Version 2.0

OfficeTalk 98 User Guide

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Introduction

Who This Book Is For

This book is intended to cater for a cross section of readers from Directors to IT Managers and from users to programmers. The early sections of the book introduce the concept of OfficeTalk, describing the key features and benefits of the product. This is followed by sections that describe the technical requirements for adopting the product and how the product could integrate with existing systems. The main core of the manual is intended for the OfficeTalk user and the OfficeTalk administrator. Each aspect of the product is described in full detail. The last section of the manual is intended for the programmer, describing how he or she can use Visual Basic or any other high level language to program using the OfficeTalk Application Programming Interface (API).

About OfficeTalk

Welcome to OfficeTalk 98. With this purchase you have given yourself and your workgroup the ability to communicate more effectively with each other and with external organisations.

OfficeTalk is a workgroup information manager. It is designed to help you organise, record and publish both your own personal information and information shared by your workgroup or organisation. It is also an effective tool for documenting communications held between your organisation and the companies that you do business with.

OfficeTalk makes easy work of active communications such as sending and receiving e-mail, organising meetings and assigning project tasks.

OfficeTalk also helps raise the level of *passive* communications within the organisation. For instance, given sufficient permissions, one person may look at a colleague's diary at the touch of a button.

OfficeTalk can provide Internet mail to everyone in your organisation, simply and effectively, through a single dial-up or direct connection to the Internet.

OfficeTalk helps share important data within the workgroup. For example, the shared contact address book gives any user access to a multitude of data regarding any of the organisation's contacts. Given sufficient permissions, one person may view any documents sent to or conversations made with a specific contact.

If your organisation is split across two or more physical locations, OfficeTalk helps to bridge any communication barriers by providing in-built connectivity between separate OfficeTalk databases. For example, a person in one location may view the up-to-date diary of a colleague, situated in a different part of the world, as if they belonged to the same local workgroup.

All in all, OfficeTalk is a diary manager, a meeting manager, a project manager and a contact manager, combined into one very effective business tool.

Planning For OfficeTalk In Your Organisation

This section explains what things to consider prior to installing OfficeTalk in your organisation. It discusses hardware and software requirements, studies the future scalability requirements of your workgroup and how to achieve them. It also suggests strategies for connecting disparate workgroups and planning for home workers.

Hardware and Software Requirements

OfficeTalk will run on any of the following operating systems:

- Windows 95
- Windows 98
- Windows NT 3.5x
- Windows NT 4.0 and above
- Windows 3.1
- Windows 3.11 (Windows for workgroups)

The minimum recommended specification for OfficeTalk 98 is as follows:

Windows NT	Windows 95/3.x
486DX 66Mhz	486DX 50Mhz
24MB RAM	16MB RAM
30MB Free disk space	30MB Free disk space

Note: OfficeTalk is a 32-bit application. Any machines running a 16-bit operating system, namely, Windows 3.1 or Windows 3.11 require Win32s to be installed. This is done for you as part of the OfficeTalk installation. Win32s is the technology used to let 16-bit operating systems run 32-bit applications.

Scalability

OfficeTalk 98 was designed with scalability and an open architecture in mind. For this reason, ODBC, the Open Database Connectivity standard, is adopted as the database platform. This means that OfficeTalk is capable of using different database engines, provided that they offer sufficient ODBC features.

OfficeTalk is supplied with a JET engine database as standard. This is the same database used by Microsoft Access®. It is a *client only* database which relies on a shared file system. The JET engine is designed for a maximum of 128 concurrent users. Client only databases, whilst being simple to set up and administer, can cause excessive network traffic when used in large workgroups. A more suitable consideration for larger workgroups is a *client server* database. In such an arrangement, all accesses to the database are made by the machine containing the database. Thus network traffic is considerably reduced.

OfficeTalk may be used with the Microsoft SQL Server® database engine or the Sybase SQL Anywhere database engine. This considerably extends the maximum workgroup size far beyond the size achievable using the JET engine.

Increased effective workgroup sizes may be achieved without turning to a more scalable database technology. By staying with the JET engine, you may instead split your workgroup into two or more smaller workgroups and connect them using the remote workgroup technology available in OfficeTalk.

OfficeTalk provides other features which increase the scalability of the product when using the client only JET engine database. For example, performing certain operations, such as periodically checking for new mail and checking for overdue tasks can dramatically increase network traffic as the number of users increases, since every machine will be regularly accessing the database over the network.

OfficeTalk provides a *polling service* which lets you dedicate one machine to polling the database, checking for important events on behalf of each and every user. For instance, when this machine finds new mail for a particular user, then that user is notified via a network message and only then will the relevant machine attempt to download the mail. Provided that the polling server is the same machine that holds the OfficeTalk database, then network traffic is almost eliminated.

Another scalability feature is available for workgroups with a slow local area network. Certain operations in OfficeTalk require more than one record to be written to the database, for example, when organising a meeting, an appointment is written into each person's diary in addition to sending a mail message. Certain operations, such as this, may be performed by a server machine rather than a client machine. This has the effect of reducing network traffic and reducing the time taken, by the client, to perform the operation.

Connecting Physically Separate Workgroups

If your organisation is split across several physical locations and possibly several different networks, OfficeTalk provides a number of methods for connecting everyone.

For example, your organisation may be split across two separate locations, both connected via a wide area network and you wish to connect everyone so that they may share OfficeTalk data. One way to achieve this would be to use an SQL Server® database. Alternatively, you could use the JET engine and adopt a data *replication* strategy such that changes made to the data in each local workgroup could be replicated in each database. OfficeTalk provides methods for doing this for organisations which have either a high bandwidth network, a low bandwidth network, or no network at all connecting its different sites.

Multi-site organisations with a high bandwidth fixed connection or ISDN connection may consider connecting directly to the main database as if all sites belonged to the same local area network. Alternatively, for slightly lower bandwidth connections, each site would have its own workgroup database. Connections to other sites would only be made if a user specifically accessed data in those sites, for example, if a local user opened one of the diaries held at one of the other sites.

If each site is using the JET engine then both of the above configurations would require each user to have file based access to the other site. This is not a requirement if using SQL Server.

Multi site organisations with a low bandwidth connection between the sites, such as a modem connection, may configure OfficeTalk such that a local copy of each site's database is kept and, periodically, a connection is established to transfer the changes between the sites. This has the advantage that all local users need only connect to a local database in order to access the remote site's data. The disadvantage of this configuration is that the local database copy is never completely up to date. OfficeTalk can replicate the changes either by connecting directly to the remote database and transferring a single data record in each direction containing the relevant changes, or by sending and receiving changes using Internet mail. For more information see "Remote Workgroups" on page 377.

Planning for Out Workers

These days, growing numbers of organisations are employing individuals who work from home or are away from the office on an almost permanent basis. OfficeTalk provides functionality for users, such as out workers, to work *offline*. When OfficeTalk is made to work offline, it copies part, or all, of the workgroup database to a separate computer. This computer may then be disconnected from the workgroup LAN and OfficeTalk may be used as normal. At any time, the offline user may choose to synchronise the offline database with the main workgroup database. The synchronisation may be performed either via a direct connection to the main workgroup database, using dial up networking, for instance, or the synchronisation may be performed using Internet mail.

Installation Effort

Installing OfficeTalk into your organisation is a straight forward procedure. It involves an initial installation on the machine which will contain the OfficeTalk database. As part of the initial installation, a directory is created, containing a setup program which subsequent installations should run. The setup program ensures that each user automatically connects to the correct OfficeTalk database.

For installations on Windows 3.1 and Windows 3.11 operating systems, the setup process involves an initial setup procedure, which prepares your computer to run 32-bit applications.

Note: OfficeTalk may be run on both 16-bit and 32-bit operating systems within the same workgroup.

Total installation time will take less than 5 minutes for each user. For further information on installing OfficeTalk see "Installing OfficeTalk" on page 13.

Integrating OfficeTalk Into Your Organisation

OfficeTalk has been designed to integrate into a variety of organisations. Some organisations may need to integrate OfficeTalk with existing e-mail software, others may need OfficeTalk to integrate with other software applications, for example, accounting software or workflow software.

Integrating With Other E-mail Systems

By default, OfficeTalk uses its own proprietary mail transport when sending mail from one OfficeTalk user to another. Additional integrated mail services are provided to let you send and receive mail to and from organisations that use Microsoft or Lotus e-mail applications. An Internet mail service is also provided which lets every OfficeTalk user send and receive Internet mail.

The mail services, provided with OfficeTalk, make it possible to integrate OfficeTalk seamlessly into any organisation which uses an existing e-mail system.

Further integration is provided with Microsoft Exchange and Microsoft Outlook. OfficeTalk is supplied with electronic forms which may be installed into Microsoft Exchange or Microsoft Outlook. Such forms enable OfficeTalk users to invite Exchange or Outlook users to meetings and to assign them tasks, all through a form-based interface.

Integrating With Other Applications

OfficeTalk can be integrated with a variety of applications by using the OfficeTalk API (application programming interface). For example, an accounting system may use the OfficeTalk API to send a manager an e-mail message when his budgetary spend has been exceeded. Alternatively, a time sheet program may use the OfficeTalk API to extract time sheeting information from each user's diary.

The OfficeTalk API may be programmed from Visual Basic, Microsoft Word, Microsoft Excel and any other automation controller.

Integration Through Tailoring

Part of a successful product integration involves meeting the needs of as many people as possible, within the organisation, whilst not exposing them to unnecessary functionality. OfficeTalk may be configured such that certain users have access to some modes while other users have access to different modes. For example, you may wish to give the sales team access to only the contact, mail and diary modes, while only managers will have access to the project planning mode.

Tighter integration with the data needs of an organisation is met through OfficeTalk's provision for database customisation. OfficeTalk lets you add additional data fields to the standard data types. Furthermore, OfficeTalk lets you add property pages to each of the standard data type property sheets, which may contain one or more custom or system fields. For example, OfficeTalk could be used to store additional data with each contact, such as the contact's birthday, marital status, National Insurance number etc.

Security Features

OfficeTalk is all about sharing everyday data within the workgroup and, sometimes, between workgroups. However, OfficeTalk provides a very flexible security system for when you do not want to share specific data or when you wish to restrict the access of certain individuals to specific data.

Restricting Access To Data

Every OfficeTalk user may be assigned a specific security profile. Users assigned the same security profile will have the same access to all data held within OfficeTalk.

For example, you may create the following security profiles and assign each security profile to the appropriate users:

- Directors
- Managers

- Team Members

Once you have defined the appropriate security profiles and have assigned them to the relevant users, OfficeTalk then lets you specify the access of each of the profiles to any area of data.

There are several levels of access which members of a security profile may have to certain data. These levels differ depending upon the data in question, but, in general, the various access levels are as follows:

- No Access
- Read Access
- Read/Edit Access
- Read/Edit/Create Access
- Read/Edit/Create/Delete Access

So, for instance, as a supervisor, you could deny all users, except Directors, access to the project entitled '5-Year Plan'. Additionally, you could configure OfficeTalk such that all directors may record their documents and conversations with contacts, knowing that neither managers nor team members may have access to them. Furthermore, directors may be given full access to any document or conversation written by any manager or team member.

