

# Overview

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This manual describes, in detail, the nine modules (or *modes*) which make up OfficeTalk. The following is a brief introduction to each module.

## Supervisor Mode

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Supervisor Mode lets you add users, resources, user groups, workgroup-wide projects and planners, workgroup-wide task classifications and specific workgroup details such as public holidays, workgroup-wide task priority descriptions, backups and usual workgroup working hours. In addition to this, Supervisor Mode lets you define individual user's access rights to projects, planners and other users' diary.

## Diary Mode

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The Diary Mode is used to keep appointments, task lists (*to-do* lists) and *background activities* for yourself and all the other users in your organisation.. From within the **Diary Mode** you can view and update your own diary information. If you have the necessary access rights, you can view and even update other users' diary information. OfficeTalk also lets you keep diary information for *resources* such as Meeting Rooms, pool cars and other bookable objects.

## Planner Mode

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The Planner Mode allows users to create planners, which are a way of planning and sharing long term activity information. Planners contain *planner* bookings which are one or more days in duration. A good example of the typical usage of a planner would be a *Holiday* planner. A planner may be created which keeps the holiday commitments of the entire workgroup. This information will then be available to all OfficeTalk users for use in their own planning and scheduling.

## Project Mode

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The Project Mode is ideal for planning and monitoring projects within your organisation. A project consists of a group of *project related* tasks and a plan for when those tasks will be completed and by whom. Project tasks can be assigned to individual users using the OfficeTalk mail system.

## Group Mode

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The Group Mode is ideal for looking at the activities of a group of users and resources. There are two views in Group Mode, the *table chart view* which presents a group's activities in a timetable format and the *group chart view* which represents a group's activities in a chart format.

## Meeting Mode

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The Meeting Mode lets you organise meetings simply and efficiently. From within Meeting Mode, you can check other users' and resources' availability, write meeting agendas, send out meeting invitations and monitor the replies. Meeting Mode works closely with the OfficeTalk mail system

## Contact Mode

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The Contact Mode provides a rich set of contact management features. Contact Mode lets you add contacts, schedule follow-up tasks, record conversations, define company and contact groups, print labels, export mail merge files to word-processors and a whole lot more.

Contact Mode contains several different views on your contact data. Company View shows company information, namely the site address and a list of employees (contacts) who work for the company. Contact View shows information specific to a particular contact, for example, the name and address of the company to which the contact belongs, if any, and the contact's home address, title, position etc. The Directory View shows both company and contact information in a *telephone directory* format. Conversation View show conversations that you and other users have documented with contacts.

## Mail Mode

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The Mail Mode provides a very *easy to use* mail facility with most of the features that you would expect from a standalone mail package. In addition, OfficeTalk mail is both MAPI and VIM compliant which

means that it will interface with Microsoft Mail™, Lotus cc:Mail™ and many other popular Email packages. Users can send mail to individual users, groups, outside contacts and to public bulletin boards. Documents and tasks can be mailed to users and their status tracked.

## Notify Mode

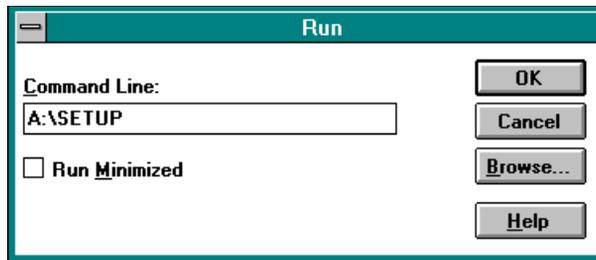
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Notify Mode lets you compose and send messages directly to other users' screens. This may be considered a more urgent form of EMail. Provided that the recipient is running OfficeTalk, regardless of what application the recipient is currently working in, any message received will appear over the top of all other windows, ensuring that you are made aware of the message.

# Installing OfficeTalk

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OfficeTalk is supplied on a single disk. To install OfficeTalk, insert the setup disk into your 3.5in floppy disk drive and select **Run** from the **File** menu in Program Manager. In the *Command Line* box, type : **A:\SETUP** (or **B:\SETUP** if your floppy disk drive is called **B:**).



*Run dialog box in Program Manager*

Then press **OK** or press ENTER on the keyboard. Wait a few moments while OfficeTalk Setup initialises. You will then see a Welcome dialog box.



