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Glossary of Terms

Appointment

Background Activity

Group

Company

Contact

Meeting

Planner

Project

Resource

Sub Task

Task

A *Background Activity* is either a Planner booking, an annual event, an overdue task or a Workgroup Holiday.

An *Appointment* is an entry in your Diary Window

A *Company* is an external organisation with which your organisation has some form of contact

A *Contact* is an external person with which your organisation has some form of contact

A *Group* is a defined set of people. eg. Sales Dept

A *Project* is a set of tasks which are timescaled

A *Meeting* is an organised meeting of OfficeTalk users and/or resorces

A *Planner* is a chart of long term activity

A *Resource* is any item in your organisation which may be *booked* by an OfficeTalk user

A *Sub Task* is a task which is a part (sub-component) of another existing task

A *Task* is an entry in your Task List. It signifies some activity which you plan to action and complete in the future.

Window Buttons

Window Buttons are the buttons directly above the OfficeTalk Windows. They are listed below:



New Item



Edit Item



Filter Button



Notes Button



Bin Button



Link Button



Increase Task Level Button



Decrement Task Level Button



Search Button



Directory View - By Company



Directory View - By Contact



Print



Attach Reminder to appointment



Back a day/week/month



Go to Today



Forward a day/week/month



Maximize Window



UnMaximize Window



Sort Tasks Button



Complete Task Button



Zoom In Button



-  Zoom Out Button
-  Back a Year Button
-  Forward a Year Button
-  Dial Button
-  Hang Up Button
-  Which Contact Groups
-  Add Company/Contact to Group
-  Open Currently select Mail Folder
-  Address mail recipient as TO
-  Address mail recipient as CC
-  Address mail recipient as BCC

Installation

To install OfficeTalk, select **Run** from the **File** menu of Program Manager. A **Run Dialog Box** will appear. Insert the OfficeTalk disk into the floppy disk drive and type

a:\setup

into the **Command Line** field. Then press OK. The OfficeTalk Setup program will start up. Follow the instructions given to you by the setup program. Once the setup is complete, an OfficeTalk Program Group will appear. Inside this Program Group you will find the OfficeTalk application icon. Depending on whether you chose to install it, the OfficeTalk help file icon will also appear.



OfficeTalk



Standalone OfficeTalk Help

Only the first installation of OfficeTalk need be done using the floppy disk. Further installations of OfficeTalk should be made by running the **netsetup.exe** program which you will find in the newly created database directory. This will be a lot quicker than installing from the original floppy disk and will ensure that all subsequent OfficeTalk installations communicate successfully with each other.

See Also

[Installing Further OfficeTalk Users](#)

[Creating a new OfficeTalk Database](#)

Installing Further OfficeTalk Users

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, you should create a new OfficeTalk database. OfficeTalk treats the first person who logs on as a supervisor and takes that person through the stages necessary to create a new database. For this reason it is best if you create the database first and then create other users. For more information on creating a new database, see [Creating a New Database](#).

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). Double click on the file **Netsetup.exe**. This will run the Network Setup Program.

When you run **netsetup.exe**, OfficeTalk pops up an OfficeTalk Network Setup dialog box. 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, OfficeTalk provides a default path (which is **c:\otalk**). Either accept this and press **Continue** or type a path of your choice. If you want to run from the executable files on the network, click on the **Run executables from the server** radio button and press **Continue**. 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 **Continue**.

When you press **Continue**, OfficeTalk netsetup 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.

Creating a New Workgroup Database

Having completed the [Installation](#), double click on the OfficeTalk icon in the OfficeTalk group window. OfficeTalk will start. Because a database has not yet been created, OfficeTalk will pop up a [New Workgroup dialog box](#), prompting you to either create a new workgroup or import an existing **.CMP** file. Create a new workgroup by clicking on the **New** button. OfficeTalk will then pop-up a [Workgroup dialog box](#). Fill out the details in this dialog box and press OK. A [User dialog box](#) will pop up asking you to enter your own personal details. Enter your First name and Last name into the appropriate fields.

Next, type in a login name into the *Login Name* field. This should be a single word by which other members of your organisation will know you, for example, your initials.

eg. aab

Next enter your usual location and phone/fax number if they are different to the workgroup details. In any case fill in your extension number, if relevant. Because you are the first OfficeTalk user to be added, you will be given supervisor privileges. When you press **OK**, OfficeTalk will create the database and display the Supervisor View. Your first task, as a supervisor is to define other users and resources. You can do this by adding to the *User List* and *Resource List* in Supervisor Mode.

See Also

[Logging in to OfficeTalk](#)

[User List](#)

[Resource List](#).

Network Settings

OfficeTalk is a network aware application which means that different OfficeTalk applications talk to each other over the network drive. Ensure that you have the following line in your AUTOEXEC.BAT file:

SHARE /f:5000

This line ensures that the underlying BTRIEVE database has sufficient space for each record.

Also ensure that every user has at least READ, WRITE, DELETE & MODIFY access to the shared disk area containing the OfficeTalk database files. Some Network Operating Systems have facilities for limiting the amount of disk space a particular user may use or for limiting the period of time during which a user may have access to a certain logical drive or disk area. Ensure that all OfficeTalk users have the necessary access and permitted disk space.

Changing Your Password

You can change your password when you first log in to OfficeTalk from the Login dialog box. When the dialog box appears, enter your login name and current password and press the **Change Password** button. OfficeTalk will pop up a Change Password dialog box. Type in a new password into the *New Password* field and type in the same password in the *Verify* field. Then press the **Change** button. OfficeTalk will re-display the Login dialog box. Type in your new password and press the **Login** button. Subsequent logins will require your new password.

If you have forgotten your password then a Supervisory user will need to *reset* your password from the User dialog box. When a password is *reset* it is set to your *Login Name*.

Logging in to OfficeTalk

When you first start up OfficeTalk, you are presented with the Login dialog box. You can log in to OfficeTalk by typing your login name into the *Login Name* field and typing your password into the *Password* field. If you are logging into OfficeTalk for the first time, your password will be exactly the same as your *Login Name*. If you cannot remember your *Login Name*, then pull down the *Login Name* list to reveal a list of all OfficeTalk users. Select your name and type in your password. If you cannot remember your password, a Supervisory user will need to reset your password from the User dialog box. When a password is *reset* it is set to your *Login Name*.

Modes

There are several modes in OfficeTalk. The mode buttons are at the top left of the application. Click on the buttons below to obtain more help on the relevant mode.



Keeping Your Own Diary

OfficeTalk provides task and appointment management using the Diary Mode. Any tasks that you have may be entered into the Task List. It is possible to add Sub Tasks to these tasks, allowing you to use the task list as an *outlining tool*. You may Schedule a Task or any of its Sub Tasks by Dragging the task or sub task over to the appropriate place on the Diary Window. You may view your diary in several ways. The normal view is the Daily View. You can view the weekly diary by pressing the **Weekly Button** and the monthly diary by pressing the **Monthly Button**.

You may schedule your tasks by dragging the tasks from the task list to any of these views. If you drag a task to a particular day in Week View or Month View then OfficeTalk will attempt to schedule the task as early as possible on the day that you dragged to.



Multi-Level Tasks

Sometimes it is nice to be able to break down larger tasks in to smaller more manageable tasks. OfficeTalk lets you do this by letting you create multi-level tasks. If you have two tasks in your task list, you can make the second task a **sub-task** of the first task by selecting the second task and pressing the



button, which is above the Task List. The second task will be indented and a  symbol will appear next to the first task to indicate that it has a list of one or more sub tasks. The first task has become a parent task. If you click the  symbol, the parent task will hide its sub-task(s) and the  symbol will change to a  symbol. You can make one or more tasks into sub tasks in several different ways. Each way is described below:



- *Using the  Button.* Select the task, or tasks, which you wish to make into sub tasks of the task above. Press the



button. You can restore the task back to its original level by selecting the task and pressing the



button.

- *Using the Cursor Keys on the keyboard.* Select the task, or tasks, which you wish to make into sub tasks of the task above. While keeping the Ctrl key depressed, press the RIGHT cursor key. You can restore the task back to its original *level* by selecting the task and pressing the LEFT cursor key while keeping the Ctrl key depressed.
- *Drag and Drop.* Drag the task or tasks, which you wish to make into sub tasks, onto any task in the task list. The task that you drag onto will become the parent of the dragged task(s). Use this method when the parent task (to be) and sub task (to be) are not adjacent in the Task List.

It is possible to make sub tasks of sub tasks. There is no restriction on the number of task levels. Generally, the more complex a task or activity is, the more levels you are likely to break the task down into.

If you mark a parent task as complete, all of its sub tasks will be automatically marked as complete. A parent task will be automatically marked as complete only when all of its sub tasks have been completed.

A parent task will be marked as overdue if any of its sub tasks become overdue.



Planner Mode

Purpose

The OfficeTalk Planner is a fully featured electronic Wall Planner. It enables you to keep track of *Activities* which span 1 or more days.

Usage

The Planner Mode consists of a Planner Window and a Key Window. The Planner Window shows up to a years activities at a time. Different types of activities may be displayed on the planner and each type of activity may have a different colour and different text displayed on it.

See Also

[Adding a Planner](#)

[Selecting a Planner](#)

[Adding Keys](#)

[Deleting Keys](#)

[Adding a Planner Booking](#)

[Deleting a Planner Booking](#)

[Changing the Description of a Key](#)

[Changing the Key of a Planner Booking](#)

[Displaying Planner Information in your Diary](#)

[Zooming In and Out of Planners](#)

[Printing Planners](#)



Adding a Planner

To make a new *Workgroup-Wide* Planner, refer to the Supervisor Mode section. You can make a new



Personal Planner from Planner Mode by pressing the  button in the sub toolbar. A Planner Dialog box will appear. Fill out the Name field and, if you wish to give other people access to your Planner, press the Access Rights button and define the access rights of the planner. For more information on how to define access rights, see Access Rights. Finally press OK on the Planner Dialog Box. A new Planner will be created and will be displayed in the Planner Window.



Zooming In and Out

The Planner Window is set to show a full year of activities by default. This allows 2 rows for each month. If you wish to make use of the other rows available for a given month (there are a maximum of 24 rows per month) then you can Zoom the display to show less months in the Planner Window, therefore showing more rows per month. To Zoom the Planner window to view more rows per month, press the



button. To Zoom the Planner window to view less rows per month, but to show more months in the display, press the



button.



Selecting a Planner

To select a Planner from the list of Planners, press the button on the Planner pull down list and choose a Planner from the list. The Planner Window will change to show the newly selected Planner and the Key Window will change to show the keys associated with that Planner.



Adding Keys



All Planners may have a set of Keys. To add a new key to a Planner, press the  button above the Key Window. A Key Dialog will appear. Fill out the Name field and choose a colour for the key from the Colour pull down list. Press OK on the Key dialog. The new key will be added to the Key Window.



Deleting Keys

To delete a key from the key window, select the key by clicking on it using the left mouse button and then press the DELETE key on the keyboard. Alternatively, press the  button.



Adding a Planner Booking

To add a booking to the Planner, first of all select a key to represent the booking. Do this by single clicking on the relevant key in the Key Window. The key will highlight to show that it is selected. Next create the booking in the Planner Window by pressing the Left mouse button when over the required starting date. While keeping the Left mouse button pressed, drag the cursor over to the required end date. Finally release the Left mouse button. The booking will be added to the Planner Window.



Deleting a Planner Booking

To delete a planner booking, select the booking by clicking on it using the left mouse button. Then press the DELETE key on the keyboard. Alternatively, press the  button.



Displaying Planner Information in your Diary

You can instruct OfficeTalk to display a window under your diary when certain planners have planner bookings falling on the currently viewed date. You can do this from within Diary Mode by pressing the **Planners** button in the Background Activities dialog box (in the Schedule menu in Diary Mode). A dialog box will appear with two lists: a list of *unselected planners* and a list of *Planners Shown in your diary*. All those planners that you add to the *Planners Shown in your diary* list will be shown in a separate window underneath your diary when one of those planners contains a booking falling on the currently viewed date.



Changing the Key of a Planner Booking

You may change any planner booking to represent a different Planner Key by double clicking on the relevant planner booking. A Select Key dialog box will appear. Choose the key that you want to associate with the planner booking from the *key* pull down list and press OK.



Changing the Description of a Key

You may change the description and colour of a Planner Key in one of two ways:

- Double click on the Key in the Key Window
- While holding the CTRL key down, double click on a planner booking which is associated with the key.

When you change the description or colour of a key, all the planner bookings associated with the key will be updated.



Changing the Month/Year displayed

OfficeTalk lets you view the previous and next year for the selected planner by pressing the  and



buttons. If you are zoomed into the planner then you may use the



and



buttons to scroll backward and forward a month.



Supervisor Mode

Supervisor mode has restricted access, allowing entry to only Supervisory users. This mode lets you add, edit and delete OfficeTalk users, resources, projects, groups, planners, classifications, public holidays. It also lets you specify *usual working hours* and task priority descriptions.

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Supervisor Mode Buttons



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What is a Supervisor

A Supervisor is a user who has special privileges. A Supervisor has access to the Supervisor Mode. From here, the supervisor can do the following:

- Add/Edit/Delete OfficeTalk Users
- Set the access of one user to another
- Create other Supervisors
- Add/Edit/Delete OfficeTalk Resources
- Add/Edit/Delete OfficeTalk Projects
- Add/Edit/Delete OfficeTalk Planners
- Add/Edit/Delete OfficeTalk Groups
- Change the ownership and access to Projects and Planners
- Add/Edit/Delete OfficeTalk Classifications
- Define Public Holidays
- Export Workgroup Database
- Reset User's Passwords
- Log people Off
- Set the Workgroups usual working hours
- Set the Workgroups Task Priority descriptions
- Initiate Automatic Workgroup backups
- Restore Users from their personal backups



User List

Purpose

The User List is in Supervisor Mode. It allows you to add, edit or delete any OfficeTalk user. If a user has Supervisory privileges then the user will have access to the Supervisor Mode and will have the ability to add, edit, change and delete other users, Resources, Projects, Groups, Planners and Classifications

Usage



To add a new user, press the  button, above the User List, or double click the left mouse button in a blank part of the person list. This will bring up a User dialog box which will allow you to enter the person's Name, Login Name, Phone number, Fax Number, Extension, Location and External EMail login sequences. You can also specify that the user should be a Supervisor by clicking the Supervisor check box. Pressing OK will save the information.



To edit an existing user, select the required person from the User list and press the  button or double click the left mouse button on the user's name in the User List. This will pop up a User dialog box, from which you can modify any relevant details.

To delete an existing user, drag the user from the User List and drop it in the bin. OfficeTalk will not let you delete yourself.

You can specify the Access Rights of any user to any other user's diary from within the User dialog box by pressing the **Access Rights** button.

See Also

User Dialog

Access Rights



Resource List

Purpose

The Resource List is in Supervisor Mode. It allows you to add, edit or delete any resource that you may wish to keep a diary for. A resource can be anything from a pool car to an overhead projector to a meeting room. There are two types of resources; fixed resources and non-fixed resources. A fixed resource is a resource which is, itself, a fixed physical location, for example a meeting room.

Usage



To add a new resource, click the  button above the resource list. To edit an existing resource, select the resource that you wish to edit and click the



 button above the resource list. In both cases a Resource dialog box will appear. Fill out the *Name* and *Location* fields and click the check box provided, if you wish to define the resource as *fixed*. When this is complete, press OK. To delete an existing resource, either drag the text of the resource over to the bin, or select the resource and press the DELETE key on your keyboard.

See Also

Resource dialog box



Project List

Purpose

The Project list is in Supervisor Mode. It allows you to add, edit or delete projects within the workgroup. Once a project is set up, it may be used in Project Mode to define, set and monitor a schedule of tasks for a group of people, relating to a particular project.

Usage



To create a new project, click the  button above the Project list. To edit an existing project, select the project that you wish to edit and click the



 button above the project list. In both cases a Project Dialog box will appear. Fill out the *Name* field, define the owner, if required and set the access rights of the project. When this is complete, press OK. To delete an existing project, drag the project from the project list and drop it in the bin.

See Also

[Project dialog box](#)



Planner List

Purpose

The Planner list is in Supervisor View. It allows you to add, edit or delete workgroup-wide access planners. Once a planner is set up, it may be used in Planner Mode to define, set and view a schedule of background activities. It could be used, for example, to keep track of Holiday commitments within the workgroup. Planners entered in this list are available to all OfficeTalk users. It is possible to define private planners using the window buttons on the [Planner Window](#).

Usage



To create a new planner, click the  button above the Planner list. To edit an existing planner, select the planner that you wish to edit and click the



 button above the planner list. In both cases a [Planner dialog box](#) will appear. Fill out the *Name* field. When this is complete, press OK. To delete an existing planner, either drag the text of the planner over to the [bin](#), or [select](#) the planner and press the DELETE key on your keyboard.

See Also

[Planner](#)



Classifications

Purpose

The Classification list is in Supervisor View. It allows you to add, edit or delete Task Classifications within the workgroup. Once you have defined classifications these may be used by all users to classify their tasks from within the Task dialog box in Diary Mode. Tasks may then be sorted by Classification.

Usage



To create a new classification, click the  button in the sub toolbar. A Classifications dialog box will appear. Press the **New** button. To edit an existing classification, press the **Edit** button. In both cases a Classification dialog box will appear. Fill out the *Name* field and press OK. To delete an existing classification, select the classification from the list and press the **delete** button.



Group List

Purpose

The Group list is in Supervisor View. It allows you to add, edit or delete a group of people. Groups may be used in other views to represent a team, group or department of people.

Usage



To create a new group, click the  button above the group list. To edit an existing group, select the group that you wish to edit and press the



 button above the Group List. In both cases, a Group dialog will be shown. Fill out the *Name* of the group if you are defining a new group. There are two lists in the Group Dialog box. The list on the left is a list of all the OfficeTalk users and resources available. The list in the right is a list of all members of the group. When defining a new group this list will be empty initially. To add a user or resource to the group select it from the **Non-Member** list and press the **Add** button. To remove a user or resource from the Group, select it from the **Member** list and press the **Remove** button. When you have chosen the members of the group, press OK. To delete an existing group, drag the group from the group list and drop it in the bin.

See Also

[Group Dialog](#)



Workgroup Details

Purpose

The Workgroup details should be entered when you setup OfficeTalk for the first time. It is recommended that you keep these details up to date since the information stored is used as default values for contact phone numbers for other OfficeTalk users. You should not change the name of your workgroup if you have already obtained a keycode for OfficeTalk since the keycode is based on the Workgroup name and changing the Workgroup name will then invalidate your keycode and access to OfficeTalk.

Usage



To modify the Workgroup details, click on the  button and modify the contents of the fields as required. Press OK when you have modified the necessary fields.

Backing Up Your Personal Diary Database

As with all database applications, it is important to keep regular backups of the applications Database. By default, your personal diary information is backed up automatically by OfficeTalk on a daily basis at midnight. You may change whether or not OfficeTalk performs a database backup and the frequency and time of the backup by selecting General Preferences from the **Options** menu available in most Views. A dialog box will appear enabling you to change the various time and frequency of backups. If ever your diary database becomes corrupted or unusable then a Supervisor may restore the database to the state of its last backup. See Restoring a User's Diary

Restoring a User's Diary

OfficeTalk may be instructed to make regular data backups of a user's Diary Database. A supervisor may restore a user's database from the last backup made by the user. To do this, enter Supervisor View and select **Restore...** from the **File** menu. A Restore User dialog box will pop up. Select the person you wish to restore and press OK. OfficeTalk will restore fully the users Diary Database. Note that any data added since the last backup will be lost when you perform a restore.

Importing CSV Files

OfficeTalk lets you import CSV files into several areas of the OfficeTalk database.

You may import CSV into the following OfficeTalk formats:

- *Personal Contacts*
- *Workgroup-Wide Contacts*
- *Personal External Companies*
- *Workgroup-Wide External Companies*
- *Tasks*

Select *Import CSV* from the *File* menu. The CSV Import Dialog box will pop up. Instructions for importing a CSV file are provided in the CSV Import Dialog section.



Importing an OfficeTalk Workgroup

If OfficeTalk starts up and fails to find a Workgroup database, a New Workgroup dialog box appears. From within the dialog box, press the Import Workgroup button. A File dialog box will appear showing all files with a .CMP extension. Select a valid OfficeTalk Workgroup database file and press OK. OfficeTalk will begin to load the database file. OfficeTalk will inform you which part of the .CMP file it is reading. After the Workgroup data has been successfully loaded, the Login dialog box will appear.



Exporting an OfficeTalk Workgroup

OfficeTalk lets you export your entire database as a single binary (.CMP) file. You would use this feature to manually back up your entire Workgroup database.

When you press the Export Workgroup button, an Export Workgroup dialog box will appear. Choose the destination path and filename for the back up file and press **OK**. OfficeTalk will then output the database. Depending upon the size of the database and the speed of the network, this may take a few minutes.



Verifying the Database

The Validate Database command lets you validate the entire OfficeTalk workgroup database. If you suspect that a database corruption has occurred, then running this command may find and even fix any problems.

Run this command by selecting the **Validate Database** command from the **File** menu. When you do this, OfficeTalk will display a Progress dialog indicating what parts of the database are being checked. For large databases, the validation may take some time. You may stop the validation at any time by pressing the **Stop** button in the Validate Database dialog box.

Registering OfficeTalk

Registering OfficeTalk

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

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 a message informing you that the trial period has expired. You will be asked if you have registered and received a keycode.

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 YES. If you have not yet registered OfficeTalk then press NO. If you press NO, 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 2 to step 6.

Having obtained your keycode, re-run the application and press YES when the OfficeTalk message appears. If you press YES, OfficeTalk will then pop up an Enter Keycode dialog box. Enter your keycode.

When you press OK, 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.

If you are told that the keycode is incorrect, 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 inform you that the keycode has been accepted. When you press OK, OfficeTalk will pop up the Login dialog box.

Registering Before the 70 day Period

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

1. Login as a supervisor and enter Supervisor Mode. Choose Obtain Keycode from the License menu. A [Register OfficeTalk dialog box](#) will appear.
2. Press the **Workgroup Name** button. The Workgroup Name dialog box will appear. 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.
3. 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 Licenses button in the Register OfficeTalk dialog box. A Licenses dialog box will appear.

You can add a license by pressing the New button. Pressing this button will pop up a 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.

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

5. 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.

6. Finally, press the Print Keycode Request button 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.

7. When you have been given your keycode number, bring up the Enter Keycode dialog box by selecting Enter Keycode from the 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.

When you press OK, 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.

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 inform you that the keycode has been accepted. 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 will then prompt you to specify the subset of actual users by popping up a Select Licensed Users dialog box. From this 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.

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

OfficeTalk Evaluation Period, Licenses and Keycodes

OfficeTalk Evaluation Period, Licenses and Keycodes

The OfficeTalk Evaluation Period, together with the Licensing and Keycode systems are designed to ensure that anybody can evaluate OfficeTalk easily and at no cost, and then move on to a fully licensed system with no loss of data.

The Licensing and Keycode systems allow OfficeTalk to be fully licensed for the exact number of users required quickly and easily. An installation may be expanded as easily at any time. No physical movement of goods is required to achieve this.

See Also

[OfficeTalk Evaluation Period for 70 days with free support](#)

[OfficeTalk Licenses](#)

[OfficeTalk Keycodes](#)

[Ordering from Sareen Software](#)

[Email security](#)

OfficeTalk Evaluation Period for 70 days with free support

OfficeTalk Evaluation Period for 70 days with free support

Every time that OfficeTalk is installed it will create a new database that can be used for up to 70 days by up to 100 users free of charge. During this period you are invited to contact Sareen Software Plc or your national distributor for free support by telephone, fax or e-mail. This enables a full evaluation of OfficeTalk to be made without any risk or obligation to purchase.

OfficeTalk evaluation systems are available from a number of different channels. These include evaluation packs sent out directly by resellers, national distributors and Sareen Software Plc, evaluation disks and CD-ROMs from computer magazines and evaluation systems downloaded from the Internet.

If you have friends or colleagues outside your workgroup or organisation who wish to evaluate OfficeTalk, please feel free to copy your disks and distribute them and ask them to contact us so that we can support them.

At the end of the 70 days OfficeTalk will no longer allow you access without a Keycode, but will remain on your system, ensuring that no data is lost. OfficeTalk is quick and easy to deinstall.

Retain all data from evaluation when purchasing OfficeTalk

Your OfficeTalk system can be permanently enabled at any time during the 70 day evaluation cycle. To avoid any possibility of being unable to use the system for a period of time, we do not recommend you leave taking action beyond day 60.

To permanently enable OfficeTalk you must purchase a license or licenses for the total number of users that you require on the system and also obtain a Keycode.

Whilst it is possible to permanently enable OfficeTalk after the end of the 70 day evaluation period without loss of data, we do not recommend this course of action as it will cause you very significant inconvenience.

OfficeTalk Licenses

OfficeTalk Licences

An OfficeTalk Licence is a unique 12 figure number which entitles the owner to a Keycode which permanently enables OfficeTalk for a specific number of OfficeTalk users. Licences may be aggregated to achieve the specific number of users required. E.g. 1 + 100 + 25 + 25 + 3 user licences entitle the owner to a Keycode for a 154 user system.

Any OfficeTalk system may be extended at any time by the addition of further licences and requesting a new Keycode.

OfficeTalk Licences may be purchased from your local reseller, national distributor or direct from Sareen Software Plc.

Licences are always for a specific and predetermined number of users with one exception - Evaluation System Licence Numbers.

Evaluation System Licence Numbers

An Evaluation System Licence Number may be issued by Sareen Software Plc with an evaluation system. This Licence may be activated for any number of users by purchasing that number of users from Sareen Software Plc before or at the time of requesting a Keycode. This facility is only available for transactions made directly with Sareen Software Plc and is designed to enable your system permanently in an even faster and more efficient manner.

You may have received an Evaluation System Licence Number in the covering letter sent with an evaluation pack by post or e-mailed to you in response to an Internet download of an evaluation system. If you are unable to locate this number please contact Sareen Software Plc who will supply you with the relevant number.

Purchasing OfficeTalk Licences

OfficeTalk Licences may be purchased from your reseller or national distributor or direct from Sareen Software Plc. A form of payment is required before any licence number is issued or an Evaluation System License Number authorised for the required quantity of users - see [Ordering from Sareen Software Plc](#). Having received a valid order, Sareen Software Plc or your supplier will issue you with a valid License Number or License Numbers for the required quantity of users. This License Number or Numbers should be entered in your OfficeTalk system and will allow completion of a Keycode Request Form for a keycode for the required number of users.

If you wish to increase the size of your workgroup, you will need to purchase an additional license or licenses for the number of additional users that you require. If you have an Evaluation System License Number and provided that you are dealing directly with Sareen Software Plc, you may enter this in your OfficeTalk system together with the number of users that you require, enabling you to complete a Keycode Request Form, which may be processed provided that payment is attached for the required number of users.

OfficeTalk Keycodes

OfficeTalk Keycodes are issued by Sareen Software Plc or your national distributor. A Keycode enables OfficeTalk for the number of users for whom you have purchased a License or Licenses. You cannot obtain a Keycode without the required License Number or Numbers.

Forty days after OfficeTalk is installed, you will be prompted with the message

You must register this product within 30 days

If you are a Supervisor you can press the Register OfficeTalk Now button and you will be taken to the Register OfficeTalk dialog box.

Once you have completed your Keycode Request Form (see [Registering OfficeTalk](#)), fax, e-mail or post it to Sareen Software or your national distributor who will supply your Keycode by return.