When users create certain data such as projects, planners, conversations etc, they have the choice of making such data either *private* or *personal*. If they have been granted sufficient access, they may make such data *public* so that all users in the workgroup may see the data. If such data is made *private*, then only the owner of that data will be aware of its existence. If such data is *personal* to a particular user then other users' access to that data will depend upon their access to the owner of the data.

Restricting Access to Modes

By default, all users have access to all of the modes supplied with OfficeTalk. A supervisor may restrict certain users from certain modes altogether, if necessary. For example, an organisation may want to restrict all staff, except for project managers, from gaining access to Project mode.

Additionally, a supervisor may specify more detailed access of some users to certain modes. For example, some users may be permitted to create public contact groups within Contact mode, whereas other users may be restricted from accessing the History view within Contact mode.

These are just some examples of the flexibility that supervisors have when configuring OfficeTalk's security system.

Inter Workgroup Security

OfficeTalk provides you with the functionality to connect to another workgroup in order to view data within that workgroup. The converse is also true. Other organisations, given your permission, may connect to and view data held within your workgroup.

Workgroups that make a connection to your workgroup are initially *non-trusted*. OfficeTalk provides security features which let you choose what data to give out to non-trusted workgroups. You may also specify a security profile for all non-trusted remote workgroups. Such a security profile would most likely give connecting workgroups, minimum access rights, if any, to the data in your workgroup. At a later stage, once the connecting remote workgroup has been qualified as a *trusted* workgroup, it may be assigned a security profile giving it a higher level of access to your data. Furthermore, after a remote workgroup has established a connection to your workgroup, you will be able to optionally assign different security levels to any of the remote users within that remote workgroup. So, for example, certain managers in the remote workgroup may be given full access to the data in your workgroup, while all other users may be given minimal access.

Inter workgroup security works in much the same way as local workgroup security. You have full control over the access that members of a remote workgroup have to every item of data in your workgroup and you may specify which modes a particular remote workgroup has access to and what members of that workgroup can and cannot do within those modes.

Feature Overview

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

Supervisor Mode

Supervisor mode lets you define users, resources, user groups, workgroup-wide projects and planners and lets you configure each of the mail services for any particular user. Furthermore, from this mode, you may define how and when OfficeTalk connects to the Internet in order to send and receive Internet mail on behalf of the users in the workgroup.

Supervisor mode lets you configure the connectivity with other remote workgroups and lets you define how and when data is replicated or accessed between the workgroups.

A supervisor has complete control over the data security within the workgroup and the data access granted to remote workgroups.

Diary Mode

The Diary mode is used to keep appointments, task lists (*to-do* lists) and background activities for yourself and all the other users in your organisation. From within Diary mode you can view and update your own diary information. If you have the necessary access rights, you can view and update other users' diary information. If OfficeTalk is configured to access other workgroups then you can even access a colleague's diary situated on the other side of the world. OfficeTalk also lets you keep diary information for resources such as meeting rooms, pool cars and other bookable objects.

Planner Mode

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

Project Mode

The Project mode is ideal for planning and monitoring projects within your organisation. A project consists of a group of related tasks and a plan for when those tasks will be completed and by whom. Project tasks can be assigned to OfficeTalk users using the OfficeTalk mail system, or to e-mail recipients using the other mail services. Recipients of assigned tasks may indicate their progress which will automatically update the project for effective tracking.

Group Mode

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

Meeting Mode

The Meeting mode lets you organise meetings simply and efficiently. From within Meeting mode, you can check other users' and resources' availability, write meeting agendas, send out meeting invitations and monitor the replies. OfficeTalk can interpret the replies sent back from both OfficeTalk users and e-mail recipients, updating the status of each meeting automatically.

Contact Mode

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

Contact mode contains several different views onto your contact data:

- Company view
- Contact view
- Directory view
- History view

Company view shows company information, namely the site address and a list of employees (contacts) who work for the company along with a history of communications with the company.

Contact view shows information specific to a particular contact, for example, the name and address of the company to which the contact belongs, if any, and the contact's home address, title, position etc, along with a history of communications with the contact.

Directory view shows both company and contact information in a telephone directory format.

History view show a history trail of communication held between members of your workgroup and all companies and contacts. At a glance, you can see what documents have been written, what conversations have been held and what e-mail has been sent to and received from each contact or company.

Mail Mode

The Mail mode provides a very easy-to-use mail client with all the features that you would expect from a standalone mail package. The OfficeTalk mail client is both MAPI and VIM compliant which means that it will interface with Microsoft Mail™, Lotus cc:Mail™ and many other popular e-mail packages. The mail client is also Internet enabled which means that OfficeTalk users can send and receive Internet mail.

Users can define mail rules to perform automated actions on sent and received mail.

Notify Mode

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

Getting Started

Installing OfficeTalk

Installing OfficeTalk into your workgroup consists of an initial installation followed by subsequent network installations. The initial installation should be performed on the machine which will host the OfficeTalk database. The setup program guides the user through the creation of the workgroup and the addition of one or more users.

The initial installation creates a **setup32** sub-directory under the directory containing the OfficeTalk database. Subsequent installations require **Setup.exe** to be run from the **setup32** directory. This ensures that all OfficeTalk machines access the same shared workgroup database.

Beginning the Installation

OfficeTalk is available for both 16-bit Windows 3.x and for 32-bit Windows 9x/NT. There is a separate installation for each operating system. Both installations run the same main OfficeTalk setup program, however the installation for Windows 3.x involves an additional setup stage prior to the main OfficeTalk Setup program.

Note: If you plan to run OfficeTalk using the JET database on a mix of 32-bit and 16-bit platforms, you must use the 16-bit database supplied with the Windows 3.x installation. To do this, run the Windows 3.x installation first and then install the Windows 9x/NT installation to the same database directory. Subsequent 16-bit platforms should run **Setup16.exe** from the **Setup16** directory. Subsequent 32-bit platforms should run **Setup.exe** from the **Setup32** directory.

Windows 3.x Installation

If you are installing OfficeTalk on a Windows 9x or Windows NT computer then skip this section and refer to "OfficeTalk Setup Program" on page 14. The Windows 3.x installation installs Win32s components which prepare your computer to run the main OfficeTalk Setup program. To begin the installation, run the **Setup16.exe** program from the Windows 3.x installation media.

Note: If you are installing a subsequent Windows 3.x platform in order to share the workgroup database then you should run **Setup16.exe** from the **Setup16** directory. This directory is created by the initial Windows 3.x installation in the directory specified in the Database page of the main OfficeTalk Setup Wizard.

Press **Next** to begin copying the Win32s components. When all the files have been copied, the Windows 3.x Setup will ask you to restart windows.

When Windows restarts, the main OfficeTalk setup program is automatically started.

OfficeTalk Setup Program

The OfficeTalk Setup program is run automatically by the Windows 3.x Installation. Windows 9x/NT platforms should start the OfficeTalk Setup program by running **Setup.exe** from the Windows 9x/NT installation media.

Note: If you are installing a subsequent Windows 9.x platform in order to share the workgroup database then you should run **Setup.exe** from the **Setup32** directory. This directory is created by the initial Windows 9.x installation in the directory specified in the Database page of the main OfficeTalk Setup wizard.

When you run **Setup.exe** the OfficeTalk Setup wizard is displayed. The first page of the wizard welcomes you to the OfficeTalk Setup program.

Pressing **Next** will display the License page. Read the terms of the license agreement. If you agree to the terms of the agreement, press **Yes**. If you do not agree, press **No** and the Setup program will close.

If Setup finds an existing previous version of OfficeTalk then Pressing **Yes** will display the Upgrade page. Otherwise the Database page is shown.

*Selecting **Create New Database** will leave the version 1.x database intact and will create a new version 2.0 database.*

The Upgrade page lets you choose whether or not you will convert the old version 1.x OfficeTalk database to the new version 2.0 format. If you do not want to upgrade the database then select the **Create New Database** radio button. Otherwise, select the **Upgrade v1.x database from .CMP file** radio button.

Setup suggests where it expects to find the latest OfficeTalk version 1.x **.CMP** file. If your **.CMP** file is located in a different place then use the **Browse** button to locate the file and press **Next**.

The Database page lets you choose the location to which the workgroup database will be installed. This page is only displayed if this is the initial OfficeTalk installation.

Note: The directory that you specify must be a shared directory to which everyone has full access. Ideally, it should be a directory on a fast file server machine.

Specify the relevant directory either by typing into the field or by pressing the **Browse…** button and using the Select Directory dialog box to choose the destination directory. Press **Next** to show the Options page. This page lets you choose whether to perform a Standard, Minimum or Custom installation.

The Standard installation copies the program files and help files to your local machine. It also installs the OfficeTalk API component which allows you to extend the functionality of OfficeTalk using Visual Basic.

The Minimum installation does not copy any files to your local machine but instead runs OfficeTalk from the server machine. No additional components are installed.

If you select the Custom installation, pressing **Next** will show the Custom page which lets you choose which specific components to install.

You can choose whether or not to run OfficeTalk from the server or from the local machine by selecting the appropriate radio button. You can also choose which components to install from the check box list. You may choose from the following:

Component	Description
OfficeTalk Executables	This is a required component.
OfficeTalk Help files	The help files.
OfficeTalk API	The Application Programming Interface which lets you write separate programs which can access the OfficeTalk database. This component is only available to Windows 9.x platforms.
OfficeTalk Active Server Pages	The Active Server Pages files which enable you to run a cut down version of OfficeTalk from a Web browser. This option is only available to Windows 9.x platforms.
cc:Mail/Notes Connectivity	The components to allow you to send and receive mail to and from cc:Mail and Lotus Notes.
Exchange Connectivity	The components to allow you to send and receive mail to and from Microsoft Exchange. This includes electronic forms to allow you to send meeting invitations and task assignments to Exchange users.

This page is shown even if you elected to run the executables from the server by selecting the Compact option since other local files are required.

Make your selection and press **Next**. The next page shown is the Choose Destination Location page. This page is also shown after the Options page if you had chosen the Standard or Minimum installation option. This page lets you choose to which local directory you wish to install the OfficeTalk executables and other related files.

Press the **Browse…** button and use the Choose Folder dialog box to select the local directory to which OfficeTalk executables will be installed. If you chose to run the executables from the server, you must still specify a directory using this page, since Setup needs to know where to copy other local files such as the offline database directory and associated files.

If you selected the **OfficeTalk Intranet ASP Pages** component from the Custom page, then pressing **Next** will display the Choose ASP Destination page. This page lets you choose the directory to which the ASP files are copied. If Microsoft Information Server is installed on the machine, Setup will detect the root web directory and will suggest a directory called **<WebRoot>/OfficeTalk**.

Pressing **Next** will display the Select Program Folder page. You may use this page to specify the name of the program folder to which the program shortcut icons will be added. You may either select an existing program folder from the list or enter the name of a new program folder.

When you press **Finish** OfficeTalk will begin copying the files to your machine. If you are performing an initial installation (i.e. you ran **Setup.exe** from the installation media) then the file copying process will take a little longer since Setup must create the **Setup32** or **Setup16** directories containing the setup files for subsequent Windows 9.x or Windows 3.x platforms respectively.

