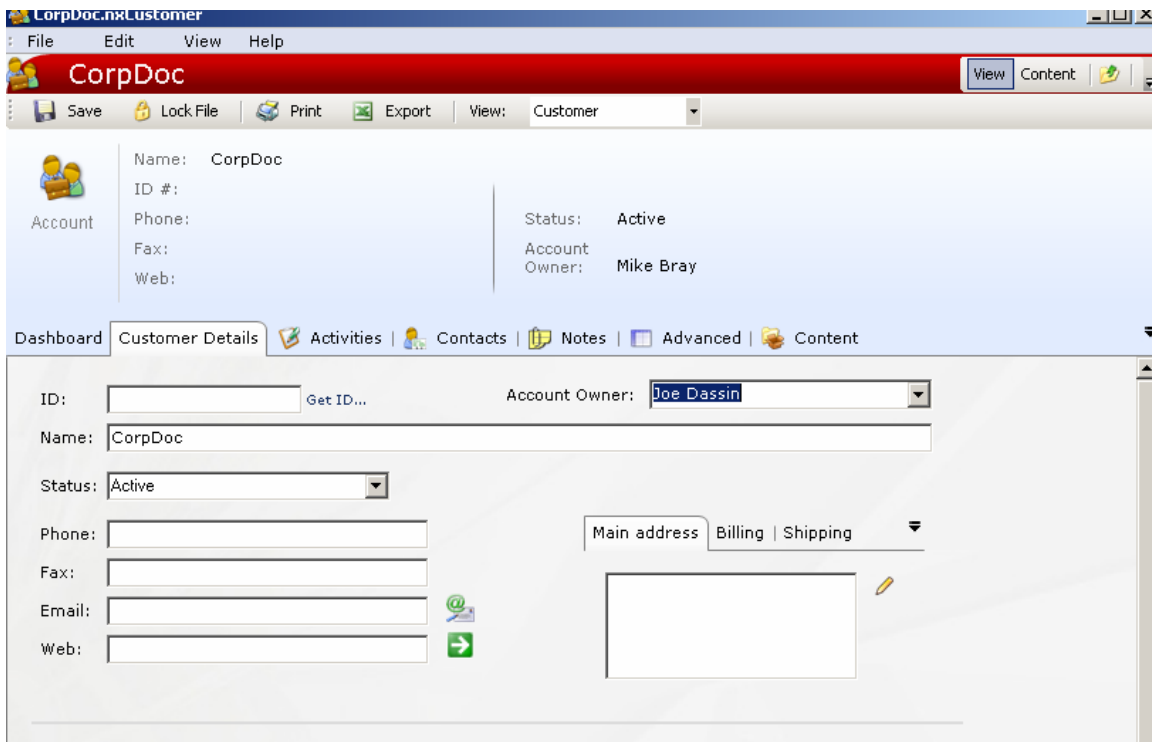


1. Converting Existing File Folders into Client “Accounts”

- Launch Novabrain Business Explorer
- Select the “File Browser Tab:
- Locate folders and highlight folders to be converted
- right click and locate “edit folder context” tab
- select **Account**