*Setup Welcome dialog box*

Press . OfficeTalk setup will then ask you to supply a directory path for the OfficeTalk database directory. OfficeTalk suggests a possible directory path. Either accept this, by pressing  or enter another more suitable drive and path.



*OfficeTalk Database Path dialog box*

**Note:** The drive and directory path for your database files must be a network drive and directory to which everyone has READ, WRITE and DELETE access.

If you have entered a drive and path which either already exists or is invalid, then OfficeTalk setup will prevent you from moving on, warning you that the path entered is not valid. Enter a valid path and then press .



*OfficeTalk Message*

When you have pressed , OfficeTalk Setup will ask you to provide a directory path in which to install the OfficeTalk executable files.



*OfficeTalk Executables Path dialog box*

OfficeTalk Setup provides a default directory path, **F:\OTALK**. Either accept this, by pressing , or enter a drive and path of your choice. If you enter a drive and path which either exists or is invalid, then, again, OfficeTalk Setup will prevent you from moving on, warning you that the path entered is not valid.

**Note:** If you specify a local drive for the *executable* directory, then the speed of running the application may be slightly faster.



*OfficeTalk Message*

Enter a valid path and then press . When you press , OfficeTalk setup will copy across the application files, create a new Program Group and put the OfficeTalk application icon and the OfficeTalk Help icon into the group.



*OfficeTalk Program Group*

OfficeTalk Setup will then inform you that it has installed OfficeTalk successfully. You are given the choice of running OfficeTalk straight away or returning to Windows.



*Successfully Installed dialog box*

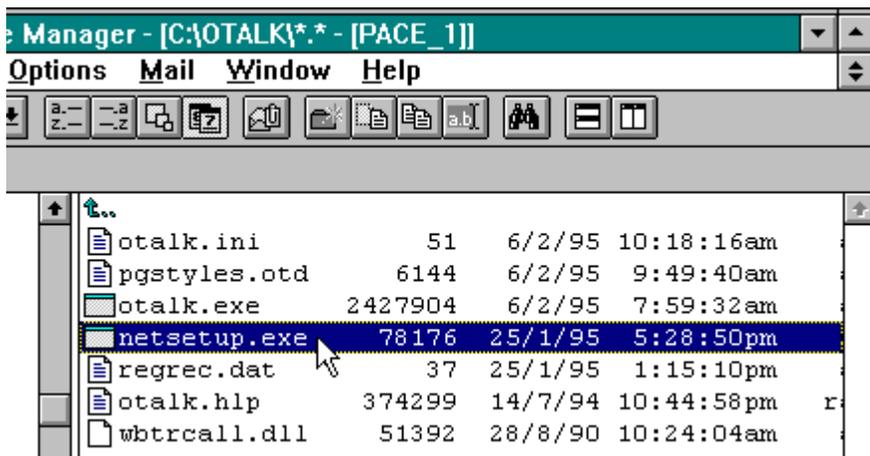
**Note:** If OfficeTalk setup fails then this is likely to be due to a lack of disk space on the drive to which you are installing the executables. Free up some space and try the installation procedure again.

## Network Setup

Once OfficeTalk has been installed from the installation disk, all other workstations may be setup over the network using the NETSETUP utility.

**Note:** Before installing other users, follow the steps in the section *Running OfficeTalk for the First Time*.

Using File Manager, locate the newly created OfficeTalk directory (for example, **F:\OTALK**, or whatever you entered in the *Database Path* field in the SETUP program). Either double click on the file **netsetup.exe** or use the **File/Run** pull down menu and use **Browse** to locate **netsetup.exe**.



*Locating the NETSETUP.EXE application*

When you run NETSETUP.EXE, OfficeTalk pops up an OfficeTalk Network Setup dialog box.



*OfficeTalk Network Setup*

This dialog box offers you the option of running the executable files from the network or running them from the local drive. If you want to install the executable files locally, select the **Copy and run locally** radio button and enter a drive and path where you wish the executables to be copied to. OfficeTalk provides a default path (which is C:\OTALK). Press . If you enter a drive or a path which either exists or is invalid OfficeTalk Network Setup will prevent you from moving on warning you that the path entered is not valid. Enter a valid path and then press .

If you want to run the executable files from the network (the default), click on the **Run executables from server** radio button and press .

When you press , OfficeTalk setup will copy across the application files, create a new Program Group and put the OfficeTalk application icon and the OfficeTalk Help icon into the group.

