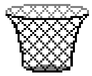
General OfficeTalk Features

The Bin 

The OfficeTALK Bin lets you *bin* items in OfficeTALK which may be later *un-binned* or *shredded* completely.

OfficeTalk displays a *bin* in the following modes:

- Supervisor Mode
- Diary Mode

In Supervisor Mode you can *bin* the following items:

- Users
- Resources
- Groups
- Planners
- Projects

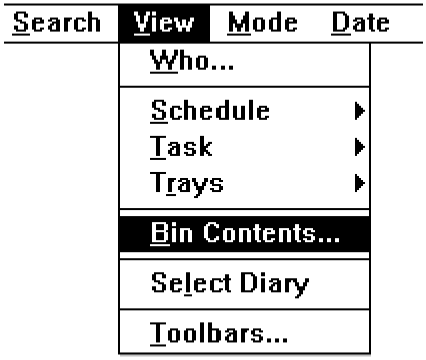
In Diary Mode you can bin the following items:

- Tasks
- Appointments

You can *bin* an item by *dragging* the item to the bin. To drag an item, press the left mouse button down when the cursor is over the item. Keep the left mouse button pressed and move the cursor over the bin . Finally release the left mouse button. The item will be removed from its original position and will be placed in the bin. If the bin contains any items then the bin will be displayed as shown below:

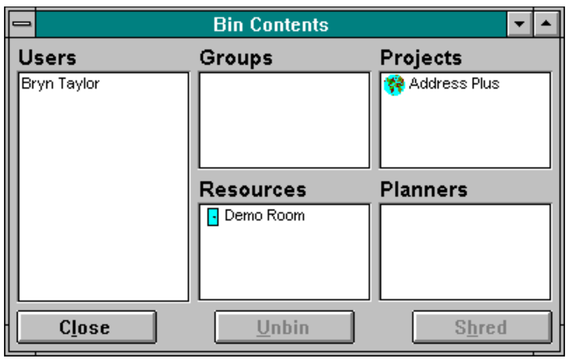
Bin with contents

You can display the contents of the bin by double clicking on the bin using the left mouse button. Alternatively, you may select **Bin Contents** from the **View** menu.



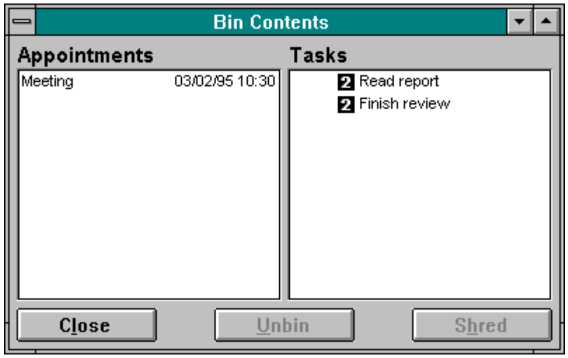
Displaying the contents of the bin

If you are in Supervisor Mode the following window will appear:



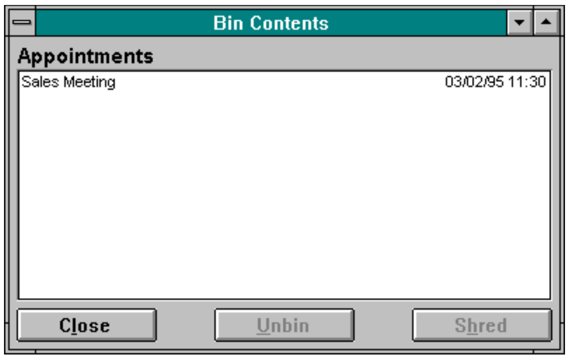
Bin Contents in Supervisor Mode

If you are in Diary Mode, viewing a user's diary, the following window will appear:



User's bin contents in Diary Mode

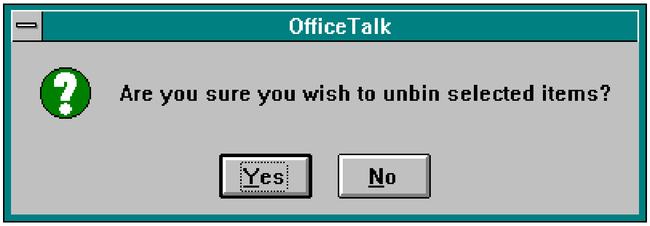
If you are viewing a resource's diary, the following window will appear:



Resource's bin contents in Diary Mode

Un-Binning Items

OfficeTalk lets you un-bin items that you have previously binned. You can do this by popping up the Bin Contents Window, selecting the item(s) and pressing the Unbin button. OfficeTalk will ask you to confirm this action. Press Yes to un-bin the item(s).



User Confirmation

Shredding Items

OfficeTalk lets you shred items that you have previously binned. You can do this by popping up the Bin Contents Window, selecting the item(s) and pressing the Shred button. Shredding an item will *delete* it completely from the OfficeTalk database. OfficeTalk will ask you to confirm this action. Press Yes to shred the item.

User Confirmation

Name Style

OfficeTalk lets you choose *how* you display the name of OfficeTalk users and Contacts. The following styles are available, shown below based on the name *John Smith*:

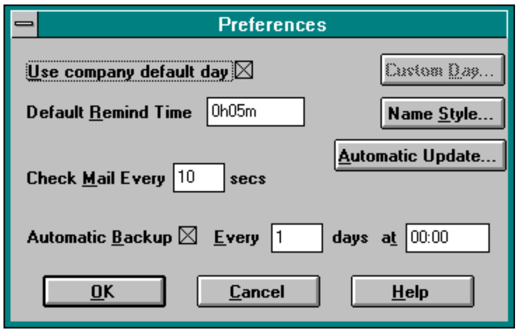
- John Smith
- John SMITH
- Smith, John
- SMITH, John
- Smith, J
- SMITH, J
- J. Smith

  - J. SMITH
  - Smith
  - SMITH
  - John
- *Login Name* (OfficeTalk users only)

OfficeTalk lets you choose one style for displaying OfficeTalk user's names and another style for displaying OfficeTalk contact names. Changing the OfficeTalk user's and/or contact's name style will affect the display of OfficeTalk users and/or contacts in all areas of the application.