2. Populate fields as applicable and click save.

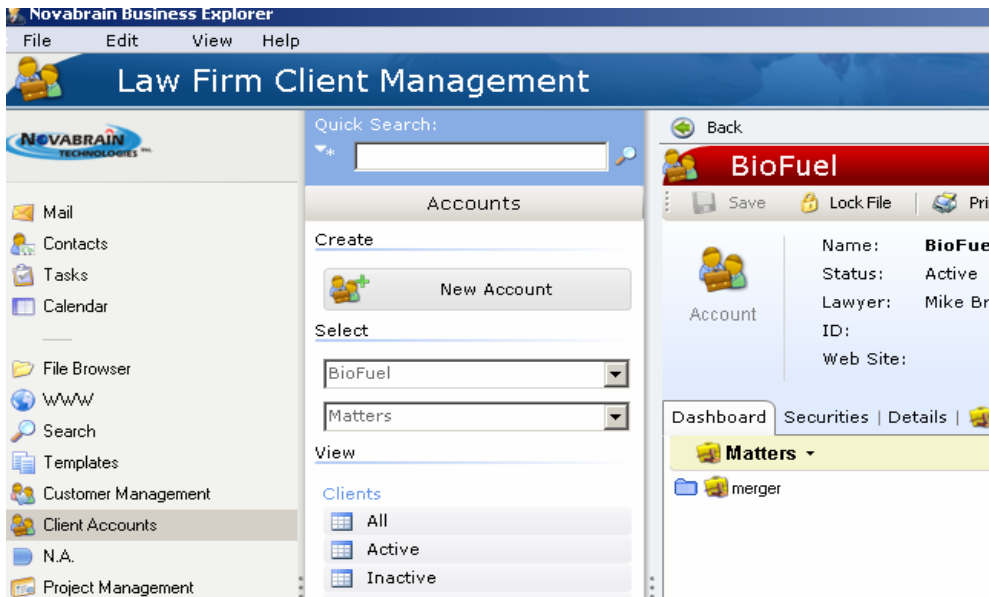
A screenshot of the LorpDoc.nxCustomer application. The 'CorpDoc' account details form is displayed. The form includes fields for Name, ID #, Phone, Fax, Web, Status, and Account Owner. The 'Status' is set to 'Active' and the 'Account Owner' is 'Joe Dassin'. There are also tabs for 'Main address', 'Billing', and 'Shipping'. The 'Main address' tab is currently selected, showing a large text area for the address.

3. Novabrain Business Explorer – In the Application

Now that you have converted a few folders into Client Accounts, you will see them in the list views and drop down menus. Going forward, you will be able to create new client accounts and matters directly in Novabrain.