OfficeTalk Setup will then inform you that it has installed OfficeTalk successfully. You are given the choice of running OfficeTalk straight away or returning to Windows.



*Successful Installation dialog box*

**Note:** The Network Setup should only be run after the Supervisor has been established as a user in the system. This is because OfficeTalk treats the first person who runs the application as the initial supervisor.

## Using SHARE and VSHARE.386

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For OfficeTalk to run correctly the environment must be setup so that different users may share the same file. For this, you must run either *SHARE.EXE* from the DOS prompt **before** running Windows, **or**, provided that you are running Windows 3.11 in 386 enhanced mode and do not have any DOS applications which need *SHARE.EXE*, then you may instead have the following entry in your *SYSTEM.INI* file in the [386Enh] section:

**device=vshare.386**

It is recommended that you use *VSHARE* rather than *SHARE*, if possible. However if you are using a DOS program which relies on *SHARE* then you should still load *SHARE*.

**Note:** VSHARE is only supplied with Windows version 3.11. It is not supplied with Windows 3.1.

OfficeTalk Setup checks to ensure that you have the relevant line in your *SYSTEM.INI* file to run *VSHARE*. If you do not have the entry, OfficeTalk Setup will warn you that *SHARE.EXE* or *VSHARE* should be run prior to running OfficeTalk. If you plan to use *SHARE.EXE*, then this may be added as an entry in your *AUTOEXEC.BAT* file (before the *win* command). If you are running Windows in 386 Enhanced Mode and plan to use *VSHARE* then add the above entry into your *SYSTEM.INI* file in the [386Enh] section. Also check to ensure that *VSHARE.386* is located in your Window's *SYSTEM* directory.

## Running OfficeTalk for the First Time

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Start up OfficeTalk by double clicking the left mouse button on the OfficeTalk icon in the OfficeTalk program group which has just been created. Initially, a database will not exist, so a New Workgroup dialog box will appear, prompting you to either create a new workgroup database or import an existing one.



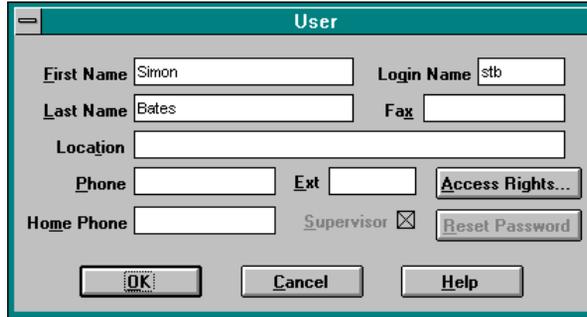
*New Workgroup dialog box*

Press the  button. OfficeTalk will then display a Workgroup dialog box. Fill out your company/workgroup name, location, phone and fax numbers. Press .



*Workgroup dialog box*

When you press OK, OfficeTalk will then prompt you for your own details by displaying a User dialog box. Enter your first name, your last name and a login name and, for now, press OK. You can come back and add further personal details later on.



*User dialog box*

When you press OK, OfficeTalk will create the database and display the Supervisor Mode. You are now ready to start using OfficeTalk.

The next stage is to setup OfficeTalk on every user's workstation. Follow the steps in the section, **Network Setup**, earlier in this chapter. After that, you may want to add further users. For more information on adding users, see the **Supervisor Mode** chapter.

Once a database has been setup and users have been defined, users will be able to use their workstations to log onto OfficeTalk.

## Logging on to OfficeTalk

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To log onto OfficeTalk, first run the application by double clicking the left mouse button on the OfficeTalk program item.



*OfficeTalk Program Item*

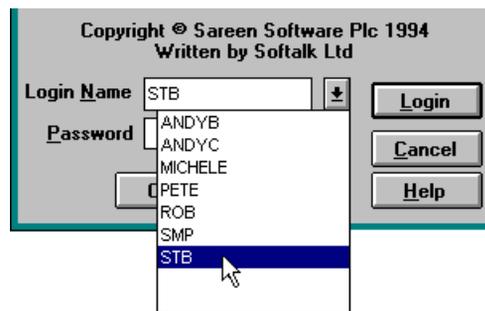
The Login dialog box will appear. If you have logged on previously at the same workstation, then your login name will already be selected in the *Login Name* field. If not, either type in your login name or select it from the list.