To change the name style of either OfficeTalk users or contacts, do the following:

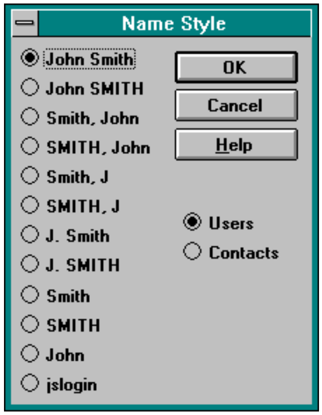
Œ Bring up the General Preferences dialog box by selecting **General Preferences** from the **Options** menu.



General Preferences dialog box

 Press the 

button. The Name Style dialog box will appear.



Name Style dialog box

Ž Select either the **Users** or **Contacts** radio button depending on which style you wish to define. Select one of the *style* radio buttons according to how you wish to display the users or contacts. If you select the **Contacts** radio button you will not get the option to choose a login name for the name style since login names are applicable only to OfficeTalk users.

 Press 

. The name style will be remembered for future login sessions.

The Toolbars

There are two toolbars in every mode in OfficeTalk. These toolbars are referred to as the *main* toolbar and the *sub* toolbar. Initially the size of these toolbars is *large with text*. The *main* toolbar is aligned along the top of the application and the *sub* toolbar is aligned along the left side of the application.

You can change both the size and position of these toolbars individually. Changing the size and/or position of either the *main* or *sub* toolbar will change the size and/or position of these toolbars in every mode within OfficeTalk.

Changing the Size of the Toolbars

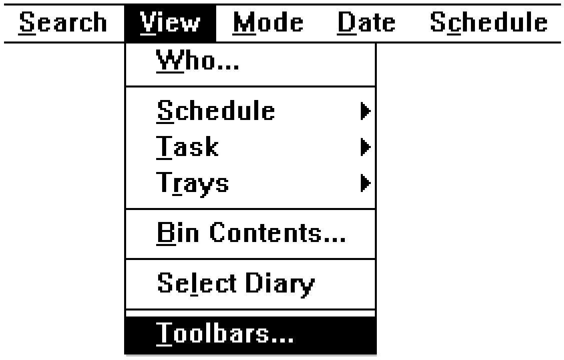
You can choose between the following toolbar sizes/styles for the *main* toolbar:

- Large with text
- Large
- Small
- Hidden
- Tab Bar
    - Colour
- Black/Grey

You can choose between the following sizes for the sub toolbar:

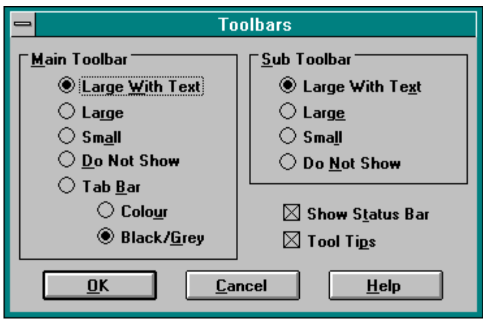
- Large with text
- Large
- Small
  - Hidden

To change the size/style, select **Toolbars** from the **View** menu or from the right mouse button menu in any mode within OfficeTalk.



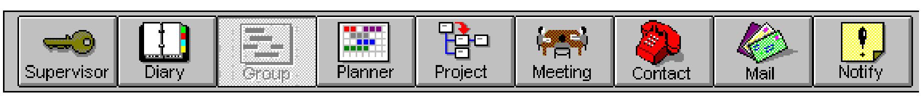
The Toolbars menu command

The Toolbars dialog box will appear.

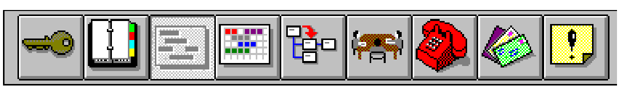


Toolbars dialog box

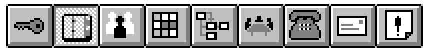
The dialog box lets you specify the size of the two toolbars individually. An example of the different sizes and styles of toolbar is shown below: Note that the Tab Bar representation is only available for the main toolbar.



Large with text



Large



Small

Tab Bar

Moving the Toolbars

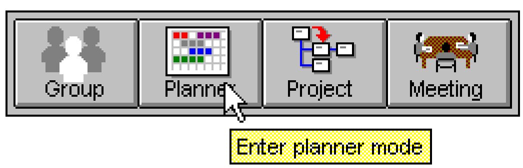
OfficeTalk lets you align both the *main* toolbar and the *sub* toolbar to any side of the window. If you so wish, you may also make the toolbars *float* above the application window. These are Windows™ standard *dockable* toolbars.

To move the toolbars, press the left mouse button down while the cursor is over a part of the toolbar but not over a toolbar button. Whilst keeping the left mouse button pressed, drag the toolbar to the required position on the screen. You will be dragging an *outline* of the toolbar. If you drag the toolbar near to one of the edges of the screen, the toolbar outline will *snap* itself to the relevant edge. Releasing the left mouse button will cause the toolbar to relocate to the new position. If you release the mouse button when the cursor is in the middle of the main window, the toolbar will relocate itself to *float* in the middle of the screen above the application windows.

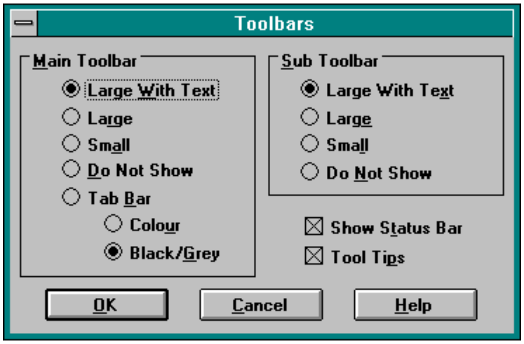
OfficeTalk will use the toolbar positioning in all modes and will remember the positioning between sessions.

ToolTip Help on Toolbars

If you move the cursor over a particular button on the toolbar and keep it there for a short time, a label will appear underneath the button, describing the action of the button.