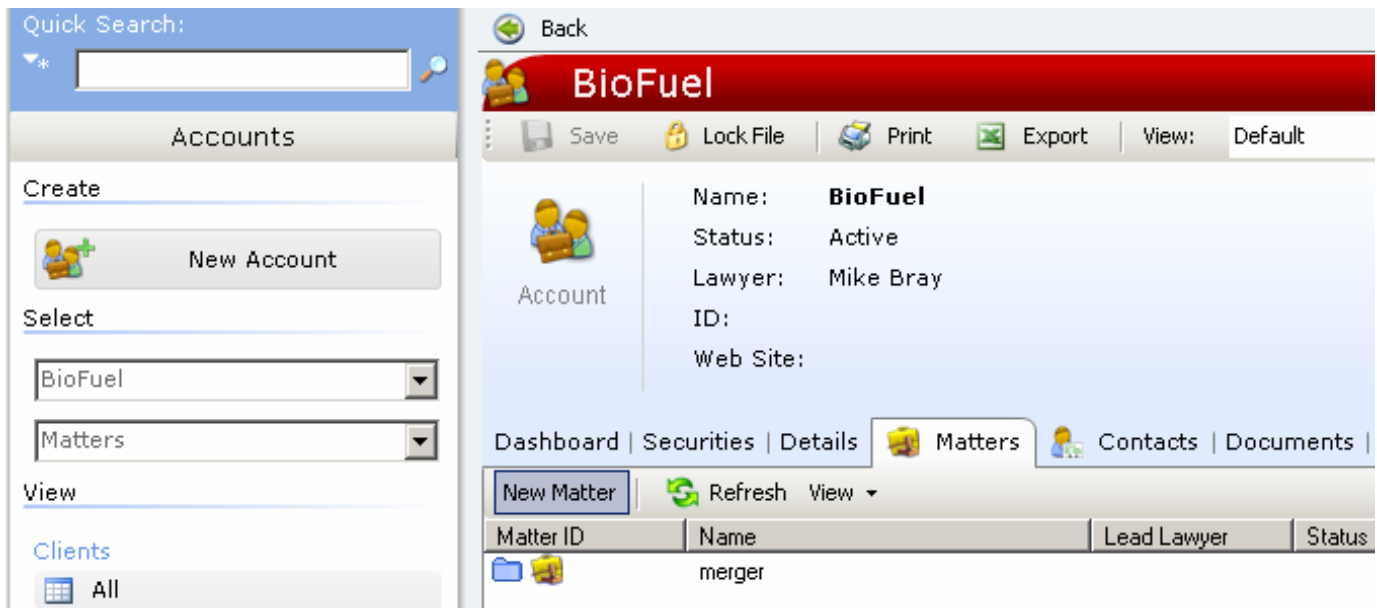
a) Create a New Client Account

- click the new account tab
- name the account and populate fields as applicable.



b) Creating a Matter

Now that the Client Account has been created, navigate to the Matters Tab in the interface. Click on New Matter and fill out the applicable details.

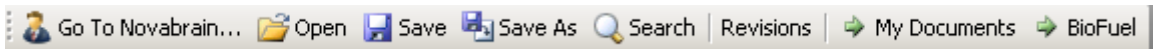


4. MS Office Integration – Novabrain Tool Bar

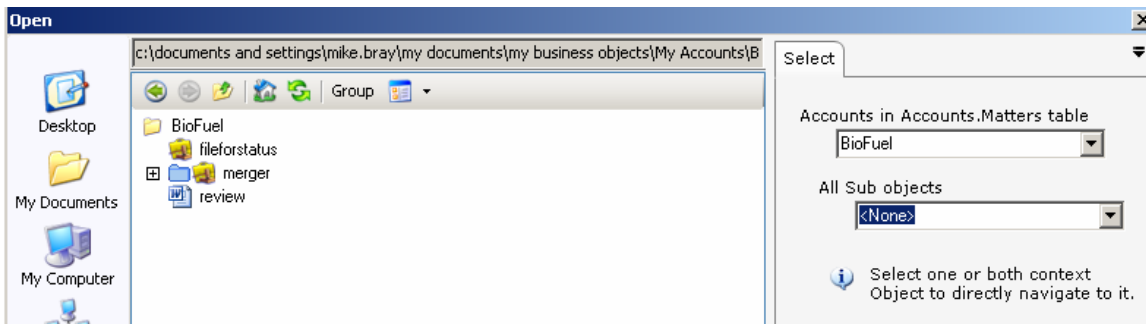
Every time a New Client Account or Matter is created they are accessible via the tool bar. The tool bar allows you to save an email, word document, power point or excel spreadsheet directly to the Client and Matter Object.

The tool bar also allows you to search for documents and control revisions. The tool bar also displays what client/matter the document relates to.

Note: The tool bar is currently only compatible with MS Office 2003. A new release is planned that will be functional for MS Office 2007

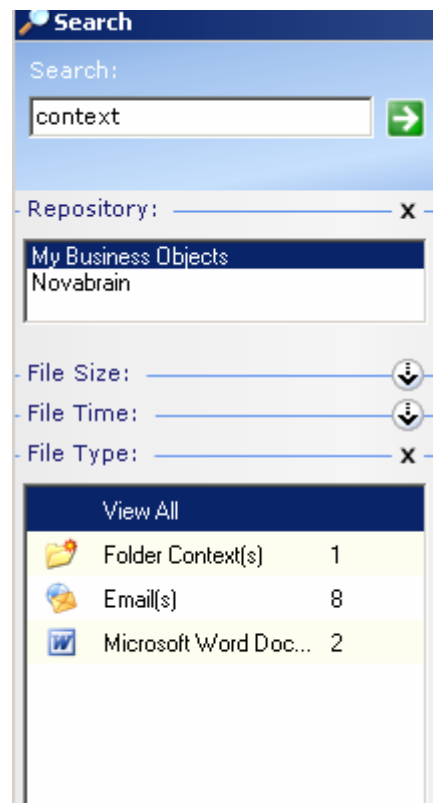
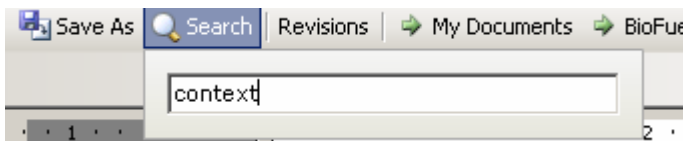