Setup creates the OfficeTalk program and help icons and places them in the program folder that you chose.

When the installation is complete, Setup will inform you by displaying a message box.

If you elected to upgrade an old version 1.x database, then OfficeTalk will ask you to confirm that you wish to do this. Choose **Yes**. If you press **No** then you will have to re-run Setup if you wish to convert the database at a later time. Pressing **Yes** will run the database conversion program. This may take a long time depending upon the size of your version 1.x database. When the program completes you will be ready to run OfficeTalk.

Running OfficeTalk for the First Time

You can run OfficeTalk by double clicking on the OfficeTalk icon in the OfficeTalk program folder.

When you run OfficeTalk for the first time, the New Workgroup wizard is displayed showing the Welcome page.

The next page lets you specify the name of your workgroup, for example, ‘ABC Corporation’.

Pressing **Next** will display the New Users page. This page lets you choose how to add user accounts to OfficeTalk. You may choose between adding users manually and using Directory Services. Directory Services is a feature of your operating system which lets you detect which user accounts are set up on your network.

If your operating system does not support Directory Services then the **Add Users Manually** radio button is selected by default. If you select

Add Users Manually and press **Next**, OfficeTalk will display the Users page. This page lets you enter your details. You must specify your first name, your last name and a login name which will uniquely identify you within the workgroup

When you have entered the relevant details, press **Next**. OfficeTalk will summarise the actions that will be taken when you press the **Finish** button. You will then be logged onto OfficeTalk into Supervisor mode from where you can add further users if necessary. For more information, see "Adding a New User" on page 36.

If you chose the **Use Directory Services** radio button in the Options page then the Directory Services page is shown when you press **Next**.

This page lets you select which users and groups you wish to automatically add to OfficeTalk. The left hand list shows a list of available directory services on your network. If you are running an NT network, then the **WinNT:** service will be expanded to show a list of available domains. Each domain, in turn, may be expanded to show a list of user groups.

A group called ‘All Users’ is shown in the left hand list which contains all users that exist in the domain. If you select a group, for example, ‘Managers’, and press **Add**, OfficeTalk will move the group and all the users contained in that group to the right hand list. This will result in an OfficeTalk user group ‘Managers’ being added to the workgroup in addition to a number of users representing each member of the group ‘Managers’.

If you expand one of the groups in the left hand list and select a single user from that group then when you press **Add**, OfficeTalk will move the group itself and the selected user to the right hand list. This will result in an OfficeTalk group being added to the workgroup along with a single user representing the selected member of the group.

If you select ‘All Users’ from the left hand list and press the **Add** button, The ‘All Users’ group and all the users in that group will be moved to the right hand list. This will result in a group ‘All Users’ being added to the workgroup along with all the users available from the NT domain who will each be members of the ‘All Users’ group.

Select the relevant users and groups that you wish to automatically add to OfficeTalk and press **Next**. OfficeTalk will show the Select User page. This page requires you to select which of the added users represents you.

Select the appropriate user and press **Next**. OfficeTalk will display the Finish page. If you are happy with the summary of actions presented to you then press **Finish**. OfficeTalk will create all the users and groups that you selected and will mark you as a supervisor. You will then be logged onto OfficeTalk into Supervisor mode from where you can add further users if necessary. For more information, see "Adding a New User" on page 36.

Logging on to OfficeTalk

To log onto OfficeTalk, start the application by double clicking the left mouse button on the OfficeTalk program item in the OfficeTalk program folder.

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

Your password is case sensitive. In this example, neither 'js' nor 'Js' will be accepted.

Next, enter your password. By default, your password is exactly the same as your login name. For example, if your name was 'John Smith' and your login name was 'JS' then your password would also be 'JS'. You may change your password from the Login dialog box. For more information on this see "Changing Your Password" on page 24.

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

Once you have entered your password, press the **Login** button, or, alternatively, press the **Enter** key on the keyboard. OfficeTalk will then log you in. By default, when you log in, you enter Diary mode. OfficeTalk lets you specify which mode to start in. For more information on this, see "Start-up Mode" on page 349.

Bypassing the Login Dialog Box

Note that you cannot elect to by-pass the login dialog from the Startup page of the Preferences dialog box. This must be done from the Login dialog box.

If you check the **Save Password** check box on the Login dialog box, OfficeTalk will remember your password so that the next time you start OfficeTalk, the Login dialog box will be bypassed and OfficeTalk will automatically log you in. If you wish to revert back to specifying your login name and password from the Login dialog box then select the Startup tab from the Preferences dialog box and uncheck the **Save Password** check box. For more information, see "Start-up Mode" on page 349.

Changing Your Password

You can change your password from the Login dialog box.

Note: If you have chosen to bypass the Login dialog box then you must first revert back to specifying your login name and password from the Login dialog box. Do this by selecting the **Startup Mode** tab from the Preferences dialog box and un-checking the **Save Password** check box.

To change your password, enter your login name and current password and press the **Change Password** button. A Change Password dialog box is shown.

Enter your new password into both the *New Password* field and the *Verify* field. Then press the **Change** button. Your password will be changed. OfficeTalk will return to the Login dialog box. Enter the new password into the *Password* field and press the **Login** button. The next time that you log into OfficeTalk you will be required to supply your new password.

Registering OfficeTalk

When you first log onto OfficeTalk, you have 30 days in which to obtain a product enabling keycode from your supplier. If you do not register OfficeTalk and obtain a keycode, any supervisors logging on to OfficeTalk will be reminded of this after 15, 20 and 25 days and every day thereafter.

Registering After the 30 Day Trial Period

If you have still not obtained a keycode after 30 days, you will be prevented from logging on to OfficeTalk. When you try to log on you will receive the following message:

If you have already received a keycode from your supplier, then press **Yes**. If you have not yet registered then press **No**. If you press **No**, OfficeTalk will display the Register OfficeTalk wizard. Follow the instructions given in this wizard and refer to "The Registration Wizard" on page 27. When you obtain your keycode, restart OfficeTalk and press **Yes** when this message appears again.

When you press **Yes**, OfficeTalk will then show an Enter Keycode dialog box. Enter your customer number and your keycode into the relevant fields and press **OK**.

When you press **OK**, OfficeTalk will check the validity of the keycode. If the keycode is not correct, OfficeTalk will inform you of this by displaying the following message:

Once you have applied for your keycode, ensure that you do not change the workgroup name since it is encrypted in the keycode.

If you get this message, firstly ensure that you have typed in the keycode correctly into the keycode field. The keycode is case sensitive, so ensure that the case of each character is correct. If you cannot find any reason why the keycode does not work then contact your OfficeTalk supplier.

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

A summary of the registration options is shown. When you press **OK**, OfficeTalk will display the Login dialog box. Ready for you to log in.

Registering Before the 30 day Period

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

Login as a supervisor and enter Supervisor Mode. Choose **Register OfficeTalk** from the **License** menu.

The Register OfficeTalk Wizard will appear. Follow the instructions given in this wizard and refer to "The Registration Wizard" on page 27.

On receiving the keycode back from your vendor, you can enter it by selecting **Enter Keycode** from the **License** menu in Supervisor mode.

Enter your keycode into the *Keycode* field in the Enter Keycode dialog box and press **OK**.

When you press **OK**, OfficeTalk will check the validity of the keycode. If the keycode is not correct, OfficeTalk will inform you of this by popping up the following message:

If you get this message, firstly ensure that you have typed in the keycode correctly into the keycode field. The keycode is case sensitive, so ensure that the case of each letter is correct. 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. 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 display the following message box:

A summary of the registration options is shown. OfficeTalk will now be registered. OfficeTalk will remember your keycode. You should never change the workgroup name or keycode *unless* you purchase further licenses in the future.

The Registration Wizard

The first page in the Registration wizard lets you specify the workgroup's name. 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**.

The next page lets you enter any licenses that you may already have. Each OfficeTalk product comes with one license. Each license has a serial number and licences a certain number of users.

If you have more than one license (for example if you bought several copies of OfficeTalk) then you may enter all the serial numbers together, thus accumulating user licenses. If you do not have a license then just press **Next**.

To enter license information, press the **New** button in the Licenses page. A License dialog box is displayed.

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 list. You can edit or delete any entries in this dialog box using the **Edit** and **Delete** buttons. When you have entered the license(s), press **Next**.

The next page lets you specify the number of additional user licenses that you require. For example, if you already have a licence for 5 users and you wish to have 55 users altogether then you would specify that you require an additional 50-user license.

The next page lets you specify whether or not you wish to purchase additional cost options. These options include the OfficeTalk API which lets you write Visual Basic programs to interface with your OfficeTalk data. The options also include the ability to run OfficeTalk in a client/server environment using a client/server database engine rather than the JET engine supplied as standard.

The next page lets you enter your details or the details of the person to whom your vendor will communicate the product enabling keycode.

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

The next page lets you fill out any feedback or comments that you have with regards to OfficeTalk.

The next page lets you choose whether your registration form will be printed out (for faxing or sending by post), output to a file (for sending via an alternative e-mail package) or e-mailed (using the OfficeTalk Internet mail service).

Select the required option and press **Next**. If you selected **Print**, OfficeTalk will display a further page which lets you preview your print out. Pressing the **Finish** button will send your registration form to the printer. Fax the printed form to your supplier whose fax number will be displayed at the top of the form. Your supplier will then inform you of your keycode.

If you selected **Output to file**, OfficeTalk will display a further page letting you choose the filename to which the registration details will be written. Pressing **Finish** will write the file to the specified location. Send the file as an attachment to your supplier using any e-mail package.

Alternatively, if you selected **E-mail**, OfficeTalk will display a further page showing the e-mail address to which the registration form will be sent. You may change this address if necessary. Pressing **Finish** will send the registration form using the OfficeTalk Internet mail service. Note, the mail will be sent the next time that you send mail using the Internet mail service.

Choosing Licensed Users

During the 30 day trial 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 defined 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 keycode, OfficeTalk will warn you of this.

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

Choose the users who you wish to license by selecting them from the **Unselected** list and pressing the **Add** button. When you have chosen all the users, press **OK**. If, for example, you have purchased 1 license but you have chosen more than 1 user then OfficeTalk will prevent you from continuing by issuing the following message:

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

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

Uninstalling OfficeTalk

Should you wish to remove OfficeTalk from your system, you can do so from within the Add/Remove Programs applet in Control Panel. From Control Panel, double click on the Add/Remove Programs applet.

From the Install/Uninstall tab, locate OfficeTalk from the list and press the **Add/Remove** button.

The uninstall program will confirm that you wish to remove OfficeTalk and all related components from your computer.

If you press **Yes**, the uninstall program will remove OfficeTalk completely from your system.

Note: 16-bit Windows does not let you remove programs from within control panel. Instead, locate and run the program **Uninstot.exe** from the Windows directory. You will be prompted with the same message box to which you should reply **Yes**.

Supervisor Mode

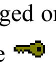
What Is Supervisor Mode?

Supervisor mode is a restricted mode available only to those who are defined as supervisors within OfficeTalk. It lets a supervisor administer and configure any data or settings which relate to the workgroup as a whole. From Supervisor mode you can configure users, resources, groups, projects, planners, categories, remote workgroups, custom data and mail services.