This *label* is called a *ToolTip*. You can disable ToolTips by unchecking the **Tool Tips** check box in the Toolbars dialog box.



Toolbars dialog box

Printing

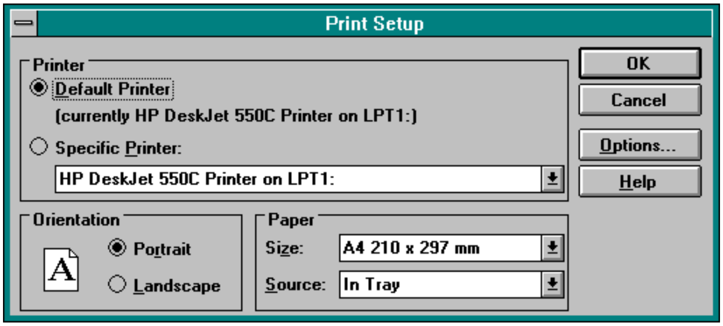
You may print many of the views that OfficeTalk provides. The list of printable views is as follows:

- **Daily Appointments**
- **Weekly Appointments**
- **Monthly Appointments**
- **Task List**
- **Group Chart**
- **Group Week-at-a-glance**
- **Projects**
- **Planners**
- **Contacts**
- **Companies**
- **Conversations**
- **Mail**

All Print dialogs have several buttons in common which provide functionality for setting up the printer, previewing what you are about to print, defining headers and footers and specifying paper styles.

Setting Up The Printer

Every Print dialog box has a Setup... button. Pressing this button will bring up a Print Setup dialog box. This dialog lets you choose which printer you wish to use.

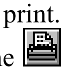


Print Setup dialog box

You can choose either the default printer or a specific printer from the list of printers. Since this dialog is standard to most other Windows applications, it also lets you choose the orientation and size of your paper. OfficeTalk does not use this functionality since paper orientation and size is defined in OfficeTalk's Paper Style dialog box (See **Paper Styles** later on in this chapter).

If you press the Options... button, another dialog box will appear which will be specific to the particular printer that you have selected.

Previewing

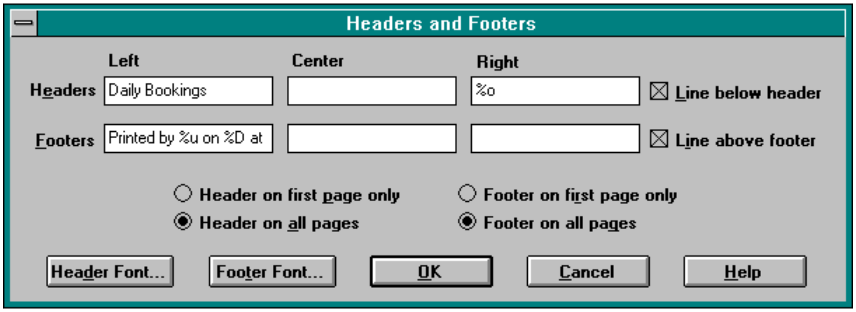
OfficeTalk lets you *preview* (view on the screen) anything that you are about to print. This saves you paper and time. To preview, pop up the relevant Print dialog box, by pressing the  button above the corresponding window. The Print dialog box will appear. Press the Preview button. OfficeTalk will then display a preview of the print out.

Headers and Footers

Headers and footers are the areas above and below the top and bottom of the print range on a page, respectively. These area are typically used for printing titles, page numbers etc.

OfficeTalk provides a 

button in every Print dialog box. Pressing this button will bring up a Headers and Footers dialog box.



Headers and Footers dialog box

OfficeTalk lets you define left, centre and right justified headers and footers, using the six fields in the Headers and Footers dialog box. You may insert any text in these fields. You may also insert certain *substitution* codes to give you additional *print time* information. The substitution codes available to you are as follows:

- %p Page number
- %t Total number of pages
- %r Row number for xy printing
- %l Column number for xy printing
- %D Current date
- %T Current time
- %% Percent sign
- %u OfficeTalk user
- %c OfficeTalk workgroup name

When a view has a date/time associated with it, the following substitutions may be used:

- %a Abbreviated weekday name
- %A Full weekday name
- %b Abbreviated month name
- %B Full month name
- %d Day of month as a decimal (01-31)
- %H Hour in 24 hour format (00-23)
- %I Hour in 12 hour format (01-12)
- %j Day of the year as a decimal (001-366)

- %m Month as a decimal (01-12)
- %M Minute as a decimal (00-59)
- %W Week of the year (00-51)
- %y Year without century (00-99)
- %Y Year with century
- %Z Time zone abbreviation if known

Extra substitutions are:

- %s Section letter (company/contact, e.g. A, B ...Z)
- %o Owner of a schedule/tasklist
- %n Name of a project/group/planner
- %S Start date for range print
- %s Start time for range print
- %E End date for range print
- %e End time for range print

- **Example**

The following text could be put into the footers field:

Printed by %u on %D at %T

If you print using this text in your footer field then OfficeTalk will print for example:

Printed by Joe Smith on 21/02/95 at 14:10

You may choose to use this example substitution on all OfficeTalk print outs. If you check the **Line below Header** check box then a horizontal line will be drawn below each header. If you check the **Line above Footer** check box then a horizontal line will be drawn above each footer. You may choose between having a header on the first page only or having a header on all pages. Similarly, you may choose between having a footer on the first page only or having a footer on all pages.

You can specify the fonts for the header and footer using the Header Font... button and the Footer Font... button. The header and footer fonts will apply only to the Print dialog from which this dialog was invoked. Once defined, the font settings will remain persistently until they are changed.