*Login dialog box*

Next, enter your password. When you were initially set up as a user, OfficeTalk defaults your password to exactly the same characters as your login name. For example, if your name was *John Smith* and your login name was *JS* then your password would also be *JS*. (Note that case sensitivity **is** important). You may change your password from the Login dialog box. For more information on this see **Changing Your Password**, later on in this chapter.

**Note:** Case sensitivity is important in both the *Login Name* and *Password* fields.



*Selecting your login name from the pull down list*

Once you have entered your password, press the  button, or, alternatively, press the ENTER key on the keyboard. OfficeTalk will then log you in. By default, when you log in, you enter Diary Mode. You may specify which mode to start in. For more information on this, see **Startup Mode** in the **General OfficeTalk Features** chapter.

## Bypassing the Login Dialog Box

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Advanced users may instruct OfficeTalk to extract their password from the OTALK.INI file (if security to their data is not an issue), by adding the following line to the OTALK.INI file in the [login] section:

```
[login]
name=#####
password=*****          ....(add this line)
```

where ##### represents the user's login name and \*\*\*\*\* represents the user's password.

This will completely by-pass the Login dialog box, logging you straight into OfficeTalk. This is useful for users for whom security is not an issue, but wish to run OfficeTalk as soon as they startup Windows without OfficeTalk prompting them for a password.

To change it back so that OfficeTalk always asks for the password, simply delete the line:

```
password=*****
```

from the OTALK.INI file.

## Changing Your Password

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You can change your password from the login dialog.

**Note:** If you have specified the password in your OTALK.INI file as described in the section **Bypassing the Login Dialog Box** then remove the line:

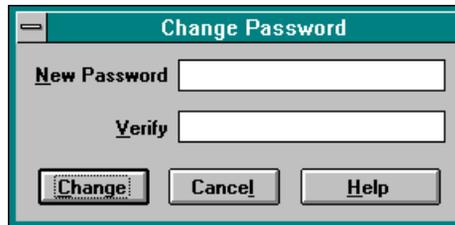
```
password=*****
```

from the OTALK.INI file.



*Login dialog box*

To change your password, enter your *Login Name* and current *Password* into the Login dialog box and press the **Change Password** button. A Change Password dialog box will appear.



*Change Password dialog box*

Enter your new password into both the *New Password* field and the *Verify* field. Then press the **Change** button. Your password will be changed. OfficeTalk will return to the Login dialog box. Enter the new password into the *Password* field and press the **Login** button.

## Registering OfficeTalk

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When you first log onto OfficeTalk, you have 70 days in which to obtain a product enabling *keycode* from your vendor. If you do not register OfficeTalk and obtain a keycode, any supervisors logging onto OfficeTalk will be reminded of this after 40, 50 and 60 days and every day thereafter.

## Registering After the 70 day Period

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If you have still not obtained a keycode after 70 days, you will be prevented from logging on to OfficeTalk. When you try to log on you will receive the following message:



*OfficeTalk Message*

If you have already registered OfficeTalk by entering a Workgroup name, entering the license serial numbers and have received a keycode from your vendor, then press .

If you have not yet registered OfficeTalk then press . If you press , OfficeTalk will pop up the Register OfficeTalk dialog box. Refer to the section **Registering Before the 70 Day Period** and follow the instructions from step 1 to step 4. Having obtained your keycode, re-run the application and press  when the OfficeTalk message appears.

If you press , OfficeTalk will then pop up an Enter Keycode dialog box. Enter your keycode.



*Enter Keycode dialog box*

When you press , OfficeTalk will check that the keycode matches the Workgroup Name, the number of users and the serial number. If the keycode is not correct, OfficeTalk will inform you of this by popping up the following message:

*OfficeTalk Warning*

If you get this message, firstly ensure that you have typed in the keycode correctly into the keycode field. If no error was made typing in the keycode, check to ensure that you have not changed the spelling of the Workgroup Name since registering OfficeTalk. Also check to ensure that no licenses have been added or deleted from the License dialog box since you registered the product. If you still cannot find any reason why the keycode does not work then contact your OfficeTalk vendor.

If everything is OK then OfficeTalk will pop up the following message box:

*OfficeTalk Message*

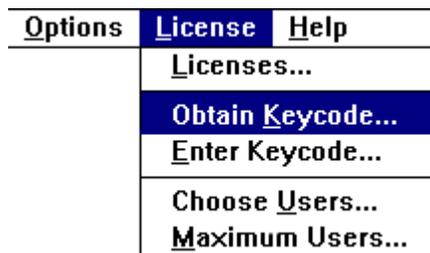
When you press OK, OfficeTalk will pop up the Login dialog box.