Supervisor mode also lets you administer the access that local users have to other OfficeTalk users and to other OfficeTalk data. You may also define the access that other OfficeTalk workgroups have to the data in your workgroup.

Administering Users

Clicking on **Users** in the left hand list will display the currently defined users in the right hand window. The table below describes the columns shown in the right hand window.

Column	Description
	The  marker indicates that the associated user is logged on.
	The  marker indicates that the associated user is a supervisor.
Name	The user's full name.
Login Name	The user's Login name
Last Logon	The date the user last logged on. If the user has never logged on, this column will display the words 'Never Logged On'.

Adding a New User

You can add a new user by clicking the right mouse button in the right hand list and selecting **New…** .This will display the User property sheet, showing the Details page.

Enter the user's first and last name along with a login name. The login name is the nickname used when logging on to OfficeTalk. It may be up to 10 characters long.

The User property sheet lets you specify or select a security profile for the new user. Selecting a security profile defines this user's level of access to data held within OfficeTalk. This may be left as 'Default Access'. For more information about OfficeTalk security, see "Controlling Access to a User's Diary" on page 38.

Press **OK** on the User property sheet and the new user will be added to the OfficeTalk database. You can edit a user's details by clicking the right mouse button over the user in the right hand list and selecting **Edit…**. As soon as a new user has been defined they may log on to OfficeTalk.

Resetting a User's Password

Remember, your login name and password are both case sensitive

When a user logs on to OfficeTalk, he must supply a login name and password. When the user is added, the supervisor specifies the user's login name and OfficeTalk defaults the user's password to be exactly the same as the login name. The user may change this password from the login dialog box at any time. If the user forgets his password he will not be able to log on to OfficeTalk. His only remedy is to ask a supervisor to reset his password back to his login name.

This is done by displaying the user's property sheet and pressing the **Reset Password** button. The next time the user logs into OfficeTalk, his password will be the same as his login name.

Importing Users from a CSV File

Note that no two login names may be the same

If you have many users to add to the OfficeTalk database and you can supply user details in the form of a comma separated (CSV) file, then OfficeTalk will let you import the users rather than add them individually.

Your CSV file must contain columns representing the user's first name, last name and login name. The file may look similar to the example below:

```
"First Name", "Last Name", "Login Name"
"Simon","Bates","stb"
"John","May","jonnie"
"Stuart","Prestedge","smp"
```

Next, select **CSV Users…** from the **File/Import** menu. The CSV Import wizard is shown.

Follow the instructions in the CSV Import wizard and press **Finish** on the last page of the wizard. The users will appear in the right hand window when you click on **Users** in the left hand list in Supervisor mode.

Using Directory Services to Add New Users

OfficeTalk lets you access all users on your network and add them as OfficeTalk users in a few simple steps. This is done using the Directory Services functionality which will be available to you only if your operating system supports it.

Provided your machine supports Directory Services, selecting **Directory Service Users…** from the **File** menu in Supervisor mode will display the Directory Service Users dialog box.

Follow the steps described in "Running OfficeTalk for the First Time" on page 19.

Controlling Access to a User’s Diary

Security is often an important issue when information is being shared. For example, you may require that some users can add information to your personal diary and that other users should not be able to see your diary information at all. OfficeTalk lets you specify the access rights of one user to another user’s diary through security profiles.

Each user is assigned the ‘Default Access’ security profile initially

Each user is assigned a specific security profile, for example, ‘Managers’ , or ‘Support Staff’. Each security profile is then granted specific access to a particular user. The access to a user’s diary may be specified separately to the access to the user’s personal data, such as any planners, projects or conversations belonging to the user. Furthermore, the access to the user’s diary may be specified separately in terms of the access to the user’s appointments and the access to the user’s tasks.

To specify the access rights of a security profile to a user, click on the user in the right hand list of users in Supervisor mode and select **Edit…** from the context menu. The User property sheet will appear. Select the Access page.

You may specify one of five levels of access for a security profile to a user’s diary:

- No Access
- Read Access
- Create Access
- Edit Access
- Delete Access

If a security profile is granted **No Access** to a user's diary then members of the security profile are not able to select the user from the drop down list of users in Diary mode. If a security profile is granted the next level of access, **Read Access**, then members of the security profile are able to select the user's diary and see the user's appointments and tasks but are not able to make any modifications.

Defining a Security Profile's Access to a User

A list of all the security profiles is displayed to the left of the Access page. The **Type** drop down list lets you specify which attribute you are defining access to. You may choose one of the following types:

Type	Description
All	Defines access to all attributes of the user.
Diary	Defines access to the user's diary (tasks and appointments).
Tasks	Defines access to the user's task list.
Appointments	Defines access to the user's appointments.
General	Defines access to the users general data, such as any planners, projects etc. owned by the user.

Select one or more security profiles from the list and specify the access of those security profiles to the user by selecting the appropriate radio button. The settings will take place when you press **OK** on the property sheet.

Defining the Access of a Remote Workgroup to a User's Diary

Since remote workgroups may be assigned a security profile, then defining the access of users in a remote workgroup to a local user's diary is simply a case of setting up the security profile as described above and then assigning the security profile to the relevant remote workgroup.

You can assign a security profile to a remote workgroup from the Access page of the Remote Workgroup property sheet.

By default, any user belonging to the remote workgroup will inherit the remote workgroup's access. OfficeTalk lets you assign a security profile to a specific user within the remote workgroup. This may also be done from within the Access page of the Remote Workgroup property sheet.

Once a remote workgroup has connected to your database, you can access it from Supervisor mode and then change its security profile.

When a remote workgroup first connects to your workgroup, it is granted non-trusted access rights to your data. You may choose which security profile is assigned to all non-trusted remote workgroups by selecting **Remote Workgroup Options** from the **Options** menu in Supervisor mode. This will display the Remote Workgroup Options dialog box. Select the Access page and select the security profile to be assigned to non-trusted remote workgroups.

For more information, see “Administering Remote Workgroups” on page 55 and "Remote Workgroups" on page 377.

Setting Up the Mail Services for a User

OfficeTalk is supplied with mail services which let you connect OfficeTalk with other e-mail systems. You are provided with an Internet service for connecting to the Internet, a MAPI service for connecting to Microsoft products, a VIM service for connecting to Lotus products in addition to OfficeTalk’s own proprietary mail service. From within Supervisor mode you can completely configure each of the standard mail services. Each of the mail services can be activated on a per-user basis. This per-user configuration may be done both from within the Mail Service dialog box and from within the User property sheet. This section deals with setting up a particular user for each of the three mail services. For more information on configuring each mail service, see “Administering Mail Services” on page 65.

Setting the Default Mail Service

The OfficeTalk mail service is the default mail service for each user. This means that when other OfficeTalk users send mail to a particular user, the message will, by default, be sent using the OfficeTalk mail service. OfficeTalk lets you specify a different default mail service for any user.

You may specify the default mail service for several users at once from within the relevant mail service’s dialog box

For example, if a user is set up with MAPI as his default mail service, then any messages sent to this user from other users will be sent and received via MAPI. This is useful if organisations wish to standardise on a single messaging system, such as MAPI.

You may specify the default mail service for a particular user from the Services page of the relevant user’s property sheet.

Only those services which are set up and activated for a particular user may be defined as that user’s default mail service

Select the appropriate mail service and press the **Default…** button. Press **OK** to save your changes.

Setting Up the Internet Service for a User

Prior to setting up the Internet service for a specific user, the service must be setup for the workgroup. For more information on this, see

“Configuring the Internet Mail service” on page 66. Before a user can send and receive Internet mail, the mail service must also be activated for that particular user. This can be done from the user’s property sheet. Bring up the User property sheet by clicking the right mouse button on the relevant user in the right hand list and selecting **Edit…** from the context sensitive menu. Select the Services tab.

All installed mail services are shown in the **Services** list. There is a check box to the left of each service. Checking one of the check boxes will activate the associated service for the user. Check the check box to the left of the Internet service and press the **Settings…** button. The mail service’s User Settings dialog box will be displayed.

Address Page

The settings in the Address page determine the user’s e-mail address. An e-mail address is of the following form:

mailbox@workgroupaddress.com

The Internet service lets you specify one or more addresses for the workgroup. The address page in the User Settings dialog box lets you select one of these addresses along with a mailbox name in order to fully specify the user’s e-mail address.

For example, your workgroup may be configured with the following addresses:

- company.com
- company.org
- mycompany.provider.com

If you specified ‘john’ as the mailbox name for the user, then mail coming to the following addresses would be delivered to the user:

- john@company.com
- john@company.org
- john@mycompany.provider.com

Selecting a workgroup address in the Address page determines the sender address of all messages sent by this user. Although the user will receive mail addressed to any of the three addresses above, he may wish to be addressed as **john@company.com** in which case

company.com should be selected from the **Workgroup Address** drop down list.

POP3 Page

The POP3 page lets you specify details of a POP3 account that is specific to this user. If your workgroup receives all of its mail via SMTP or via a multiple POP3 mailbox then this page must be left blank. However, if mail for this user is received via a single user POP3 account then you should specify the login name and password for the POP3 account.

For more information on POP3 and SMTP see "POP3 and SMTP Capabilities" on page 66.

Forwarding Page

The forwarding page of the User Settings dialog box lets you configure mail redirection for this user. The redirection is handled by the mail gateway machine as soon as the message is received from the Internet.

You can also use mail rules to perform mail forwarding which is useful if you wish to forward mail under

You may choose between:

- No forwarding

certain conditions

- Forwarding to a local user
- Forwarding to an e-mail address.

To forward to a local user, select the **Forward To User** radio button and select the relevant user from the drop down list. To forward to an e-mail address, select the **Forward To Address** radio button and enter the relevant e-mail address.

Checking the **Keep a Copy** check box ensures that the user gets a copy of the message before it is forwarded.

Setting a User’s Default Mail Access

OfficeTalk may be configured such that any e-mail sent and received by a particular user may be seen by any other user as history items within Contact mode. By default, a user’s e-mail may not be viewed by any other user. A user’s e-mail may be made publicly available, by default, by selecting the **Sent and received mail is publicly available to all users by default** radio button in the E-mail Access page.

If a user’s e-mail is made publicly available by default, as described above, the user may still change this default option or may still mark individual messages as private. If you do not want to give users the ability to do this then uncheck the **User may change default settings** check box.

Archiving Users

You may also archive resources in just the same way

If a user leaves your organisation and you wish to keep the user’s diary and personal data but you no longer wish the user to be considered a member of the workgroup then, rather than deleting the user and losing data related to that user, OfficeTalk lets you archive the user. You may not view the diary of an archived user, nor may you mail, notify or assign tasks to the user. An archived user is only shown in Supervisor mode in the **Archives** list.

To archive a user. Click the right mouse button on the relevant user and select **Archive** from the context menu. The user will become unavailable to other members of the workgroup the next time they log on to OfficeTalk.

To un-archive a user, expand the **Archives** item in the left hand list in Supervisor mode, and select **Archived Users**. From the right hand window, click on the relevant user using the right mouse button and select **Unarchive** from the context menu.

Administering Resources

Clicking on **Resources** in the left hand list will display the currently defined resources in the right hand list. The table below describes the columns available to show in the right hand list.