Paper Styles

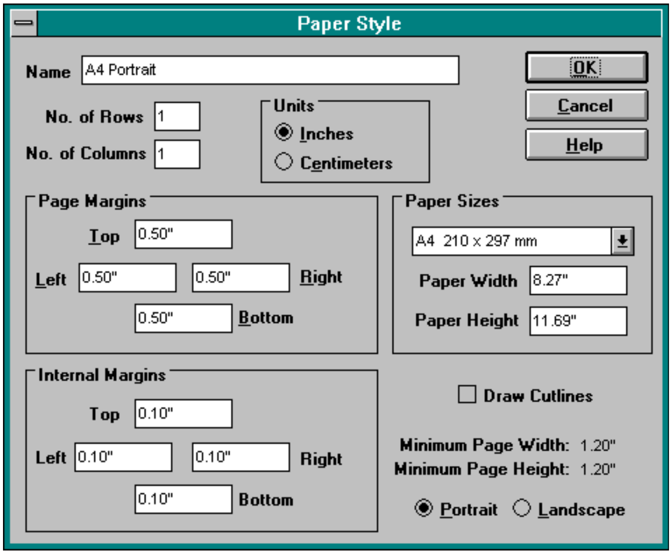
When printing you must always tell OfficeTalk the *paper style* that you wish to print on. A *paper style* describes the size and orientation of the printed view. It also lets you divide a page into *sub pages* which OfficeTalk will treat as if they were pages in their own right.

OfficeTalk comes supplied with several pre-defined *paper style*s. These are as follows:

- A4 Portrait
- A4 Landscape
- A4 Landscape (2 rows x 2 Cols)
- A5 Landscape
- A5 Portrait
- Envelope
- Filofax® 2 pages Landscape
- Filofax® 2 pages Portrait

You can select a paper style from within any Print dialog box by choosing the relevant style from the **Paper Style** pull down list.

You can create or edit paper styles by selecting **Paper Styles** from the **Print** sub menu in the **File** menu. When you select this menu option, the Paper Styles dialog box will appear. You can create a new paper style by pressing the [New...] button. Alternatively, you can edit an existing paper style by selecting the paper style from the list and pressing the [Edit...] button. In both cases a Paper Styles dialog box will appear.

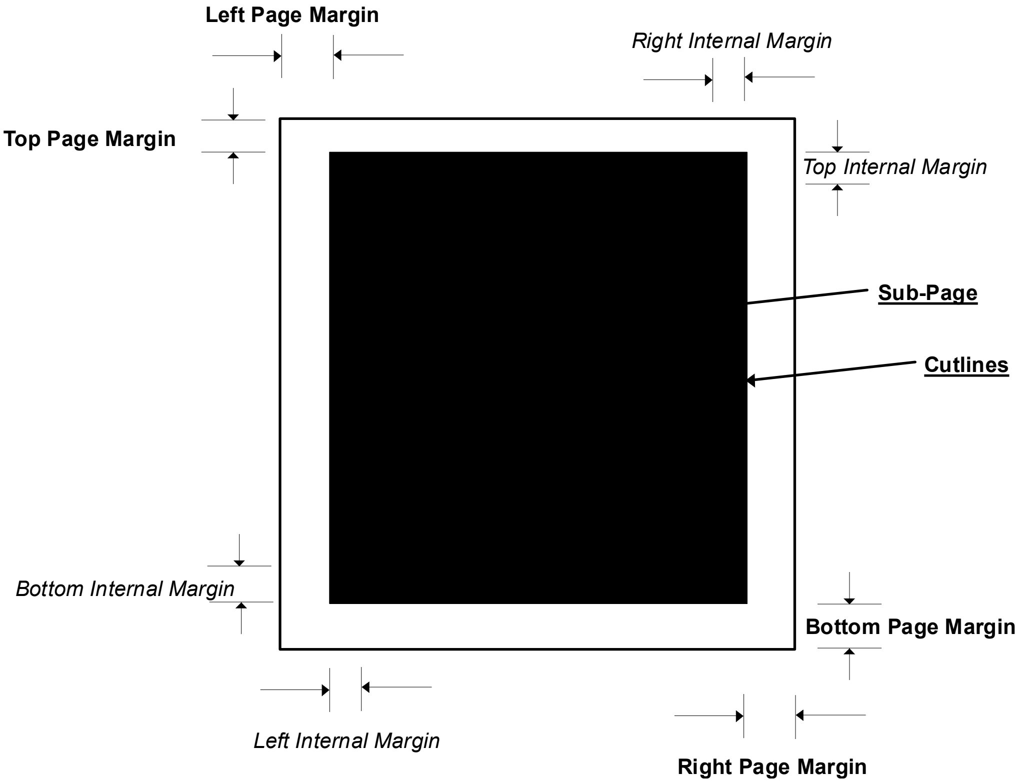


Paper Styles dialog box

The **Paper Sizes** fields define the printable area in terms of width and height. You may choose from a list of existing paper sizes or you may select **Custom** (at the bottom of the list) and specify your own *Paper Width* and *Paper Height*.

The *No. of Rows* field and the *No. of Columns* field define how the page is to be divided into *sub-pages*. The default is *No. of Rows* = 1 and *No. of Columns* = 1 which means that the page is not split into sub-pages.

The **Page Margins** and the **Internal Margins** may be used to completely define the printable area of the page (and/or sub pages). The diagram below summarises each measurement.



• ***Example***

If you wanted to print out some OfficeTalk contacts onto sheets of labels (4 across x 8 down) then you would set *No. of Rows* = *8* and *No. of Columns* = 4. You would then specify the internal margins according to the size of the labels.

The **Draw Cutlines** check box draws lines representing where you should cut along if you wanted to cut the printout into its individual sub-pages. For example, if you used the Filofax® 2 pages Landscape paper style, which comes supplied with OfficeTalk, you would probably want OfficeTalk to draw the cutlines so that you could cut out the two filofax sized pages from your single A4 sheet of paper.

You can specify the orientation of the paper by selecting either the **Portrait** or **Landscape** radio button. This will automatically instruct the printer to use either landscape or portrait.

Linking Information

OfficeTalk lets you *link* items of many different types together, allowing you to easily associate one piece of information with another. For example, you may need to do a particular task as a result of a conversation that you had with a particular contact. OfficeTalk will let you link together the task, the conversation and the contact so that you can quickly access each piece of information from the other.