If you are dealing directly with Sareen Software Plc, have an Evaluation System Licence Number (for which you have amended for the required quantity of users) and have not purchased additional licences prior to completing your Keycode Request Form, please ensure that you attach order and payment details when submitting your Keycode Request Form to Sareen Software (see [Ordering from Sareen Software Plc](#)).

For help on registering OfficeTalk see [Registering OfficeTalk](#).

Ordering from Sareen Software

You may purchase OfficeTalk licences from Sareen Software Plc by post, fax, e-mail or telephone. All orders should be accompanied by an acceptable form of payment.

Payment can be made by

Credit Card - Visa / ACCESS / AMEX. We will require the card number, expiry date, the name of the card holder and billing address.

Cheques made payable to Sareen Software Plc

Bank Transfer to Barclays Bank, 8 George Street, Richmond, TW9 1JU, UK for Sareen Software Plc, Account 10897361, Sort Code 20-72-17

Purchase Orders are only accepted from approved UK companies for systems to be installed in the UK.

You may already have our price list and order form. If the file **otorder.exe** is present in your OfficeTalk directory on you local or network drive, run it and fill out the on-screen form, accompanying this with an official order, if applicable.

The latest OfficeTalk prices are available direct from Sareen Software Plc or from your national distributor or reseller.

Taxation

Orders from outside the European Union will not be charged VAT. Orders from organisations within the European Union (UK excepted) supplying a valid VAT number will not be charged VAT.

Dispatch of Physical Product

International orders will be dispatched by surface mail. If you wish to have OfficeTalk dispatched via airmail or courier please contact us for pricing details.

E-mail Security

Users sending credit card numbers across the Internet do so at their own risk. If you have direct access to CompuServe mail and are concerned about security we suggest that this is a more secure environment.

User dialog box

Purpose

This dialog box lets you specify the details of a particular OfficeTalk user. You may specify the following information:

Usage

First Name

The users first name.

Last Name

The users last name.

Login Name

This is the name by which OfficeTalk recognises a particular user. The Login Name must be 8 characters or less.

Location, Phone, Fax

This is the usual location, phone and fax number of the user, if different from the Workgroup location, phone and fax numbers. For example, the user may work from home. In this case, the three fields should be filled to indicate the details. If the user usually works in the office then leave these three fields blank.

Ext

This is the user's usual Workgroup phone extension number

Home Phone Number

This is the users home phone number

Supervisor

This check box should be marked if the user is to have supervisory priviledges.

Access Rights button

Pressing this button allows you to set the individual access rights of other OfficeTalk users to this user's diary.

Reset Password button

Pressing this button sets the users password back to the user's login name. The user may then *Change* the password when he/she next logs in.

See Also

Changing a Users Password

Supervisor Mode

Login dialog box

Purpose

The Login dialog box lets you log into the OfficeTalk application.

Usage

Login Name

Your login name will be assigned to you by a Supervisor. It may be a maximum of 8 characters. If you do not remember your Login Name then press the Pull Down button, next to the Login Name field and search for it. If all else fails, ask your OfficeTalk supervisor.

Password

This is your password which OfficeTalk requires before logging you onto the application. If you do not remember your password your OfficeTalk supervisor will be able to reset it to be the same as your Login Name. For more information on resetting a password, see the User dialog box

Login button

Pressing this button will log you on to the application provided that you have entered your correct Login Name and Password. Pressing the RETURN key will also have the same effect as pressing this button.

Change Password

Pressing this button will allow you to change your password. You must enter your correct Login Name and current password before OfficeTalk will allow you to change your password. For more detailed information, see Changing Your Password.

Group dialog box

Purpose

This dialog box lets you define Workgroup-Wide Groups. Groups may consist of one or more users and/or resources. Once you have defined a Group, you may:

- Display the Group's appointments in Group View in Diary Mode.
- Select the group as a Mailing Group in Mail Mode
- Invite the group to a meeting from Meeting Mode
- Notify the Group with a message from Notify Mode

Usage

Group Name

This is the name of the group.

Add button

To add a user or resource to the group, select the user(s) or resource(s) from the *Non-Members* list and press the **Add** button.

Remove button

To remove users or resources from the *Members* list, select the user(s) or resource(s) from the *Members* list and press the **Remove** button.

Clear button

To remove all users and resources from the *Members* list, press the **Clear** button.

When you define a Group from Supervisor Mode, the Group becomes, by default, a public group. If you select an Owner for the group, then the group will become a Personal Group, seen only by the *owner*. If you wish all OfficeTalk users to have access to the group, then ensure that --No Owner-- is selected in the *Owner* pull down menu.

When you have added the required users and resources, press OK.

Change Password dialog box

Purpose

This dialog box lets you to change your password. You may invoke this dialog box from the Login dialog box

Usage

Type in your new password and then type in the same password into the edit box. Next, press the **Change** button. Your password will now have been permanently changed. The Login dialog box will re-appear. Type in your new password into the *password* field of the Login dialog box and press the **Login** button.

Classification dialog box

Purpose

This dialog box lets you define Workgroup-Wide Task Classifications. Once you have defined a Classification, you may associate it with any task. You can then sort your tasks by classification. For more information, see [Sorting Your Tasks](#)

Usage

Task Type Name

Type the name of the Task Classification in the Classification Name field. For more information, see [Classification List](#).

Resource dialog box

Purpose

This dialog box lets you define Workgroup-Wide Resources. A resource is any object within your organisation which may be booked by members of your organisation.

Usage

Name

Type the name of the resource into the Name edit box. Typical names for resources are anything from *Meeting Room* to *Overhead Projector*.

Default Location

If the resource is not , i.e. it does not have a fixed location, then it should have a default location so that people may locate it even when it is not being used. Specify the resource's default location in the Location edit box. You may specify a resource as being fixed by clicking on the check box with the Left mouse button.

Owner

A resource may be given an *owner* by selecting the relevant name from the *Owner* pull down list. An owner will be automatically EMail-ed by OfficeTalk when the resource is booked from within the Meeting Manager.

Project dialog box

Purpose

This dialog box lets you define Workgroup-Wide Projects.

Usage

Name

Type the name of the project into the Name field.

Owner

When you define a Project from Supervisor Mode, the Project becomes, by default, a public project without an owner. If the project has been defined from within Diary Mode then the project will be a Personal Project and will have an owner. Personal projects created in Diary mode are, by default, visible only to the original owner. If you wish all OfficeTalk users to have access to the project, then ensure that --No Owner-- is selected in the *Owner* pull down menu.

The **Access Rights** button allows you to change the rights of other users to any public or personal project. For more information on Access Rights, see Defining Access Rights.

See Also

Project Mode

New Workgroup dialog box

Purpose

This dialog box informs you that OfficeTalk has not managed to find a workgroup database. If you know that an OfficeTalk database exists then it is likely that the **databasePath** variable in the OTALK.INI file is not specifying the correct database directory.

If you are creating an OfficeTalk database for the first time then you now have the choice of starting a new workgroup database or *importing* an existing workgroup file.

Usage

New

Press this button if you wish to begin a new workgroup database. If you are using OfficeTalk for the first time then you should press this button.

Import

Press this button if you wish to *import* a workgroup database which has previously been saved to an OfficeTalk workgroup File (.CMP).

Workgroup dialog box

Purpose

This dialog box enables you to define certain details about your Workgroup. In addition to specifying the name, location and phone number of your workgroup or company, this dialog box also lets you specify the following:

- Holidays which affect the entire workgroup
- Workgroup task priority descriptions
- Usual Workgroup working hours

Usage

Workgroup Name

Type the name of the Workgroup into this field.

Location, Phone, Fax

This is the usual location, phone and fax number of the Workgroup or your branch of the company.

See Also

[Workgroup Custom Day dialog box](#)

[Public Holiday dialog box](#)

[Priorities dialog box](#)

Custom Day dialog box

Purpose

This dialog box enables you to define the days of the week that your Workgroup usually works and the usual start and end times of each day. The working week settings and the start and end times of the day may be superceded by user's own settings. Their standard working week and their standard day will default to the settings that are made in this dialog box. The Meeting Manager uses the information provided in this dialog box to determine which hours to use when *Auto - Searching* for available meeting times.

Usage

Day Start, Day End

Type in the time that the Workgroup begins business and ends business each day. If your Workgroup works a shift system, then set the start setting to midnight (0:00) and the end setting to 23:59.

Day of Week buttons

Check each *Day of Week* check box which is a working day during the week. Most Companies, for example, will typically only check the Monday to Friday check boxes.

Holidays dialog box

Purpose

This dialog box allows you define holidays which are common to all users in the workgroup. OfficeTalk comes supplied with standard international holidays. You may add and/or delete items within the holiday list. The list comprises a date for the holiday and some text describing the holiday. For example, as well as defining standard national holidays, you may also enter Workgroup Shutdown periods. The holidays may be viewed in the Background Activities window from within Diary Mode by selecting *Public Holidays* within the Background Activities dialog box.

Usage

Add button

To add a new standard holiday, press the Add button. This will pop up a Holiday dialog box, allowing you to enter a date and a holiday description. When you have done this, press OK on the dialog box.

Edit button

To edit an existing standard holiday, select the holiday that you wish to modify and press the Edit button. This will pop up a Holiday dialog box, allowing you to modify the date and description of the holiday that you have selected. When you have made your modifications, press OK on the dialog box.

Delete button

To delete a standard holiday, select the holiday that you wish to delete and press the Delete button. OfficeTalk will ask you to confirm the deletion before it removes the holiday altogether.

Priorities dialog box

Purpose

This dialog box allows you to define priority levels for tasks defined in OfficeTalk.

Usage

You may define up to 5 priority levels and associate a description with each priority level. OfficeTalk will always give a task a default priority. There are five *default* radio buttons in the Priorities dialog box. You can choose which default priority to give a newly created task by selecting the appropriate radio button.

Access Rights dialog box

Purpose

This dialog box allows you to define the access levels of OfficeTalk users to various OfficeTalk items. An item can be one of:

- *Other User's diaries*
- *Public and Personal Groups*
- *Public and Personal Projects*
- *Public and Personal Planners*

By default everybody has read access to everybody else's diary and everybody has read access to a group, project or planner (unless they created the item).

Usage

Select the user (or users) whose access, to the item, you wish to define. The radio buttons will indicate the user's access levels. To change the access levels of the selected user, click on the radio button which represents the desired access level. The following access levels are allowed:

No Access

If you define a user to have no access to the item then the item will not even appear in any pull down Selection List. The user will be unaware of the item's existence.

Read Access

If you define a user to have read access to an item then the user may view the detail of the item but may not add, edit or delete any data within the item.

Read/Create Access

If you define a user to have Read/Create access then they may view the item and may add data to the item, but they may not modify or delete any data within the item.

Read/Create/Edit Access

If you define a user to have Read/Create/Edit access then they may do any operation on the data within the item except delete data.

Read/Create/Edit/Delete Access

If you define a user to have Read/Create/Edit/Delete access then they have full access to that item, having all the same privileges to the item as the owner. The one exception to this is if you are defining access to your own diary. Another user with full access to your diary may not view, edit or delete appointments marked as *Private*.

Appointment dialog box

Purpose

This dialog box allows you to define all the attributes of an appointment.

Usage

Description

The description of the appointment.

Time

This is the start date and time of the appointment. This defaults to the current time or, if you brought up this dialog box by double clicking in the Daily Appointments Window, the time slot in which you double clicked.

Duration

This is the duration of the appointment. It defaults to 30 minutes. It can be changed from this dialog box to any duration length but OfficeTalk will round the duration to the nearest 5 minutes.

Remind

Clicking the Remind box will set a reminder for the appointment to remind you a certain number of minutes before the start time of the appointment.

Remind Time

The Remind Time may be changed to signify how many minutes prior to the start of an appointment before a Reminder message pops to the screen. The default time is 5 minutes.

Private

The Private check box, if selected, will prevent other OfficeTalk users from seeing the description of the appointment or editing the contents of the appointment. Other users will see the appointment text as *Private*.

Notes

The Notes button can be pressed in order to store any specific notes about the appointment. If the appointment has a task associated with it then the Notes field will be shared by the appointment and the task.

Task dialog box

Purpose

This dialog box allows you to define all the attributes of a task.

Usage

Description

The description of the task

Deadline

This is the deadline by which time the task must be completed, ie. marked as Done.

Require Deadline

This is a check box which should be checked if the task is to be completed by a certain deadline. The default is not checked.

Duration

This is the duration of the task. It defaults to 30 minutes. It can be changed from this dialog box to any duration length but OfficeTalk will round the duration to the nearest half hour.

Classification

This pull down list lets you choose a classification description for the task. You can define various Classification descriptions from Supervisor mode.

Done

This is a checkbox which, if checked, will signify that the task has been completed. Another way of informing OfficeTalk that a task has been completed is to drag the task over to the Out Tray.

Priority

This is a pull down list from which you can select one of five priorities to represent the priority of the task. You can define descriptions for each of the five priority levels from the Priorities dialog box within Supervisor Mode. OfficeTalk provides you with default descriptions for priority levels one to three.

Notes

The Notes button can be pressed in order to store any specific notes about the task. If the task has been scheduled then the Notes field will be shared by the task and the associated appointment.

Project Task dialog box

Purpose

This dialog box lets you define all the attributes of a project task.

Usage

Description

The description of the project task

Deadline

This is the deadline by which time the project task must be completed, ie. marked as Done.

Require Deadline

This is a check box which should be checked if the task is to be completed by a certain deadline. The default is not checked.

Planned Duration

This is the planned duration of the task. It defaults to 30 minutes. It can be changed from this dialog box to any duration length but OfficeTalk will round the duration to the nearest half hour.

Classification

This pull down list lets you choose a classification description for the project task. You can define various Classification descriptions from Supervisor mode.

Done

This is a checkbox which, if checked, will mark the project task as complete. Another way of informing



OfficeTalk that a task has been completed is to select the task and press the

Priority

This is a pull down list from which you can select one of five priorities to represent the priority of the task. You can define descriptions for each of the five priority levels from the Priorities dialog box within Supervisor Mode. OfficeTalk provides you with default descriptions for priority levels one to three.

Notes

The Notes button can be pressed in order to store any specific notes about the project task.

Sub Task dialog box

Purpose

This dialog box allows you to define sub tasks for a specific task.

Usage

You may add sub tasks in the same way that you add tasks to the task list. (See [Task List](#)).

Repeat dialog box

Purpose

This dialog box enables you to repeat appointments. You may repeat appointments daily, weekly or monthly. The dialog box is made up as follows:

Usage

Daily, Monthly, Weekly Radio Buttons

Select the appropriate radio button depending on whether you wish to repeat the appointment on a daily, weekly or monthly basis.

Use Weekends Check Box

De-select this check box if you do not wish for repeat appointments to fall on Saturdays or Sundays. By default, OfficeTalk will not use Weekends in any Appointment Repeats.

Ending

Specify the last date of the repeated appointment. For example if you wanted to repeat an appointment for the next 4 days then set this date to be 4 days in advance of today. The default setting for this field is tomorrow.

On Weekends, Before Weekends, After Weekends Radio Buttons

If you choose to repeat an appointment on a monthly basis then using these radio buttons you can specify what will happen if an appointment was to end up being repeated on a weekend. You can choose either to place the appointment as late as possible before the weekend, or actually on the weekend, or as early as possible after the weekend.

nth day of month, nth Weekday, Last Day Radio Buttons

If you choose to repeat an appointment on a monthly basis then using these radio buttons you can decide how the monthly repeat will take place. For example, if the date of the selected appointment is the 25th of the month then selecting the first radio button will repeat the appointment every 25th of each month. Alternatively, if the date of the selected appointment is also a Wednesday, then choosing the nth Weekday radio button will repeat the appointment on every 4th Wednesday. Lastly, if the date of the selected appointment is the last day of the month then the *Last Day* radio button will be enabled and selecting this option will ensure that the appointment is repeated on the last day of every month.

Mail Folder dialog box

Purpose

This dialog box allows you to modify the name of an existing folder. The name of the folder must be 50 characters or less. The name should contain only alpha-numeric characters eg. (A-Z, a-z, 0-9).

Over-ride Resource dialog box

Purpose

This dialog box allows you to over-ride resource appointments that were made via the Meeting Manager.

Usage

Pressing the **Over-ride** button will remove the resources original appointment and book the resource to the meeting that you are about to book. Pressing the **Skip** button will exclude the resource from the meeting you are about to book.

Contact Record dialog box

Purpose

This dialog box is used when creating a new Contact and editing an existing Contact.

Usage

This dialog box provides the following fields:

- *Title*
- *First Names*
- *Last Name*
- *Phone*
- *Position*
- *Department*
- *EMail*
- *Comment*

You can add the contact to a company by pressing the button next to the **Employee Of** field. This will pop up a Search Companies dialog box. From this dialog box, you can search for the relevant company by entering the first few letters of the company name and pressing the **Search** button. Next select the desired company and press the **Select** button. This will associate the contact with the selected company. You can dis-associate a contact from a company by selecting --No Company-- from the Search Companies dialog box.

You can add notes by pressing the **Notes** button.

You can specify the contacts Home Address by pressing the **Home Address** button. This will pop up a Home Address dialog box.

External Mail Login

Purpose

In order to make OfficeTalk work with the MAPI and/or VIM messaging systems, both the MAPI and VIM systems require that when an OfficeTalk user logs on, he or she logs into the relevant messaging system at the same time. By specifying a MAPI and/or VIM login name and password via the External Mail dialog Box, OfficeTalk can *silently* log the user into the relevant messaging system. If this dialog box appears it means that either you have not entered a MAPI or VIM login name and password via the External Mail dialog Box or the login name and password that has been entered is not recognised by the corresponding messaging system.

Usage

Firstly, ensure that you have an entry in the MAPI or VIM post office, then enter your MAPI or VIM Login Name and Password into the appropriate fields and press the **Login** button. If you wish to log into OfficeTalk without logging onto either messaging system then press the **Cancel** button.

External Mail Information dialog box

Purpose

This dialog box lets you enter your MAPI and VIM mail *Sign In* names and passwords. If you enter a valid name and password into this dialog box and you have checked the **Turn on MAPI support** and/or **Turn on VIM Support** check box, then the next time you log in, OfficeTalk will not need to prompt you for a login name and password. Instead it will use the information provided in this dialog box and it will silently log into your MAPI or VIM messaging system.

Usage

Enter your MAPI login name into the *MAPI Login Name* field and your MAPI password into the *MAPI password* field. Enter your VIM login name into the *VIM Login Name* field and your VIM password into the *VIM password* field. The login name and password will have been given to you by your EMail post office Manager.

Planner dialog box

Purpose

A Planner lets you mark off certain days against certain events. It has many possible applications, for example you could use it to record holidays throughout your organisation, or perhaps to highlight those days when you are away from the office. For more information on planners see [Planner View](#).

All public (workgroup-wide) and personal planners are visible in the Planner List within Supervisor Mode. This dialog box lets you add new public planners and edit both public and personal planners. You may also define users' access rights to a planner.

Usage

Name

Type the name of the planner into the Name field.

Owner

When you define a planner from Supervisor Mode, the planner becomes, by default, a public planner without an owner. If the planner has been defined from within [Diary Mode](#) then the planner will be a Personal planner and will have an owner. Personal planners created in Diary mode are, by default, visible only to the original owner. If you wish all OfficeTalk users to have access to the planner, then ensure that --No Owner-- is selected in the *Owner* pull down menu.

The **Access Rights** button allows you to change the rights of other users to this particular planner. For more information on Access Rights, see [Defining Access Rights](#).

Export Workgroup Data dialog box

Purpose

This dialog box lets you export all the data held in OfficeTalk as a single file. You would normally export your data for backup purposes, although OfficeTalk does provide an automated way of backing up your database. For more information, see [Backing up your Database](#).

Usage

Choose a filename for your Workgroup backup file and Press **OK**.

Backup Workgroup Data dialog box

Purpose

This dialog box lets you specify the frequency of automatic Workgroup data backups. By default, OfficeTalk backs up your Workgroup data once every day at midnight.

Usage

If you wish OfficeTalk to perform automatic Workgroup data backups then ensure that the **Automatic Backup** check box is checked. If this check box is not checked then OfficeTalk will not perform automatic backups. You can select the frequency of backups by entering a number (of days) into the *Every n days* field. You can also specify the time of day when a backup should be executed.

Restore User From Backup dialog box

Purpose

This dialog box lets you restore a user's diary to the user's last personal backup.

Usage

Select the user whose diary you wish to restore. The date and time of the last backup will be displayed in the dialog box along with the size of the backup file. Next, press **OK**. The user's tasks, appointments and mail will be restored from the user's last personal backup. A personal backup may be performed by selecting **Backup...** from the **File** menu from within Diary Mode. Personal backups may also be automated, from within the [Preferences dialog box](#).

Note that you cannot restore your own diary using this method.

Edit Date dialog box

Notes dialog box

Purpose

This dialog box lets you view and/or edit notes.

Usage

From within the Notes dialog box, you can type free-format text and press either **Cancel** to ignore changes or **OK** to save changes. If another user is already editing these particular notes, then the **OK** button will be *greyed* and you will not be able to save any changes that you make to the notes. OfficeTalk lets you import ascii text into a notes dialog box, using the File/Import command in the dialog box menu.

Modem Settings dialog box

Purpose

This dialog box lets you set up your modem for autodialling

Usage

Initialization

This is the sequence used to instruct your modem to initialize. The default sequence is the Hayes compatible command "ATZ".

Dial Prefix

This is the sequence used to instruct your modem to dial. It prefixes the number that you wish to dial. The default sequence is the Hayes compatible command "ATDT" which assumes tone-dialling capabilities of both your modem and telephone line. If either your modem or telephone line support only *pulse* dialling, then change this sequence to "ATDP".

Escape

This is the sequence used to instruct your modem to switch to command mode. The default sequence is the Hayes compatible command "+++".

Hang Up

This is the sequence used to instruct your modem to hang up. The default sequence is the Hayes compatible command "ATH0".

Baud Rate

This is the speed of your modem connection. The default is 9600 bps.

Port

This is the COM port to which your modem is attached.

Byte Size

This is the number of bits in each byte. You may choose anything from 4 to 8 bits. The default is 8 bits.

Parity

This selects the parity checks used in communication. The default is none.

Stop Bits

This selects the number of stop bits for each byte of information. The default is 1.

Annual Events dialog box

Purpose

This dialog box lets you add, edit and delete Annual Events. Annual events include Birthdays, Anniversaries and other one-off events.

Usage

Add button

To add a new Annual Event, press the Add button. This will pop up a sub-dialog box, allowing you to enter a date and an event description. When you have done this, press OK on the sub dialog box.

Edit button

To edit an existing Annual Event, select the event that you wish to modify and press the Edit button. This will pop up a sub-dialog box, allowing you to modify the date and description of the event that you have selected. When you have made your modifications, press OK on the sub dialog box.

Delete button

To delete an Annual Event, select the event that you wish to delete and press the Delete button. OfficeTalk will ask you to confirm the deletion before it removes the event altogether.

Annual Event dialog box

Purpose

This dialog box lets you add or edit an Annual Event.

Usage

Type the description of the annual event in the *Description* field. Specify the date of the Annual Event in the *Date* field and specify a number (of days) in the *Days to Remind* field. This will cause OfficeTalk to remind you of the event a number of days in advance. OfficeTalk reminds you of any relevant annual events when you log in. You are reminded of annual events which occur on the current day, as well as being reminded of any relevant future annual events.

Away From Office dialog box

This dialog box allows you to discover where a person may be located at any particular time. If the person has popped away from his/her desk then (s)he may have used the Where utility to indicate his/her whereabouts. OfficeTalk will check for this first of all and will show the Location and extension number (if relevant) of the person. If the user has not used the Where utility, OfficeTalk will look to see if the user is currently in a meeting. If (s)he is, OfficeTalk will tell you which meeting the user is in and when (s)he will be out.

Public Holiday dialog box

This dialog box lets you specify the details of a workgroup wide holiday. Enter the description of the holiday into the *Description* field and specify the date of the holiday in the *Date* field.

Repeat Appointment Conflict dialog box

This dialog box informs you that there was a conflict during the Repeat Appointment command. You have several choices:

1. Book the appointment at any time during that day. You can do this by pressing the **Book Anytime** button.
2. Book the appointment on the previous day. You can do this by pressing the **Previous Day** button. This button will only be enabled if the repeat appointment command was a weekly or monthly repeat appointment.
3. Book the appointment on the next day. You can do this by pressing the **Next Day** button. This button will only be enabled if the repeat appointment command was a weekly or monthly repeat appointment.
4. Skip this repeat appointment and attempt to book the next appointment in the repeat series. You can do this by pressing the **Skip** button.

Repeat Anytime Error dialog box

Background Activities dialog box

Purpose

This dialog box lets you choose which Background Activities to display from within Diary Mode. Background Activities are one or more of the following:

- *Planner Appointments*
- *Annual Events*
- *Public Holidays*

Usage

Check the check box next to the Background Activity that you wish to display. If you check the **Planners** check box, then press the **Planners** button. A Viewed Planners dialog box will appear. Choose the planners that you wish to monitor and press OK. Finally press OK on the Background Activity dialog box.

See Also

Monitoring Background Activities

Viewed Planners dialog box

Purpose

This dialog box lets you select planners for viewing in the Background Activities Window from within Diary Mode

Usage

Select the required planner or planners in the list of **Unselected Planners** and press the **Add** button. The selected planners will be moved to the **Shown in your Diary** list. You can remove planners from this list by selecting them and pressing the **Remove** button. Pressing the **Clear** button will remove all planners from the **Shown in your Diary** list.

Name Style dialog box

Purpose

This dialog box lets you select how you want all names in OfficeTalk to be represented. You may choose any one of the following styles:

- Firstname Lastname
- Firstname LASTNAME
- Lastname, Firstname
- LASTNAME, Firstname
- Lastname, F
- LASTNAME, F
- F. Lastname
- F. LASTNAME
- Lastname
- LASTNAME
- Firstname

OfficeTalk sorts all lists of names alphabetically, so if you wish to sort by Lastname, then you should choose a name style which begins with the last name.

Usage

Choose the required name style by selecting the corresponding radio button.

Select Planner Key dialog box

Purpose

This dialog box lets you change the key that a particular planner booking represents.

Usage

The **Key** pull down list contains a list of planner keys and their associated colours. Select the key that you want the planner booking to represent and press **OK**.

Edit Planner Key dialog box

Purpose

This dialog box lets you change the description and colour associated with a key.

Usage

Enter a description for the key in the *Name* field and select a colour from the list of colours and then press **OK**.

Select Group dialog box

Purpose

This dialog box lets you select a group of companies and contacts to view. It also lets you define, edit or delete new and existing groups and lets you specify a *default* group which OfficeTalk will automatically select on start up.

Once a group has been selected then only the companies and contacts in this group will be available to you.

Usage

Select the appropriate group from the **Contact Group** pull down list. If you select --No Group-- then all Companies and Contacts in OfficeTalk will be available to you. Pressing the **Edit Groups...** button will bring up a Groups dialog box, from which you can add, edit and delete groups. You can specify that the selected group be made the *default* group by pressing the **Use As Default** button. This means that OfficeTalk will remember your group selection between consecutive OfficeTalk sessions. When you have selected the desired group, press **OK**

Edit Contact Groups dialog box

Edit Contact Group dialog box

Purpose

This dialog box lets you define a group of companies and contacts. Once you have defined a Contact Group, you can select it from the [Select Group dialog box](#) and filter out all other companies and contacts.

Usage

Give the group a name by entering a suitable group description into the *Name* field. If a group has an *owner* then this means that the grouping of companies and contacts is visible only to that user. By default, the group will not have an owner, meaning that all users may use the grouping.