## Registering Before the 70 day Period

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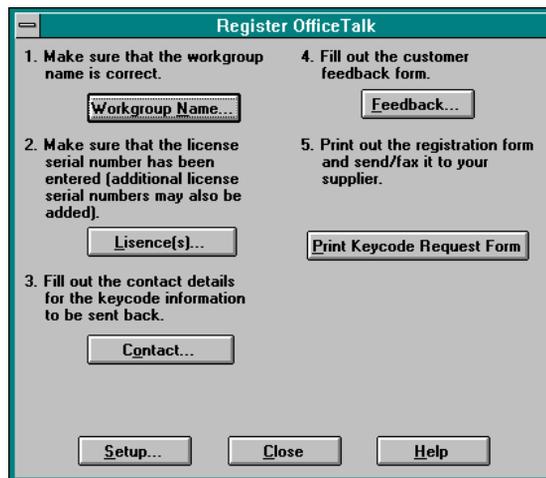
To register OfficeTalk and receive the product enabling *keycode*, do the following:

- Ⓔ Login as a supervisor and enter Supervisor Mode. Choose **Obtain Keycode** from the **License** menu.



*License menu*

A Register OfficeTalk dialog box will appear.



*Obtain Keycode dialog box*

- Press the **Workgroup Name...** button. The Workgroup Name dialog box will appear.



*Workgroup Name dialog box*

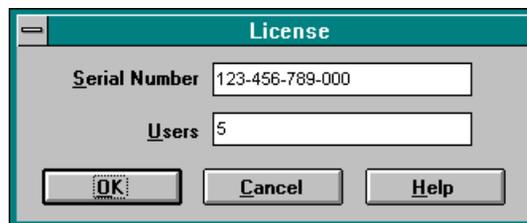
Ensure that the workgroup name is correct. **This is important since the keycode that you receive will be based upon this name and changing the Workgroup Name at some point in the future will invalidate the keycode.**

- Ž Next, you should enter the license details. Each OfficeTalk product comes with a serial number. Each serial number is associated with a certain number of user licenses. If you have more than one serial number (for example if you bought several copies of OfficeTalk) then you may enter all the serial numbers together, thus accumulating user licenses.

To enter the serial number(s), press the  button in the Register OfficeTalk dialog box. A Licenses dialog box will appear.

*Licenses dialog box*

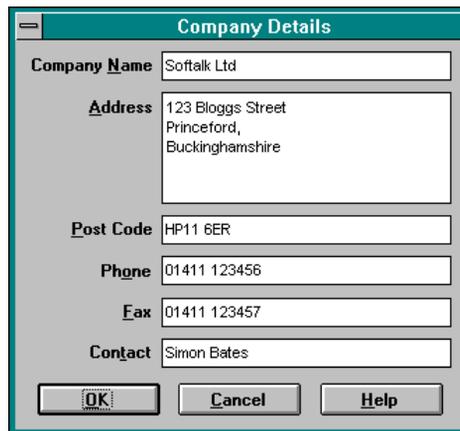
You can add a license by pressing the  button. Pressing this button will pop up an License dialog box.

*License dialog box*

Enter the serial number for this license and specify the number of users purchased against this license. Press OK. The license will now appear in the Licenses dialog box. You can edit or delete any entries in this dialog box using the **Edit...** and **Delete** buttons.

Finally press **Close** on the Licenses dialog box.

- Next enter your details or the details of the person to whom your vendor will communicate the product enabling *keycode*. Do this by pressing the **Contact...** button in the Register OfficeTalk dialog box. When you press this button the Contact Details dialog box will appear for you to enter the relevant details.



Company Details	
Company Name	Softalk Ltd
Address	123 Bloggs Street Princeford, Buckinghamshire
Post Code	HP11 6ER
Phone	01411 123456
Fax	01411 123457
Contact	Simon Bates
<b>OK</b> <b>Cancel</b> <b>Help</b>	

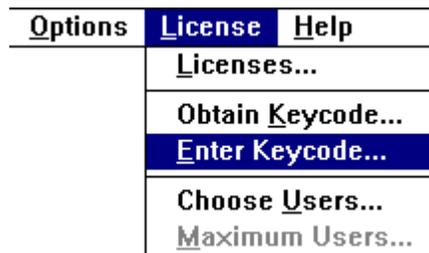
*Contact Details dialog box*

When you have entered the relevant details, press **OK**.