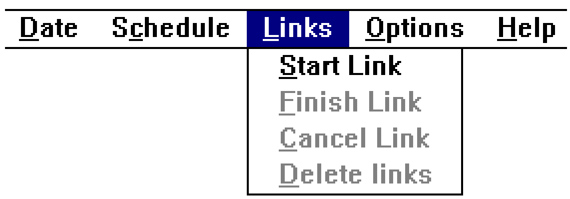
OfficeTalk lets you link information belonging to other users, provided that you have access to their information. For example, you may send a mail message to somebody requesting that they do a task that you have entered for them in their task list. You may wish to link your copy of the mail message to their task, letting you find the task quickly to see if it has been completed.

How to link two items together

To link, for example, an appointment to a task, select the appointment from the Daily Appointment Window and press the  button above that window. Next, select the task that you wish to link to and press the  button above the Task list.

Notice that when you have pressed the link button **once**, all other link buttons will change to indicate that OfficeTalk is expecting you to *finish* the link. When you press the second  button to finish the link, all link buttons will change back to their original appearance.

You can use the menu to link items together. The **Link** menu contains the following commands:



Links Menu

To connect one end of the link, select the relevant OfficeTalk item and choose **Start Link** from the **Links** menu. Next, to connect the other end of the link, select the other OfficeTalk item and choose **Finish Link**. The items will now be linked together.

Cancelling a Link

To cancel a link making operation, select **Cancel Link** from the **Links** menu.

Deleting Links

To delete an existing link, select one of the items at one end of the link and select **Delete Links** from the **Links** menu. All links attached to the selected object will be deleted.

Viewing Links

Any item within OfficeTalk (e.g., task, appointment, conversation etc.) that is linked to another item will be displayed with a marker shown next to it. You can view all the items that a particular item is linked to by clicking on the marker using the left mouse button. A list of links will *drop down* below the marker. You can *goto* any of the links shown by clicking on the relevant link in the list, using the left mouse button.

List of drop down links

When you select one of the links from the list, OfficeTalk will change to the relevant mode and display the item in the view.

If any of the items in the list of links have other links themselves, then OfficeTalk will indicate this by displaying an arrow symbol down the right margin of the link list next to the relevant link. You may view these links by clicking on the arrow using the left mouse button. When you click on the arrow, another list will appear, showing another set of links. You can *goto* any of these items in the same way as described above.

Showing link chains

How OfficeTalk uses links

In some cases, OfficeTalk will automatically create links to indicate to you that two items should be linked together. The following two cases involve OfficeTalk automatically creating links:

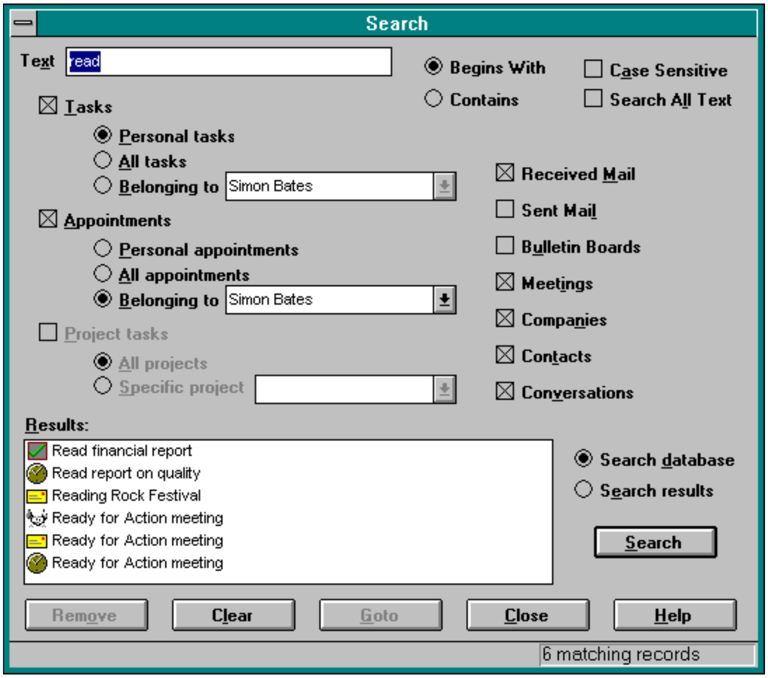
- When you create a *follow-up* task for a conversation, OfficeTalk creates a task in the appropriate task list and automatically creates a link between the task and the conversation.

- When you mail somebody a task, the mail message that they receive will be linked to the task in their task list.

Searching the Entire Database

There is a **Search Database** command in every mode in OfficeTalk in the **Search** menu. Choosing this command will pop up the Search Database dialog box. This dialog box lets you search for text in the following OfficeTalk objects:

- Tasks
- Appointments
- Project Tasks
- Received Mail
- Sent Mail
- Bulletin Boards
- Meetings
- Companies
- Contacts
- Conversations



Search Database dialog box

Enter the text that you wish to search for in the *Text* field. If you wish the search to be *case sensitive* (i.e. take into consideration uppercase and lowercase) then check the **Case Sensitive** check box.

By default, when searching the entire database, OfficeTalk will only search the main text of an object. For example, in the case of appointments, only the appointment text will be searched and appointment notes will be ignored. In the case of conversations, only the subject of the conversation will be searched. In the case of mail, only the subject of the mail message will be searched. In the case of companies and contacts, only the name of the company or contact will be searched. If you want OfficeTalk to search all aspects of any object then check the **Search All Text** check box. When this check box is checked, OfficeTalk will search any note text associated with appointments, tasks, companies and contacts. It will search the contents of all received mail messages, sent mail, bulletin boards and conversations. It will also search the agenda of meetings. The table below summarises how the search differs according to whether the **Search All Text** check box is checked or not:

OfficeTalk item	Search All Text *not* selected	Search All Text selected
Tasks	description searched	description, classifications, notes
Appointments	description searched	description, notes
Project Tasks	description searched	description, classifications, notes
Received Mail	subject searched	subject, message body
Sent Mail	subject searched	subject, message body
Bulletin Boards	subject searched	subject, message body
Meetings	subject, place searched	subject, agenda
Companies	name searched	name, all address lines, comment, phone numbers, email address, notes
Contacts	name searched	name, phone ext, position, department, mail, comment, notes, entire home address.
Conversations	subject searched	subject, conversation body

The effect of the Search All Text check box

By default, OfficeTalk searches for objects *beginning with* your search text. If you wish to search for objects *containing* your search text then select the **Contains** radio button prior to performing the search.