There are two lists in this dialog box; a list of results and a list of group members. Initially, a new group will contain no members. To add a company to the group, select the **Companies** radio button, enter the first few letters of the company's name into the *Search Text* field and press the **Search** button. The results of the search will be listed in the **Results** list. You can add a company from the **Results** list to the group by selecting the appropriate company from the **results** list and pressing the **Add** button. Alternatively, you can perform a company search using the [Search Companies dialog box](#) and from within this dialog box, press the **Company Search Results** button. This will transfer the results from the [Search Companies dialog box](#) to the **Results** list. You can add a company from the results list one at a time using the **Add** button, or you can add all the companies in the **Results** list by pressing the **Add All** button.

You can add contacts to the group in exactly the same way as you add Companies, except you should select the **Contacts** radio button and use the **Contact Search Results** button to transfer the results from the [Search Contacts dialog box](#). You can *remove* companies or contacts from the group by selecting the relevant company or contact from the **Members** list and pressing the **Remove** button. Both the **Results** list and the **Members** list display how many items are in their list.

When you have chosen the members of the group, press the **OK** button to create or update the group. Otherwise press **Cancel** to cancel the entire operation.

Dial Company dialog box

Purpose

This dialog box lets you auto dial the selected company. The dialog box lets you choose either the *Phone 1* or *Phone 2* number or lets you type in your own number.

Usage

Select the radio button corresponding to the number that you wish to dial or type in your own number into the *Number* field and then press **OK**. OfficeTalk will try to locate the modem and begin dialling. You must have a modem connected to the same line as your handset and your computer must be able to communicate with the modem. You may pick up the handset prior to dialling, but you should note that excess noise at the handset mouthpiece can cause the tone dialling to fail. OfficeTalk will instruct the

modem to hang up after 30 seconds or when you press the  button whichever is sooner.

Dial Contact dialog box

Purpose

This dialog box lets you auto dial the selected contact. The dialog box lets you choose either the *Company Phone 1*, the *Company Phone 2*, the *Home Phone 1* or the *Home Phone 2* number or lets you type in your own number.

Usage

Select the radio button corresponding to the number that you wish to dial or type in your own number into the *Number* field and then press **OK**. OfficeTalk will try to locate the modem and begin dialling. You must have a modem connected to the same line as your handset and your computer must be able to communicate with the modem. You may pick up the handset prior to dialling, but you should note that excess noise at the handset mouthpiece can cause the tone dialling to fail. OfficeTalk will instruct the

modem to hang up after 30 seconds or when you press the  button whichever is sooner.

CSV Export dialog box

Purpose

This dialog box lets you output Tasks, Appointments, Company or Contact records in a Comma Separated Variable (CSV) file.

Usage

Enter the name of the output file in the *File* field. Pressing the **Browse** button will bring up a Save As dialog box, from which you can select the filename. If you check the **Quoted Fields** check box, each field will be enclosed in double quote characters. The **Quoted Fields** check box is selected by default. If you check the **Output Header** check box, then the field names of each field will be output as the first record. The **Output Header** check box is selected by default. You can specify the delimiter (character(s) for separating fields within a record) by entering the delimiter character(s) in the *Delimiter* field. The default delimiter character is a *single quote* character. If you check the **End Line with Delimiter** check box, OfficeTalk will append the specified delimiter to the end of each record. The **End Line with Delimiter** check box is un-checked by default.

Addresses dialog box

Purpose

This dialog box lets you specify additional *sites* for a company. A list of additional sites is stored in this dialog box. OfficeTalk lets you create new sites or edit existing sites. When you define an additional site, OfficeTalk creates a new company record for the additional sites and links the sites together. The word **More...** will appear at the bottom right corner of all company records which are linked to other sites. Clicking the left mouse button on this word will cycle you through each connected record.

Usage

To add a new site, press the **New** button. An Address dialog box will appear. Type in the new site address and press **OK**. To edit an existing site, select the site from the list and press the **Edit** button. The Address dialog box will appear. Edit the contents of that dialog box and press **OK**.

Any of the sites of a company may be deleted in the same way that you would delete an ordinary company record. See Deleting a Company record.

Address dialog box

Purpose

This dialog box lets you specify an additional address for a company or contact. It provides the following fields:

- Address1
- Address2
- Address3
- Town/City
- County
- Postcode
- Country
- Phone1
- Phone2
- Fax
- EMail Address

Usage

Fill out the fields and press **OK**.

Search dialog box

This dialog box lets you search based on a search text. You can search for items beginning with the search text or containing the search text by selecting either the **Begins With** or **Contains** radio button.

Pressing the **Search** button will perform the search and will place the results in the **Results** window.

Search Conversations dialog box

The Search Conversations dialog box consists of a Search field into which you may enter your search text, a **Search** button for performing the search and a **Goto** button for displaying the resulting record(s). There is a User list from which you may choose to Search conversations of either **--All Users--** or one or more specific users. A Date Range check box lets you specify a date range over which to search for conversations. Leaving the **To** date field blank is equivalent to *the current date*. Radio buttons let you choose between searching **Subject Text only** or **All Text**. The search may be performed on either all conversations (Database), Filtered Conversations, or the Search Results.

You can search for conversations in the following way:

1. Enter some search text into the Search field.
2. Select either the **Subjects Only** radio button which will search only the subject text of conversations or the **All Text** radio button to search the body of the conversation as well as the subject text.
3. Press the **Search** button.

The results of the search will appear in the Results window at the bottom of the Conversation Search dialog box. You can display any of the conversations in the Results window by selecting the relevant conversation and pressing the **Goto** button. OfficeTalk will close the dialog box and load the record into the Conversation Window.

Select Conversation Filter dialog box

Purpose

This dialog box lets you select a conversation filter. It also lets you define, edit or delete new and existing conversation filters and lets you specify a *default* filter which OfficeTalk will automatically select on start up.

Once a filter has been selected then only the conversations in this filter will be available to you.

Usage

Select the appropriate filter from the **Conversation** pull down list. If you select --No Filter-- then all Conversations in OfficeTalk will be available to you, except conversations made by users to whom you have no access. Pressing the **Edit Filters...** button will bring up a Conversation Filters dialog box, from which you can add, edit and delete conversation filters. You can specify that the selected filter be made the *default* filter by pressing the **Use As Default** button. This means that OfficeTalk will remember your filter selection between consecutive OfficeTalk sessions. When you have selected the desired filter, press **OK**

Edit Conversation Filter dialog box

Purpose

This dialog box lets you construct a conversation filter. Once you have defined a filter, it may be selected. Only those conversations which pass the selected filter will then be available to you from the Conversation Window.

An extremely useful filter, which may be constructed, is a **Current Contact** or a **Current Company** filter. A **Current Contact** filter will pass only those conversations which have been recorded with the contact currently selected in Contact view. Similarly, a **Current Company** filter will pass only those conversations which have been recorded with the company currently selected in Company view.

Another useful filter would be one which filters out all conversations except those created by yourself.

Usage

Firstly, specify a name for the filter. The name should correspond to the filtering action of the filter. Next, select which **User** you wish to apply the filter to. By default, OfficeTalk shows the conversations created by all users in the company, except those ones to which you have no access. You may select either --All Users--, the default setting, or you may choose a name from the **Users** drop down list.



Next, you may choose which company to filter on. Do this by pressing the  button, next to the **Company** field. A Search Companies dialog box will appear. From the **results** list, you may choose, --All Companies--, the default, or you may choose --Current Company--, as described above. Alternatively, you may search for a specific company and select it.



Next, you may choose which contact to filter on. Do this by pressing the  button, next to the **Contact** field. A Search Contacts dialog box will appear. From the **results** list, you may choose, --All Contacts--, the default, or you may choose --Current Contact--, as described above. Alternatively, you may search for a specific contact and select it. If you have filtered on a specific Company, then you can either select --All Contacts-- from the Contact field, or you can select a specific employee of the company by pressing the **Select Person** button. A **Select Person** dialog box will appear providing you with a list of all employees of the company. Choose the relevant employee and press **OK**.

Finally, you can select a specific time frame, over which to filter. Do this by checking the **Date Range** check box. When you do this the *From* and *To* fields will appear. Enter the start date of the filter in the *From* field and enter the end date of the filter in the *To* field. Note that if you keep the *To* field blank, the default, then OfficeTalk will assume the end date to be the current date.



New Mail Folder dialog box

Purpose

This dialog box lets you add a new mail folder. A Folder is a place to store your own received and sent messages. Only *you* have access to your folders.

Usage

Enter the name of the new folder into the *Name* field. If you wish this folder to be a *top-level* folder then press **OK**. If you wish to make the folder a *sub-folder* of an existing folder then select the *parent* folder from the list of folders, ensure that the **Make Sub-Folder of** radio button is selected and then press OK. In this case, a *plus* symbol will appear next to the selected parent folder to indicate that it has *sub-folders* (it may already have other sub-folders in which case it will already have a *plus* symbol next to it). Pressing the *plus* symbol next to the parent folder will show all its sub-folders.



Send Mail Options dialog box

From this dialog box you can do the following:

1. Create routed documents
2. Create delayed mail messages
3. Request confirmation on recipients reading messages
4. Assign tasks with messages

See Also

[Circulating Documents](#)

[Assigning tasks with messages](#)

[Sending delayed messages](#)

[Informing you when recipients have read their message](#)

Assign Task dialog box

This dialog box appears when you press the **Task Details** button from within the Send Mail Options dialog box. The *Description* field will be filled with the subject text of the mail message but may be changed if required. The *Deadline* field lets you specify a date and time by which the assigned task must be completed.

When you have filled in the relevant details, press OK on the Assign Task dialog box.

See Also

[Assigning Tasks with mail messages](#)



Search Mail dialog box

Purpose

This dialog box lets you search for mail messages that you have sent or received.

Usage

- Fill out the *Search Text* field with the characters that you wish to search for.
- Specify whether or not you wish the search to be case sensitive.
- Specify whether or not you wish to search for mail messages *starting with* or *containing* the specified search text.
- Specify a date range if you wish to confine the search to within specified time periods. Do this by clicking on the *Date Range* check box and then filling in the date and time fields.
- OfficeTalk will automatically search through the subject fields. You may specify whether you wish to search the contents of the mail messages too. Do this by selecting the **Search Mail Text** check box.
- Select where you wish to search by clicking on one or more of the *Received Mail* check box, the *Sent Mail* check box or the *Bulletin Boards* check box.
- Select whether you wish to search on the OfficeTalk database or the Results Window. Only search on the Results window if you have entries in the Results Window.
- Press the **Search** button
- The results of the search will appear in the **Results** window. Select one of the results and press the **Goto** button. This will take you to the mail message.

Edit Items

This dialog box lets you create, edit and delete items in a list. This dialog box contains a **New** button. Pressing this will let you create a new item. The **Edit** button lets you edit existing items and the **Delete** button lets you delete existing items.

Update Periods dialog box

This dialog box lets you specify the frequency of Automatic Data updates. The following information is updated:

1. Your diary (default: every 60 mins)
2. Visible/Selected diary (default: every 2 mins)
3. Groups (default: every 720 mins)
4. Resources (default: every 720 mins)
5. Projects (default: every 60 mins)
5. Planners (default: every 60 mins)

Check the items of data which you wish to be updated at your workstation when another user makes a change from another workstation.

CSV Import dialog box

Purpose

This dialog box lets you import CSV files into one of several OfficeTalk formats.

Usage

Select the CSV file that you wish to import. Do this by pressing the **Browse...** button and choosing the file from the File dialog box. The available fields found in the chosen file will be displayed in the *Available Fields* box.

Select the OfficeTalk *format* into which you wish to import the data, by choosing from the *Import Type* pull down menu. You have the following choices:

- (i) Personal Contact
- (ii) Workgroup-Wide Contact
- (iii) Personal External Company
- (iv) Workgroup-Wide External Company
- (v) Personal Task

When you make your selection, the corresponding fields available for this type of data will be displayed in the *OfficeTalk fields* box. Next connect the *Available Fields* to the *OfficeTalk fields* by selecting the relevant field from each box and pressing the **Connect** button. The resulting connection will be displayed in the *Connections* box. You may delete a connection by selecting it from the *Connections* box and pressing the **Delete** button. When all the connections have been made you can start importing the records by pressing the **Import** button.

Linking Contacts to Companies

OfficeTalk usually expects contacts (people) to be part of an External Company (though this is not always the case). OfficeTalk allows you to define several contacts for any one company. If you have a CSV file containing both Company names and Contact Names and you wish to make the link between Company and Contact then this is possible by doing two passes of the CSV file, as follows:

(i) Firstly, import the External Companies. This will mean importing the Company Name, the Company address, company phone numbers etc.

(ii) Next import the Contacts. This will mean importing the person's name, title, position, department, home address. In order to make the link between the contact and the company, to whom the contact belongs, ensure that the '[Company]' field is connected to the Company Name (as used when originally importing the External Companies). When you press the Import button, OfficeTalk will take longer than usual to import the contacts, however each contact will be linked to the appropriate company.

Search Contacts dialog box

Purpose

This dialog box allows you search for Contact records in several ways.

Usage

If, for example, you wish to search for all contacts whose last names start with ' Sm ' then in the *Last Name* field, type in 'Sm' and ensure that the **Begins With** radio button is selected.

If you wish to search for all contacts whose First Name contains ' ohn ' then in the *First Name* field, type in ' ohn ' and check the **Contains** radio button.

You can do multiple level searches by filling out more than one field. For example, you may wish to view all the records where the contact's First Name contains ' ohn ' and the Last Name begins with 'Sm'. This is done by filling out both fields.

Once you have filled in the relevant search criteria, press the **Search** button. OfficeTalk will search the database and place any matches in the **Results** window. You can view any of the results by selecting the relevant record in the **Results** window and pressing the **Goto** button.

Search Companies dialog box

Purpose

This dialog box allows you search for Company records in several ways.

Usage

If, for example, you wish to search for all Companies **starting** with *So* then in the *Company* field, type in *So* and ensure that the **Begins With** radio button is selected.

If you wish to search for all companies **containing** the character sequence *oft* then in the *Company* field, type in *oft* and check the **Contains** radio button.

You can do multiple level searches by filling out more than one field. For example, you may wish to view all the records where the Company Name contains the letters *oft* AND where the postcode starts with *HP11*. This is done by filling out both fields with the relevant search criteria.

Once you have filled in the relevant search criteria, press the **Search** button. OfficeTalk will search the database and place any matches in the **Results** window. You can view any of the results by selecting the relevant record in the **Results** window and pressing the **Goto** button.

Company Record dialog box

Purpose

This dialog box allows you to add or edit a new Company record to the Contact Database.

Usage

Fill in the details appropriate to the contact. You may choose whether or not the record that you are about to add or edit will be defined as a *Company Record* or a *Personal Record*. You can do this by clicking on either the **Company Record** or **Personal Record** radio button as appropriate. If you define a record as a *Personal Record* then other OfficeTalk users will not be able to view the record. If you define a record as a *Company Record* then other OfficeTalk users will be able to view, edit and delete the record.

Preferences dialog box

Purpose

This dialog box allows you to define certain preference settings particular to your own requirements. Some settings that you make will update the OTALK.INI file in the C:\WINDOWS directory. The various settings are as follows:

Usage

Use Custom Day Check Box

If you wish to use the default settings for the normal working hours of the company then you should select this check box. If you wish to use your own settings then un-check the check box and press the **Custom Day** button. This will bring up another dialog box called Custom Day. Select the working days and working hours from this dialog box and press OK.

Default Remind Time

Specifying a time in this field will instruct OfficeTalk to assume that you wish to be reminded this many minutes prior to an appointment when you set a reminder for a particular appointment.

Name Style...

Pressing the **Name Style** button will bring up a Name Style dialog box allowing you to choose the style in which OfficeTalk displays user and contact names. Select the style you want and press OK. OfficeTalk will remember your setting.

Automatic Update Button

When other people add data to OfficeTalk, you do not get updated with this data straight away in some cases. Your data will always be up to date when you first log on to OfficeTalk. You can instruct OfficeTalk to automatically update you with data that concerns you by pressing the *Automatic Update* button.

Pressing this button will bring up a Automatic Update dialog box containing a list of information types each with a check box and a default update time period. By default, OfficeTalk will never update your session with new data unless one or more of the check boxes are selected. Unless you wish to very closely monitor the activity of other OfficeTalk users it is usually acceptable to have none of the check boxes selected. If you wish to be updated with information periodically then select the appropriate check box and enter a corresponding duration (in minutes) between updates. Be careful that you do not demand updates too frequently when operating with very large databases of information. In some cases updates can take several seconds. The speed of update is, of course, dependent on the speed of your machine and the network server.

Automatic Backup Check Box

OfficeTalk will automatically back up your diary information every day at midnight unless otherwise instructed. To turn off automatic backups, deselect the *Automatic Backup* check box. You can change the time and frequency that OfficeTalk makes the backups by changing the time and frequency fields which are to the right of the *Automatic Backup* check box. It is recommended that you let OfficeTalk perform automatic backups on a daily basis.

Print Task dialog box

Purpose

This dialog box lets you print out a task list.

Usage

There are 5 buttons common to every Printing related dialog box. These are:

- Print Prints the data
- Preview Previews the data
- Setup Sets up the printer options
- Cancel Cancels the print dialog box
- Help Brings up Help for the dialog box
- Headers & Footers Lets you specify headers and footers

The **Page style** drop down list is also common to all Print dialog boxes. You may choose the page style from this list. It is possible to create new page styles which let you specify paper margins, orientation and page subdivisions. For more information on creating page styles, see the [Page Styles dialog box](#).

When printing, you should adjust any print options in the dialog box and *Preview* the data before going on to Print it. This saves you paper and time.

Choosing the Fields To Print

By default, the Print Task dialog box prints out the description of each task in the task list that you were viewing prior to selecting the print option.

It is possible to print out other task information in addition to the task description. To do this, check one or more of the following check boxes in the **Print Fields** box:

- Status One of Completed/Overdue/Scheduled
- Priority The task's priority
- Deadline The task's deadline (date & time)
- Duration The task's duration
- Classification The task's classification

Expanding the Task List

If some of your tasks contain sub tasks then the sub tasks will only be printed if they are currently *expanded* in the task list (see [Sub Tasks](#)). If you wish to print out all the sub tasks then check the **Fully Expand List** check box. This will expand each task that has sub tasks, prior to printing the task list.

Printing Task Notes

You can print any notes related to a task by checking the **Print Notes** check box. The notes will be printed just after the description of the task.

Printing Field Titles

By default, OfficeTalk does not print the field headings, eg Description, Status etc. If you check the **Print Field Titles** check box, OfficeTalk will print them and line up the task information under the correct fields.

Choosing Fonts

When printing a task list, you can choose the following fonts:

- Title Font The field title font

- Task Font The task description and fields font
- Sub Task Font The sub task description and fields font
- Notes Font The task notes font

Print Daily Appointment dialog box

Purpose

This dialog box lets you print out daily appointments.

Usage

There are 5 buttons common to every Printing related dialog box. These are:

- Print Prints the data
- Preview Previews the data
- Setup Sets up the printer options
- Cancel Cancels the print dialog box
- Help Brings up Help for the dialog box
- Headers & Footers Lets you specify headers and footers

The **Page style** drop down list is also common to all Print dialog boxes. You may choose the page style from this list. It is possible to create new page styles which let you specify paper margins, orientation and page subdivisions. For more information on creating page styles, see the [Page Styles dialog box](#).

When printing, you should adjust any print options in the dialog box and *Preview* the data before going on to Print it. This saves you paper and time.

From/To fields

OfficeTalk lets you specify the date range over which you wish to print out daily appointments.

New Page per Day

If you check the **New page per day** check box, OfficeTalk will start a new page for each day's appointments.

Printing Appointment Notes

You can print any notes related to an appointment by checking the **Print Notes** check box. The notes will be printed just after the description of the appointment.

Choosing Fonts

When printing appointments, you can choose the following fonts:

- Title Font - The appointment date and time font
- Appointment Font - The appointment description font
- Note Font - The appointment notes font

Print Mail dialog box

Purpose

This dialog box lets you print out mail.

Usage

There are 5 buttons common to every Printing related dialog box. These are:

- Print Prints the data
- Preview Previews the data
- Setup Sets up the printer options
- Cancel Cancels the print dialog box
- Help Brings up Help for the dialog box
- Headers & Footers Lets you specify headers and footers

The **Page style** drop down list is also common to all Print dialog boxes. You may choose the page style from this list. It is possible to create new page styles which let you specify paper margins, orientation and page subdivisions. For more information on creating page styles, see the [Page Styles dialog box](#).

When printing, you should adjust any print options in the dialog box and *Preview* the data before going on to Print it. This saves you paper and time.

OfficeTalk lets you specify what mail to print by providing you with three radio buttons. Select one of the following radio buttons in the dialog box:

- Current Message - The message currently shown in the mail window.
- Open Folder - The currently open folder (includes incoming mail folder)
- Mail Search results - The mail in the results window of the Find Mail dialog box.

New Page per Message

If you check the **New page per message** check box, OfficeTalk will start a new page for each new message.

Line between messages

If you check the **Line between messages** check box, OfficeTalk will draw a horizontal line between each message.

Choosing Fonts

When printing mail, you can choose the following fonts:

- Title Font - The mail title font, eg. Mail, Subject, Time, From, To etc.
- Field Font - The mail field font
- Subject Font - The subject text font
- Text Font - The mail body text font

Print Company dialog box

Purpose

This dialog box lets you print out Companies.

Usage

There are 5 buttons common to every Printing related dialog box. These are:

- Print Prints the data
- Preview Previews the data
- Setup Sets up the printer options
- Cancel Cancels the print dialog box
- Help Brings up Help for the dialog box
- Headers & Footers Lets you specify headers and footers

The **Page style** drop down list is also common to all Print dialog boxes. You may choose the page style from this list. It is possible to create new page styles which let you specify paper margins, orientation and page subdivisions. For more information on creating page styles, see the [Page Styles dialog box](#).

When printing, you should adjust any print options in the dialog box and *Preview* the data before going on to Print it. This saves you paper and time.

OfficeTalk lets you specify which companies to print by providing you with two radio buttons. Select one of the following radio buttons in the dialog box:

- All External Companies - All companies in Company View.
- Current External Company - The company currently displayed in Company view.

New Page per Alphabetical section

If you check the **New Page per Alphabetical section** check box, OfficeTalk will start a new page for each new alphabetical section that it prints.

Draw Line between records

If you check the **Draw line between records** check box, OfficeTalk will draw a horizontal line between each company record.

One record per page

If you check the **One record per page** check box, OfficeTalk will begin a new page for every company record.

It is possible to choose which company fields to print out in addition to the company name. To do this, check none or more of the following check boxes in the dialog box:

- Address1
- Address2
- City
- County
- Postcode
- Country
- Phone 1
- Phone 2
- Fax

Address Indent

OfficeTalk lets you specify the indent between the Company name and the address fields. The default is no indent (0.00").

Choosing Fonts

When printing companies, you can choose the following fonts:

- Title Font - The company title font, eg. Address1, Address2, city etc.
- Field Font - The company field font

Print Contact dialog box

Purpose

This dialog box lets you print out Contacts.

Usage

There are 5 buttons common to every Printing related dialog box. These are:

- Print Prints the data
- Preview Previews the data
- Setup Sets up the printer options
- Cancel Cancels the print dialog box
- Help Brings up Help for the dialog box
- Headers & Footers Lets you specify headers and footers

The **Page style** drop down list is also common to all Print dialog boxes. You may choose the page style from this list. It is possible to create new page styles which let you specify paper margins, orientation and page subdivisions. For more information on creating page styles, see the [Page Styles dialog box](#).

When printing, you should adjust any print options in the dialog box and *Preview* the data before going on to Print it. This saves you paper and time.

OfficeTalk lets you specify which contacts to print by providing you with two radio buttons. Select one of the following radio buttons in the dialog box:

- All Contacts - All contacts in Contact view.
- Current Contact - The contact currently displayed in Contact view.

New Page per Alphabetical section

If you check the **New Page per Alphabetical section** check box, OfficeTalk will start a new page for each new alphabetical section that it prints.

Draw Line between records

If you check the **Draw line between records** check box, OfficeTalk will draw a horizontal line between each contact record.

One record per page

If you check the **One record per page** check box, OfficeTalk will begin a new page for every contact record.

It is possible to choose which company fields to print out in addition to the company name. To do this, check none or more of the following check boxes in the dialog box:

Company Address

- Address1
- Address2
- City
- County
- Postcode
- Country
- Phone 1
- Phone 2

- Fax

Home Address

- Address1
- Address2
- City
- County
- Postcode
- Country
- Phone 1
- Phone 2
- Fax

If you check the **Print "Company Address"** check box, OfficeTalk will print out the words "Company Address" just before it prints out the fields of the company address. Similarly, if you check the **Print "Home Address"** check box, OfficeTalk will print out the words "Home Address" just before it prints out the fields of the home address.

Address Indent

OfficeTalk lets you specify the indent between the Company name and the address fields. The default is no indent (0.00").

Choosing Fonts

When printing companies, you can choose the following fonts:

- Title Font - The company title font, eg. Address1, Address2, city etc.
- Field Font - The company field font

Print Conversation dialog box

Purpose

This dialog box lets you print out Conversations.

Usage

There are 5 buttons common to every Printing related dialog box. These are:

- Print Prints the data
- Preview Previews the data
- Setup Sets up the printer options
- Cancel Cancels the print dialog box
- Help Brings up Help for the dialog box
- Headers & Footers Lets you specify headers and footers

The **Page style** drop down list is also common to all Print dialog boxes. You may choose the page style from this list. It is possible to create new page styles which let you specify paper margins, orientation and page subdivisions. For more information on creating page styles, see the [Page Styles dialog box](#).

When printing, you should adjust any print options in the dialog box and *Preview* the data before going on to Print it. This saves you paper and time.

OfficeTalk lets you specify which conversations to print by providing you with two radio buttons. Select one of the following radio buttons in the dialog box:

- All in current filter - All conversations which pass the current filter.
- All in current thread - All conversations belonging to the same thread as the current conversation.

New Page per Conversation

If you check the **New Page per Conversation** check box, OfficeTalk will start a new page for each conversation that it prints.

Draw Line between records

If you check the **Draw line between records** check box, OfficeTalk will draw a horizontal line between each conversation record.

Display field Names

If you check the **Display field names** check box, OfficeTalk will print field titles for each conversation.

Setting the Subject prefix

OfficeTalk lets you optionally replace the word "Subject:" with any other vocabulary to represent the conversation subject. You may choose to replace the word "Subject:" with nothing in which case, for example, "My Conversation" will be printed instead of "Subject: My Conversation".

It is possible to choose which company fields to print out, in addition to the subject and body text, when printing out conversations. To do this, check none or more of the following check boxes in the dialog box:

- Date
- User
- Time
- Contact

- Company

Choosing Fonts

When printing companies, you can choose the following fonts:

- Field Name Font - The field name font, eg. Company, Contact , Date etc.
- Field Font - The field font
- Subject Font - The subject font
- Text Font - The conversation body font

Print Monthly Appointment dialog box

Purpose

This dialog box lets you print out monthly appointments.

Usage

There are 5 buttons common to every Printing related dialog box. These are:

- Print Prints the data
- Preview Previews the data
- Setup Sets up the printer options
- Cancel Cancels the print dialog box
- Help Brings up Help for the dialog box
- Headers & Footers Lets you specify headers and footers

The **Page style** drop down list is also common to all Print dialog boxes. You may choose the page style from this list. It is possible to create new page styles which let you specify paper margins, orientation and page subdivisions. For more information on creating page styles, see the [Page Styles dialog box](#).

When printing, you should adjust any print options in the dialog box and *Preview* the data before going on to Print it. This saves you paper and time.