Column	Description
	If a  marker appears in this column it signifies that the associated resource is a fixed resource.
Name	The name of the resource, e.g. ‘Meeting Room 2’.
Last Edited	The time when this record was last edited.
Usual Location	If the resource is not fixed then this column specifies where the resource is usually kept.
Owner	The resource’s owner. This user is asked when the resource is needed for meetings.

What is a Resource?

A resource is an object in a workgroup whose time may be booked by users in the organisation. Examples of a resource are:

- **A Meeting Room**
- **A Pool Car**
- **An Overhead Projector**

There is no limit to the number of resources that may be defined in OfficeTalk

OfficeTalk will keep a separate diary for every resource that you define. There are two types of resources; fixed resources and non-fixed resources. A non-fixed resource may be moved. An example is an ‘Overhead Projector’ which may get moved between meeting rooms.

Fixed Resources

A fixed resource is a resource which has a permanent location and cannot be moved, for example a ‘Meeting Room’. When scheduling meetings, OfficeTalk lets you choose a location at which to hold the meeting. If you have any fixed resources defined, OfficeTalk will let you select one as the venue for the meeting.

You can create a fixed resource in the following way:

- Bring up the Resource property sheet by clicking the right mouse button on the relevant resource in the right hand list and selecting **Edit…** from the context menu. The Details page of the Resource property sheet will be displayed.
- Specify a name for the resource.
- Select the **Fixed** check box. Press **OK**.

Resource Owners

Any resource may be assigned an owner. The owner of a resource is an OfficeTalk user who is responsible for the resource. If a particular resource, such as an overhead projector, is requested for a meeting, then, if the resource has an owner, the owner will be e-mailed, requesting confirmation that the resource may be reserved for the meeting.

You can specify an owner for a resource in the following way:

- Bring up the Resource property sheet by clicking the right mouse button on the relevant resource in the right hand list and selecting **Edit…** from the context menu. The Details page will be displayed.
- From the **Owner** drop down list, select an OfficeTalk user. Press **OK**.

Controlling Access to Resources

Supervisor mode lets you control who has access to which resource. If a user has been granted no access to a resource then that user will not be able to book the resource for meetings or even view the diary kept for the resource. A user with full access to a resource can book the resource for a meeting and view and even update the diary kept for the resource.

You can grant access to a particular resource in the following way:

- Bring up the Resource property sheet by clicking the right mouse button on the relevant resource in the right hand list and selecting **Edit…** from the context menu. Select the Access page.
- Specify whether this is a private, personal or public resource by selecting the appropriate radio button. If you select **Personal** then other users' access to this resource will depend on their *general* access to the owner of the resource.

- If you wish to grant access to the resource regardless of users' access to the owner, then select the **Custom** radio button and press the **Custom Access…** button.
- The Custom Access property sheet will be shown. The Item Access page lets you specify access of each security profile to the resource. Select the security profile(s) whose access to the resource you wish to change.
- Specify the access to the resource by checking the appropriate radio button. The settings will take place when you press **OK** on the property sheet. The access of all local and remote users that have been assigned the selected security profile(s) will change to the new settings.

Administering Groups

Clicking on **Groups** in the left hand list will display the currently defined groups in the right hand list. The table below describes the columns available to show in the right hand list.

Column	Description
Name	The name of the group, e.g. 'Sales Team'.
Last Edited	The time when this record was last edited.
Owner	The resource's owner. This person is asked when the resource is needed for meetings.

What is a Group?

A group is a set of local users and resources. The purpose of a group is to provide an easy way to perform certain actions with the same grouping of users and resources. For example, you may wish to e-mail every member of your sales team with their monthly sales results. Rather than selecting each user individually, you can simply e-mail the 'Sales Team' group instead. Also, once you have defined a group, you may view the diaries of each member of the group, side by side, from Group mode.

Adding a Group

OfficeTalk lets you add a group from both Group mode and Supervisor mode. You can add a group from Supervisor mode in the following way:

- Having selected **Groups** from the left hand list, click the right mouse button anywhere in the right hand list and select **New…** from the context menu. The Group property sheet will appear, showing the Details page.

- Specify a name for the group, for example, 'Sales Team'.
- Click the Members tab. The Members page contains two lists. The left hand list shows a list of all users and resources which do *not* belong to the group and the right hand list shows all the members of the group. Choose the required group members from the left hand list and press the **Add** button.

- Press **OK** on the Group property sheet to save your changes.

Sub Groups

OfficeTalk lets you define sub groups. A sub group may contain only users and resources that are members of the parent group. This enables you to structure the groups in any way you like. For example, your sales team may be split such that half your sales team sells to the United States and the other half sells to the rest of the world and you may wish to reflect this in the OfficeTalk workgroup. You would do this by adding two sub groups: 'United States Team' and 'Rest Of World Team' to your 'Sales Team' group.

You can add a sub group in the following way:

- In the left hand list in Supervisor mode, press the ⊞ button next to the **Groups** entry. This will display a list of the groups already defined in your workgroup.

- From the left hand list, select the group to which you wish to add the sub group.
- Click the right mouse button anywhere in the right hand list and select **New…** from the context menu. Now add the group as described in the section "Adding a Group" on page 46.

Defining the Security Profile for a Group of Users

OfficeTalk lets you assign a security profile to all the users belonging to a particular group. The alternative is to assign the security profile to each user individually which, for large workgroups, may be undesirable. You can make this group assignment by selecting **Groups** in the left hand list in Supervisor mode and the right clicking on the relevant group in the right hand list and selecting **Set security profile** from the context menu. A Security Profile dialog box is displayed, allowing you to select the appropriate security profile from a drop down list. Press **OK** to perform the group assignment.

Controlling Access to a Group

Note that granting a user access to the group's contents does not affect that user's access to the members of the group

Supervisor mode lets you control who has access to which group. The reasons for providing security on groups are several. One reason, for example, would be if you wanted to allow users to use groups as mailing lists but you did not want unauthorised users to change the members of the mailing list. In this circumstance you would grant read access only to most users.

You can grant access to a particular group in the following way:

- Bring up the Group property sheet by clicking the right mouse button on the relevant group in the right hand list and selecting **Edit…** from the context menu. Select the Access page.

Note that only supervisors and the group's owner may change the access to the group

Specify whether this is a private, personal or public group by selecting the appropriate radio button. If you select **Private** then only the owner of the group will have access to the group. If you select **Personal** then other users' access to this group and the contents of the group will depend on their *general* access to the owner of the group. If you select **Public**, then all users will have full access to the group and its contents.

- If you wish to grant access to the group regardless of users' access to the owner, then select the **Custom** radio button and press the **Custom Access…** button.

- The Custom Access property sheet will be shown. This property sheet provides two pages; the Item Access page and the Contents Access page. The Item Access page lets you specify access of each security profile to the group. For example, if a user is given edit access, using the Item Access page, then, in the case of a group, they may edit the group's name. If they are given delete access, using the Item Access page, then, they may delete the group. The Contents Access page lets you specify access of each security profile to the members of the group. For example, if a user is given change access, using the Contents Access page, then the user may add or remove users from the group.
- For each page, select the security profile(s) whose access you wish to change. Specify the required access by checking the appropriate radio button. The settings will take place when you press **OK** on the property sheet. The access of all local and remote users that have been assigned the selected security profile(s) will change to the new settings.

Administering Planners

Clicking on **Planners** in the left hand list will display the currently defined planners in the right hand list. The table below describes the columns available to be shown in the right hand list.

Column	Description
Name	The name of the planner, e.g. 'Holiday Planner'.
Last Edited	The time when this record was last edited.
Owner	The planner's owner.

What is a Planner?

A planner is a record of long-term activity where the smallest unit of time is one day. A good example of a planner is a holiday planner.

A planner consists of a set of keys, each representing a different kind of activity. A key may be selected and used to add bookings to the planner.

For example, a holiday planner may consist of a set of keys, that each represent a different user. To represent a particular user's holiday, select the key representing that user and then draw the booking onto the planner. For more information, see "Planner Mode" on page 189.

Adding a Planner

You can add a new planner in the following way:

- Select **Planners** from the left hand list and then click the right mouse button anywhere in the right hand window. Select **New…** from the context menu. The Planner property sheet will be displayed.
- Specify a name for the planner, e.g. ‘Holidays’ and press **OK**.

The Diary tab may be used to show planner bookings through onto certain user’s diaries. For more information on how to do this, see “Showing a Planner in Your Diary” on page 196

For more information on planners see "Planner Mode" on page 189.

Controlling Access to a Planner

Note that there is a difference between access to a planner and access to the contents of the planner

Supervisor mode lets you control who has access to a particular planner. If a user is given full access to a planner then the user may edit the planner’s name and even delete the planner. If the user is given full access to the planner’s contents then the user is free to add, edit and delete planner keys and bookings held within the planner.

You can grant access to a particular planner in the following way:

- Bring up the Planner property sheet by clicking the right mouse button on the relevant planner in the right hand list in Supervisor mode and selecting **Edit…** from the context menu. Select the Access page.

Note that only supervisors and the planner’s owner may change the access to the planner

Specify whether this is a private, personal or public planner by selecting the appropriate radio button. If you select **Private** then only the owner of the planner will have access to the planner. If you select **Personal** then other users’ access to this planner and the contents of the planner will depend on their *general* access to the owner of the planner. If you select **Public**, then all users will have full access to the planner and its contents.

- If you wish to grant access to the planner regardless of users' access to the owner, then select the **Custom** radio button and press the **Custom Access…** button.

- The Custom Access property sheet is shown. This property sheet provides two pages; the Item Access page and the Contents Access page. The Item Access page lets you specify access of each security profile to the planner. For example, if a user is given edit access, using the Item Access page, then, in the case of a planner, they may edit the planner's name. If they are given delete access, using the Item Access page, then they may delete the planner. The Contents Access page lets you specify the access of each security profile to the planner keys and planner bookings held within the planner. For example, if a user is given delete access, using the Contents Access page, then the user may add, edit and delete planner keys and planner bookings held within the planner.
- For both the Item Access page and the Contents Access page in turn, select the security profile(s) whose access you wish to change to the planner and the planner's contents, respectively. Specify the access to the planner by checking the appropriate radio button. The settings will take place when you press **OK** on the property sheet. The access of all members of the selected security profile(s) will change to the new settings.

Planner Folders

Planner folders are used to structure your list of planners. For example, you may wish to keep separately the sales team's planners from the marketing team's planners. Planner folders may contain planners and other planner folders. OfficeTalk lets you add planner folders from both Planner mode and Supervisor mode. You can add a planner folder from Supervisor mode in the following way:

Create a sub planner folder by selecting the parent planner folder from the left hand list and choosing ***New Sub Planner Folder…*** *from the context menu*

You can specify access to a planner folder in just the same way that you specify access to a planner by using the Access page in the Planner Folder property sheet.

- From Supervisor mode, select **Planners** in the left hand list using the right mouse button and select **New Planner Folder…** from the context menu. A Planner Folder property sheet is displayed.

You can add a planner to a planner folder from Supervisor mode by dragging the planner from the right hand list and dropping it onto the relevant planner folder in either the right or left hand list.