OfficeTalk provides several options regarding which types of data will be searched. There is a check box for each data type. You have the option of excluding a particular data type from the search by *unchecking* the relevant check box.

For the task and appointment data types you have a further option of choosing whose tasks and appointments you wish to search. By default, OfficeTalk will search your personal appointments and tasks. You can instruct OfficeTalk to search all users tasks or appointments by selecting the **All Tasks** or **All Appointments** radio button. You can also instruct OfficeTalk to search a particular user's tasks or appointments. You can do this by selecting the **Belonging To** radio button next to the **Tasks** or **Appointments** check box. Then select the particular user from the pull down list of OfficeTalk users.

You have the choice of searching either the OfficeTalk database or searching the results of the last search. You can search the results of the last search by selecting the **Search Results** radio button. By default, the OfficeTalk will search the OfficeTalk database.

When you have specified your search criteria, you can now perform the search by pressing the Search button. OfficeTalk will search through all the data types that have been selected in the dialog box. The status bar of the dialog box will update you with the progress of the search. When the search is complete, the number of matched records will appear to the right of the dialog box status bar. The results of the search will be placed into the **Results** window.

You can view any of the items in the **Results** window by selecting that item from the **Results** window and pressing the Goto button. OfficeTalk will remove the Search Database dialog box, change to the relevant mode and will load the selected record into view. The results held in the Search Database dialog box will not be lost. When you next select **Search Database** from the **Search** menu, the results of the last search will be listed in the **Results** window.

OfficeTalk lets you remove individual records from the **Results** window. You can do this by selecting the relevant record and pressing the Remove button. You can remove all records from the **Results** window by pressing the Clear button.

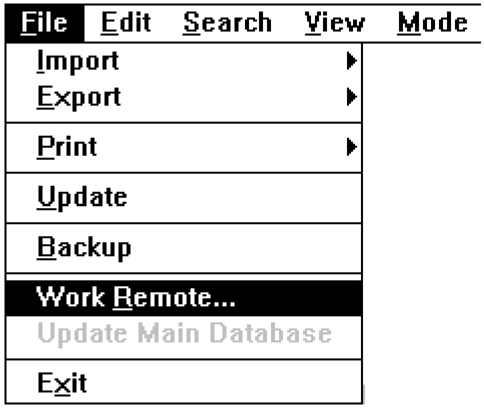
Working Remotely

Introduction

OfficeTalk has the facility to let you copy certain portions of the OfficeTalk database onto a local hard disk and continue using OfficeTalk as if you were connected to the shared database. This is extremely useful, if you have a portable computer and spend most of the time away from the office but still wish to benefit from the shared data offered by the main database.

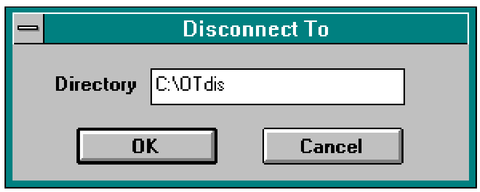
Working Remote

To work Remote, select **Work Remote** from the **File** menu from within any mode.



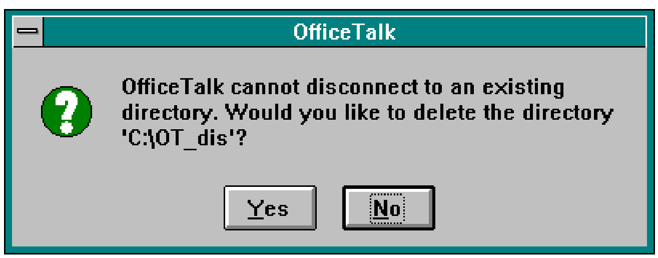
Work Remote

When you select this the Disconnect To dialog box will appear. Enter the pathname for the disconnected database. OfficeTalk supplies a default path. Press OK.



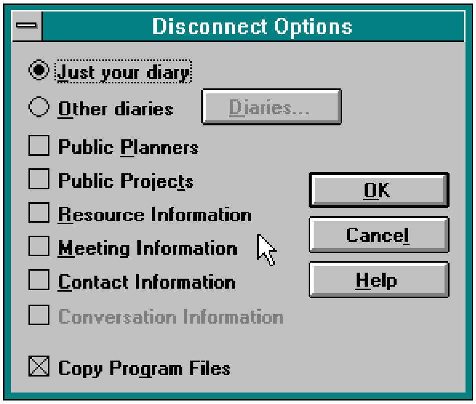
Disconnect To dialog box

OfficeTalk expects a directory path which does not exist. If the specified directory already exists, OfficeTalk will confirm with you that it is OK to remove the directory and all its contents.



OfficeTalk Confirmation

If you choose that you do not wish to delete the directory, OfficeTalk will redisplay the Disconnect To dialog box. Otherwise the Disconnection Options dialog box will be displayed.

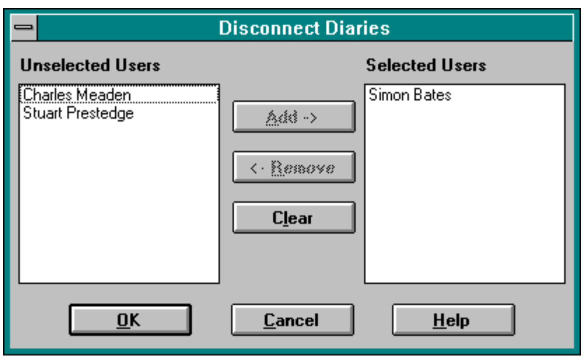


Disconnect Options dialog box

The Disconnect Options dialog box lets you select which parts of the OfficeTalk database you wish to take remotely. By default, OfficeTalk assumes that you wish to take your own diary and the Program files. Selecting these default options will copy your appointments and tasks in addition to any *personal* projects, groups, planners and mail. The program files will also be copied and a new Program Manager group, OfficeTalk Remote, will be created if the **Copy Program Files** check box is selected.