From/To fields

OfficeTalk lets you specify the date range over which you wish to print out monthly appointments.

Wrap Text

If you check the **Wrap Text** check box, OfficeTalk will *wrap* any text which would otherwise be too long to fit on a single line.

Indicating Overflow

If you check the **Indicate Overflow** check box, OfficeTalk will draw an arrow to indicate overflow when too many appointments in a single day have been drawn in the chosen font. You will need to reduce the Appointment Font size if you wish to see all of the appointments.

Print Appointment Times

If you check the **Print Appointment Times** check box, OfficeTalk will prefix each appointment with its time.

Print Sub Calendars

If you check the **Print Sub Calendars** check box, OfficeTalk will display last months and next months calendars at the bottom of the page.

Choosing Fonts

When printing appointments, you can choose the following fonts:

- Time Font The appointment times font.
- Appointment Font The appointment description font
- Date Font The font of the date text in the top corner of each day box.
- Day Font The font of the date text in the top corner of each day box.
- Sub Calendar Font The font used to draw the sub-calendars.

Print Weekly Appointment dialog box

Purpose

This dialog box lets you print out weekly appointments.

Usage

There are 5 buttons common to every Printing related dialog box. These are:

- Print Prints the data
- Preview Previews the data
- Setup Sets up the printer options
- Cancel Cancels the print dialog box
- Help Brings up Help for the dialog box
- Headers & Footers Lets you specify headers and footers

The **Page style** drop down list is also common to all Print dialog boxes. You may choose the page style from this list. It is possible to create new page styles which let you specify paper margins, orientation and page subdivisions. For more information on creating page styles, see the [Page Styles dialog box](#).

When printing, you should adjust any print options in the dialog box and *Preview* the data before going on to Print it. This saves you paper and time.

From/To fields

OfficeTalk lets you specify the date range over which you wish to print out weekly appointments.

Wrap Text

If you check the **Wrap Text** check box, OfficeTalk will *wrap* any text which would otherwise be too long to fit on a single line.

Indicating Overflow

If you check the **Indicate Overflow** check box, OfficeTalk will draw an arrow to indicate overflow when too many appointments in a single day have been drawn in the chosen font. You will need to reduce the Appointment Font size if you wish to see all of the appointments.

The Page Format

You may print out weekly appointments in a variety of formats. They are as follow:

- Week to a page Prints the entire week on a single page.
- Standard week to a two pages Prints the entire week on two pages.
- Working week to a two pages Prints the working week on two pages.
- Two days to a page Prints 2 days on each page.
- Day to a page Prints a single day on each page.

- Left dates Left justifies the date text.
- Right dates Right justifies the date text.
- Alternating dates Justifies the date text alternately.
- Start on left Left justifies the date text and then alternates.

Choosing Fonts

When printing appointments, you can choose the following fonts:

- Time Font - The appointment times font (relevant only if **Print Appointment Times** is checked).
- Appointment Font - The appointment description font
- Date Font - The font of the date text in each day box.

Print Group Chart dialog box

Purpose

This dialog box lets you print out Group Chart appointments.

Usage

There are 5 buttons common to every Printing related dialog box. These are:

- Print Prints the data
- Preview Previews the data
- Setup Sets up the printer options
- Cancel Cancels the print dialog box
- Help Brings up Help for the dialog box
- Headers & Footers Lets you specify headers and footers

The **Page style** drop down list is also common to all Print dialog boxes. You may choose the page style from this list. It is possible to create new page styles which let you specify paper margins, orientation and page subdivisions. For more information on creating page styles, see the [Page Styles dialog box](#).

When printing, you should adjust any print options in the dialog box and *Preview* the data before going on to Print it. This saves you paper and time.

From/To fields

OfficeTalk lets you specify the date range over which you wish to print out group appointments.

Specifying the number of horizontal pages

OfficeTalk lets you specify how many pages wide you wish to fit the print out. The time scale (if printed) will be calculated according to the number of pages that you specify.

People List on each sheet

If you check the **People List on each sheet** check box, OfficeTalk will list the names of the users and resources in the group down the left hand side of each sheet printed. By default, this list is printed only on the leftmost sheets.

Time banner on each sheet

If you check the **Time banner on each sheet** check box, OfficeTalk will display the time banner on all sheets printed. By default, this list is printed only on the uppermost sheets.

Choosing Fonts

When printing appointments, you can choose the following fonts:

- Banner Font - The Time Banner times font (along the top of the page).
- Appointment Font - The appointment description font
- People Font - The font of the People List (the left side of the page).

Print Week Group dialog box

Purpose

This dialog box lets you print out Week-at-a-glance Group appointments.

Usage

There are 5 buttons common to every Printing related dialog box. These are:

- Print Prints the data
- Preview Previews the data
- Setup Sets up the printer options
- Cancel Cancels the print dialog box
- Help Brings up Help for the dialog box
- Headers & Footers Lets you specify headers and footers

The **Page style** drop down list is also common to all Print dialog boxes. You may choose the page style from this list. It is possible to create new page styles which let you specify paper margins, orientation and page subdivisions. For more information on creating page styles, see the [Page Styles dialog box](#).

When printing, you should adjust any print options in the dialog box and *Preview* the data before going on to Print it. This saves you paper and time.

From/To fields

OfficeTalk lets you specify the date range over which you wish to print out group appointments.

Specifying the number of horizontal pages

OfficeTalk lets you specify how many pages wide you wish to fit the print out. The width of each group member's appointment list will be calculated according to the number of pages that you specify.

Print Weekends

If you check the **Print Weekends** check box, OfficeTalk will print out the appointments for each group member including appointments on weekends.

Indicating Overflow

If you check the **Indicate Overflow** check box, OfficeTalk will draw an arrow to indicate overflow when too many appointments in a single day have been drawn in the chosen font. You will need to reduce the Appointment Font size if you wish to see all of the appointments.

Days per page

You can specify the number of days per page to print by selecting the required number from this drop down list.

Choosing Fonts

When printing appointments, you can choose the following fonts:

- Title Font - The font of each group member's name (printed along the top of the page).
- Appointment Font - The appointment description font.
- Date Font - The font of the date (printed down the left side of the page).

Print Project Chart dialog box

Purpose

This dialog box lets you print out Project plans.

Usage

There are 5 buttons common to every Printing related dialog box. These are:

- Print Prints the data
- Preview Previews the data
- Setup Sets up the printer options
- Cancel Cancels the print dialog box
- Help Brings up Help for the dialog box
- Headers & Footers Lets you specify headers and footers

The **Page style** drop down list is also common to all Print dialog boxes. You may choose the page style from this list. It is possible to create new page styles which let you specify paper margins, orientation and page subdivisions. For more information on creating page styles, see the [Page Styles dialog box](#).

When printing, you should adjust any print options in the dialog box and *Preview* the data before going on to Print it. This saves you paper and time.

From/To fields

OfficeTalk lets you specify the date range over which you wish to print out the project.

Specifying the number of horizontal pages

OfficeTalk lets you specify how many pages wide you wish to fit the print out. The time scale (if printed) will be calculated according to the number of pages that you specify.

Task List on each column

If you check the **Task List on each column** check box, OfficeTalk will list the task descriptions down the left hand side of each sheet printed. By default, the task list is printed only on the leftmost sheets.

Banner on each row

If you check the **Banner on each row** check box, OfficeTalk will display the time banner on all sheets printed. By default, this list is printed only on the uppermost sheets.

Expanding the Task List

If some of your project tasks contain sub tasks then the sub tasks will only be printed if they are currently *expanded* in the task list (see [Sub Tasks](#)). If you wish to print out all the sub tasks then check the **Fully Expand List** check box. This will expand each task that has sub tasks, prior to printing the task list.

Printing Task Notes

You can print any notes related to a project task by checking the **Print Notes** check box. The notes will be printed on a separate sheet.

Labelling boxes

By default, OfficeTalk prints the project task descriptions inside all *boxes* which represent the planned start and end time of each task. If you do not wish to print the description in each *box* then un-check the **Label Boxes** check box.

OfficeTalk lets you print either the Project Table, the Project Window or both. You can choose this option by selecting the relevant radio button.

Fixing the description width

By default, OfficeTalk sets the description field width to be wide enough to show the widest project task description. You can fix the description width by checking the **Fix description width to** check box and entering a value into the field to the right of the check box. The default is 2".

OfficeTalk lets you choose which fields to print. You may select none or more of the following (provided that you have not selected *Print Project Window Only*):

- Status
- Priority
- Deadline
- Classification
- Planned Start
- Planned Duration
- Assigned To

Choosing Fonts

When printing appointments, you can choose the following fonts:

- Banner Font - The Time Banner times font (along the top of the page).
- Task Font - The project task description font
- Sub Task Font - The project sub task description font
- Project Window Font - The font of the tasks drawn in the project window.
- Title Font - The font of the field titles.

Print Planner dialog box

Purpose

This dialog box lets you print out Planners.

Usage

There are 5 buttons common to every Printing related dialog box. These are:

- Print Prints the data
- Preview Previews the data
- Setup Sets up the printer options
- Cancel Cancels the print dialog box
- Help Brings up Help for the dialog box
- Headers & Footers Lets you specify headers and footers

The **Page style** drop down list is also common to all Print dialog boxes. You may choose the page style from this list. It is possible to create new page styles which let you specify paper margins, orientation and page subdivisions. For more information on creating page styles, see the [Page Styles dialog box](#).

When printing, you should adjust any print options in the dialog box and *Preview* the data before going on to Print it. This saves you paper and time.

From/To fields

OfficeTalk lets you specify the date range over which you wish to print out planners.

Print Dates

If you select the **Print Dates** check box, OfficeTalk will print dates in the top left corner of each day square. This is useful for seeing exactly when planner bookings start and end.

Number Keys

When you check the **Number Keys** check box, OfficeTalk displays a number next to each key in the key index and a number to the left of the text in the planner bookings. This is useful when printing out planners on a monochrome printer and you wish to match up the keys to the bookings.

You may choose one of three options when printing keys:

- Keys on separate page - A key index will be printed on a separate page.
- Keys on every page - A key index will be printed at the bottom of every page.
- Do not print keys - A key index will not be printed.

Choosing a Print Span

You may print a full year to a page, 6, 4, 3, 2 or 1 month to a page by selecting the appropriate span radio button.

Choosing Fonts

When printing bookings, you can choose the following fonts:

- Month Font - The Month font used to print JAN, FEB..etc down the left of the page.
- Booking Font- The booking description font
- Day Font - The Day font used to print M, T, W, T, F..etc along the top of the page.
- Date Font - The font used to print the date in the top left corner of each day.

- Key Font - The font used in the key index (if printed).

Page Styles dialog box

Purpose

This dialog box lets you create or edit existing page styles.

The following are examples of possible page styles:

- A4 Portrait
- A4 Landscape
- A5 Landscape 2-Columns
- Filofax® 2-pages vertical on A4 paper
- Labels 250mm x 120mm (10 x 4) on A5 paper

OfficeTalk lets you define page styles by letting you specify the paper size on which to base the paper style (eg. A4, A5, custom etc.), the page margins, the paper orientation (landscape or portrait) and the number of vertical and horizontal *sub-pages* (page subdivisions).

Usage

Select Page Setup from the File...Print menu in either Diary mode, Mail mode or Contact mode. The Page Styles dialog box will appear. To create a new page style, press the **New** button. To edit an existing page style, select the Page Style that you wish to edit and press the **Edit** button. In both cases, a Page Setup dialog box will appear. For more information on specifying a Page Style, see the [Page Setup dialog box](#). To delete an existing page style, select the page style from the list and press the **Delete button**. When you have finished, press the **Close** button.

Page Setup dialog box

Purpose

This dialog box lets you define page styles.

The following are examples of possible page styles:

- A4 Portrait
- A4 Landscape
- A5 Landscape 2-Columns
- Filofax® 2-pages vertical on A4 paper
- Labels 250mm x 120mm (10 x 4) on A5 paper

OfficeTalk lets you define page styles by letting you specify the paper size on which to base the paper style (eg. A4, A5, custom etc.), the page margins, the paper orientation (landscape or portrait) and the number of vertical and horizontal *sub-pages* (page subdivisions).

Usage

Specifying a Name for your Page Style

Give your page style a name by entering an accurate description for the page style in the *Name* field. You should try to include as many attributes of the page style as you can when naming it.

Selecting a Base Paper Size

Select the paper size, eg. A4, A5, custom etc., from the Paper Sizes drop down list. This specifies the printable area for each physical page. This will typically be A4, since this is the size that most standard printers cater for.

Selecting the Page Subdivisions

OfficeTalk lets you split a page into *n sub-pages* across by *m sub-pages* down. OfficeTalk will then treat each *sub-page* as if it were a separate page. This can be extremely flexible. Consider, for example, the case of printing address labels. A page could be divided into the correct number of sub-pages, across and down, so as to match the sheet of labels. The contact database may then be printed out onto the label page style with the option to print one address per page. The Page Style would interpret the *one address per page* to mean *one address per sub-page*. This would result in each contact record being printed out onto each label on the sheet.

Another example of the flexibility of the page sub-division technique is when printing out Filofax® size paper. It is possible to fit 2 portrait Filofax® size sheets onto one landscape A4 sheet of paper. This is convenient since most standard printers cater for A4 size paper. OfficeTalk lets you do this using the page sub-division technique.

Printing the Outlines

If you check the **Print Outlines** check box, then OfficeTalk will draw lines along sub-division boundaries. This is useful if you wish to eventually cut the sheet of paper into its sub-division pages.

Specifying the Margins

OfficeTalk lets you specify outer and inner margins. Outer margins specify the size of the printable area, given the paper size. The Inner margins are used when you use page sub-divisions. They specify the printable area within each sub-page, given the size of the sub-page.

When you have specified the Page Style, press OK. You may now use the Page Style in any of the Print

dialogs within OfficeTalk.

Headers and Footers dialog box

Purpose

This dialog box lets you define the Header and Footer that will be printed at the top and bottom of each page (or sub-page).

Usage

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:

Standard substitutions

- %p Page number
- %t Total number of pages
- %r Row number for xy printing
- %l Column number for xy printing
- %D Today's date
- %T Current time
- %% Percent sign
- %u OfficeTalk user
- %c OfficeTalk company

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, eg. 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.

An example for using the substitutions is as follows:

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 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 and having a footer on all pages.

Choosing Fonts

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 box from which this dialog box was invoked. Once defined, the font settings will remain persistently until they are changed.

Startup Mode dialog box

Purpose

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.

Usage

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.

Require Signature dialog box

Purpose

This dialog box requires you to enter your OfficeTalk password in order that the sender of the circulated document knows that you and only you have read and passed on the document.

Usage

Type in your usual OfficeTalk password and press **OK**. Note that case sensitivity is important.

See Also

[Circulating Documents](#)

Follow Up Task

Purpose

Often, as a result of a phone call or other conversation, you will need to action certain tasks. OfficeTalk lets you attach follow-up tasks to conversations.

Usage

Enter the description of the follow-up task in the Action field and enter a deadline by which the task should be complete in the Follow up by field. The task may be assigned either to yourself or to any OfficeTalk user visible to you. Users will be shown in the Assign To pull down list if you have creation access or higher to their diaries.

When you press OK, OfficeTalk will create a task with the specified description in the assigned users task list (Diary Mode) and will link the conversation to the task. The link may only be seen by you.

See Also

[Follow-up tasks](#)

Send Mail dialog box

Purpose

This dialog box lets you either send the prepared mail message immediately or specify send options.

Usage

To send the message immediately, press the **Send** button. To bring up the Send Mail Options dialog box, press the **Options** button.

See Also

Mail Mode

Document Flow dialog box

Purpose

Sometimes it is necessary to pass a mail message or a document (attached file) to a number of people in a specified order so that they can read and comment in turn. Alternatively you may wish to send around a form which requires certain user's authorisation in a certain order. OfficeTalk makes this possible by allowing mail messages and their attachments to be routed amongst OfficeTalk users.

Usage

The Document Flow dialog box shows only the To: recipients that you have addressed. It does not show the CC: and BCC: recipients. The order in which the recipients will receive the message is the order in which the names appear in the name list. If you want the message (and/or attached document) to return back to you then select your name as a recipient and ensure that your name appears at the bottom of the list in the Document Flow dialog box. Alternatively, do not select your name into the circulation list, but ensure that the **Return To Sender** check box is selected. Note that OfficeTalk does not let you select this check box if your name is already in the circulation list.

You can modify the order in which recipients receive the document by using the **To Top**, **To Bottom**, **Raise** and **Lower** buttons. When you have specified the correct order, press **OK**.

See Also

[Circulating Documents](#)

Reply Option dialog box

Purpose

OfficeTalk lets you reply to messages that you have received. This dialog box lets you choose who to reply to.

Usage

If you wish to reply to the sender of the original message then select the **Reply to Sender** check box. If you wish to reply to all recipients of the original message then select the **Reply to Recipients** check box. If you wish to do both then ensure that both check boxes are selected.

See Also

[Replying to received messages](#)

Who dialog box

Purpose

The Who dialog box lets you see who is logged on. The Who dialog box in Supervisor Mode also lets you log users off.

Usage

Select the user that you wish to log off and press the **Log Off** button. OfficeTalk will confirm that you wish to log the user off. Reply **Yes**. The user will be logged off after a short while.

See Also

[Seeing Who is logged on](#)

Who dialog box

Purpose

The Who dialog box lets you see who is logged on.

Usage

Press **OK** to close the window.

See Also

[Seeing Who is logged on](#)

New Folder/Bulletin Board

Purpose

This dialog box lets you choose between creating a new private Folder or a new public Bulletin Board folder.

Usage

Select the **Folder** radio button to create a new folder or the **Bulletin Board** radio button to create a new Bulletin Board. When you press **OK**, depending on your selection, OfficeTalk will pop up either a New Folder dialog box or a New Bulletin Board dialog box.

See Also

Folders

Add Meeting Member

Purpose

This dialog box lets you add users and resources to an already booked meeting.

Usage

This dialog box contains a mixed list of users and resources. Note that none of the users or resources already invited to the meeting will appear in this list. Select the user that you wish to invite or the resource that you wish to book to the meeting and press **OK**. OfficeTalk will mail an invitation to an invited user or will inform the owner of a booked resource, as appropriate.

If you try to add a resource which already has an appointment at the time of the meeting, OfficeTalk will warn you of this by displaying the [Override Resource Appointments dialog box](#).

See Also

[Meeting Mode](#)

Override Resource dialog box

Purpose

This dialog box appears when you are trying to book a resource for a meeting which has already been booked for some other reason. This dialog box lets you either override the resource or skip booking the resource altogether.

Usage

To override the resource's existing booking, press the **Override** button. To skip booking the resource, press the **Skip** button. To cancel the entire Book Meeting command, press **Cancel**.

See Also

[Meeting Mode](#)

Cannot Attend dialog box

Purpose

If you decline a meeting invitation, OfficeTalk lets you provide a reason why you cannot attend.

Usage

If you wish to provide a reason, then enter your comments in the Reason Window and press **OK**. If you do not wish to provide a reason then just press **OK**. If you do not want to decline the meeting invitation then press the **Cancel** button.

See Also

[Meeting Mode](#)

Book Meeting dialog box

Purpose



This dialog box appears when you press the  button. It gives you the choice of either mailing users with your invitation, notifying users with your invitation, or not informing them at all.

Usage

If you wish to mail users an invitation then select the **Mail** radio button. If you wish to notify users then select the **Notify** radio button. If you do not wish to inform them at all, then press the **None** radio button. The **None** radio button may be selected if you merely wish to make a group booking and informing all the users isn't necessary.

See Also

[Meeting Mode](#)

Add Company To Contact Group dialog box

Purpose

This dialog box lets you add the selected company to a contact group.

Usage

Select the required group from the **Contact Group** pull down list. Select any contacts, belonging to the company, that you wish to add to the group in addition to adding the company itself. Press **OK**. OfficeTalk will verify that you wish to add the current company to the selected group. Press **Yes** to confirm.

See Also

[Company/Contact groups](#)

Send To Recipient dialog box

Purpose

This dialog box lets you manually address a MAPI or VIM recipient and add them to the Send To list.

Usage

Select whether the recipient should be addressed as **To**, **CC**, or **BCC**. Enter the recipients full name and email address into the relevant fields. Finally select whether the recipient may be reached through the MAPI or VIM messaging systems.

See Also

[Mail Mode](#)

Bin Repeat Appointment dialog box

Purpose

This dialog box lets you bin a series of repeated appointments.

Usage

If you wish to bin only the selected appointment then select the **Bin this appointment only** radio button.

If you wish to bin the selected appointment and all BEFORE then select the **Bin this appointment and all before in the same repeat sequence** radio button. This radio button will be disabled if the selected appointment is the first of the repeated appointments.

If you wish to bin the selected appointment and all AFTER then select the **Bin this appointment and all after in the same repeat sequence** radio button. This radio button will be disabled if the selected appointment is the last of the repeated appointments.

If you wish to bin all the appointments in the same repeat series as the selected appointment then select the **Bin all appointments in the same repeat sequence** radio button.

See Also

[Repeat Appointments](#)

Register OfficeTalk dialog box

How To

This dialog box lets you register OfficeTalk and lets you prepare a keycode request fax. You may access this dialog box by selecting Obtain Keycode from the License menu in Supervisor Mode. The process for registering is as follows:

1. Enter the workgroup name (if a name is not already specified).
2. Enter the license details (product serial no. and number of users).
3. Enter the details of the person to whom the keycode will be sent.
4. Provide any feedback that you have about OfficeTalk.
5. Print the Keycode Request form. Fax it to the number given at the top of the form.
6. When you receive your keycode, if you are within your 70 day trial period, select Enter Keycode from the License menu in Supervisor Mode. An Enter Keycode dialog box will appear allowing you to enter the keycode. If your trial period has expired then run OfficeTalk. OfficeTalk will inform you that your trial period has expired and will ask you if you have registered and received a keycode. Reply **YES**. The Enter Keycode dialog box will then be displayed.

Enter your keycode into the Enter Keycode dialog box and press OK. OfficeTalk will now be properly registered.

Keycode dialog box

Purpose

This dialog box lets you enter a keycode to enable OfficeTalk beyond the 70 day trial period.

Usage

Prior to entering your keycode, you must have entered your license details. You will probably have done this by selecting Obtain Keycode from the License menu in Supervisor Mode and preparing a keycode request form to send off to your keycode supplier.

If you have not entered your license details in this way then you can enter these details by selecting Licenses... from the License menu in Supervisor Mode.

If your license details have already been entered then simply enter the 12 digit keycode into the *Keycode* field and press OK. If all your details have been entered correctly, OfficeTalk will accept the keycode and the product will be fully enabled. If OfficeTalk rejects the keycode then check that you have entered it properly. Then check that your workgroup name is *exactly* as specified to your keycode vendor. Also check that your licenses have been entered correctly. (If you obtained your keycode by selecting Obtain Keycode from the License menu then all this information will be correct and should not be changed). If all information seems correct yet the keycode is still not accepted then contact your keycode supplier.

See Also

[Registering OfficeTalk dialog box](#)

Workgroup Name dialog box

Purpose

This dialog box lets you enter your workgroup's name. Once OfficeTalk has been registered the workgroup name should not be changed since this would invalidate the product enabling keycode.

Usage

Enter the workgroup name and press **OK**

See Also

[Registering OfficeTalk dialog box](#)

License dialog box

Purpose

This dialog box lets you add the details of a single license. A license is the combination of a serial number and a specified number of users.

Usage

Enter the serial number and the number of users granted by this license and press **OK**.

See Also

[Registering OfficeTalk dialog box](#)

Feedback dialog box

Purpose

The information that you provide in this dialog box is useful to your supplier if ever require product support. Your feedback on the product will assist future product development.

Usage

1. Enter the *type* of network that you run eg. Novell Network, Microsoft Windows For Workgroups etc.
2. Enter the name of your network administrator.
3. Enter the name of your OfficeTalk administrator.
4. Please enter the type of business carried out by your company, eg. Accountants, Computer Suppliers etc
5. Please enter any other information you consider relevant about your technical or business environment.
6. Please enter any feedback that you have related to OfficeTalk.

See Also

[Registering OfficeTalk dialog box](#)

Registration Details dialog box

Purpose

This dialog box lets you specify the details of the person to whom the product enabling keycode will be sent.

Usage

Enter the details of the person to whom the keycode should be sent and press **OK**.

See Also

[Registering OfficeTalk dialog box](#)

Duplicate Companies dialog box

Purpose

This dialog box pops up when you have tried to import companies which already exist in the database. Duplicate companies are not added to the database on CSV import. Instead, they are added to the Repeating Records list in this dialog box. This dialog box is presented at the end of the CSV import.

Usage

For each company in the Repeating Records list, you have the following options:

1. Add them as another address of the existing company. Do this by selecting the company and pressing the **Make Other Address** button.

2. Add the company as a separate record. Do this by selecting the company and pressing the **Add Separate** button.

3. Do not add the company. Do this by selecting the company and pressing the **Remove** button.

OfficeTalk also lets you edit any repeated record, so that you can modify the name of the company. You can do this by selecting the company and pressing the **Edit** button.

See Also

[Importing Contacts from a CSV file](#)

Reconnection Clash dialog box

Purpose

The mail type of the displayed contact has been changed both by you and by someone else on the main database.

Usage

Select the mail type of the contact and press OK.

Edit Contact Groups dialog box

Purpose

This dialog box displays a list of all the Contact Groups visible to you.

Usage

From this dialog box you can add a new Contact Group by pressing the **New** button or edit an existing contact group by selecting the contact group and pressing the **Edit** button. You can delete a contact group by selecting it and pressing the **Delete** button. You can copy an existing contact group by selecting the relevant contact group and pressing the **Copy** button.

See Also

[Company/Contact groups](#)

Toolbars dialog box

Purpose

This dialog box lets you select the size of the main toolbar and sub toolbar. In addition to this you can replace the main toolbar with a Tab bar. You can also enable/disable the tool tips help which is provided by default on all toolbar buttons. Lastly, you can show or hide the status bar.

Usage

Select the required size of the sub toolbar by selecting the relevant radio button from the Sub Toolbar group. Select the size of the main bar or choose a colour or Black/Grey Tab bar from the Main Toolbar group. You can enable or disable tool tip help by checking or unchecking the Tool Tips check box. You can show or hide the status bar by checking or unchecking the Status Bar check box.

Disconnect Options dialog box

Purpose

This dialog box lets you specify what data you take with you when you work remotely.

Usage

You can choose between taking just your diary and taking other user's diaries in addition to your own. You can do this by selecting either the **Just your diary** or the **Other diaries** radio button. If you select the **Other diaries** radio button the **Diaries** button will become enabled. Pressing this button will pop up a Disconnect Diaries dialog box from which you can select the required diaries.

Reconnection Clash dialog box

Purpose

The text of the displayed item has been changed both by you and by someone else on the main database.

Usage

Enter the required text and press OK.

Reconnection Clash dialog box

Purpose

The status of the displayed item has been changed both by you and by someone else on the main database.

Usage

Select the required status and press OK

Reconnection Clash dialog box

Purpose

The selection of the displayed item has been changed both by you and by someone else on the main database.

Usage

Choose the required selection and press OK

Reconnection Clash dialog box

Purpose

The time of the displayed item has been changed both by you and by someone else on the main database.

Usage

Select the required time and press OK

Reconnection Clash dialog box

Purpose

The date and time of the displayed item has been changed both by you and by someone else on the main database.

Usage

Select the required date and time and press OK

Reconnection Clash dialog box

Purpose

The integer number of the displayed item has been changed both by you and by someone else on the main database.