a) To open a document click the open tab in the tool bar and select document:



b) Searching

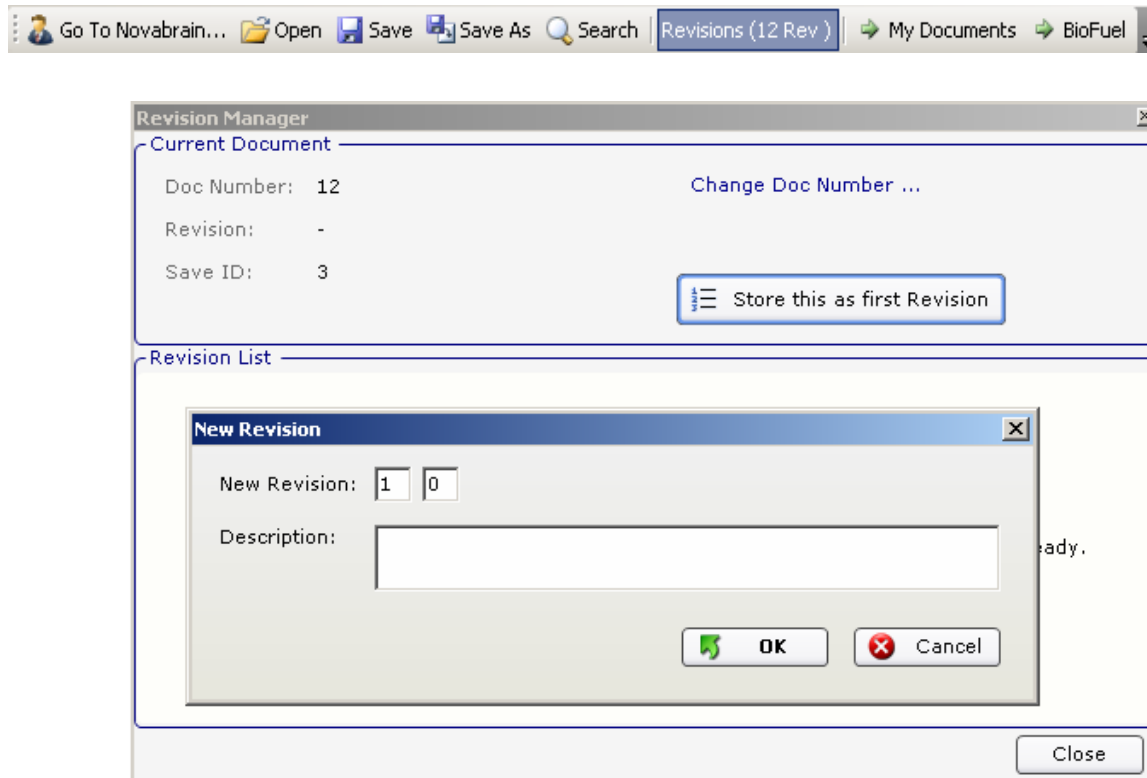
Novabrain Business Explorer includes a powerful search engine. This is used to locate content by keyword and context.



c) Revision

Novabrain Business Explorer allows users to create version snapshots directly from MS Office.

- to create a new version or see a list of revisions, click the revision tab.



5. Adding PDF's, images, voice recordings etc

- locate content to be stored with client account or matter
- drag and drop into Client or Matter Folder in Novabrain Business Explorer (see Content tab) **OR** drag and drop directly into file folder via browsing for the client or matter name under the My Business Objects Folder in Windows