To copy other users diary information, select the **Other Diaries** radio button. The 

button will be enabled. Press this button to bring up the Disconnect Diaries dialog box.

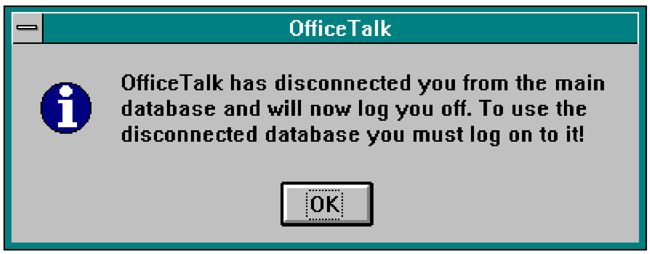


Disconnect Diaries dialog box

From the **Unselected Users** list, select the users whose diaries you wish to copy for working remotely. Press the Add -> button to move these users into the **Selected Users** list. You can use the <- Remove button to remove selected users from the **Selected Users** list. The Clear button will remove all users from the **Selected Users** list.

To copy *public* planners, *public* projects, resource information, meeting information, contact information, and conversations (only if contact information selected) check the corresponding radio button in the Disconnect Options dialog box. If you select the **Contact Information** check box, OfficeTalk will copy *all* companies and contacts for the entire workgroup. Selecting this check box will also enable the **Conversation Information** check box, giving you the choice of taking all the conversations for the entire workgroup.

When you press OK, OfficeTalk will copy the relevant information to your local drive. When this is complete, OfficeTalk will display the following message:



OfficeTalk Message

When you press OK on the information box, OfficeTalk will log you off and the application will close down. The next time you log on, you will not connect to the main database, but instead you will log on to the copy of the database that you have just made.

Using OfficeTalk Remotely

When working *remotely* you may do everything that you might do when connected to the main database, **except** you may not delete items which existed *prior* to time that you disconnected from the main database.

Even if you do not select to copy certain parts of the OfficeTalk database, you may still add records to these databases. For example, if you do not copy the contacts database, you may still add contacts, companies and conversations. These records will be added to the main database when you attempt to reconnect with the main database.

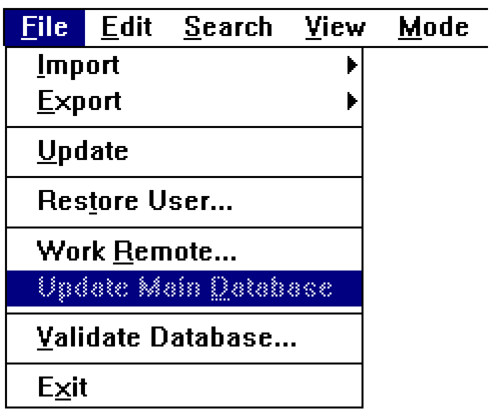
Sending Mail Messages While Working Remotely

While working remotely, you may send mail messages as normal. If you send a mail message to another OfficeTalk user then the message will be stored until you reconnect to the main database at which point it will be delivered. You may send mail messages to other OfficeTalk users, user groups and bulletin boards.

If you send a mail message to a VIM or MAPI recipient, OfficeTalk will try to communicate with the VIM or MAPI messaging immediately. If your VIM or MAPI message database is not held locally, then OfficeTalk will not be able to send the message. You will be informed of this. OfficeTalk will not buffer the message. You must resend the message when you have access to the MAPI or VIM messaging system.

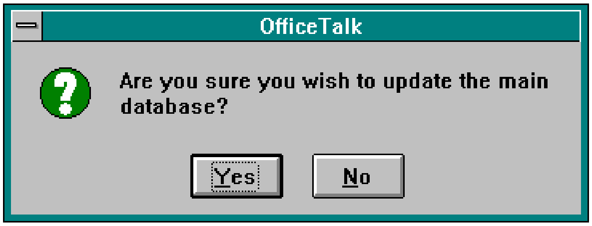
Updating the Main Database

If you wish to update the main database with your modifications but want to remain working offline and it is not important that you receive changes from the main database then instead of *Working Online* and then *Working Remote*, you may select the command **Update Main Database** from the **File** menu.



Update Main Database Command

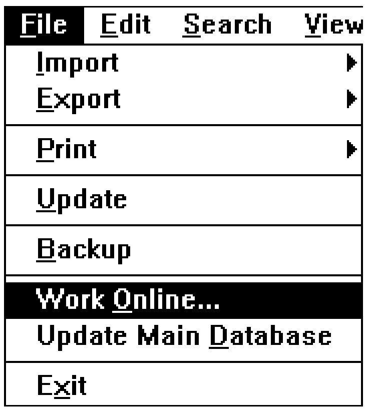
This will effect any changes that you have made, whilst working remotely, onto the main database. When you select the command, OfficeTalk will confirm that you wish to update the main database.



OfficeTalk Confirmation

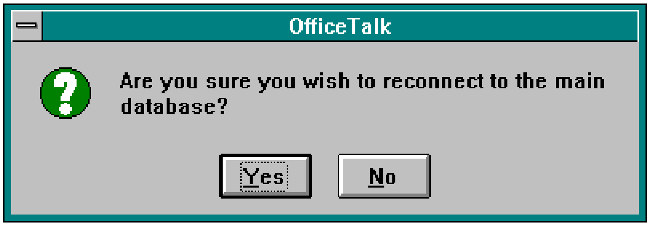
Working Online

If you wish to reconnect to the main database, bringing with you all changes made whilst disconnected, then select the command **Work Online** from the **File** menu.



Work Online command

OfficeTalk will confirm that you wish to reconnect to the main database.