Usage

Select the required number and press OK

Reconnection Clash dialog box

Purpose

The selection of the displayed item has been changed both by you and by someone else on the main database.

Usage

Choose the required selection and press OK

Reconnection Clash dialog box

Purpose

The duration of the displayed item has been changed both by you and by someone else on the main database.

Usage

Select the required duration and press OK

Reconnection Clash dialog box

Purpose

The colour of the displayed item has been changed both by you and by someone else on the main database.

Usage

Select the required colour and press OK

Reconnection Clash dialog box

Purpose

The text of the displayed item has been changed both by you and by someone else on the main database.

Usage

Select the required text and press OK

VIM Address dialog box

Purpose

This dialog box lets you select recipients from one or more VIM address books.

Usage

Firstly choose the VIM address book from which to select the recipients. The default address book is the Directory. Next select the relevant name(s) from the Addresses list and press either the To, CC or BCC button. The selected recipients will appear in the Recipients list. You can remove recipients from the Recipients List by selecting them and pressing the **Remove** button. When you have made your selection, press OK. The selected recipients will be added to the Send To window in Mail Mode.

Viewed Planners dialog box

Purpose

This dialog box allows you choose which planners to show in the background activities window within Diary Mode. Select the required planners from the **Unselected Planners** list and press the **Add** button. The selected planners will be moved to the **Shown in your diary** list. The selected planners will be included in the background activities window.

See Also

[Background Activities Window](#)

Conversation Filters dialog box

Purpose

This dialog box allows you to create new conversation filters and edit and delete existing ones. To add a new conversation filter, press the **New** button. To edit an existing conversation filter, select the relevant filter from the list and press the **Edit** button. To delete an existing conversation filter, select the relevant conversation filter and press the **Delete** button.

See Also

[Viewing and Filtering Conversations](#)

Classifications dialog box

Purpose

This dialog box allows you to create new task classifications and edit and delete existing ones. To add a new classification, press the **New** button. To edit an existing classification, select the relevant classification from the list and press the **Edit** button. To delete an existing classification, select the relevant classification and press the **Delete** button.

See Also

[Task List](#)

Licenses dialog box

Purpose

This dialog box allows you to create new licenses and edit and delete existing ones. To add a new license, press the **New** button. To edit an existing license, select the relevant license from the list and press the **Edit** button. To delete an existing license, select the relevant license and press the **Delete** button. Note that editing or deleting licenses after OfficeTalk has been registered will cause the keycode to become invalid.

See Also

[Registering OfficeTalk](#)

Choose Users dialog box

Purpose

When the 70 day trial period expires and OfficeTalk has been registered, the number of licensed users may be less than the number of users actually defined in OfficeTalk. In such a case, this dialog box pops up letting you choose a subset of users. You may select no more than the total number of licenses that you own and there must be at least one supervisor in the subset. Once the subset has been selected, OfficeTalk will use the subset as if the members of the subset were the only users defined. The users NOT in the subset will remain in the database so that if further licenses are purchased then these users may be reactivated.

See Also

[Registering OfficeTalk](#)

Disconnect Diaries dialog box

Purpose

When you work remotely, OfficeTalk gives you the option of copying different parts of the database to the remote workstation. You may select a subset of user's diary information by pressing **Diaries** in the [Disconnect Options dialog box](#). Pressing this button will pop up this dialog box.

Select the users' diaries that you wish to copy from the **Unselected users** list and press the **Add** button. The selected users will be copied to the **Selected Users** list. To remove users from the **Selected Users** list, select them from that list and press the **Remove** button. When you have chosen your subset of diaries, press **OK**.

See Also

[Disconnect Options dialog box](#)

Select Contact dialog box

Purpose

Select the relevant employee of the selected company from the pull down list and press OK.

Add Contact to Group dialog box

Purpose

This dialog box lets you add the selected contact to a group. Choose the group to which you wish to add the contact from the **Contact Group** pull down list and press **OK**.

Add Company or Contact to Group dialog box

Purpose

This dialog box lets you add the selected company or contact to a group. Choose the group to which you wish to add the company or contact from the **Contact Group** pull down list and press **OK**.

Document Template dialog box

Purpose

This dialog box lets you add personal or public Document Templates. Choose a name for the Document template, for example *Standard Document* and then specify the filename of the RTF file or TXT file that identifies your Document template file.

Note that if you are specifying a public Document template which will be used by other OfficeTalk users then you should ensure that the template file resides in the _tpltes sub directory.

Template files may reside in directories other than the _tpltes directory, but for other users to use them, they must be referenced by a UNC pathname, e.g. \COMPUTER1 rather than E:.

Template files may also reside in directories other than the _tpltes directory provided that the templates are personal templates and you will always be accessing them from the same computer on the network. **See Also**

[Documents, creating](#)

[Document Templates](#)

[Document Templates, designing](#)

New Document dialog box

Purpose

This dialog box lets you create a new Document to a contact or company. The contact or company displayed in the dialog box is the current contact/company selected in the contact or company view in Contact mode.

Select the required Document Template and press **Edit Document**. OfficeTalk will generate a Document replacing fields in the Document template based upon the selected contact/company. **See Also**

[Documents, creating](#)

[Document Templates](#)

[Document Templates, designing](#)

New Mail Merge dialog box

Purpose

This dialog box lets you create a new Mail merge for a particular contact group.

Select the contact group that you want to use for the mail merge and select the required Document Template and press **OK**. OfficeTalk will generate a mail merge document replacing fields in the Document Template based upon all the contact/companies in the contact group. **See Also**

[Documents, creating](#)

[Document Templates](#)

[Document Templates, designing](#)



Diary Mode

Logging on to OfficeTalk takes you into the Diary Mode. This is where you do all your personal time planning and scheduling.

From within the Diary Mode you can view and update your own Appointments diary and task list. If you have sufficient access rights, you can view and even update other users' and resources' diaries.

You may view [Background Activities](#) from within Diary Mode. This is useful if you want to keep track of activities which you may not keep in your Appointments diary, for example, Workgroup holidays, anniversaries, and other planned workgroup activity.

See Also

[Task List](#)

[Daily Appointments Window](#)

[Weekly Appointments Window](#)

[Monthly Appointments Window](#)

[Resources](#)

[Viewing a Groups Activities](#)

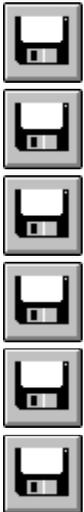
[Displaying Another User's Diary](#)

[Monitoring Background Activities](#)

[Task Trays](#)

[The Calendar](#)

Diary Mode Buttons





Task List

Purpose

The task list may be used as a *To Do* list, letting you see at a glance the status of all the tasks that you have to do. The task list lets you add tasks and drag tasks either to the Daily Appointment Window, to the Task Trays or to the Bin.

Usage

There are several ways to add a task.

1. Single click the mouse in an empty space in the task list, type in the task description and press RETURN.

2. Press the  button above the task list.

3. Press the  button in the sub toolbar.

4. Press the INSERT key when the task list has focus.

In the second, third and fourth cases, OfficeTalk will pop up a Task dialog box letting you see or enter full details about your task.

Once a task is in your task list, it will remain there until you bin it. You can *bin* a task by dragging it to the bin.

It is possible to *schedule* a task in your diary. You may *Schedule* a task by dragging the task over to the daily, monthly or weekly Appointment window. When you release the task over one of these windows, OfficeTalk will create an appointment in your diary. If you drop the task into your Daily Appointment Window then OfficeTalk will schedule the task in the timeslot on which you dropped the task. The default duration of the appointment is 30 minutes (the duration of the actual task). This may be changed by pulling down the duration bar on the Daily Appointment Window. (See Changing an Appointment Duration).

You may mark a task as completed by dragging the task to the Out Tray or by selecting the task and

pressing the  button, above the task list. You may *Unschedule* a task by dragging the task to the In Tray or by dragging the associated appointment to the bin.

If a task has not been marked as complete before its due date then the task will become *Overdue*.

A Task in the Task List will be one of 4 colours depending on it's status. If the task is unscheduled and is neither completed or overdue, then the task colour will be black. If the task has been scheduled and is neither overdue or completed, then the task colour will be blue. If the task is overdue then the task colour will be red. If the task has been completed then the task colour will be green.

You may add Sub Tasks to existing tasks in order to break down larger tasks into more manageable tasks. See [Sub Tasks](#) for more information.

See Also

[Attaching Notes to a Task](#)

[Linking a Task](#)

[Marking a Task as Complete](#)

[Maximising the Task List](#)

[Scheduling a Task](#)

[Setting a Task's Deadline](#)

[Setting a Task's Classification](#)

[Setting a Task's Priority](#)

[Sorting your task list](#)

[Printing your task list](#)



Sorting the Task List

Purpose

If you have a lot of tasks it sometimes helps to sort them into a convenient order. OfficeTalk lets you sort your task list by the following criteria:

- Alphabetically
- By Priority
- By Deadline
- By Creation Date
- By Status
- By Classification

Usage

You can sort your task list in many different ways. OfficeTalk allows you to apply a first, second and third sort on your task list. For example, you may wish to apply the following sort:

- First Sort By Status
- Second Sort By Priority
- Third Sort Alphabetically

This would first sort the entire list by the Status of each task (i.e. all completed tasks would be grouped together, all overdue tasks would be grouped together etc.). Then each of these groupings would be sorted by priority (i.e. there would be a sub grouping of all priority 1, overdue tasks). Finally each of these sub groupings would be sorted alphabetically.



You can sort your task list using the  button in the sub toolbar. When you press this button the Sort Tasks dialog box will appear.

You can choose your first, second and third sorts by selecting the appropriate radio buttons. You can choose whether your sort is ascending or descending by checking or un-checking the **Ascending** check box. When you press OK your Task List will be sorted.

Sorting The Project Task List

Purpose

If you have a lot of tasks it sometimes helps to sort them into a convenient order. OfficeTalk lets you sort your project task list.

Usage

You can sort your project task list in many different ways. OfficeTalk allows you to apply a first, second and third sort on your task list. For example, you may wish to apply the following sort:

- First Sort By Planned Start
- Second Sort By Duration
- Third Sort Alphabetically

This would first sort the entire list by the Planned Start time of each task. Then each of these groupings would be sorted by duration . Finally each of these sub groupings would be sorted alphabetically.



You can sort your task list using the  button at the top of the Task List. When you press this button the Sort Project Tasks dialog box will appear.

You can choose your first, second and third sorts by selecting the appropriate radio buttons. You can choose whether your sort is ascending or descending by checking or un-checking the Ascending check box. When you press OK your Task List will be sorted.



Maximising the Task List

Purpose

If you have a lot of tasks it sometimes helps to maximise the task list. This will let you see more tasks on the screen at the same time.

Usage

You can maximise the size of the Task List by pressing the  button in the top right corner of the List. When maximised, the button in the top right corner of the window will change to an



 button. Press this button to restore the list back to its original size.



Linking a Task

Purpose

You can link a task to any other OfficeTalk data item, making it easy to quickly move between certain linked items.

Usage

You can link a task to an item by selecting the task that you want to link, pressing the  button above the task list, selecting the other OfficeTalk data item and pressing the



 button above that data items window. The task will now be linked to that data item. A  symbol will appear next to the task.

See Also

[Linking](#)



Setting a Task's Priority

Purpose

Prioritising your list of things to do is something that you probably do every day. OfficeTalk lets you prioritise your task list.

Usage

You can change the priority of a task in one of three ways:

- *Using the Cursor Keys.* Select the task whose priority you wish to change. Whilst holding down the Ctrl key, press the UP or DOWN cursor keys to increase or decrease the priority, respectively.
- *Using the Mouse.* While holding down the Ctrl key, click the mouse on the priority marker. The priority of the task will increase.

- *Via the Task dialog box.* Select the task whose priority you wish to change and press the  button. Choose the appropriate priority from the priority pull down list and press OK.

A Supervisor may change the default task priorities and descriptions from the Priority Dialog Box in Supervisor Mode.



Marking a Task as Complete

Purpose

When you have finished a task, OfficeTalk lets you mark it as complete.

Usage

You can mark a task as *complete* in one of three ways:

- *Using the*  *Window button.* Select the task that you wish to mark as complete. Press the  button.
- *Using the Task Trays.* Ensure that the Task Trays are visible by selecting Show task trays from the Options menu. Drag the task from the task list over to the OUT tray.
- *Via the Task dialog box.* Select the task whose priority you wish to change and press the  button. Check the **Complete** check box and press OK.

When you mark a task as completed, the task text is changed to green and a completed symbol is attached to the task. If you want OfficeTalk to draw a line through the task when it is completed, select Lines Through Done Tasks from the *Options* menu.



Setting a Tasks Deadline

Purpose

OfficeTalk lets you set a *deadline* for every task in your list. If a task has not been marked as complete when its deadline arrives then OfficeTalk marks the task as *overdue*, showing the text of the task in a red colour. Any task that has a deadline may be displayed in the Background Activities window.

Usage



Bring up the task dialog by selecting the task and pressing the  button. Check the Require Deadline check box and enter the deadline date and time into the deadline field. If a task is not completed at the time of its deadline, OfficeTalk will pop up a message box warning you that the task has become overdue. It will then display that task in red along with an overdue symbol.



Setting a Task's Classification

Purpose

OfficeTalk lets you set a *Classification* for every task in your list. This is a good way of categorising your tasks for when you wish to sort your task list.

Usage

Bring up the task dialog by selecting the task and pressing the  button. Select the classification description from the Type pull down list. Press OK.



Scheduling a Task

Purpose

Sometimes, you may wish to allocate some time to do a particular task by placing a corresponding appointment in your Daily Appointment Window. Rather than having to manually make a new appointment with the same description as the task, OfficeTalk lets you *schedule* a task. When you schedule a task, OfficeTalk automatically creates an appointment in the Appointment window and connects the task to the appointment.

Usage

You can schedule a task by dragging the task from the Task List and dropping it on the relevant time slot in the Daily Appointment Window. Alternatively, you may drop it on the relevant day in the Weekly or Monthly Appointment Window. If you do the latter, OfficeTalk assumes that you want to schedule the task as early as possible on the specified day. When you schedule a task, the task becomes blue and a *clock* symbol is attached to the task. You can use the [When button](#) to find out when a particular task was booked.



Adding Notes to a Task

Purpose

You may wish to add notes to a task, for example, to detail the steps needed to complete the task.

Usage

OfficeTalk lets you attach notes to any task in one of two ways:

- *Using the  button.* Select the task to which you wish to attach a note and press the button. A Notes dialog box will appear.
- *Via the Task dialog box.* Bring up the Task dialog box by selecting the task to which you wish to attach a note and pressing the  button. Press the Notes button in the Task dialog box.

In both the cases described above, a Notes dialog box will appear. You can type any text into this box. When you have finished, press OK. If a task has some notes associated with it then a notes marker will appear to the right of the task in the Task List. If you double click the Left mouse button on the notes marker then the corresponding notes will appear in a Notes dialog box, letting you edit the existing notes. Press OK to save the changes or press Cancel to ignore the changes.

If you schedule a task which has notes then the resulting appointment will have a notes marker indicating that it too has notes. The appointment's notes will be identical to the task's notes. Any changes to the notes will be reflected in both the task and the appointment.

You can delete notes attached to a task by selecting the task from the task list and selecting Edit/Tasks/Delete Notes from the menu.



Daily Appointment Window

Purpose

The Daily Appointment Window is used as a daily diary. It is intended to be used as a record of what you *have* done and as a *planner* for what you are *going* to do.

Usage

The Daily Appointment Window is set at the left of the Diary View. It contains a series of time slots with the time of day being displayed down the left margin. An appointment is a period of time that you plan to spend doing a particular activity. The Daily Appointment Window shows a user's appointments for a

particular day. You may view appointments for the *previous* day by pressing the  button, above the appointment window. You may view appointments for the *next* day by pressing the



 button, above the appointments window. You may view *today's* appointments by pressing the



 button.

See Also

[Adding an Appointment](#)

[Moving an Appointment](#)

[Changing the duration of an Appointment](#)

[Deleting an Appointment](#)

[Reminding Yourself about an Appointment](#)

[Adding Notes to an Appointment](#)

[Marking an Appointment as Private](#)

[Printing Daily Appointments](#)



Weekly Appointment Window

Purpose

The Weekly Appointment Window shows a weekly representation of your diary. It is intended to be used as a record of what you *have* done and as a *planner* for what you are *going* to do.

Usage

The Weekly Appointment Window is set at the left of the Diary View. It displays the appointments for an

entire week. You may view appointments for the *previous* week by pressing the  button, above the appointment window. You may view appointments for the *next* week by pressing the



 button, above the appointments window. You may view *this* weeks appointments by pressing the



 button.

See Also

[Printing Weekly Appointments](#)



Monthly Appointment Window

Purpose

The Monthly Appointment Window shows a monthly representation of your diary. It is intended to be used as a record of what you *have* done and as a *planner* for what you are *going* to do.

Usage

The Monthly Appointment Window is set at the left of the Diary View. It displays the appointments for an

entire month. You may view appointments for the *previous* month by pressing the  button, above the appointment window. You may view appointments for the *next* month by pressing the



 button, above the appointments window. You may view *this* months appointments by pressing the



 button.

See Also

[Printing Monthly Appointments](#)



Adding an Appointment

You may add an appointment to the Daily Appointment Window by clicking the mouse in a time slot, typing the appointment description and pressing RETURN. There are other ways of adding an appointment. These are detailed below:

- Press the  button above the Appointment Window. An Appointment dialog box will appear. Fill out the details and press OK.
- Press the  button in the sub toolbar. An Appointment dialog box will appear. Fill out the details and press OK.
- If you organise a meeting via the Meeting Mode, OfficeTalk will place a tentative appointment in your diary. See The Meeting Mode.
- Drop a task on the relevant time slot. See Task List



Moving an Appointment

You can move an appointment within the same day by dragging it from its current time slot to another time slot. The appointment will start from the time slot that you drag it to and will keep its current duration.

You can move an appointment to another date in the following way:

- Select the relevant appointment in the Daily Appointments window and press the  button at the top of the window. The Appointment dialog box will appear.
- Modify the date in the time field and press OK.

A quicker way to change the date of an appointment is to drag the appointment to the relevant day on the calendar. OfficeTalk will attempt to make the appointment at the same time on the chosen day. This way restricts you to moving an appointment within the same month.



Changing an Appointment's Duration

There are two ways to change an appointment's duration. The first way is to select the relevant appointment in the Daily Appointment window and press the **Edit** window button at the top of the window. The Appointment dialog box will appear. Modify the duration field as necessary. The format for the duration field is **xxhxxm**, for example, 1h30m, where h represents hours and m represents minutes. An appointment's duration is always rounded down to the nearest 5 minutes.

A quicker way to change an appointment's duration is to stretch the appointment using the duration bars down the left side of the Daily Appointment window. To change the duration of the appointment but fix the start time, you must drag the duration bars from the bottom-most part of the bar.

To change the duration of the appointment but make the start time earlier, you must drag the duration bars from the uppermost part of the bar.

Note: Appointments may not be longer than 1 day in duration.



Deleting an Appointment

Usually, when you have completed an appointment you will want to keep the appointment in your diary as a record of what you have done. Sometimes, though, you may wish to delete an appointment. You can *bin* an appointment by dragging the appointment from the Daily Appointment window over to the bin. Another way of binning an appointment is by selecting the Appointment from the Daily Appointment



Window and pressing the  button. You can retrieve an appointment that has been binned by double clicking on the bin. This will bring up the Bin dialog from which you can Unbin the appointment. To delete an appointment completely, open the bin, select the binned appointment and press the **Shred** button.

See Also

[The Bin](#)



Marking an Appointment as Private

You may have an appointment that you do not want other users to know about, yet you may wish to indicate your non-availability at this time. OfficeTalk lets you mark a particular appointment as private to you. You can do this in the following way: Select the appointment from the Daily Appointment window and



press the  window button. This will bring up the Appointment dialog. Check the Private check box and press OK.



Reminding Yourself about an Appointment

OfficeTalk can remind you of certain appointments. There are two ways to add a reminder to an appointment. The first way is to select the appointment from the Daily Appointment window and press the



window button. This will pop up the Appointment dialog box. Check the Remind check box and specify the number of minutes prior to the appointment that you wish to be reminded.



Another way is to select the appointment and press the button above the Daily Appointment Window. This will add a reminder to the appointment. You will be reminded 5 minutes before the appointment is due to start unless you modify the Default Remind Time field from the General Preferences command in the Options menu.

In both cases, a bell symbol will appear on the appointment to indicate that a reminder is attached to this appointment.

When the time comes, OfficeTalk will remind you of the appointment by popping up a Message box to the screen. Press OK to remove the reminder.



Adding Notes to an Appointment

You may add a note to any appointment. Do this by selecting the appointment and pressing the  button above the Daily Appointment window. An Appointment Notes dialog box will appear into which you can type any free-format text. Enter your note and press OK. Another way of bringing up the Appointment Notes dialog box is by pressing the



button from within the Appointment dialog.

You can delete notes attached to an appointment by selecting the appointment from the Daily Appointments Window and selecting Edit/Appointments/Delete Notes from the menu.



Viewing another User's Diary

Purpose

The User Selection list, above the Appointment Window, allows you to quickly select which users' task list and diary you wish to view.

Usage

To change the view to another user's task list and diary, click on the *drop-down* button on the *Diary* pull down list and select the required name from the list of users.

Having selected another user's diary, you will be restricted by the access that has been granted to you for that particular user. If you have been granted *No Access* then that user will not be in your Diary pull down list and so you will not even be able to view that user's diary. If you have *Read Access* then you will be able to view all of the users tasks and appointments (except for appointments and tasks marked as *PRIVATE*), but you will not be able to edit any of the information nor will you be able to add or delete information in their diary.

There are five different access levels. For more information on Access Levels see [Access Rights](#).

If you have full access to another user, then you can work with another user's diary as if it were your own. You may create [Links](#) to other user's tasks and appointments. These links will not be seen by other users just as you will not be able to view other users' links. If you are using OfficeTalk without a mouse, you can change the diary selection by selecting the **Select Diary** menu item from the View menu. This will set the focus to the Selection list. Use the UP and DOWN cursor keys to change the selected user.



Where

Purpose

Where is used to quickly find out *where* a particular user is at any time.

Usage

WHERE works in different ways, depending on the user selected in the User Selection list at the top of the Diary Mode screen. If your own name is selected, then WHERE pops up an Away From Office dialog box. You can enter details of *where* you are going and when you will be back.

If another user selected your name from the User Selection list and pressed the WHERE button then the user would see the details that you entered. Similarly, if you select another user from the User Selection list, then the Away From Office dialog box will not appear. Instead a dialog box will appear providing you with details of where that user is and when he/she will be back.

If the user is not logged into OfficeTalk and has left no details of where he or she is then OfficeTalk will tell you that the user is not logged in and no details have been recorded. If the user is logged into OfficeTalk then pressing the WHERE button will pop up a message informing you that the user is in the office and is logged into OfficeTalk.

If the user is currently in a meeting then OfficeTalk will tell you what the meeting is, where it is and when the user is due out of the meeting. If the user has filled out the details of the Away From Office dialog box then OfficeTalk will inform you exactly where the user is, the telephone number and extension of the user and when the user will be back along with any further comments that the user has left.



When

Purpose

When is used to find out *when* you booked a particular task.

Usage

Select a scheduled task from the task list and press the WHEN button. The diary will display the appointment which corresponds to the task. A *scheduled* task is a task which has an associated appointment in your diary. WHEN will only work with *scheduled* tasks.

See Also

Task List

Scheduling a Task

Selecting Objects

Purpose

You select objects so that you can then carry out operations with them or on them. For example, selecting people, in order to invite them to a meeting or selecting tasks, in order to find out when they were booked.

Usage

You can select an object by clicking on the object using the left mouse button.



Repeat Appointments

Purpose

The **Repeat Appointments** command is used to make repeated appointments. For example, you may wish to book a Team meeting at 10am on the first Tuesday of each month, or you may wish to create an appointment to attend a project review every week on a Friday for six weeks.

Usage

To use the Repeat command, select an appointment from the Daily Appointment Window which is not the result of scheduling a task. Select **Repeat Appointments** from the **Schedule** menu. A Repeat dialog box will appear. The Repeat dialog has three radio buttons, daily, weekly, and monthly. The daily radio button will always be selected initially. The daily repeat has the following operation:

- **Use Weekends Check box.** If you check this check box, the appointment will be repeated over weekends as well as week days. If this box is not checked, no appointments will occur on weekends.
- **Ending.** The appointment will be repeated from the day the original appointment started, every day, until the date shown in this field.

The weekly repeat has the following operation:

- **Ending.** The appointment will be repeated from the day the original appointment started, every week, until the date shown in this field.

The monthly repeat has the following operation:

- **On Weekends radio button.** Select this radio button if you are happy that a monthly repeated appointment may fall on a weekend.
- **Before Weekend radio button.** Select this radio button if you require that all repeated appointments which would normally fall on a weekend are instead booked just before the weekend.
- **After Weekend radio button.** Select this radio button if you require that all repeated appointments which would normally fall on a weekend are instead booked just after the weekend.
- **nth of the month radio button.** If the original appointment occurs on, for example the 15th of a particular month then selecting this radio button will book all repeated appointments on the 15th of every month, except in the case of weekends, where you have chosen not to use weekends.
- **nth weekday of the month radio button.** If the original appointment occurs on, for example the 2nd Thursday of a particular month then selecting this radio button will book all repeated appointments on the 2nd Thursday of every month, except in the case of weekends, where you have chosen not to use weekends.
- **Last day radio button.** If the original appointment occurs on the last day of a particular month then this radio button will become enabled. Selecting this radio button will repeat the appointment on the

last day of every month, except in the case of weekends, where you have chosen not to use weekends.

- *Ending Field.* The appointment will be repeated from the day the original appointment started, every month, until the date shown in this field.



Group Mode

The Group view is ideal for looking at the activities of a group of users from a single window. The Group view consists of three separate sub-views:

- **Chart View**
This view lets you view the appointments of a group of people and resources in a chart view, similar to the view in [Project View](#). This is the first view that you see when entering Group View. The list of members is shown down the side of the screen and time is displayed along the top of the screen. You can use the zoom buttons to change the timescale. For more information, see [The Chart Window](#)
- **Table View**
This view shows the weekly appointments of all the members of a selected group in a timetable format. For more information, see [The Group Table Window](#).

When you enter Group Mode the main window will be initially blank. You can select a Group to display from the *Group Selection List*. Select one of the topics below for more information.

See Also

[Creating a New Personal Group](#)

[Selecting a Group To View](#)

[The Group Chart View](#)

[The Group Table View](#)

[Zooming In and Out](#)

[Moving Appointments](#)

[Changing an Appointments Duration](#)

[Viewing an Appointments Full Description](#)

[Printing Groups \(Chart format\)](#)

[Printing Groups \(Table format\)](#)



The Group Table View

This view displays the appointments of a group of people and resources in a *week-at-a-glance* view. The members of the group are listed along the top of the view and the days of the week are displayed down the left side of the view.



You can use the



buttons to change the timescale and you can use the scroll bar at the bottom of the screen to scroll other members of the group into view.

Each column shows a different member's appointments for the week. The width of any column may be changed by positioning the mouse over the separator lines on the group member's title bar, pressing the left mouse button and moving the cursor until the column is of the required width. The width of all the columns may be changed by following this procedure whilst keeping the CTRL key pressed down.