Administering Projects

Clicking on **Projects** in the left hand list will display the currently defined projects in the right hand list. The table below describes the columns available to be shown in the right hand list.

Column	Description
Name	The name of the project, e.g. 'Work Plan'.
Last Edited	The time when this record was last edited.
Owner	The project's owner.

What is a Project?

A project is a structured list of tasks that may be individually given a planned start time and a planned duration. Project mode represents a project as a list of tasks and an associated bar chart of planned activity. For more information see "Project Mode" on page 167.

Adding a Project

You can add a new project in the following way:

- Select **Projects** from the left hand list and then click the right mouse button anywhere in the right hand list. Select **New…** from the context menu. The Project property sheet will appear.

- Specify a name for the project, e.g. ‘Development Plan’ and press **OK**.

Controlling Access to a Project

Note that there is a difference between access to a project and access to the contents of the project

Supervisor mode lets you control who has access to a particular project. If a user is given full access to a project then the user may edit the project’s name and even delete the project. If the user is given full access to the project’s contents then the user is free to add, edit and delete project tasks held within the project.

You can grant access to a particular project in the following way:

- Bring up the Project property sheet by clicking the right mouse button on the relevant project in the right hand list in Supervisor mode and selecting **Edit…** from the context menu. Select the Access page.

Note that only supervisors and the project’s owner may change the access to the project

Specify whether this is a private, personal or public project by selecting the appropriate radio button. If you select **Private** then only the owner of the project will have access to the project. If you select **Personal** then other users’ access to this project and the contents of the project will depend on their *general* access to the owner of the project. If you select **Public**, then all users will have full access to the project and its contents.

- If you wish to grant access to the project regardless of users’ access to the owner, then select the **Custom** radio button and press the **Custom Access…** button.

- The Custom Access dialog box will be shown. This dialog box provides two pages; the Item Access page and the Contents Access page. The Item Access page lets you specify access of each security profile to the project. For example, if a user is given edit access, using the Item Access page, then, in the case of a project, they may edit the project's name. If they are given delete access using the Item Access page, then they may delete the project. The Contents Access page lets you specify access of each security profile to the project tasks held within the project. For example, if a user is given delete access using the Contents Access page, then the user may add, edit and delete project tasks held within the project.
- For each page, select the security profile(s) whose access you wish to affect. Specify the access to the project by checking the appropriate radio button. The settings will take place when you press **OK** on the property sheet. The access of all members of the selected security profile(s) will change to the new settings.

Project Folders

Project folders are used to structure your list of projects. For example, you may wish to keep separately operational projects from the strategic projects. Project folders may contain projects and other project folders. OfficeTalk lets you add project folders from both Project mode and Supervisor mode. You can add a project folder in the following way:

Create a sub project folder by selecting the parent project folder from the left hand list and choosing ***New Sub Project Folder…*** *from the context menu*

- From Supervisor mode, select **Projects** in the left hand list using the right mouse button and select **New Project Folder…** from the context menu. A Project Folder property sheet will appear.

You can specify access to a project folder in just the same way that you specify access to a project by using the Access page in the Project Folder property sheet

You can add a project to a project folder from Supervisor mode by dragging the project from the right hand list and dropping it onto the relevant project folder in either the right or left hand list.

Administering Remote Workgroups

From within Supervisor mode you can administer the creation, connection and replication of remote workgroups. To view the list of any remote workgroups defined in your workgroup, click on **Remote Workgroups** in the left hand list.

What is a Remote Workgroup?

A remote workgroup is another OfficeTalk workgroup that you have referenced from your workgroup. Once you have referenced a remote workgroup, OfficeTalk lets you connect to that workgroup and, provided that you have sufficient access, lets you view the workgroup data directly or replicate the data locally.

Referencing Another Workgroup

To reference another workgroup, select **Remote Workgroups** from the left hand list, click the right mouse button anywhere in the right hand window and select **New…** from the context menu. This will display the Remote Workgroup wizard which will guide you through the process of connecting to another workgroup. For more information, see "Remote Workgroups" on page 377.

Controlling the Access of Remote Workgroups to your Data

OfficeTalk provides three remote workgroup configurations:

- Mirrored Workgroups
- Direct Workgroups
- Replica Workgroups

The mirrored workgroup configuration ensures that users of each workgroup see each other as local users. This means that access rights of physically remote users may be specified in exactly the same way as local users. For more information, see "Administering Access Rights" on page 83.

The direct and replica configurations keep remote users separately from local users. Defining the access of remote users to data in your workgroup is possible from within the Remote Workgroup property sheet. Double click on the relevant remote workgroup in the right hand list in Supervisor mode. The Remote Workgroup property sheet will be shown. Select the Access tab.

Note: The property sheet of mirrored remote workgroups does not contain an Access page.

Select the security profile that you wish to grant to all users of the remote workgroup. If there are specific users belonging to the remote workgroup to whom you wish to assign separate security profiles, then press the **Remote User Access…** button. This will display the Remote User Access Rights dialog box from which you can assign security profiles on an individual basis. For more information, see "Granting Access to Remote Workgroups" on page 383.

Administering Custom Data

Custom Fields

OfficeTalk provides the ability to completely customise the data that you store and display. You may add additional fields to most data types, such as tasks, projects, planners etc. and you can add data to these custom fields by making these custom fields available in the standard data entry property sheets.

Since different users in your organisation will be interested in different data, OfficeTalk lets you provide different users with different data entry property sheets. The standard pages are always shown in any custom property sheet. Property sheets may only be extended to show additional pages which may contain both system and custom fields.

Within a list, OfficeTalk lets you view, sort, group and filter by any custom data field. Any custom data field added to your database becomes available as a column in the relevant list windows.

Only a supervisor can customise the database in this way since changes made to the database will affect all users in the workgroup.

What is a Custom Field?

A custom field is a user definable property which may be stored against a particular data type. A custom field may be made available to the relevant data entry property sheet and to any relevant list windows.

For example, if you were to add a custom field, ‘Job Number’, to the task data type then you would be able to add job numbers to any task from within the task property sheet. Also, you would be able to view the job number of each task by displaying the ‘Job Number’ column in the task list in Diary mode.

Also, if you were to add a custom field, ‘Birthday’, to the contact data type then you would be able to record the birthdays for all contacts in OfficeTalk. You would be able to enter the birthdays from an additional property page in the Contact property sheet. You would be able to view the birthdays of a contact by adding the ‘Birthday’ column to the contact list in Directory view. Additionally, you would be able to add the ‘Birthday’ field to the Contact view.

Custom fields are also available from the search dialog boxes making it possible to include any custom field when performing both simple and advanced searching. Equally, custom fields are available from the print dialog boxes so that any data held in custom fields may be printed in just the same way as the system fields.

Customisable OfficeTalk Data Types

You can add custom fields to the following OfficeTalk data types:

- Appointments
- Companies
- Contacts
- Conversations
- Meeting Members
- Meetings
- Planner Bookings
- Planner Keys
- Planners
- Project Tasks
- Projects
- Resource Bookings
- Resources
- Tasks
- Users

Custom Field Types

You may add custom fields of the following types:

Type	Description
String	A standard text string. OfficeTalk lets you set a default for the string.
Number	An integer for which you may provide a default.
Real	A floating point number for which you may provide a default.
Yes/No	A Boolean which you may default to true or false.
Date	A date field which has a drop down calendar and a drop down list of friendly dates, such as ‘Today’, ‘Tomorrow’,

	‘Next Week’ etc.
Time	A time field which you may default to either *the current time* or a specified time.
Date/Time	A date and time field which is a combination of the Date and Time fields above.
Duration	A duration field, specified in days, hours and minutes. E.g. 5d4h20m or 2h30m or 50m. You may provide a default duration for this field.
Currency	A 2 decimal place real field with either a preceding or following currency symbol which you may specify. You may specify a default for this field.
Phone	A standard text field which has a drop down list of country codes.
E-mail	This field will accept e-mail addresses of the type Internet, MAPI or VIM. This field comes with a button to change the mail service used for mail sent to the entered address and a button for per-recipient settings particular to the mail service used.
Colour	This field is a drop down list of colours. You may choose a default colour for this field.
Link	This field is a link to any item of OfficeTalk data. For example, if added to the task data type, it would allow you to link a task to any contact. You may supply a default for this field.
Selection	This field is a drop down list of user definable strings. For example you may add a ‘Priority’ field to an appointment and you may wish your users to choose from either ‘High’, ‘Medium’ or ‘Low’. The selection type would let you do this. You may choose a default selection for this field.
Web Address	This field represents a World Wide Web (WWW) address. If shown in a property page, a button will also be displayed. Clicking the button will launch your default Web Viewer and will load the page specified in the field. You may specify a default for this field.

Custom Property Sheets

OfficeTalk lets you customise the property sheets used for data entry to include any custom fields that you add. You cannot change the standard pages of a property sheet, however you can add additional pages to which you can add any number of custom fields.

What is a Custom Property Sheet?

A custom property sheet is an extension of a standard property sheet to which you may add additional pages. Each additional page may contain one or more standard or custom fields appropriate to that OfficeTalk data type.

The Property Sheet page of the Security profile property sheet lets you choose the custom property sheets to be used for the members of the security profile. For more details, see “Defining Custom Property Sheets for a Security Profile” on page 86

You may assign different property sheets to different OfficeTalk users. For example, you may wish to provide your sales team with one view onto the data held in your contact database and you may want your accounts team to have an entirely different view of that data. You can do this by creating separate custom property sheets. One of the property sheets could contain sales related data, such as ‘Next Contact Date’ and ‘Interests’. The other property sheet could contain accounts related data such as ‘Monthly payment date’ and ‘Customer Ref. No.’.

OfficeTalk lets you assign the sales related property sheet to the users in the sales team and the accounts related property sheet to the users in the accounts team. Whenever any user from either team accesses the Contact property sheet, the additional relevant pages would be shown.

The Custom Field Wizard

Prior to creating a custom field you should ensure that all other users are logged off

OfficeTalk brings together the creation of custom fields and the customising of property sheets into a single process called the Custom Field wizard. Using the Custom Field wizard, you can add a new custom field, add a new tab to a new or existing property sheet and assign the property sheet to one or more users.

You can add a new custom field using the Custom Field wizard in the following way:

- From Supervisor mode, bring up the Custom Field wizard by selecting **New/Custom Field…** from the **Edit** menu. The Custom Field wizard will appear.

- Specify a name for the new custom field. Press **Next**. This is the name which will appear in the Column Chooser dialog of the associated list.

- Choose the OfficeTalk data type that you wish to add the new custom field to. For example, if you choose **Tasks**, the custom field would be added to all existing and new tasks shown in Diary mode. You may choose from the list detailed in “Customisable OfficeTalk Data Types” on page 57. Press **Next**.

- Choose the type of the custom field, e.g. **String**, **Number**, **Yes/No** etc. You may choose from any of the custom types specified in the table detailed in “Custom Field Types” on page 57
- The next page shown depends upon which custom field type you chose. If you chose a currency type, the next page lets you choose the symbol used to represent the currency and lets you specify whether the symbol precedes or follows the value. If you chose a link type, the next page lets you specify which OfficeTalk data type to link to. If you chose the selection type, the next page lets you specify the list of string values which the field will contain in its drop down list.
- Unless you chose one of the date, date/time or phone field types, the next page lets you choose a default value for the field.
- The next page lets you choose which property sheet the custom fields are added to. You have the choice of either adding the new field to an existing custom property sheet or creating a new custom property sheet.