OfficeTalk Confirmation

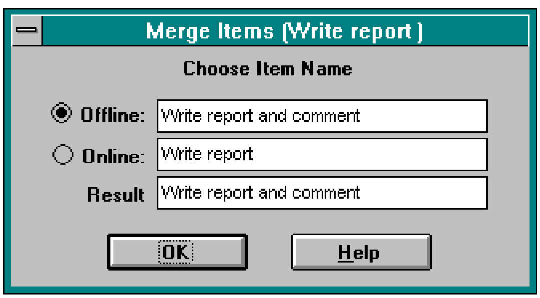
When OfficeTalk reconnects with the main database, all mail messages to other OfficeTalk users will be delivered. OfficeTalk will also attempt to add or modify all other data which you changed since disconnecting.

Handling Clashes

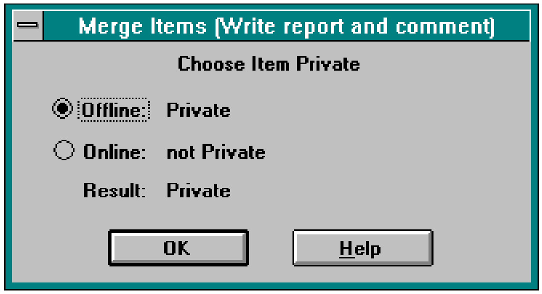
Sometimes, OfficeTalk will find *change clashes* where you have modified some data that has also been modified on the main database *since* you disconnected. If OfficeTalk finds any clashes, then during the reconnection process, OfficeTalk will pop up a series of dialog boxes. Each dialog box will represent a *change clash* for a particular field in a particular record. Each dialog box will display the data in the *remote* database and the corresponding data in the *online* database. Both *Remote* and *Online* fields will have a radio button beside them. Selecting the *Remote* field radio button will indicate that you wish to use the data from the *remote* database. Selecting the *Online* field radio button will indicate that you wish to use the data from the main database. The data that you choose, according to which radio button you select, will appear in the *Result* field. Once you have made your choice, press 

to continue with the reconnection process.

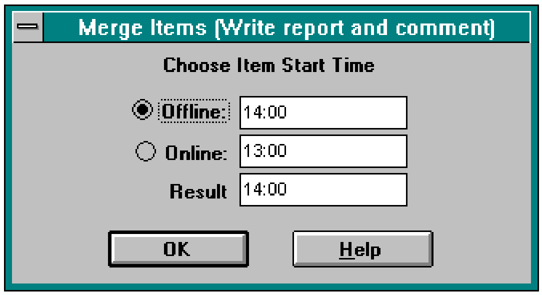
The following shows some examples of the dialog boxes which may appear if certain clashes occur during the reconnection process:



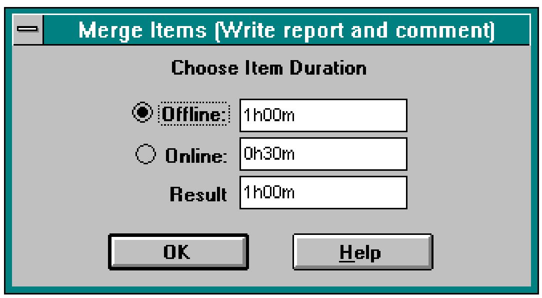
Task Description Clash



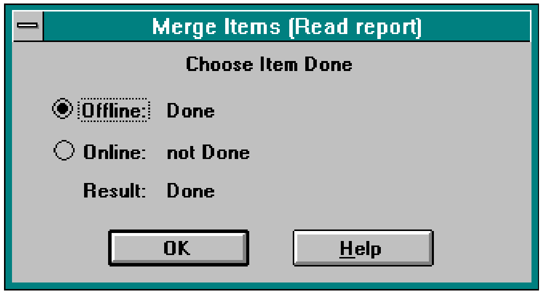
Task Private Clash



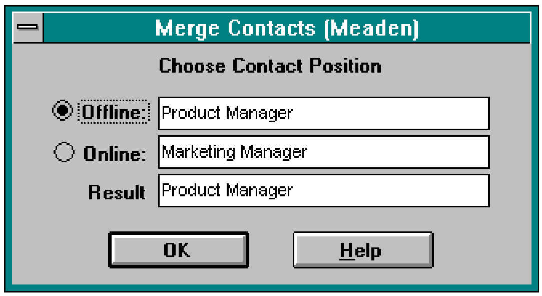
Task Start Time Clash



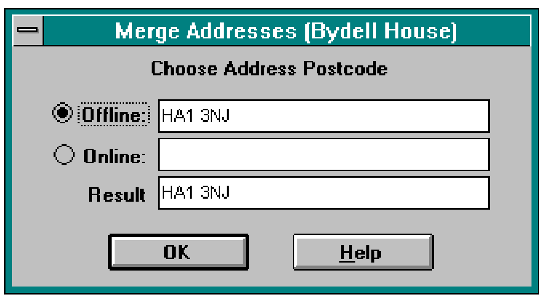
Task Duration Clash



Task Complete Clash



Contact Position Clash

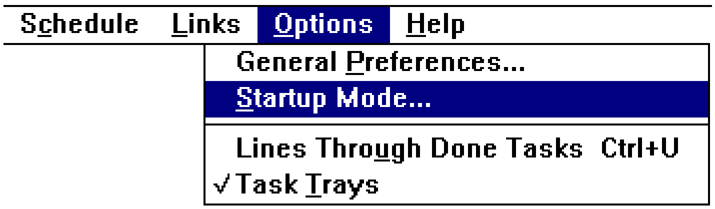


Company Postcode Clash

Choosing The Startup Mode

By default, when you start OfficeTalk, you begin in Diary Mode with the Daily Appointments Window displayed. OfficeTalk lets you change which mode you begin in when you start the application. Further, OfficeTalk lets you choose which view, within that mode, is shown initially. You can do this in the following way:

Œ Select **Startup Mode** from the **Options** menu.



Selecting Startup Mode

 The Startup Mode dialog box will appear:

Startup Mode dialog box

Ž Select which mode you wish to start up in by choosing one of the leftmost radio buttons. Then, for each mode containing multiple views, select which of those views you wish to begin in when you enter the corresponding mode by selecting one or more of the *indented* radio buttons. Press OK to apply the selection and Cancel to cancel the operation.