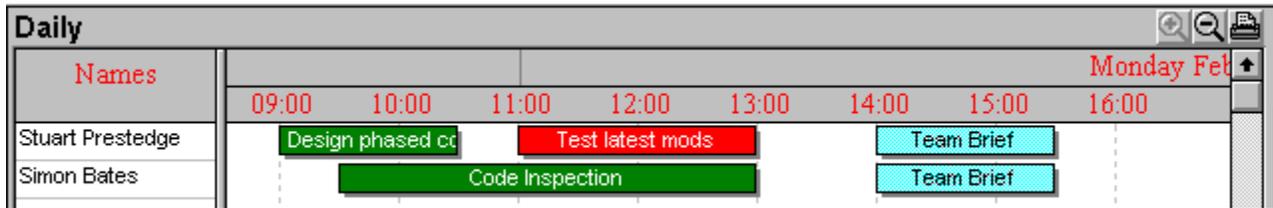
Any appointments in the Group Table View are represented by a shaded rectangle containing a textual description of the appointment. The colour of the text is normally black. If an appointment is associated with a task then the colour of the appointment may change depending on the status of the task. If the task is *overdue* then the colour of the appointment text will turn red. If the task is *completed* then the colour of the appointment text will turn green. This colour coding is very useful for anyone who wishes to see, at a glance, the status of any scheduled tasks in a particular group.

See Also

[Printing The Group Table Window](#)



The Group Chart Window



This view displays the appointments of a group of people and resources in a chart view, similar to the view in [Project View](#). The list of group members is shown down the left side of the screen and time is displayed along the top of the screen. You can use the [zoom](#) buttons to change the timescale and you can use the scroll bar at the bottom of the screen to scroll the *Time banner* forwards and backwards through time. Another way of scrolling the *Time Banner* is to [drag](#) the *Time Bar* left or right. appointments in the Group Chart Window are represented by a shaded rectangle containing a textual description of the appointment. The background colour of the rectangle is normally light blue. If an appointment is associated with a task then the colour of the appointment may change depending on the status of the task. If the task is overdue then the background colour of the appointment will turn red. If the task is completed then the background colour of the appointment will turn green. This colour coding is very useful for anyone who wishes to see, at a glance, the status of any scheduled tasks in a particular group.

See Also

[Printing The Monthly Group Window](#)



Adding a New Personal Group

To add a new personal group, press the **New Group** button in the sub toolbar in Group Mode. A Group dialog box will appear. Enter the name of the group into the *Name* field. You may specify to whom the group belongs (the default is yourself). You may then select the users and resources who you wish to become members of the new group. For more information on creating a new group, see the [Group dialog box](#).

See Also

[Editing an Existing Personal Group](#)

[Deleting an Existing Personal Group](#)

[Group dialog box](#).



Editing an Existing Personal Group

To edit an existing personal group, select **Edit Group** from the **Edit/Personal Groups** menu in Group Mode. A Group dialog box will appear. Edit the details of the project and press **OK**. For more information on editing a group, see the [Group dialog box](#).

See Also

[Adding a new Personal Group](#)

[Deleting an Existing Personal Group](#)

[Group dialog box](#)



Deleting an Existing Personal Group

To delete an existing personal group, select **Delete Group** from the **Edit/Personal Groups** menu in Group Mode. OfficeTalk will pop up a confirmation dialog box. Press **Yes** to indicate that you wish to delete the group.

See Also

[Adding a new Personal Group](#)

[Editing an Existing Personal Group](#)



Zooming In and Out

You can change the time span of the Chart Group view and the Group Table view by pressing the plus and minus buttons at the top right of the Group window. For the Chart window the possible views are:

- Daily View
- Bi-Daily View
- Weekly View
- Bi-Weekly View
- Monthly View
- Quarterly View

In the Group Table view, the plus and minus buttons will change the view from showing the full seven days of the week to showing only a single day of the week.



Selecting a Group to View

Provided that one or more groups have been defined, you can select a group from the pull down Selection list. The appointments for the members of the group may be displayed in either the Group Chart View, or the Group Table View.



Moving Appointments within Group View

Provided you have sufficient privileges, you may move appointments within the Group Chart Window. To do this, position the cursor over the appointment that you wish to move, press the Left mouse button. An outline will appear around the appointment. Moving the mouse left or right will move the appointment accordingly. The movement of the appointment will be restricted as follows:

- (i) It is not possible to move an appointment outside the bounds of the day to which it belonged.
- (ii) An appointment may only move between adjacent appointments
- (iii) An appointment may only move horizontally, ie. it is not possible to move an appointment from one person to another.



Changing an Appointments Duration

Provided you have sufficient privileges, you may change the duration of appointments in the Group Chart Window. To do this, position the cursor over the left or right edge of the appointment that you wish to stretch and press the Left mouse button. An outline will appear around the appointment. Moving the mouse left or right will stretch the appointment accordingly. The movement of the appointment will be restricted as follows:

- (i) It is not possible to stretch an appointment outside the bounds of the day to which it belonged.
- (ii) An appointment may only stretch between adjacent appointments

Note that, in Group Mode, you may only change Appointment durations from within the Group Chart View. It is not possible to change Appointment durations from the Group Table View.



Viewing an Appointments Full Description

If an appointment has a very short duration in comparison to the time span represented by the Group Window then it will be impossible to read the appointment description. However, if you position the cursor over the appointment that you wish to read then the full appointment description will appear in the status bar.



Next/Prev Week

In Group Table view, you may move forward and backward a day at a time by pressing the  and  buttons.



Project Mode

The Project mode is used to plan, create and view tasks related to projects and assign the tasks to other OfficeTalk users.

When you enter Project Mode the main window will be initially blank. You can select a Project to display from the *Project Selection List*. From within Project Mode it is possible to create tasks and represent them in the Project Window. You may assign tasks and sub tasks to various OfficeTalk users and monitor their status as the receivers of the tasks schedule them in their own diary.

See Also

[The Project Mode Windows](#)

[Creating a New Personal Project](#)

[Editing an existing Personal Project](#)

[Deleting an existing Personal Project](#)

[Zooming In and Out](#)

[Selecting a Project To View](#)

[Moving Tasks](#)

[Changing an Appointments Duration](#)

[Viewing an Appointments Full Description](#)

[Assigning a Project Task](#)

[Viewing Slack Time](#)

[Sorting the Project Task List](#)

[Importing MPX files](#)

[Exporting MPX files](#)

[Exporting CSV files](#)



The Project Mode Windows

The Project Mode consists of two main windows: The Table Window and the Project Window. The Table Window shows a tabular representation of your project and the Project Window shows a chart representation. Initially, only the Description field of the Tabular Window is visible. This field, itself, is a Project Task List, which is identical in operation to the Task List in Diary View. You may view more of the Table Window by dragging the Splitter bar to the right. This will reduce the width of the Project Window.

Table Window

The entire Table Window may be seen by dragging the splitter bar, which divides the Table and Project Windows, over to the right. The Table window can show the following fields:

- Description
- Planned Start Time
- Planned Duration
- Deadline
- Priority
- Assigned To

You can change the width of any of the fields in the Table Window by placing the cursor on the relevant separator line in the title strip and dragging the separator line left or right.

Project Window

The Project Window lets you view a project in a Gantt representation. Any tasks in the Project Window are represented by a shaded rectangle containing a textual description of the appointment. The background colour of the rectangle is normally light yellow but the colour of the task may change depending on the status of the task. For example, if the task is overdue then the background colour of the task will turn red. If the task is completed then the background colour of the task will turn green. This colour coding is very useful for anyone who wishes to see, at a glance, the status of all the ongoing tasks in a particular project.



Adding a New Personal Project



To add a new personal project, press the  button in the sub toolbar in Project Mode. A Project dialog box will appear. Enter the name of the project into the *Name* field. You may specify to whom the project belongs (the default is yourself). You may also specify the access of other users to the new project. Their default access is *read access*.

See Also

[Access Rights](#)

[Editing an Existing Personal Project](#)

[Deleting an Existing Personal Project](#)



Editing an Existing Personal Project

To edit an existing personal project, select **Edit Project** from the **Edit/Personal Projects** menu in Project Mode. A Project dialog box will appear. Edit the details of the project and press **OK**.

See Also

[Adding a new Personal Project](#)

[Deleting an Existing Personal Project](#)



Deleting an Existing Personal Project

To delete an existing personal project, select **Delete Project** from the **Edit/Personal Projects** menu in Project Mode. OfficeTalk will pop up a confirmation dialog box. Press **Yes** to indicate that you wish to delete the project.

See Also

[Adding a new Personal Project](#)

[Editing an Existing Personal Project](#)



Zooming in and Out



You can change the time span of the Project view by pressing the  and



 buttons at the top right of the Project window. The possible views are:

- Daily View
- Bi-Daily View
- Weekly View
- Bi-Weekly View
- Monthly View
- Quarterly View



Selecting a Project to View

Provided that one or more projects have been defined, select the relevant project from the pull down project list. All the tasks and their associated planned timescales will be shown in the Table Window and the Project Window.



Moving Project Tasks

Provided you have sufficient privileges, you may move tasks in the Project Window. To do this, position the cursor over the project task that you wish to move, press the Left mouse button. An outline will appear around the project task. Moving the mouse left or right will move the project task accordingly. The movement of the project task will be restricted as follows:

- A project task may only move within the bounds of its parent task, **unless** the CTRL key is held down while the project task is being dragged. If a project task does not have a parent task then its movement is unbounded.
- A project task may only move horizontally.



Changing a Project Task Duration

Provided you have sufficient privileges, you may change the duration of project tasks in the Project Window. To do this, position the cursor over the left or right edge of the project task that you wish to stretch and press the Left mouse button. An outline will appear around the project task. Moving the mouse left or right will stretch the project task accordingly. The movement of the project task will be restricted by its parent task, **unless** the CTRL key is held down while the project task is stretched.



Viewing a Project Task's Full Description

If a project task has a very short duration in comparison to the time span represented by the Project Window then it will be impossible to read the project task description. However, if you position the cursor over the project task that you wish to read then the full project task description will appear in the status bar.



Viewing Slack Time

Slack Time is the time between the planned end of a project task and the deadline of the project task. It represents the amount by which a project task may slip before creating a problem for the project plan.

You can view *Slack Time* by pressing the **Slack** button above the Project Window. To hide the *Slack Time* press the same button again.



Assigning a Project Task to a User

Purpose

This function lets you delegate project tasks to specific OfficeTalk users and then lets you track their progress in terms of whether or not the tasks have been completed.

Usage

You can assign a project task to a user by firstly double clicking on the Project Task. This will bring up a Project Task Dialog. From the **Assign To** pull down list, select the user to whom you wish to assign the task. Finally press OK on the Project Task Dialog. The task will appear in the user's task list. If the task gets completed by the user then the colour of the task in the project window will change to green. If the task becomes overdue, then the colour of the task will turn red.



Importing Microsoft Project MPX Files

Purpose

This function lets you import Microsoft Project MPX files

Usage

Select File/Import/Project from the menu when in Project Mode. An Import Project dialog box will appear. Select the MPX file that you wish to import and press OK on the dialog box. OfficeTalk will create a new Project, extracting the Project name from the MPX file. OfficeTalk will also read all the Project Tasks into the project, displaying them as *planned* tasks in the Project Window.



Exporting Microsoft Project MPX Files

Purpose

This function lets you export Microsoft Project MPX files

Usage

Select File/Export/Project from the menu when in Project Mode. An Export Project dialog box will appear. Choose a name for the MPX file that you wish to export and press OK on the dialog box. OfficeTalk will create a new MPX file. All Project Task durations will be rounded to the nearest day. Only *planned* tasks will be output.



Exporting Project CSV Files

Purpose

This function lets you export an OfficeTalk Project as a Comma Separated Variable (CSV) file.

Usage

Select File/Export/CSV Records from the menu when in Project Mode. A CSV Output dialog box will appear. Choose a name for the CSV file that you wish to export, choose the delimiter, select whether or not you wish fields to be *quoted*, select whether or not you wish to output a CSV header as the first record and whether or not you wish to end each record line with a delimiter. Then press OK on the dialog box. OfficeTalk will create a new CSV file. Only the Description and Level of the Project Task will be output.



Diary Mode

Diary Mode is the default view when starting OfficeTalk. From Diary Mode it is possible to add appointments to your diary and tasks to your task list. It is also possible to view other users' diaries and task lists and, provided you have sufficient access rights, you may even add to or delete items from other users' diaries and task lists.

See Also

[The Task List](#)

[The Appointment Window](#)

[Displaying Another User's Diary](#)

[Defining Access Rights](#)

[Monitoring Background Activities](#) [The Calendar](#)

[Search Database](#)



Monitoring Background Activities

Background Activities are one or more of the following:

- *Planner Bookings*
- *Annual Events*
- *Public Holidays*
- *Tasks with a deadline*

OfficeTalk lets you represent background activities within Diary Mode. This means that for the day, week or month shown, you have instant access to all the important background activities that affect you.

You can bring up the Background Activities dialog by selecting **Background Activities...** from the **Schedule** menu in Diary Mode.

The most flexible Background Activity is the Planner. Planner Bookings are created from the **Planner Mode**. OfficeTalk lets you view Planner Bookings which occur on the date displayed in the Daily Appointments Window. If, for example, there is a Holiday planner for the members of your workgroup, you may include this planner as one of the planners to view, giving yourself instant access to who is on holiday on any particular day, week or month.

Choose which Background Activities to display from the Background Activities dialog box and then press **OK**.

Setting a Reminder

You can set a reminder for an appointment by selecting an appointment in the Daily Appointments

Window and pressing the  button. A *Bell* icon will appear next to the appointment.



Annual Events

Purpose

OfficeTalk lets you keep a list of Annual Events. You can use the Annual Events feature to keep anything from birthdays and anniversaries to company holidays, for example. Annual Events are personal and may not be seen by other users. When you add an Annual Event, you can specify a certain number of days fore-warning of the event. OfficeTalk will warn you by popping up a notification on the relevant day.

Usage

You can add an Annual Event by selecting Annual Events from the Schedule menu. An Annual Events dialog box will appear. Press the New button. Another dialog box will appear. Type in the description of the Annual Event, for example 'my birthday' and enter the day and month of the event. OfficeTalk will remind you of any annual events, occurring on that day, when you log into OfficeTalk. If you want OfficeTalk to remind you in advance of the event, enter a number in the *Days To Remind* field, specifying the number of days' fore-warning that you require. The default is 1 day. If you do not want OfficeTalk to remind you at all then uncheck the **Remind** check box. Finally, press OK.



Resources

A resource is any object in your organisation whose time may be booked, for example, a meeting room, a pool car or an overhead projector.

OfficeTalk lets you define Workgroup resources and keep a diary for each of these resources. You may keep a diary for an unlimited number of resources.

For information on how to add a resource, see [The Resource List](#) in Supervisor Mode.

There are two types of resources, *Fixed Resources* and *Non-fixed resources*. A resource is a *Fixed Resource* if it cannot be physically moved, for example a meeting room. It helps OfficeTalk to know if a resource is fixed or not for when OfficeTalk is scheduling meetings. (See [Meeting Manager](#)).

You can view a resource's diary by selecting the resource from the *Selection* pull down list. Note that when you select a resource, the task list is hidden since resources have no need for a task list.

Defining Access Rights

OfficeTalk lets you define users' access rights to various items within OfficeTalk. These include:

- *Other User's diaries*
- *Public and Personal Groups*
- *Public and Personal Projects*
- *Public and Personal Planners*

To define a user's access to a particular item, select the item (i.e. a user, a group, a project or a



planner) from the relevant list in Supervisor Mode and press the  button. The corresponding dialog will appear. Next, press the **Access Rights** button. An Access Rights dialog box will appear. The dialog box contains a list of OfficeTalk users and a set of radio buttons representing their access rights to the item. If you select one of the OfficeTalk users from the User list, a radio button will highlight defining that user's access rights to the item. To change the selected user's access rights to the item, click the radio button which corresponds to the required access privilege and press OK. The following access rights are permitted:

- *No Access*
- *Read Access*
- *Read, Create Access*
- *Read, Create, Edit Access*
- *Read, Create, Edit, Delete Access*



Meeting Mode

Purpose

This mode is used to book meetings. It lets the user specify the other OfficeTalk users and Workgroup resources required at the meeting. It provides the facility for writing an agenda and automatically handles the sending out of meeting invitations and the monitoring of responses.

Usage

Select, from the user list, the users who you wish to invite to the meeting. Also Select the resources which you wish to book. You will see, in the Availability Window, a representation of the availability of all the users and resources that you have asked to (or reserved for) the meeting.

Next, choose the duration of the meeting. Do this by pressing and keeping pressed the left mouse button in the Availability Window. While keeping the left button pressed, drag the cursor downwards until you have defined the intended duration of the meeting.

Next, press the **Find Slot** button. This will find the next available slot when all people and resources are free.

Next you should fill out an Agenda for the meeting by clicking on the **Agenda** button. Finally, type in the Subject of the meeting and press the BOOK button.

When you press the BOOK button, OfficeTalk will pop up a Book Meeting dialog box which lets you choose between *mailing* or *notifying* the recipients with the meeting invitation or not informing them at all. Choose the relevant radio button and press the **Book** button in the dialog box. If you choose to mail or notify recipients, OfficeTalk will inform all those invited about the meeting and will ask them if they can attend. All the invitees need do is click on the YES (I can Attend) or the NO (I Cannot Attend) button which will come with their mail message or notification. OfficeTalk will also place a provisional appointment in each user's and resource's diary.

Monitoring Responses to your Invitation

You can keep track of who has replied to your invitation by clicking on the STATUS button. When you do this, OfficeTalk will display a list of meetings. If *all* invited users have not yet replied then OfficeTalk will display a question mark symbol next to the meeting title.

Double click on the meeting you wish to know about. A pop-up window will appear, presenting you with all the people and resources who have been invited to the meeting. If they have not replied, then the question mark symbol is displayed. If they have replied YES, then a tick symbol is displayed. If they have replied NO, then a cross symbol is displayed. From this window, you can easily remind people to either reply to your invitation message, if they have not already, or simply remind them to come along, as the meeting time draws near. Do this by selecting the people whom you wish to remind and then clicking on the REMIND button.

You can delete a person or a resource by selecting them and then hitting the DELETE button. Doing so removes them from the list of attendees. You would typically do this if you knew that someone could not

come yet the meeting should still go ahead.

See Also

[Reminding an Invitee](#)

[Replying to a Meeting Request](#)

[Cancelling a Meeting](#)

[Welcoming a user to a Meeting](#)

[Adding a user to a Meeting](#)

[Removing a user from a Meeting](#)

[Linking a Meeting](#)

Meeting Mode Buttons





The Find Slot Button

Purpose

The Find Slot button is used to automatically find the next available time when all users and resources can attend the meeting that you plan to hold.

Usage

From within Meeting Mode, select the people and resources from the user list and resource list. Next click the left mouse button in the Availability Window and drag the cursor down (whilst keeping the left mouse button pressed) to define the duration of the meeting. Finally press the Find Slot button. OfficeTalk will skip to the next time when all people and resources are available.



Agenda

Purpose

OfficeTalk lets you attach an Agenda to a meeting.

Usage



Prior to booking the meeting, press the  button. An Agenda dialog box will appear. Enter any free format notes into this dialog box and then press OK. When the meeting is booked, the agenda will be added to the meeting invitation mail message.



Book

Purpose

The Book button is used to book a meeting.

Usage

From within Meeting Mode, select the people and resources from the person list and resource list. Next click the left mouse button in the Availability Window and drag the cursor down (whilst keeping the left mouse button pressed) to define the duration of the meeting. The Availability Window defaults to displaying half hour time slots. If you wish to book meetings lasting a duration other than multiples of half an hour then specify the duration in the *Duration* field.

Next, press the Find Slot button to find the next time when all people and resources are available. Finally press the BOOK button to go ahead and book the meeting. OfficeTalk will pop up a Book Meeting dialog box giving you the choice of how to inform the invited users. Press the **Book** button in the dialog box. OfficeTalk will then book the meeting, sending out meeting requests and provisionally booking the time in the users' and resources' diaries.



Replying to a Meeting Invitation

How To

When you have been invited to a meeting, an appointment will appear in your diary. This appointment will display a *meeting* symbol to distinguish it from other appointments and a *red* question mark symbol to indicate that it is a *tentative* appointment. OfficeTalk does not yet know whether or not the meeting will go ahead.

To respond to the meeting request, go into Mail Mode and look for the meeting request mail.

The mail message will tell you the subject of the meeting, the location, the agenda and the other people invited to the meeting. If you wish to reply to the meeting, press either the **Yes, I can attend** button or the **No, I cannot attend** button. If you press the **Yes, I can attend** button, this will inform OfficeTalk that you can attend. If you press the **No, I cannot attend** button, OfficeTalk will pop up a Reason dialog box. If you wish, you may enter a reason why you cannot attend. Press OK to remove the dialog box.



Status

Purpose

The Status button is used to track the progress of a meeting in terms of how many people have replied to your meeting request, how many have answered YES, how many have answered NO and for what reason. You may also use the Status button to remind people to attend the meeting regardless of whether they have replied to your meeting request.

Usage

From within Meeting Mode, having booked a meeting, press the Status button. A list of meetings will pop up. Choose the meeting whose progress you want to check. Do this by double clicking on the relevant text defining the subject of the meeting. When you do this, a list of the people and resources that you invited to the meeting will be displayed. If a user has not yet responded to your meeting request then the user will have a blue question mark prefixed to the user's name. If the user has replied but has said NO to the meeting then a red cross will be prefixed to his/her name. If the user has replied YES, then a green tick will be prefixed to the user's name. If the user has replied NO then you can find out the user's reason for not attending (only if a reason was given) by selecting the user from the list of invited users and pressing the **Reason...** button. When you do this a Reason For Not Attending dialog box will appear with the user's comments displayed.



Cancelling/Deleting a Meeting

Purpose

To inform all invited users of a meeting cancellation and or delete the meeting from OfficeTalk.

Usage

Press the Status button and locate the meeting that you wish to cancel/delete. Select the meeting and press the **Delete** button. The meeting status line will disappear and all previously invited users will be sent a mail message to inform them that the meeting has been cancelled.



Reminding an Invited User to Attend

Purpose

To remind selected invited users to attend the meeting.

Usage

Press the Status button and locate the meeting that you want to remind the user to attend. Select the meeting and press the **Open** button. Alternatively, double click the meeting in the Meeting List. A list of invited users will be shown in a Meeting pop up window. Select the user (or users) that you wish to remind. Press the **Remind** button at the bottom of the window. The selected users will be notified reminding them to reply to the meeting request.



Adding a User to a Meeting

Purpose

Once a meeting has been booked, you may wish to invite further users who were not originally invited.

Usage

You can add further users to a meeting in the following way:

- Press the Status button to bring up the Meeting List
- Select the relevant meeting and press the Open button
- Press the **Add...** button. An Add Member dialog box will appear. Select the user that you wish to add from the Member pull-down list and press OK on the dialog box.

OfficeTalk will add the user to the meeting and mail an invitation to the user in the normal way.



Removing a User From a Meeting

Purpose

If a user has declined a meeting request, yet the meeting must still go ahead, then the user should be removed from the meeting.

Usage

You can remove a user from a meeting in the following way:

- Press the Status button to bring up the Meeting List
- Select the relevant meeting and press the Open button
- Select the user that you wish to remove
- Press the Delete button

OfficeTalk will confirm that you wish to remove the user. If you reply Yes, then OfficeTalk will remove the user from the meeting.

If a user has accepted the meeting invitation, you may still remove the user from the meeting to indicate that he/she is no longer required at the meeting. In this case, OfficeTalk will inform the user, via OfficeTalk Mail, that he/she is no longer required at the meeting.



Rescheduling a Meeting

Purpose

If certain key people decline your meeting invitation, you may choose to reschedule the meeting so that they can attend. OfficeTalk lets you reschedule a meeting so that all you need do is choose another time and place for the meeting. OfficeTalk will then mail all invited users, informing them that the meeting has been rescheduled and will ask them to confirm that they can attend.

Usage

You can reschedule a meeting in the following way:

- Press the Status button to bring up the Meeting List
- Select the relevant meeting and press the Reschedule button
- Choose the time and place of the meeting as usual
- Press Book to book the meeting or Cancel Reschedule to cancel

OfficeTalk will effectively cancel the old meeting and all the associated tentative bookings and will re-book the meeting at the new time and place. It will also reset the status of all invited users.



Welcoming a User to a Meeting

Purpose

Normally, when you invite a user to a meeting, the user must reply that he can attend before the meeting goes ahead. However, it is possible to invite certain users as welcome to attend. This means that those users will receive an invitation saying that they are *welcome* to attend the meeting, but if they decline the invitation then the meeting will still go ahead as planned.

Usage

You can invite a user as welcome to attend by keeping the CTRL key pressed when selecting the user from the list. The user's availability will be displayed in a hatched colour instead of a solid colour and the user's name will be highlighted in green rather than blue to distinguish it from availability of users who must attend the meeting.



Linking a Meeting

Purpose

You can link a meeting to any other OfficeTalk data item, making it easy to quickly move between certain linked items.

Usage

You can link a meeting to an item by selecting the meeting that you want to link, selecting *Start Link* from

the *Links* menu, selecting the other OfficeTalk data item and pressing the  button above that data items window. The meeting will now be linked to that data item. A

 symbol will appear next to the meeting in the Status pop up Window.

See Also

[Linking](#)



Contact Mode

The Contact Mode allows you to store your personal and Workgroup-wide contacts and record conversations and follow-up tasks. There are several sub-views within Contact Mode. Press one of the buttons below for more information on the different areas.

The Contact Buttons





Company View

The Company View lets you view information about an external Company or organisation, for example, the Company's address, phone number and notes about the company. It consists of two windows; a Company Window and a Contact Window. You can view the companies from this mode using the **Next** and **Prev** buttons or using the cursor keys on the keyboard. Select one of the topics below for more information:

[Quick Access To Company Records](#)

[Adding New Company Records](#)

[Making a Company Record Personal](#)

[Adding Duplicate Company Records](#)

[Editing Company Records](#)

[Multiple Site Companies](#)

[Adding New Contacts from within Company View](#)

[Adding Notes to a Company](#)

[Editing Contacts from within Company View](#)

[Searching for Companies](#)

[Contact Groups](#)

[Adding Companies to Groups](#)

[Finding Which Groups a Company Belongs To](#)

[Auto-dialing Companies](#)

[Importing Companies from a CSV file](#)

[Linking to Companies](#)

[Printing Companies](#)

[Document Templates](#)

[Writing Documents to Contacts and Companies](#)

[Performing Mail Merges on Contact Groups](#)



Searching for Company Records



You can search for Companies from within Company View by pressing the  button. This will bring up the Find External Company dialog box. For more information on searching for Companies, see the [Find External Company dialog box](#).

See Also

[Searching For Contacts](#)



Quick Access to Company Records



You can look at consecutive Company records by pressing the **Previous** and **Next** buttons. Pressing one of the letters at the top of the Company window will take you to the first Company record beginning with that letter. If no records exist which begin with the letter that you pressed then OfficeTalk will find the first record that exists after the letter that you pressed.



Pressing an alphabetical letter on the keyboard will also take you to the first record beginning with that letter, if one exists.



Adding New Company Records



You can add a new Company record by pressing the  button above the Company Window. Alternatively, you may press the **New Company** button in the sub toolbar. A Company Dialog box will appear where you can specify the required details of the Company. OfficeTalk requires that you specify at least the Company Name. All other fields are optional.

Additional Addresses

A Company may have more than one address. You may add another address by pressing the **Other Addresses...** button. Pressing this will bring up an Addresses dialog box. Press the **New** button on the Addresses dialog box. This will pop up an Address dialog box. You must fill out the first address field. All other fields are optional. When you press OK on the Address dialog box, the Addresses dialog box and the Company dialog box, the word **more...** will appear in the bottom right corner of the Company Record. Repeatedly pressing this word will cycle round all addresses of the displayed Company.