- If you wish to create a new property sheet then select the **Add to New Sheet** radio button and supply a name for the property sheet. Press **Next**. The next page lets you choose which page will contain the new custom field. If you elected to create a new property sheet then you must create a new page. If you selected an existing property sheet then you have the choice of either creating a new page or selecting an existing page.

- By default, if you leave the description field blank, the first field in the page will be positioned at the top of the page. If you add some descriptive text to the page then this text will appear at the top of the page and the first field will be moved down appropriately.
- The next page lets you choose which security profiles will be assigned the custom property sheet. You may choose between making the property sheet the default for the entire workgroup, making it the default for certain security profiles, or doing neither.

- If you choose to assign it to specific security profiles then select the **Default for some security profiles** radio button and press the **Profiles…** button. A Select Security Profiles dialog box is displayed letting you select the appropriate security profiles.
- The next page summarises your decisions prior to the creation of the custom field. If you are happy with the summary, press the **Finish** button. OfficeTalk will try to create the custom field. If OfficeTalk successfully creates the custom field, a message box will be displayed to inform you.

If OfficeTalk fails to create the new custom field, then the most likely cause is that another user is logged on to OfficeTalk. Make sure that all users are logged off and try adding the field again by pressing the **Retry** button.

Once the new custom field has been successfully added, it will be available in the relevant list, the print and search dialog boxes and the relevant property sheet.

Adding, Editing and Deleting Custom Fields

You can add, edit and delete custom fields by selecting **Custom Data** from the left hand list in Supervisor mode and double clicking on the relevant OfficeTalk data type in the right hand list. The Data Design dialog box is displayed.

Select the Fields tab. To add a new custom field, press the **Add…** button. The Field dialog box is shown. Enter a name for the field and select the field type from the **Type** drop down list. You can specify default field values by clicking on the **…** button. Press **OK** to add the custom field.

You can edit an existing custom field by selecting the field from the Data Design dialog box and pressing the **Edit…** button. The corresponding Field dialog box is shown. You will not be able to change the custom field type, however, by clicking on the **…** button, you will be able to modify the default field values.

You can delete an existing custom field by selecting the field from the Data Design dialog box and pressing the **Delete** button. You will be asked to confirm deletion of the custom field and warned that any data stored in the custom field in each record will be lost. Press **Yes** to delete the custom field.

Adding, Editing and Deleting Custom Property Sheets

You can add, edit and delete custom property sheets by selecting **Custom Data** from the left hand list in Supervisor mode and double clicking on the relevant OfficeTalk data type in the right hand list. The Data Design property sheet is displayed. Select the Property Sheets tab. You can edit or delete existing custom property sheets by selecting the relevant custom property sheet from the list and pressing the **Edit…** or **Delete** buttons respectively.

You can add a new custom property sheet by pressing the **New…** button. The Property Sheet property sheet is shown.

Enter a name for the custom property sheet. For example, if the new custom property sheet is an extension of the Task property sheet, then you might enter the name 'New Task Property Sheet'. Next, select the Pages tab. The Pages page will be displayed, showing a list of the additional custom property pages which will appear in the custom property sheet. You can add a new page by pressing the **New…** button. The Property Page dialog box is displayed.

A list of all the standard and custom fields will be shown in the **Unused Fields** list. You can choose which fields will be shown in the new property page by selecting the fields from this list and pressing the **Add…** button. You can use the **Raise** and **Lower** buttons to order the chosen fields in the right hand list. The order in which the fields are displayed in the right hand list will correspond to the order in which the fields appear in the custom property page.

Assigning Custom Property Sheets to Different Security Profiles

Once you have created a custom property sheet, OfficeTalk lets you assign the property sheet to specific security profiles or to the workgroup as a whole. You can assign a property sheet to a specific security profile in the following way:

- From Supervisor mode, select **Security Profiles** from the left hand list. Click the right mouse button on the relevant security profile in the right hand list and select **Edit…** from the context menu. The Security Profile property sheet is displayed.
- Select the Property Sheet tab. The Property Sheet page will be displayed. From the **Data Type** drop down list, select the OfficeTalk data type corresponding to the property sheet that you wish to change for members of this security profile.
- The **Property Sheet** drop down list will contain an entry called 'Workgroup Default'. Selecting this will assign, to the members of the security profile, the property sheet that is assigned to the workgroup. The list also contains an entry called 'OfficeTalk Default'. Selecting this will assign, to the members of the security profile, the standard property sheet for the corresponding OfficeTalk data type. The **Property Sheet** drop down list will also contain any user defined property sheets for the corresponding OfficeTalk data type. Selecting a specific property sheet from this list will cause the members of the security profile to use that property sheet when editing or creating data of the corresponding OfficeTalk data type.
- Press **OK** to make the changes.

By default, all security profiles are assigned the 'Workgroup Default' property sheet for each OfficeTalk data type. Changing the workgroup default property sheet for a particular data type will change the property sheet for all members of those security profiles assigned with the workgroup default.

You can change the property sheet marked as the 'Workgroup Default' for a particular OfficeTalk data type in the following way:

- From Supervisor mode, select **Workgroup Details** from the **Edit** menu. The Workgroup property sheet is displayed. Select the Property Sheet tab.
- From the **Data Type** drop down list, select the OfficeTalk data type whose property sheet you wish to make the workgroup default.
- The **Property Sheet** drop down list contains an entry called 'OfficeTalk Default'. Selecting this will assign the standard property sheet for the corresponding OfficeTalk data type as the workgroup default. The **Property Sheet** drop down list also contains any user defined property sheets for the corresponding OfficeTalk data type. Selecting a specific Property Sheet from this list will make that property sheet the workgroup default property sheet.
- Press **OK** to make the changes.

Controlling the Access to Custom Fields

Once you have defined custom fields, you may wish to control the access that specific users have to each field. One way to do this is to create a series of custom property sheets, some of which contain certain fields and some of which contain other fields. The custom property sheets may then be assigned to the appropriate users, through the respective security profiles. This can lead to an excessive amount of similar custom property sheets being created. Furthermore, users will have access to the custom fields as list columns.

A better way is to individually specify the access of the relevant fields to each security profile. This way, the same property sheet may be shared between two users, one of whom has access to all fields in the property sheet and another who has access to only some.

You can specify the access to a custom field in the following way:

- Select **Custom Data** in the left hand list in Supervisor mode and then double click on the appropriate data type in the right hand list. The appropriate Data Design property sheet is displayed.
- Select the Fields tab. A list of available custom fields are shown for the particular data type. Double click on the relevant custom field. The Custom Field property sheet is shown. Select the Access tab.

The Access page lets you specify the access that each security profile has to the custom field. A particular user's access to certain custom fields will be entirely dependent upon which security profile the user belongs to.You may choose between the following:

Access Level	Description
No Access	A user with no access to a custom field will not be able to see the field in the property sheet.
Read Access	A user with read access to a custom field will be able to read the contents of the field but may not change it.
Full Access	A user with full access to a custom field may read and edit the contents of the custom field.

Administering Mail Services

From within Supervisor mode you can administer the configuration of mail services. To view the list of mail services in your workgroup, click on **Mail Services** in the left hand list.

What is a Mail Service?

A mail service translates between OfficeTalk mail and another mail transport. OfficeTalk is supplied with three mail services:

- Internet Mail Service

- MAPI Mail Service
- VIM Mail Service

Each mail service may be enabled or disabled on a per-user basis.

Configuring the Internet Mail service

Gateway Machine

The Internet mail service can enable the entire OfficeTalk workgroup to send and receive Internet mail using just one connection to the Internet. The OfficeTalk Internet mail service is capable of receiving Internet mail from either a POP3 server or an SMTP server and can send mail via an SMTP server. This means that it is ideal for either dial up *or* dedicated connections.

For larger workgroups, you will probably want to dedicate one machine to sending and receiving workgroup Internet mail

At least one OfficeTalk machine must be configured as a gateway machine. A gateway machine is responsible for connecting to the Internet and sending and receiving mail for the entire workgroup. All other OfficeTalk machines send and receive their mail to and from the workgroup database. Periodically, the gateway machine reads the outgoing messages from the workgroup database, connects to the Internet and sends the mail. Simultaneously, the gateway machine collects mail from all configured POP3 mailboxes or the specified SMTP server and distributes the mail to the appropriate OfficeTalk user.

POP3 and SMTP Capabilities

The OfficeTalk Internet mail service can receive mail via either a single-user POP3 mailbox or via a multiple POP3 mailbox. A multiple POP3 mailbox can be used for receiving mail for one or more people, whereas a single-user POP3 mailbox may be used for receiving mail for only one person. Alternatively, OfficeTalk can receive mail from an SMTP server. This is less common than receiving via POP3 but, like the multiple POP3 mailbox, all the mail for the entire workgroup may be received via a single connection to the SMTP server.

Most organisations typically receive using POP3 and purchase, from a service provider, a POP3 mailbox for each user. You can provide OfficeTalk with information about each POP3 mailbox and it will download mail from each mailbox in turn.

The OfficeTalk Internet mail service is particularly advantageous when all users' mail is collected from the same multiple POP3 mailbox or from the same SMTP server since you need only pay your Internet service provider for one mailbox and can provide Internet mail connectivity for your entire workgroup.

Setting Up Address Information

The first step in configuring the Internet mail service is to set up the workgroup e-mail address.

An Internet e-mail address is of the following format:

mailbox@workgroupaddress

where **mailbox** may be, for example, 'john' or 'susan.smith' and **workgroupaddress** may be, for example, 'mycompany.com' or 'mycompany.myprovider.org', to illustrate just a few examples.

The Address page in the Internet Service property sheet lets you enter one or more workgroup addresses.

Note: A workgroup address is the part of the e-mail address to the right of the '@' character.

If all your users' e-mail addresses have the same workgroup address part, for example:

- johnb@company.com
- mike.gray@company.com
- juliedeane@company.com

then you need add only one workgroup address, 'company.com' in this page. However, if some of your users have e-mail addresses with different workgroup address parts then you will need to add each of these workgroup addresses in this page. You can add a new workgroup address in the following way:

- From Supervisor mode, select **Mail Services** in the left hand list. This will show the available mail services in the right hand list.
- Click the right mouse button on the **Internet Service** entry and select **Edit…** from the context menu. The Internet Service property sheet will be shown, showing the Address page.

- Enter your primary workgroup address, e.g. 'mycompany.com' into the **Workgroup Address** field.
- If you wish to add any other workgroup addresses then click the **New…** button. The Address dialog box is displayed. Type in an additional workgroup address and press **OK**.

You can edit and delete workgroup addresses from this page by selecting the appropriate workgroup address from the list and pressing the **Edit…** or **Delete** button.

Setting Up Per-User Information

Before a user can send and receive Internet mail, the mail service must first be activated for the user. This can be done from the Users page.

There is a check box to the left of each user. Select the check box to the left of the user that you wish to configure and press the **Settings…** button. The User Settings property sheet will be displayed.