- Next fill out any feedback that you have about the product by pressing the **Feedback...** button. When you press this button, a Feedback dialog box will appear.

*Feedback dialog box*

- ‘ Finally, press the **Print Keycode Request Form** button. This will print out a Registration Form. Fax this form through to your vendor whose fax number will be displayed at the top of the form. Your vendor will then inform you of your keycode.
- ’ When you have been given your keycode number, bring up the Enter Keycode dialog box by selecting **Enter Keycode** from the **License** menu.

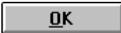


*License menu*

Enter your keycode into the *Keycode* field in the Enter Keycode dialog box and press **OK**. Note that OfficeTalk ignores the ‘-’ character, so you can use it to space the numbers for clarity.



*Enter Keycode dialog box*

When you press , OfficeTalk will check that the keycode matches the Workgroup Name, the number of users and the serial number. If the keycode is not correct, OfficeTalk will inform you of this by popping up the following message:



*OfficeTalk Warning*

If you get this message, firstly ensure that you have typed in the keycode correctly into the keycode field. If no error was made typing in the keycode, check to ensure that you have not changed the spelling of the workgroup name since registering OfficeTalk. Also check to ensure that no licenses have been added or deleted from the License dialog box since you registered the product. If you still cannot find any reason why the keycode does not work then contact your OfficeTalk vendor.

If everything is OK then OfficeTalk will pop up the following message box:



*OfficeTalk Message*

OfficeTalk will now be registered. OfficeTalk will remember your keycode. You should never change the workgroup name, license information or keycode *unless* you purchase further licenses in the future.

## Choosing Licensed Users

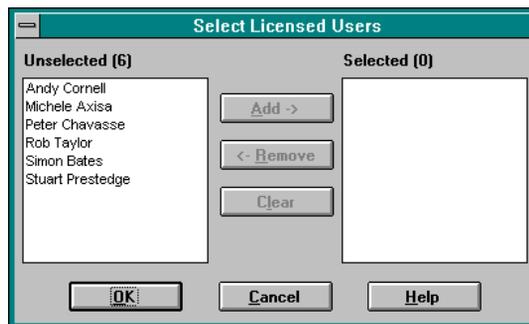
During the 70 day Registration Period you may add up to 100 OfficeTalk users. When you register the product and obtain a keycode for a specified number of users, it is possible that there are more users than the number of user licenses that you have. For this reason, OfficeTalk lets you specify a subset of users who will become the actual users.

If you have more users than licenses then when you first log on after entering the product enabling keycode, OfficeTalk will warn you of this.



*OfficeTalk warning*

OfficeTalk will then prompt you to specify the subset of actual users by popping up a Select Licensed Users dialog box.



*Select Licensed Users dialog box*

Choose the users who you wish to license by selecting them from the **Unselected** list and pressing the **Add ->** button. When you have chosen all the users, press OK. If, for example you have purchased

5 licenses but you have chosen more than 5 users then OfficeTalk will prevent you from continuing by issuing the following message:



*OfficeTalk Message*

Remove some users from the **Selected** list and press OK. You must choose at least *one* supervisor user. If you do not, OfficeTalk will prevent you from moving on by issuing the following message.



*OfficeTalk Message*

You can change the subset of licensed users at any time by selecting **Choose Users** from the **License** menu in Supervisor Mode.

## De-Installing OfficeTalk

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OfficeTalk comes supplied with a de-installation program so that the OfficeTalk executables may be removed completely from a workstation. To run the De-Installation program double click on the De-Install icon in your OfficeTalk program group. If you did not create an icon for the De-Installation program during OfficeTalk setup then run **DEINST.EXE** from your OfficeTalk executable directory.

To De-Install OfficeTalk, run the de-install program and press the **De-Install OfficeTALK** button. When you press this button, OfficeTalk will check to see if either the OfficeTalk database directory or the executable directory exist on the local drive and, if they do, OfficeTalk will warn you that it is about to

delete, in turn, the OfficeTalk executable directory and/or the OfficeTalk database directory. OfficeTalk will let you confirm that you wish to proceed.



*De-Install welcome screen*

When OfficeTalk has deleted one or both of the directories, it will remove the OTALK.INI file from your Windows directory (only if you are using a local Windows directory). OfficeTalk will then inform you that the application has been removed completely from your workstation.



*Successful DeInstallation*