Deleting a Company Record

To delete a Company Record, ensure that the record that you wish to delete is in view. Select Delete Company from the Edit/Company menu. OfficeTalk will ask you to confirm that you wish to delete the Company. Press YES.



Making a Company Record Personal

Sometimes you will want to mark certain Company records as personal to you so that only you can see the record. You can do this in the following way:

1. Select the Company that you wish to make personal to yourself
2. Press the  button. The Company dialog box will appear.
3. Select the **Personal Record** radio button and press OK.

Company records which are personal to yourself may only be seen by you and will only be found in any searches performed by you.



Adding Duplicate Company Records

If you add a Company record whose name already exists, OfficeTalk detects this and pops up a Company Exists dialog box.

The dialog box contains three buttons: **Add Separate**, **Make Other Address** and **Cancel**.

OfficeTalk gives you three choices of what to do:

1. If you wish to add the record as a separate record, keeping the same company name but in no way related to the record already existing with that name then press the **Add Separate** button.
2. If you wish to add the record, making it another address of the record already existing with that name then press the **Make Other Address...** button. The record will be added and the text **more...** will be shown at the bottom right of the Company window when this record is displayed. Pressing the left mouse button while the cursor is over the text will cause OfficeTalk to display the next record in that group of sites.
3. If you wish to cancel the operation such that the record is not added at all, then press the **Cancel** button.



Multiple Site Companies

If you wish to make an existing Company record another *site* of another existing company record then OfficeTalk lets you do this using the **Make Chain** command.

Select into view one of the companies that you wish to join together as a multiple site company. Select the Edit/Company/Make Chain from the menu. A Make Chain With... dialog box will appear. Use the dialog box to search for the other company that you wish to join to and then select it from the Results window and press the **Select** button. OfficeTalk will confirm that you wish to join the two companies together to signify that they are different sites of the same company. When you press YES, OfficeTalk will display the text "**more...**" in the bottom right corner of the Company window. Clicking on this text using the left mouse button will display the other company or companies to which it is linked.



Editing Company Records

You can edit an existing Company record by double clicking the Left mouse button in the Company



Window or pressing the button above the Company Window with the appropriate record in view. A Company dialog box will appear with the current Company details filled in. Edit the relevant fields and then press the OK button.



Adding New Contacts from within Company View

The Contact Window contains all the contacts who work for or are associated with the company displayed in the Company Window. You can add a new contact to the company by double clicking the Left mouse button in the Contact window under the last contact record or by selecting **New Contact** from the **Edit/Contact** menu. A Contact dialog box will appear allowing you to fill in the title, first and last names, position, extension and notes.

Title	First Names	Last Name	Position
Mr	Simon	Bates	



Editing Contacts from within Company View

You may edit an existing Contact record by double clicking the Left mouse button on the relevant Contact in the Contact Window or by selecting the relevant Contact and choosing Edit Contact... from the Edit/Contact menu. When you do either of these, the Contact dialog box will appear. Modify the fields as required and then press OK to confirm your changes.

Title	First Names	Last Name	Position
Mr	Simon	Bates	



Adding Notes to a Company

OfficeTalk lets you keep notes about any company. You can do this in the following way:

1. Select into view the Company that you wish to keep notes for.



2. Press the  button. The Company Notes dialog box will appear.

3. Enter any free format text and press OK.

Another way to add notes to a Company is by pressing the **Notes** button in the Company dialog box. When you add notes to a Company, a Notes marker will appear next to the Comment field to indicate that this company has some notes attached. You can quickly pop up the Company Notes dialog box by double clicking on the notes marker, using the left mouse button.

You can delete the notes for a company by selecting **Delete Notes** from the Edit/Company menu. The Notes marker will then disappear.



Linking a Company

Purpose

You can link a company to any other OfficeTalk data item, making it easy to quickly move between certain linked items.

Usage

You can link a company to an item by displaying the company that you want to link, and pressing the



button above the Company Window, selecting the other OfficeTalk data item and pressing the



button above that data items window. The company will now be linked to that data item. A  symbol will appear next to the Company.

See Also

[Linking](#)



Contact View

The Contact View lets you view your Contact Database by People rather than by Companies. This view allows you to view not only the Work address of each contact but a Home Address too, if one exists. From this View you may also add new contacts, edit and delete existing contacts as well as performing powerful search operations. You can view the contacts from this mode using the **Next** and **Prev** buttons or using the cursor keys on the keyboard. If you select a contact that belongs to a Company then that company will be selected when you next enter Company View.

Select one of the topics below for more information:

[Adding New Contact Records](#)

[Deleting a Contact Record](#)

[Making a Contact Record Personal](#)

[Joining a Contact to a Company](#)

[Adding a Home Address](#)

[Searching for Contact Records](#)

[Adding Notes to a Contact](#)

[Adding Contacts to Groups](#)

[Adding Contacts to Groups](#)

[Finding Which Groups a Contact Belongs To](#)

[Auto-dialing Contacts](#)

[Importing Contacts from a CSV file](#)

[Printing Contacts](#)



Joining a Contact to a Company

If you define a Contact as part of a Company from Company View, then the Contact Person is *associated with* that company when viewed from Contact View. The Contact's work address is set to the address of the Company he or she is *associated with*. If you add a new Contact from Contact View, the Contact is not *associated with* any Company. If you wish to associate the Contact to a Company then select the



appropriate contact record and either press the  button above the Contact Window or double click the Left mouse button in the Contact Window. The Contact dialog box will appear. Press the



 button next to the **Employee Of** field. A Search Companies dialog box will appear. Specify the first few letters of the Company you wish to associate the contact with and press the **Search** button. The company should appear in the **Results** window below. Select the company and press the **Select** button. Then press OK. The Contact is now associated with the Company.



Adding a Home Address



To add a Home Address, press the  button above the Contact Window or double click the Left mouse button in the Contact Window. The Contact dialog box will appear. Press the **Home Address...** button. An Address dialog box will appear. Enter the Contact's Home Address and then press OK. The Home Address should appear to the right hand side of the Contact Window.



Deleting a Contact Record

To delete a Contact Record, ensure that the record that you wish to delete is in view. Select Delete Contact from the Edit/Contact menu. OfficeTalk will ask you to confirm that you wish to delete the Contact. Press YES.



Making a Contact Record Personal

Sometimes you will want to mark certain Contact records as personal to you so that only you can see the record. You can do this in the following way:

1. Select the Contact that you wish to make personal to yourself
2. Press the  button. The Contact dialog box will appear.
3. Select the **Personal Record** radio button and press OK.

Contact records which are personal to yourself may only be seen by you and will only be found in any searches performed by you. You may not make a personal Contact if he/she belongs to a Company which is public.



Adding New Contact Records



You can add a new Contact record by pressing the  button above the Contact Window. A Contact dialog box will appear letting you specify the required details of the contact. OfficeTalk requires that you specify at least the Contact's Last Name. All other fields are optional.



Finding Contact Records

You can search for Contacts from within Contact View by pressing the  button. This will bring up the Search Contact dialog box. For more information on searching for Contacts, see the [Search Contacts dialog box](#) section.



Adding Notes to a Contact

OfficeTalk lets you keep notes about any contact. You can do this in the following way:

1. Select into view the Contact that you wish to keep notes for.



2. Press the  button. The Contact Notes dialog box will appear.
3. Enter any free format text and press OK.

Another way to add notes to a Contact is by pressing the **Notes** button in the Contact dialog box. When you add notes to a Contact, a Notes marker will appear next to the Comment field to indicate that this contact has some notes attached. You can quickly pop up the Contact Notes dialog box by double clicking on the notes marker, using the left mouse button.

You can delete the notes for a contact by selecting **Delete Notes** from the Edit/Contact menu. The Notes marker will then disappear.



Linking a Contact

Purpose

You can link a Contact to any other OfficeTalk data item, making it easy to quickly move between certain linked items.

Usage

You can link a Contact to an item by displaying the Contact that you want to link, and pressing the  button above the Contact Window, selecting the other OfficeTalk data item and pressing the



 button above that data items window. The Contact will now be linked to that data item. A  symbol will appear next to the Contact.

See Also

[Linking](#)



Company/Contact Groups

Purpose

OfficeTalk lets you group together Companies and Contacts. You might want to group together your Companies and Contacts for several reasons. For example, if you wanted to create a mail merge file, or if you wanted to keep a list of prospects for a particular product. Once you have created a Company/Contact group, you can *select* the group. This will cause the Contact Mode to display only those Companies or Contacts in the group.

Usage

You can select a Contact group by bringing up the Select Contact Group dialog box. Do this by pressing



the button above the Company or Contact Window. Select the group from the **Contact Group** pull-down selection list.

To add, edit or delete Company/Contact Groups, press the **Edit Groups** button. This will pop up a Contact Groups dialog box. To add a new group, Press the **New** button. This will pop a Contact Group dialog box from which you can define the new group.

Once you have created a group, you may wish to make it the *default* group. This means that when you start up OfficeTalk and go into Contact mode, this default group will automatically be selected. You can do



this in the following way: Press the button. The Select Contact Group dialog box will appear. Choose the relevant group from the Contact Group pull down list and press the Use As Default button. Then press OK. You can instruct OfficeTalk to have no default group by selecting **--No Group--** from the Contact Group pull down list and pressing the Use As Default button.



Adding Companies to a Contact Group

Purpose

OfficeTalk lets you quickly add a Company to a Contact Group.

Usage



You can do this using the  window button. When you press this button an Add Company To Group dialog box will appear. From the Contact Group pull down list, select which group you wish to add the Company to. If the Company has any employees (contacts) associated with it then these will appear in the **Contacts to Add** window. Select one or more contacts from this window and press the OK button. OfficeTalk will confirm that you wish to add the Company and associated Contacts to the group before adding them.



Adding Contacts to a Contact Group

Purpose

OfficeTalk lets you quickly add a Contact to a Contact Group.

Usage



You can do this using the  window button. When you press this button an Add Contact To Group dialog box will appear. From the Contact Group pull down list, select which group you wish to add the Contact to and press the OK button. OfficeTalk will confirm that you wish to add the Contact to the group before adding it.



Finding Which Group(s) a Company/Contact Belongs To

Purpose

OfficeTalk lets you find out which groups a particular Company or Contact belongs to.

Usage

You can do this using the  window button. Select the Company or Contact of interest and press the  button. If the Company or Contact does not belong to any groups, OfficeTalk will display a message informing you of this. If the Company or Contact does belong to one or more Contact Groups, OfficeTalk will display a list of the groups.



Directory View

The directory view lets you view Company records and Contact records in the style of a telephone directory. There are 2 different views in Directory View:



(i) Companies only



(ii) Contacts only

Press the relevant button for your preferred view.

Goto Record

From the Directory View, you can display the full details of either a Company or a Contact by double clicking on the relevant Company or Contact text line. OfficeTalk will switch to either Company View or Contact View as appropriate and will display the relevant Company or Contact.



Auto-dialling Companies/Contacts

If you have a modem connected to your computer, OfficeTalk will let you automatically dial the company

or contact that you are currently viewing. You can do this by pressing the  window button above the Company or Contact window. A Dial Company or Dial Contact dialog box will appear. The dialog box will contain a radio button for every phone number that is available for that particular company or contact. Select the phone number that you wish to dial and press OK. OfficeTalk will try to initialise your modem. If the modem cannot be found then OfficeTalk will warn you. If a modem is present and is set up correctly, the number will be dialled. Pick up the phone after the modem has dialled the number. The modem will hang up after 20 seconds or when you press the



window button, whichever is sooner.

See Also

[Setting up a modem for autodialling](#)



Setting up a Modem for Auto-dialling

You can set up your modem to communicate with OfficeTalk by selecting the *Modem Settings* menu from the *Options* menu. The Modem Settings dialog box will appear. Select the *Baud Rate* of modem and choose the *Port* that the modem is connected to.



Conversation View

Conversation View lets you record and view conversations you and other users have with Contacts defined in Contact Mode. Select one of the topics below for more information.

[Recording a Conversation](#)

[Attaching a File to a Conversation](#)

[Adding to a Conversation Thread](#)

[Adding Follow-up Tasks](#)

[Conversation List Fields](#)

[Viewing and Filtering Conversations](#)

[Searching for Conversations](#)

[Linking to Conversations](#)

[Printing Conversations](#)



Recording a Conversation

From Conversation View, Press the Compose button. Select the Contact with whom you had the conversation or meeting from the Contact list at the top of the window. If the Contact belongs to a Company then the relevant Company will be automatically selected from the Company List. Fill out the Subject field and then document the conversation or meeting in the large Conversation Window. An Attach Window at the bottom of the screen lets you attach any file that you wish to associate with this conversation. When you have documented the conversation, press the Save Conversation button at the bottom of the screen.



Attaching a File to a Conversation

To attach a file to a recorded Conversation select Attach Document... from the Edit/Conversation menu. A File dialog box will appear. Select the file that you wish to attach from the File dialog box and press OK. An icon will appear in the Attach Window to represent the attached document.



Adding to a Conversation Thread

If you wish to create a conversation which follows on from an existing conversation then OfficeTalk lets you join the conversations into a conversation thread. You can do this in the following way:

1. Select the conversation that you wish to join onto. Note that the conversation that you select must be either a non-threaded conversation (the title will read (1 of 1)) or it must be the last conversation in the thread (the title will read (3 of 3), for example). You cannot join onto a conversation which is not the end of a thread (for example if the title read (1 of 3)).
2. Press the **Continue Thread** button. OfficeTalk will place you in Compose View. The subject, contact and company fields will already be filled out, however you may change any of them except the subject field.
3. Fill out the body of the conversation and press the **Save Conversation** button. The new conversation will be added to the end of the selected conversation.
4. If you do change the subject of the conversation then OfficeTalk assumes that you do not wish to add the conversation to the thread after all. However OfficeTalk does warn you if you do so by popping up a Changed Subject dialog box. You are asked if you wish to create a new subject or associate with the old one.

If you press the **New Subject** button, OfficeTalk will not join the conversation to the thread, but will instead create a separate conversation with the new subject name. If you press the **Associate with Old** button, OfficeTalk will attach the conversation to the end of the thread but will change the subject back to the same subject description used throughout the conversation thread.



Adding Follow-up Tasks

You can attach Follow-up Tasks to conversations using the Follow-Up button. Select the Conversation to which you want to attach the follow-up. Press the Follow-up button. A Follow-Up Dialog Box will appear allowing you to specify a description of the task to be done and a recipient of the task (defaults to you). When you add the Follow-Up task, the task will appear in the recipients task list with a [link](#) connecting the task and conversation to each other.



Conversation List Fields

You can modify the width of each field in the Conversation list by placing the mouse over the vertical separator line between each field heading and then pressing the Left mouse button and dragging the field to be wider or thinner as appropriate. OfficeTalk will remember this setting for the duration of your login session.

Conversations					
Date	Time	User	Contact	Company	Subject



Viewing and Filtering Conversations

To View Conversations that have been previously recorded, press the Read button on the main toolbar. When you first enter this view, OfficeTalk will display all conversations available to you. You may filter



out Conversations that you are not interested in by selecting a *filter*, using the button. When you press this button, a Select Filter dialog box will appear. To view all users conversations, select --No Filter-- from the pull down list of filters.

Creating a New Filter

Alternatively you may wish to look at all conversations made by a specific user. To do this you must create a new filter, if a similar one does not already exist. Firstly press the **Edit Filters...** button on the Filters dialog box. A Filters dialog box will appear showing a list of previously defined filters. Press the **New** button. A Conversation Filter dialog box will appear. From this dialog box you may now construct your filter. You can select the user whose conversations you wish to view. This may be yourself or it may be any other user or even all users. Next, select the contact whose conversations you are interested in. If you select --Current Contact-- then OfficeTalk will filter on conversations made by the contact currently selected in the Contact view. If you are more interested in conversations made with a company rather than a particular individual then select the relevant company into the Company field. If you select --Current Company-- then OfficeTalk will filter on conversations with the company currently selected in the Company view.

You may filter on a date range by checking the **Date Range** check box. A Start Date and End Date field will appear letting you specify the required date range. If you leave the End Date field blank then this signifies the current date. It is therefore possible to specify a filter, filtering on conversations between a specified date and the current date.

Specifying a Default Filter

Once you have created your filter you can instruct OfficeTalk to use this as the default filter. When OfficeTalk starts up, it will always filter using the default filter until another filter is selected.



Searching for Conversations



You can search for conversations by pressing the  button. This will bring up a Conversation Search dialog box. Firstly, select whether you wish to search the subject text of each Conversation or the entire text of each conversation.

Next, select where you wish to search. You may either search the Conversation database (the default) or you may search through conversations which pass the currently selected filter or, alternatively, you may search the results of a previous search. Next choose which users conversations you wish to search. You can perform the search based on a date range. To do this, select the Date Range check box. A From field and a To field will appear. Enter the required date range into these fields.

Finally enter the text that you wish to search for. You can search for conversations *beginning with* or *containing* the search text. To perform the search press the **Search** button. If any conversations are found as a result of the search then they will appear in the Results window. You can **Goto** a conversation listed in the Results window by selecting the relevant conversation and pressing the Goto button. OfficeTalk will show the selected conversation in the Conversation Window.



Linking a Conversation

Purpose

You can link a Conversation to any other OfficeTalk data item, making it easy to quickly move between certain linked items.

Usage

You can link a Conversation to an item by displaying the Conversation that you want to link, and pressing



the button above the Conversation Window, selecting the other OfficeTalk data item and pressing the



button above that data items window. The Conversation will now be linked to that data item. A



symbol will appear next to the Conversation.

See Also

[Linking](#)

Document Templates

Creating Document Templates

OfficeTalk lets you create a template for a Document which may then be sent to any contact or company held within the OfficeTalk database. Certain fields may be specified in the template which will be replaced by information relating to the contact or company selected.

OfficeTalk lets you design Document templates either as pure text files (with .TXT extensions) or as RTF files (with .RTF extensions). The final size of the template file must not exceed 64k.

To create a Document template, use any word processor which supports either RTF format (for example Microsoft Word) or Text format (any word processor, including Notepad). Design the template ([See Designing Document Templates](#) for more information) and save the file into the **_tmpltes** sub directory of the OfficeTalk directory. It is important that you save the file into the **_tmpltes** directory so that other users may use your template. The filename of the saved template may be any filename which has a .TXT or .RTF extension. You will only be able to use the RTF format if you have a word processor which supports this format. The .TXT and .RTF extensions must both be associated with the relevant word processor executable.

Next, select Document Templates from the Edit menu in Contact mode. The Document Templates dialog box will appear. This dialog box shows a list of existing Document templates with buttons to create, edit and delete templates. Press New to bring up the Document Template dialog box. Give the new template a name and then, use the Browse button to search for the RTF template file that you created. By default, the template will be personal to you and only you will be able to see the template. You may make the template visible to all users by selecting the public radio button. Press OK to save the template.

Designing Document Templates

Designing Document Templates

When creating Documents and mail merges, OfficeTalk takes a copy of the Document template and replaces one or more fields with information relating to you, the selected company and the selected contact

The following is a list of fields that OfficeTalk recognises. Note that case is important.

<@Company> blanked otherwise and the selected contact.	The selected company name. Valid only if a contact is not selected, blanked otherwise and the selected contact.
<@Contact>	The selected contact last name. Blanked if no contact selected.
<@User>	Your last name.
<@CompanyName> blanked otherwise	The selected company name. Valid only if a contact is not selected, blanked otherwise
<@CompanyDescription> selected, blanked otherwise	The selected company name and address1. Valid only if a contact is not selected, blanked otherwise
<@ContactName>	The selected contact name including title. Blanked if no contact selected.
<@ContactDescription> no contact selected.	The selected contact name based on the current name style. Blanked if no contact selected.
<@UserName>	Your last name.
<@UserDescription>	Your name based on the current name style.
<@UserLastName>	Your surname
<@UserFirstName>	Your first name
<@CompanyCreationDate>	The date when the company record was created
<@CompanyCreationTime>	The time when the company record was created.
<@ContactCreationDate>	The date when the contact record was created
<@ContactCreationTime>	The time when the contact record was created
<@UserCreationDate>	The date when your user record was created
<@UserCreationTime>	The time when your user record was created
<@CompanyAddress> otherwise.	The company full address. Valid only if a contact is not selected. Blanked otherwise.
<@CompanyAddress1> selected. Blanked otherwise.	The company address1 field. Valid only if a contact is not selected. Blanked otherwise.
<@CompanyAddress2> selected. Blanked otherwise.	The company address2 field. Valid only if a contact is not selected. Blanked otherwise.
<@CompanyAddress3> selected. Blanked otherwise.	The company address3 field. Valid only if a contact is not selected. Blanked otherwise.
<@CompanyTown> Blanked otherwise.	The company town/city field. Valid only if a contact is not selected. Blanked otherwise.
<@CompanyCity> Blanked otherwise.	The company town/city field. Valid only if a contact is not selected. Blanked otherwise.
<@CompanyPostcode> Blanked otherwise.	The company postcode. Valid only if a contact is not selected. Blanked otherwise.
<@CompanyPhone1> Blanked otherwise.	The company phone1 field. Valid only if a contact is not selected. Blanked otherwise.
<@CompanyPhone2> Blanked otherwise.	The company phone2 field. Valid only if a contact is not selected. Blanked otherwise.
<@CompanyFax> otherwise.	The company fax field. Valid only if a contact is not selected. Blanked otherwise.
<@ContactAddress>	The contact full address field. This is the company address, if the contact belongs to a company.

selected. Blanked otherwise. <@ContactAddress1> belongs to a company.	Otherwise it is the contact's home address. Valid only if a contact is selected. The contact address1 field. This is the company address1, if the contact belongs to a company.
selected. Blanked otherwise. <@ContactAddress2> belongs to a company.	Otherwise it is the contact's home address 1. Valid only if a contact is selected. The contact address 2 field. This is the company address 2, if the contact belongs to a company.
selected. Blanked otherwise. <@ContactAddress3> belongs to a company.	Otherwise it is the contact's home address 2. Valid only if a contact is selected. The contact address 3 field. This is the company address 3, if the contact belongs to a company.
selected. Blanked otherwise. <@ContactTown> belongs to a company.	Otherwise it is the contact's home address 3. Valid only if a contact is selected. The contact town/city field. This is the company town/city, if the contact belongs to a company.
selected. Blanked otherwise. <@ContactCity> belongs to a company.	Otherwise it is the contact's home town/city. Valid only if a contact is selected. The contact town/city field. This is the company town/city, if the contact belongs to a company.
selected. Blanked otherwise. <@ContactPostcode> belongs to a company.	Otherwise it is the contact's home town/city. Valid only if a contact is selected. The contact postcode field. This is the company postcode, if the contact belongs to a company.
selected. Blanked otherwise. <@ContactPhone1> belongs to a company.	Otherwise it is the contact's home postcode. Valid only if a contact is selected. The contact phone1 field. This is the company phone1, if the contact belongs to a company.
selected. Blanked otherwise. <@ContactPhone2> belongs to a company.	Otherwise it is the contact's home phone1. Valid only if a contact is selected. The contact phone2 field. This is the company phone2, if the contact belongs to a company.
selected. Blanked otherwise. <@ContactFax> company.	Otherwise it is the contact's home phone2. Valid only if a contact is selected. The contact fax field. This is the company fax, if the contact belongs to a company.
Blanked otherwise. <@ContactTitle> otherwise.	Otherwise it is the contact's home fax. Valid only if a contact is selected. The contact title field. Valid only if a contact is selected. Blanked otherwise.
<@ContactHomeAddress> Blanked otherwise.	The contact full home address. Valid only if a contact is selected.
<@ContactHomeAddress1> Blanked otherwise.	The contact home address1 field. Valid only if a contact is selected.
<@ContactHomeAddress2> Blanked otherwise.	The contact home address2 field. Valid only if a contact is selected.
<@ContactHomeAddress3> Blanked otherwise.	The contact home address3 field. Valid only if a contact is selected.
<@ContactHomeTown> selected. Blanked otherwise.	The contact home town/city field. Valid only if a contact is selected.
<@ContactHomeCity> Blanked otherwise.	The contact home town/city field. Valid only if a contact is selected.
<@ContactHomePostcode> Blanked otherwise.	The contact home postcode field. Valid only if a contact is selected.
<@ContactHomePhone1> Blanked otherwise.	The contact home phone1 field. Valid only if a contact is selected.

<@ContactHomePhone2> Blanked otherwise.	The contact home phone2 field. Valid only if a contact is selected.
<@ContactHomeFax> otherwise.	The contact home fax field. Valid only if a contact is selected. Blanked otherwise.
<@ContactFirstName> otherwise.	The contact's first name. Valid only if a contact is selected. Blanked otherwise.
<@ContactLastName> otherwise.	The contact's last name. Valid only if a contact is selected. Blanked otherwise.
<@ContactPosition> otherwise.	The contact's position. Valid only if a contact is selected. Blanked otherwise.
<@ContactDepartment> otherwise.	The contact's department. Valid only if a contact is selected. Blanked otherwise.
<@ContactCompany> selected.	The company to which the contact belongs. Valid only if a contact is selected.
<@Date>	The current date.
<@Time>	The current time.

Certain fields are blanked if either a contact is not selected (in the case of some contact fields) and if a contact is selected (in the case of some company fields). In these cases, it is possible to supply defaults for the fields. For example, you might be mailing a set of companies, some of whom have contacts that may be addressed as Dear <@ContactFirstName> and others which do not have contacts that should be addressed Dear Sir/Madam. It is possible to provide this default by appending a colon directly after the field name, just prior to the closing field delimiter '>'. For example, to achieve the stated result, the greeting in the Document template would be as follows:

Dear <@ContactFirstName: Sir/Madam>

Documents

Creating Documents to Contacts and Companies

Once you have created a Document Template (see [Document Templates](#) and [Designing Document Templates](#)), the procedure for creating a Document to a contact or company is as follows:

1. Within the Company or Contact view, select the company and/or contact to whom you wish to write the Document.
2. Select New Document from the Edit menu in Contact mode (alternatively press CTRL + W from within Contact mode). A New Document dialog box will appear showing who the Document is to.
3. Select the Document template required, enter a subject (or leave blank to get the Document template name as the default subject) and choose whether or not to add the Document as a conversation. Also choose whether or not to attach the letter as an attachment to the conversation. If it is not added as a conversation, OfficeTalk will not record the Document anywhere else.
4. Press Edit Document. This will generate the Document and will load it into the relevant word processor. If you do not select **Add as a Conversation** OfficeTalk will ask you if you wish to save the file or discard it, after it has been loaded into the word processor. Note that you will not be able to discard the file while it is being edited in the word processor.
5. Make any necessary changes to the Document and print/save as required.

Creating Mail Merges with Contact Groups

Creating Mail Merges with Contact Groups

Once you have created a Document Template, the procedure for creating a mail merge is as follows:

1. Select Mail Merge from the Edit menu in Contact mode.
2. Select a Contact Group that you want to mail.
3. Select the Document template required, enter a subject (or leave blank to get the Document template name as the default subject) and choose whether or not to add the Document as a conversation. If it is not added as a conversation, OfficeTalk will not record the Document anywhere else.
4. Press OK. This will generate the mail merge as a single document and will load it into the relevant word processor. OfficeTalk lets you create a single conversation to represent the entire mail merge, letting you attach either or both the Document template and the generated document itself. If you do not attach the generated document, OfficeTalk will ask you if you wish to save the generated document file or discard it, after it has been loaded into the word processor. Note that you will not be able to discard the file while it is being edited in the word processor.

OfficeTalk also lets you record a conversation for each recipient of the mail merge. To each of these conversations may be attached either the original document template, or the generated document.



Mail Mode

Purpose

Mail Mode allows you to electronically send and receive messages to and from other users.

Usage

OfficeTalk Mail provides the following capability:

Composing Simple Messages

Advanced Addressing

Reading Messages sent to you

Attaching files to a mail message

Replying to received messages

Circulating Documents

Keeping track of mail sent by you

Assigning tasks with messages

Saving messages to disk

Sending delayed messages

Informing you when recipients have read their message

Folders

Deleting Mail Messages

Searching for Mail Messages

Prompting Recipients for their Signature

Mailing Contacts

Mailing External Recipients

Linking Mail Messages

Printing Mail

Mail Mode buttons







Reading Messages Sent To You

How To

All new mail arrives in the *Incoming Mail* Folder. When new mail arrives, it appears as a single line of text which indicates the date and time at which the message arrived, the subject of the mail and the user who sent the message to you. New mail will be displayed with a yellow envelope icon to the left of the text, indicating that the mail has not yet been *opened*. To open the message (i.e. to read the contents), single click the left mouse button when the cursor is over the message line that you wish to read. The body of the message will be shown in the Message Window in the bottom half of the screen. The text entry in the Incoming Mail Folder will turn red and the yellow envelope icon will turn white, indicating that the message has been read. All message entries will remain in the Incoming Mail Folder until you bin them or move them to a folder.



Keeping Track of Mail Sent By You

How To

When you send mail to another user, the action is recorded in your Sent Mail Folder. Sent Mail is displayed as a list of messages that you have sent. Each line of text is called a Message Header and details the date and time when you sent the message along with the subject of the message. Each



message line has a sign to the left of the Message Header text, allowing you to expand each Message Header to reveal the recipients of the message and their status with regards to that message. The following status descriptions are provided:

Not Opened Yet

The recipient has not opened the message.

Opened <Date><Time>

The time when the recipient opened the message.

Read <Date><Time>

The time when the recipient pressed the **I Have Read This Message** button. In order for this status description to be recorded, the sender of the message must request that OfficeTalk keep a record of when the recipient opened the message. To do this the sender must select the *Require Read Confirmation* check box in the *Send Mail Options Dialog Box*.

Passed On <Date><Time>

This status description is recorded in the Sent Mail folder provided that the sent mail message is a *routed document*. This description indicates when the recipient pressed the **Pass On** button when (s)he had finished with the document.

Assigned Task Completed

This status description indicates that you assigned a task to the recipient and the task associated with that mail message has been completed by the recipient.

Assigned Task Not Completed

This status description indicates that you assigned a task to the recipient and the task associated with that mail message has not yet been completed by the recipient.

Shredded

This status description indicates that the recipient has binned and then shredded the mail message.



Folders

Purpose

Folders in Mail Mode allow you to store both Recieved Sent Mail.

Usage

A Folder provides a convenient place to move messages to, once they have been read, for either public or private access. Several different types of folders are displayed in the Folder Window in Read Mail View. They are:

- 1 Incoming Mail folder
- 2 Sent Mail folder
- 3 Bin folder
- 4 Bulletin Board folder (public mail folder)
- 5 Personal Mail Folder

New mail is automatically placed in the Incoming Mail folder on arrival. You can view the contents of the Incoming Mail folder by double clicking on the Incoming Mail folder in the Folder Window. Its contents will be displayed in the Mail Window.

Whenever you send a mail message, a sent mail entry will automatically be placed in the Sent Mail folder, unless you send the mail message via the MAPI or VIM messaging systems. You can view the contents of the Sent Mail folder by double clicking on it in the Folder window. For more information on Sent Mail see Keeping Track of Mail Sent By You in this chapter.

Whenever you wish to bin a message or a sent mail item or even a folder, you may drag it over and drop it on the bin folder.

A Bulletin Board is a public folder. Recieved and Sent Mail may be moved into a Bulletin Board and you may also send messages directly to a Bulletin Board. All users have access to bulletin boards. Any message in a bulletin board may be read by any OfficeTalk user. Bulletin boards are useful for publishing public information. Bulletin boards may be hierarchical allowing you to create structure for the public information.

A Personal Mail Folder is a convenient place to which to move messages to that you wish to keep. You may create an unlimited number of Personal Mail Folders and the folders may be hierarchical allowing you to create a structure for your folders.

Creating New Folders



To create a folder, press the  button above the Folder List Window when in Read Mail View. A New Folder dialog box will appear.

Choose what type of folder you wish to add. You may choose between adding a Bulletin Board folder and a Personal Mail folder. Select the appropriate radio button and press OK.

A Personal Mail Folder dialog box or a Bulletin Board dialog box will appear depending on your selection in the New Folder dialog box. The process for adding a new Bulletin Board folder is identical to the process for adding a new Personal Mail folder. The following explanation demonstrates how to add a new Personal Mail folder:

Enter the name of the new folder into the Name field. If this folder is to be a top-level folder then press OK. The new folder will appear in the Folder Window. The red numbers along the right margin of the Folder Window indicate the number of messages stored in each folder.

Creating Sub Folders

If you wish to make the folder a sub-folder of an existing folder then select the parent folder from the list of folders, ensure that the **Make Sub-Folder of** radio button is selected and then press OK. In this case, a



symbol will appear next to the selected parent folder to indicate that it has sub-folders (it may already have other sub-folders in which case it will already have a



symbol next to it). Pressing the



symbol next to the parent folder will show all its sub-folders.

Editing A Folder's Name



You can change the name of a folder by selecting the folder and pressing the button. A Folder dialog box will appear. Modify the folder name by editing the Name field and then press OK.

Moving Mail to a Folder

You can move a message by dragging it from the Incoming Mail folder and dropping it onto a folder of your choice. The folder that you drop it onto may be either a top level (parent) folder or a sub-folder. It may be either a personal mail folder or a bulletin board (public folder). The red message count, next to the folder name, will increase to show the new number of messages stored in that folder.



Assigning Tasks With Messages

Purpose

Occasionally it is useful to send a mail message to another person with a request to perform a task. A manager may use this functionality as a way of delegating tasks to members of his/her team. Team members may use this functionality to remind other members of their team of something that needs doing.

Usage

Construct the mail message as usual (See [Composing Simple Messages](#)). When you press the Send button the Send Mail dialog box will appear. Press the **Options** button on the Send Mail dialog box. The **Send Mail Options** dialog box will appear. Check the *Assign Task with Message* check box. The **Task Details** button will become enabled. Press this button. A Mail Task dialog box will appear. Enter the task description into the *Description* field if this is different from the subject of the mail message. Also enter a deadline for the task. The deadline defaults to tomorrow. Press OK on both the Mail Task dialog and Send Mail Options dialog. Finally, press the **Send** button in the Send Mail dialog box. The receiver of the message will not receive the task until the message has been opened.



Deleting Mail

Purpose

OfficeTalk lets you delete mail messages in any folder. If you delete mail in the **Bin** folder, OfficeTalk shreds the message so that it is deleted completely.

Usage

Drag the mail message that you wish to delete from the Mail Window and drop it on the bin folder. You may un-bin the message at a later time by double clicking on the bin folder and moving the message to a different folder. To delete the contents of the Bin folder, select Empty Bin from the Edit folder.



Circulating Mail

Purpose

Circulating documents which must flow around the recipients in a certain order. An example of a document which needs a certain order is a report about which you want everybody's comments, in turn.

Usage

To circulate a document, ensure that you have defined the recipients of the mail message. Next, press the



button. The Send Mail dialog box will appear. Press the **Options** button to bring up the Send Mail Options dialog box and select *Send as Routed Document* from the dialog Box. This will instruct OfficeTalk to send the mail message around the recipients in an unspecified order. If you wish to specify the order in which the recipients will receive the document then press the **Route Order** button in the same dialog box. A Route Order dialog box will appear which will list the recipients which you have chosen to receive the mail message. By selecting the recipients from the list and using the **To Top**, **To Bottom**, **Raise** and **Lower**, buttons, order the recipients such that the recipient that you wish to receive the message first is at the top of the list. Finally press OK on the Route Order dialog box and the Send Mail Options dialog box and press the **Send** button on the Send Mail dialog box.

When you receive a circulated document it does not get sent on to the next recipient until you have finished with it. You can inform OfficeTalk that you have finished with the document by pressing the **Pass On Document** button. When you press this button, the routed message will travel on to the next recipient in the list. You will keep any attached documents but if you attempt to edit any of them after you have passed on the message, OfficeTalk will warn you that all other recipients will also get these changes.



Clear

Purpose

This button allows you to clear all windows in order to compose a new message.

Usage

Having clicked on the Clear button, the Subject Window, the Body Window and the Attach Window will be cleared.



Read Mail

Purpose

The Read Mail View allows you to view a list of messages sent to you by other users.

Usage



Having clicked on the  button, if there are any messages waiting for you then they will be displayed in the incoming mail window. New messages are prefixed with a  icon. To read the body of the message, click on the text of the subject in the incoming mail window. As soon as you do this, the subject text will turn red, the  icon will turn white to signify that you have read this item of mail and the body of the mail message will appear in the Read/Compose window. You can easily read the next mail message by double clicking in the Read/Compose window. Alternatively you can view previous or next messages using the PREV and NEXT buttons. You must also be in the Read Mail View if you wish to view mail messages stored in folders.



Composing and Sending a Simple Mail Message

Purpose

Use these buttons to compose a mail message and send it to a person or group of people.

Usage

Having clicked on the compose button, two text windows will appear; a Subject window and a Message window. Type the subject of the mail message into the Subject window and then type your message into the window underneath. Next Attach any relevant files, select the user(s) or groups to whom you wish to send the message either by double clicking on their name(s) in the **Send To** list or dragging their name(s)

to the **Send To** list. Finally, either press CTRL+S to send the message quickly or press the  button. If you do the latter, The Send Mail dialog box will appear. Click on the **Send** button in the dialog box to send the message.

See Also

[Circulating Mail](#)

[Advanced Addressing](#)



Next and Previous Message

Purpose

Use these buttons to view subsequent and previous mail messages

Usage

If there is a message after the current message then clicking on NEXT will display it. If there is a previous message then clicking on PREV will display it. Instead of using the NEXT button, you may double click in the Read Window.



Reply

Purpose

Use this button to reply to a received mail message.

Usage

Pressing the Reply Button will allow you to reply to the mail message currently being viewed in the Read Window. When you press the Reply Button, a dialog box will appear giving you the choice of replying to:

- The Sender of the message only
- The Recipients of the message.
- or both.

Make your selection by checking either or both of the **Reply to Sender** and/or the **Reply to Recipients** check boxes. Then press OK. OfficeTalk will display the Compose View and the relevant users will be selected in the **Send To** window. You may add or remove recipients if you wish.

Finally, send the mail message as usual, either by pressing the **Send** button (see [Composing Simple Messages](#)) or by pressing CTRL+S to send the message quickly.



Save a Mail message

Purpose

Use this button to save a received mail message or to save a message that you composed as an ASCII text file.

Usage



When you press the  button, a dialog box will appear for you to choose the directory and filename of the message. Having selected the required path and filename, press OK. Your message will be saved to the filename that you specified.



Sending a Delayed Message

Purpose

Use this feature to send a mail message which will arrive in the recipients Incoming Mail Folder at some specified time in the future. This may be useful if you are away from the office and you wish to send a message such that it arrives while you are away.

Usage

Construct the mail message as usual (See [Composing Simple Messages](#)). Press the Send button to bring up the Send Mail dialog box. Next, press the **Options** button to bring up the Send Mail Options dialog box. Select the **Delayed Send** check box and then specify the date and time at which you wish the message to be sent. Next press OK on the Send Mail Options dialog box. Finally press the **Send** button in the Send Mail dialog box. OfficeTalk will remember the mail message and will send it on the specified date and time.



Informing You When a Mail Message Has Been Read

Purpose

Use this feature to instruct OfficeTalk to provide the recipient with a way of indicating that he/she has read the mail message.

Usage

Construct the mail message as usual (See [Composing Simple Messages](#)). When you press the  button to bring up the Send Mail dialog box, press the **Options** button. A Send Mail Options dialog box will appear. Select the **Require Read Confirmation** check box. OfficeTalk will send an **I Have Read This Message** button, along with the mail message. When the recipient has read the message, he/she may press this button to inform the sender that the message has been read. The sender may find out if recipients of his message have read the message by looking in the [Sent Mail](#) folder.



Prompting Recipients For a Signature

Purpose

When you are circulating a message/document and it is important that you know that a particular mail message has been read by each specific recipient you may prompt the recipient to *sign* to say that he/she has read the message before the message is passed on.

Usage

Construct the mail message as usual (See [Composing Simple Messages](#)). When you press the  button to bring up the Send Mail dialog box, press the **Options** button. A Send Mail Options dialog box will appear.

Follow the instructions for sending a [routed document](#) and then check the **Require Signature** check box. Press OK on the Send Mail Options dialog box and send the message by pressing the **Send** button on the Send Mail dialog box. When the recipient reads the message the **Pass on document** button will appear at the top of the message.



Attach

Purpose

Attach allows you to send any type of binary file along with a text file. It can be used to send any type of file. Provided that the receiver has the appropriate application associated with the attached file, then on receiving the file, the receiver may execute or view it.

Usage

There are two ways of attaching files to your mail message. Firstly from within Compose View it is possible to attach files without using the Attach button. Run up File Manager and size it such that you can see both the file that you wish to attach in the File Manager application and you can also see the Attach Window in Mail Mode. The attach window is the bottom window when in Mail Mode Compose View. Then, drag the relevant file from File Manager into the Attach Window. If the cursor becomes a *No Entry* sign when you are about to drop the file over the Attach Window, then ensure that you are in Write View and not in Read View. The file is now attached to the message that you have written in the Message Window.

An alternative to the above method is to use the Attach button. When you press the Attach button, an Attach dialog box will appear allowing you to locate the file that you wish to send. When you have selected the relevant file, press OK. The file will now be attached.

In both cases, the file will be represented in the Attach Window by the icon of the application with which the file is *associated*.



Searching For Mail Messages

Purpose

This command allows you to search for mail messages which contain a specified series of characters.

Usage

From the *Search* menu, select the *Search Mail* sub menu, or press the  button above the Incoming Mail window. This will pop up a Search Mail dialog box.



Advanced Addressing

Purpose

OfficeTalk allows you to address To (TO), Carbon Copy (CC) and Blind Carbon Copy (BCC) recipients. When you Carbon Copy a recipient, all other recipients can see that this person has been *copied*, however if you Blind Carbon Copy a recipient, only you and that recipient will know.

Usage

All the recipients that you can address appear in the **Send To** window. Select the recipients that you wish to send *to*. You can do this by double clicking on each recipient in turn while keeping the CTRL key pressed down. Next, press the **To** button. Then select the people that you wish to *carbon copy* and press the **CC** button and finally select the people you wish to *blind carbon copy* and press the **BCC** button.



Mailing Contacts

How To

You may wish to mail Contacts as well as OfficeTalk users. You can do this using the MAPI messaging system in the following way:

- Select the Contact into view from within Contact Mode.
- Select MAPI or VIM from the pull down list of messaging mediums.
- Enter the Contact's mail address in the EMail field.
- Check the **Turn on MAPI Support** or **Turn on VIM Support** from the External Mail dialog.
- Ensure that your MAPI and/or VIM login name and password is setup in the External Mail dialog box (Select External Mail from the Options menu).
 - Log out of OfficeTalk and log back in again.

See Also

Using OfficeTalk with other EMail systems



Using OfficeTalk with other EMail systems

OfficeTalk lets you EMail recipients using either OfficeTalk, MAPI (Messaging Application Program Interface) or VIM (Vendor Independent Messaging) messaging systems. This means that OfficeTalk can communicate with Microsoft Mail, Lotus cc:Mail and any other mail system that also supports either VIM or MAPI.

The External Mail command in the Mail mode menu pops up an External Mail Information dialog box which lets you specify the user's MAPI and VIM login names and passwords. Enter the correct information and ensure that either (or both) the **Turn on MAPI Support** and/or **Turn on VIM support** check boxes are checked. Provided that these check boxes are checked, the next time you log in to OfficeTalk, you will also be logged into the MAPI and/or VIM mail systems. OfficeTalk will then be able to send and receive messages to and from non-OfficeTalk users who have other mail systems.

When you mail a message to another OfficeTalk user, OfficeTalk automatically knows the internal mail address of that user. OfficeTalk has two ways of knowing the mail addresses of non-OfficeTalk users.

1. By using the external messaging system address book
2. By keeping the mail address for a specific non-OfficeTalk user along with the Contact information for that person.

Using a Messaging System Address Book

If you have enabled MAPI or VIM support, OfficeTalk will add a MAPI and/or VIM address book in the **Send To** window in Write Mail View. This address book appears as a single entry in the **Send To** window. You may open the VIM address book entry, by double clicking on the address book in the Send To list.

The name of the address book will be either *MAPI Address Book* or *VIM Address Book*. The names of the address books may not be changed.

To mail a user held in a VIM address book, open the address book, select the relevant VIM sub-address book (the default is Directory). Next, select the appropriate recipient(s) and press the To, CC or BCC button. The recipient(s) will appear in the Recipient Window in the VIM Address Book dialog box. Close the address book. OfficeTalk will insert the recipients into the Recipients window. The message may now be sent in the normal way.

To mail a user held in a MAPI address, double click on the MAPI address book entry. A Microsoft Address book dialog box will appear.

Select the required recipients in the Directory Window and then press either the **To->** button or the **CC->** depending on whether you wish to address the recipient as To: or CC:, respectively. Next press OK. OfficeTalk will insert the chosen recipients into the Recipients window. The message may now be sent in the normal way.

Using a Contact Mail Address

If you do not wish to use the external messaging system address book, OfficeTalk lets you mail non-OfficeTalk users as if they were contacts. The way OfficeTalk implements this is by letting you specify a

Mail address in a Contact record. For more information on how to do this, see [Mailing Contacts](#).

Once you have set up the EMail address of one or more contacts, a Contacts Address Book entry will be displayed in the **Send To** window in the Write Mail View. You may expand this entry to show a list of all the contacts in OfficeTalk which have been given an Email address.

If you do not specify an EMail address in the Contact dialog box but do specify a messaging system then the contact will still appear in the Advanced Addressing dialog box. However, when you send a message to the contact, since there is no EMail Address, OfficeTalk will try to match the name of the contact with an address entry in the specified messaging systems's address book. Note that the name of the contact must be the same as the name specified in the relevant messaging system address book.

To address a contact as a recipient of a mail message, expand the Contact Address book entry by



clicking on the  marker. The list of addressable contacts will be displayed underneath the Contact Address Book entry. Select the contact and press the To, CC or BCC button. The contact will appear in the Recipient Window below. Alternatively, you may double click on the contact in the **Send To** list. This will have the same effect as selecting the contact and pressing the To button. The message may now be sent in the normal way.

Receiving Mail Messages from other Mail Systems

Provided that you are logged into MAPI and/or VIM messaging systems, OfficeTalk will be able to receive messages sent to your MAPI and/or VIM address. The messages will arrive in your OfficeTalk Incoming Mail folder as usual.



Linking a Mail Message

Purpose

You can link a mail message to any other OfficeTalk data item, making it easy to quickly move between certain linked items.

Usage

You can link a mail message to an item by selecting the message that you want to link, from the Incoming



Mail/Folder window and pressing the  button above the Mail/Folder Window, selecting the other OfficeTalk data item and pressing the



 button above that data items window. The mail message will now be linked to that data item. A



 symbol will appear next to the mail message.

See Also

[Linking](#)



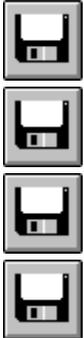
Notify Mode

Purpose

Notify Mode is used to send pop up notes of various formats on any OfficeTalk users screen.

Usage

To send a notification, firstly choose the style of notification that you wish to send. This can be one of the following:



Secondly, choose the date on which you want to send it (Note this does not apply to the *While you were out* style). This is done by selecting the appropriate date on the calendar. Next, fill out the relevant details



in the notification form, select the user(s) who you wish to notify and then press the button with the left mouse button. You will be asked to confirm that you wish to send the notification. Press YES to send the notification. If you tick the *Sound Alarm* checkbox, then the bell will sound on the receivers computer when the notification arrives. The notification will arrive a short while after you send it. If you tick the *Inform of Read* checkbox, then as soon as the receiver has read the notification, OfficeTalk will notify you of this.



Simple Notification Style

Purpose

The *Simple* notification style is used to pop up a plain message on to another users screen.

Usage

When you enter Notification mode, the default style of the Notification messages are *Simple* Notifications. All received notification pop ups contain Snooze, OK and Mail buttons.

Associated with the Snooze button, there is a text box allowing you to choose a time delay for the snooze option. For example, if the Snooze Time is set at 0:05 minutes, then after you press the Snooze button, the notification will re-appear exactly 5 minutes later. This is useful if you do not want to deal with the message straight away but do not wish to forget about it. Alternatively, you may wish to archive the message. This can be done by pressing the MAIL button. This will mail the message to yourself, allowing you to drag the message to the relevant Mail Folder



While You Were Out Notify Style

Purpose

The *While You Were Out* notification style is used to pop up a While You Were Out Telephone note on to another user's screen.

Usage



Press the  button and fill out the details of the telephone call. Select the OfficeTalk user to whom you wish to send the message and press the Notify button. OfficeTalk will confirm that you wish to send the note. A few moments later, depending on the receivers notification polling settings, the message will arrive on the destination screen.

If you wish the user to be notified immediately, it is always wise to check that they are logged into OfficeTalk. You can do this by using the Who button.



Yes/No Notify Style

Purpose

The Yes/No notification style is used to pop up a note on another user's screen, allowing them to reply YES or NO in response to your message.

Usage



Press the  button and fill out your message. Select the OfficeTalk user to whom you wish to send the message and press the Notify button. OfficeTalk will confirm that you wish to send the note. A few moments later, depending on the receivers notification polling settings, the message will arrive on the destination screen.

If you wish the user to be notified immediately, it is always wise to check that they are logged into OfficeTalk. You can do this by using the Who button.



Respond Notify Style

Purpose

The *Respond* notification style is used to pop up a note on another user's screen, allowing them to respond to your message.

Usage



Press the  button and fill out your message. Select the OfficeTalk user to whom you wish to send the message and press the Notify button. OfficeTalk will confirm that you wish to send the note. A few moments later, depending on the receivers notification polling settings, the message will arrive on the destination screen.

If you wish the user to be notified immediately, it is always wise to check that they are logged into OfficeTalk. You can do this by using the Who button.



Popping up Pending Notifications

How To

OfficeTalk checks for incoming notifications at a frequency depending upon the setting of the **Check Mail Every n Secs** field in the General Preferences dialog box. You can pop up any pending notifications before they appear automatically by selecting Popup Pending Notifications from the Notify menu.

Utilities

The Calendar

The Bin

The Task Trays

Task Trays



Purpose

The task trays are used to graphically represent the status of your workflow at any time. They can also be used to mark tasks as either *unscheduled*, *scheduled* or *complete*.

Usage

By default OfficeTalk does not display the task trays in Diary Mode. You can show the task trays by selecting *Show Task Trays* from the *Options* menu in Diary Mode. OfficeTalk will remember this setting. The trays may be used in several different ways. Firstly, you can drag tasks from the task list to any of the trays. For example, dragging a task to the OUT tray will mark that task as complete and will also graphically move the task into the OUT tray. You can view what is in any of the trays at any time by double clicking on the relevant tray with the left mouse button.

You can mark all the scheduled tasks as complete by dragging the PROCESS tray into the OUT tray. You may delete all the completed tasks by dragging the OUT tray to the Bin.

The Calendar



Purpose

The calendar tool is used to change the dates that OfficeTalk refers to. The Calendar tool appears in most views. In Diary Mode the calendar is used to change the date that the diary window shows. In Notification Mode, the calendar is used to change the date on which notifications will be sent. (This does not apply to the *While You Were Out* Notification). In Meeting Mode, the calendar is used to choose the date of the meeting and the display of the multi-schedule window.

Usage

You can change the date on the calendar by clicking the left mouse button on the relevant date. You can change the month by pressing the left and right arrows at the top of the calendar.



The Bin

Purpose

The bin appears in several OfficeTalk modes. It is used to delete items. It can also be used to retrieve previously deleted items.

Usage

OfficeTalk will let you drag many different items to the bin. The items which you may drag to the bin are:

- Tasks (Diary Mode)
- Appointments (Diary Mode)
- Mail (Mail Mode)
- User List (Supervisor Mode)
- Group List (Supervisor Mode)
- Resource List (Supervisor Mode)
- Project List (Supervisor Mode)
- Planner List (Supervisor Mode)
- Classification List (Supervisor Mode)

When you drop an item in the bin, it stays in the bin until you decide to either *shred* or *delete* the item.

Binning an Item

To *bin* an item, drag it over and drop it on the bin. You may select several items together, using the CTRL key and bin them all together. The items will now be inside the bin. You can view the items in the bin by double-clicking on the bin, using the left mouse button. This action will pop up a Bin Contents window.

Unbinning an Item

You may *Un-bin* an item by selecting it from the Bin Contents window and pressing the **Un-bin** button.

Shredding an Item

You may *shred* an item by selecting it from the Bin Contents window and pressing the **Shred** button. This will delete the item completely.



Who's Logged On?

Purpose

This feature shows you who is currently logged on to the Application.

Usage

Press the Who button and a window will pop up, listing all those people currently logged on to the application. Click on OK to close the pop up window.

Duration

OfficeTalk understands duration in terms of days (d), hours (h) and minutes (m).
Shown below are a few examples of how duration may be specified:

- 3d (3 Days)
- 3 (3 Days)
- 4d6h (4 Days, 6 Hours)
- 4d6h30m (4 Days, 6 Hours, 30 Minutes)
- 4h (4 Hours)
- 5m (5 Minutes)
- 1h30m (1 Hour and 30 Minutes)

Dragging

Purpose

The *Drag and Drop* style used throughout OfficeTalk is designed to make user interactions consistent and simple to use.

Usage

To drag an object, click the left mouse button on the object and keep the left mouse button depressed while you move the mouse to the place where you wish to drop the object. The dragging of the object should be represented by a change of the cursor image. If the cursor image becomes a *No Entry* sign while you are dragging then this means that you may not drop the dragged object in this area of the application. To drop an object simply release the left mouse button.

Links in OfficeTalk

Purpose

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 another. 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.

Usage

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.

Searching the Database

Purpose

This feature lets you search part, or all, of the OfficeTalk database for a word or part of a word.

Usage

From any OfficeTalk mode select Search Database from the Search menu. A Search dialog box will appear. The dialog box gives you the choice of searching the following:

- Tasks
- Appointments
- Projects
- Mail
- Meetings
- Companies
- Contacts
- Conversations

Select the areas that you wish to search through by checking the relevant check box (the default is all). You may specify further search criteria for Tasks, Appointments and Project Tasks. Next choose whether or not you wish to search the *body* of all items by checking the **Search All Text** check box. If you search all text then OfficeTalk will look through any notes and extra fields in the case of tasks, Appointments, companies and contacts and will look through the body of mail messages and conversations.

Finally, type in the text that you wish to search for into the *Text* field and press the **Search** button. Pressing RETURN will have the same effect as pressing the Search button. OfficeTalk will search through all the selected areas of the database and will return its findings in the **Results** window. OfficeTalk will indicate to you what sort of data matched your search request by displaying the appropriate icon alongside the text result.

Once OfficeTalk has returned the results, you may further narrow down your search by performing a search on the results, rather than on the database. Do this by selecting the **Search Result** radio button.

If you have found the required data, you can *Goto* this item of data by selecting the item from the **Results** window and pressing the **Goto** button. OfficeTalk will go to the relevant mode and will display the item of data.