Address Page

The settings in the Address page determine the user's e-mail address. An e-mail address is of the following form:

mailbox@workgroupaddress.com

The Internet service Address page lets you specify one or more addresses for the workgroup. The Address page in the User property sheet lets you select one of these addresses along with a mailbox name in order to fully specify the user's e-mail address.

For example, your workgroup may be configured with the following addresses:

- company.com
- company.org
- mycompany.provider.com

If you specified ‘john’ as the mailbox for the user, then mail coming to the following addresses would be delivered to the user:

- john@company.com
- john@company.org
- john@mycompany.provider.com

Selecting a workgroup address in the Address page determines the e-mail address used when recipients of your mail reply to your message. Although the user will receive mail addressed to any of the three addresses above, he may wish to be addressed as ‘john@company.com’ in which case ‘company.com’ should be selected from the **Workgroup Address** drop down list.

POP3 Page

The POP3 page lets you specify details of a POP3 account that is specific to this user. If your workgroup receives all its mail via SMTP or via a multiple POP3 mailbox then the fields in this page should be left blank. However, if mail for this user is received via a single user POP3 account, you should specify the login name and password for the POP3 account.

Forwarding Page

The Forwarding page of the User Settings property sheet lets you configure mail redirection for this user. The redirection is handled by the gateway machine as soon as the message is received from the Internet.

You may choose between the following:

- No forwarding
- Forwarding to a local user
- Forwarding to an e-mail address

To forward to a local user, select the **Forward To User** radio button and select the relevant user from the drop down list. To forward to an e-mail address, select the **Forward To Address** radio button and enter the relevant e-mail address.

Checking the **Keep a Copy** check box ensures that the user gets a copy of the message before it is forwarded.

Setting up a Workgroup POP3 Mailbox

If you have a multiple POP3 mailbox which is capable of handling the collection of mail for any number of users then you should enter the login name and password for this mailbox in the POP3 page of the Internet Service property sheet.

Note: If you will be collecting mail for your workgroup through one or more single-user POP3 mailboxes, then you must specify the details for each of the POP3 mailboxes in the User Settings property sheet on a per-user basis. For more information see "Setting Up Per-User

Information" on page 67. In this case you should leave the **Login Name** and **Password** fields blank on this page.

Setting Up Host Information

The Host page lets you specify whether your machine will be a gateway machine or a non-gateway machine. If you specify your machine as a gateway machine then you must provide additional information in this page.

Specifying How to Connect

If your machine is configured as a gateway machine then it has the responsibility for connecting to the Internet and sending and receiving mail for the workgroup.

If you need to dial up via a modem in order to connect to the Internet then select the **Dial-up** radio button and select a dial-up service from the drop down list or add a new dial-up service by pressing the **New Connection…** button. The **Properties…** button lets you configure an existing dial-up service.

Specifying the Mail Server Address

If you have a dedicated connection to the Internet then select the **Direct Connection** radio button.

If you send your mail via SMTP and receive your mail via POP3 then your provider will usually locate both SMTP and POP3 servers at the same address: for example ‘mail.provider.com’. In this case, you should enter the server address, ‘mail.provider.com’, into the **Mail Server Address** field.

If the SMTP server and POP3 server are located at two different addresses then you should specify the SMTP server address in the **Mail Server Address** field and the POP3 server address in the **Receive Server Address** field. To access the **Receive Server Address** field, press the **Advanced…** button. The Host Server Receive Address dialog box is displayed containing the **Receive Server Address** field.

If you receive mail using POP3 then you should ensure that **SMTP/POP3** is selected in the **Mail Server Type** drop down list.

If you send and receive your mail using SMTP only, then both send and receive servers are usually located at the same address. You should enter this address into the **Mail Server Address** field. You should also ensure that the mail server type is set to **SMTP Only**.

Setting Up Connection Information

The Connection page lets you specify when and how often the gateway machine connects to the Internet in order to send and receive Internet mail. You can also specify options for disconnecting automatically.

Specifying Connection Options

This page lets you specify whether or not to connect to the Internet when OfficeTalk starts up. You can specify that OfficeTalk connects after start up by checking the **Connect to the Internet on Service startup** check box. You can also specify the number of seconds to wait before connecting in the corresponding field.

You may specify whether or not you wish OfficeTalk to prompt you prior to connecting to the Internet. You can do this by checking the **Prompt before connection** check box.

Scheduling Connection Times

The Connection page also lets you specify a schedule for connecting to the Internet. For example, you may specify that OfficeTalk connects every 30 minutes, or you can specify that OfficeTalk will connect Monday through Friday at 10:00am. You can do this by pressing the **Connection Schedule…** button. This will bring up the Schedule dialog box. The Schedule dialog box contains the list of defined scheduled events for when a connection will be made.

You can add a scheduled event in the following way:

- Bring up the Schedule dialog box by pressing the **Connection Schedule…** button in the Connection page of the Internet Service property sheet.
- Press the **New…** button located in the Schedule dialog box. A Scheduled Event dialog box is displayed.

- The **When** drop down list lets you choose the type of scheduled event. You may choose between specifying connection to occur *Every n minutes* or *Once* on a particular date at a particular time or *Weekly on* one or more days of the week at a certain time. The fields in the Scheduled Event dialog box will change according to your selection. Once you have selected the scheduled event type and have specified the appropriate dates and times, then press **OK**. The scheduled event will be added to the list in the Schedule dialog box.

Specifying Disconnection Options

You can configure the Internet mail service to automatically disconnect from the Internet after a certain period of time. You can do this by checking the **Disconnect automatically** check box and specifying a time period in the adjacent field. You may specify whether or not you wish OfficeTalk to prompt you prior to disconnection. You can do this by checking the **Prompt before disconnection** check box.

You will not lose mail if you force the disconnection in this manner. OfficeTalk will simply re-request or re-send the last item of mail the next time you connect

If the service is still sending or receiving mail at this time, then the service will not disconnect until all activity has finished. If you wish to force disconnection after a certain period of time regardless of whether mail is still being sent or received then bring up the Advanced dialog box by pressing the **Advanced…** button.

The Advanced dialog box gives you three disconnection options:

- Do not force disconnection
- Prompt before forcing disconnection
- Force disconnection silently

Choose the appropriate option and press **OK**.

Handling Mail For Unknown Users

If you receive mail using SMTP or using a multiple POP3 mailbox then mail can be sent to 'anyone@mycompany.com', using the above example. In this case, the mailbox 'anyone' is not associated with any user. OfficeTalk can recognise mail for unknown users and can forward the mail to a known user. This can be done from the Forwarding page.

The Forwarding page lets you choose from the following options:

- No forwarding of unknown mail.
- Forwarding unknown mail to a particular user. This is done by selecting the **Forward to User** radio button and selecting a user from the drop down list.
- Forwarding to an e-mail address. This can be done by selecting the **Forward to Address** radio button and specifying an address in the adjacent field. If this option is selected then mail is re-sent to the specified address the next time that the Internet service connects in order to send and receive mail.

Virtual Mailboxes

A virtual mailbox is a virtual e-mail address defined in the workgroup to which mail can be sent. Mail sent to a virtual mailbox will not get delivered to anyone unless mail in that virtual mailbox is explicitly forwarded. You can create as many virtual mail boxes as you like regardless of the number of OfficeTalk licenses that you have purchased. You can forward mail, sent to a virtual mailbox, to an OfficeTalk user or to an external e-mail address .

For example, suppose you decided that you wanted to set up a mailbox for your customers to send enquiries to but, ultimately, one OfficeTalk user would be responsible for reading mail coming into this mail box. The solution would be to set up a virtual mailbox called 'enquiries' and have all the mail sent to this mailbox forwarded to the relevant user. You can do this in the following way:

- From Supervisor mode, select **Mail Services**. This will show the available mail services in the right hand list.

- Click the right mouse button on the **Internet Service** entry and select **Edit…**. The Internet Service property sheet is displayed. Select the Virtual Mailboxes tab.

- Click the **New…** button. The Virtual Mailbox property sheet is displayed showing the Address page. Specify a mailbox name, for example, ‘enquiries’.
- If you receive your e-mail via single-user POP3 mailboxes then click the POP3 tab and specify the POP3 login name and password.
- Click the Forwarding tab and select the **Forward To User** radio button and select the relevant user from the drop down list. Alternatively, select the **Forward To Address** radio button and specify an e-mail address.

Configuring an Auto Responder

An auto responder is a virtual mailbox which is capable of automatically replying to anyone that sends mail to it. Such a feature would enable you to offer your customers an e-mail address to which they can send mail and automatically receive information about your company or the products and services that you provide. You could configure an auto responder for each product or service, each responder replying with different information.

A responder can be set up to reply with either a plain text message or a binary attachment.

You can create a responder in the following way:

- Set up a virtual mailbox as described in “Virtual Mailboxes” on page 74.
- Click on the File tab of the Virtual Mailbox property sheet. Specify the filename of the file that you wish to reply with. This can be either a text file or a binary file.

- Select whether you wish to attach the file to the responding mail message or import the file, as text into the responding mail message. Note that if you choose to import a file, the file must be a text file.
- To prevent the virtual mailbox from auto responding, simply clear the **Response File** field.

As soon as OfficeTalk receives a message sent to the virtual mailbox, it will reply to the sender with your response message.

Specifying Logging Options

OfficeTalk lets you log events, such as sending a message and receiving a message, to an event log. Additionally, OfficeTalk lets you log all SMTP/POP3 level transactions.

OfficeTalk can log when a message has been sent, when a message has been received, when a message has been responded to and when a message has been forwarded. You can configure OfficeTalk to log any combination of these events by checking the appropriate check boxes in the Log Options page. You can view the logged events at any time by pressing the **Show Logged Events** button on this page.

You can log all SMTP/POP3 activity by selecting the **Log SMTP/POP3 communications to file** check box and specifying a filename for the log file. You can show the file at any time by pressing the **Show file…** button. You can empty the file at any time by pressing the **Empty file…** button.

Specifying Error Handling

If there is a network error or another form of error during mail processing then you can instruct OfficeTalk to inform you of this either by displaying a message box or by logging the error to the list of logged events. You can specify these options from the Errors page.

Configuring the MAPI Mail Service

From within Supervisor mode, you can configure each OfficeTalk user for sending and receiving messages via the MAPI messaging subsystem. If an OfficeTalk user needs to be able to send messages to or receive messages from a Microsoft Mail® or Microsoft Exchange® user, from within OfficeTalk mail, then the MAPI mail service should be activated for that user.

Setting Up Users

You can set up and activate the MAPI mail service for a particular user in the following way:

- From Supervisor mode, select **Mail Services** from the left hand list. This will show the available mail services in the right hand list.
- Click the right mouse button on the **MAPI Service** and select **Edit…**. The MAPI Service property sheet is displayed. Select the Users tab.

- Select the check box to the left of the user that you wish to configure and press the **Settings…** button. The mail service User Settings property sheet is displayed, showing the Credentials page.

Windows 3.1 and 3.11 users should enter their Microsoft Mail login name and password into the Login Profile and Password fields respectively

A list of MAPI profiles is only available to you if you are editing your settings

Select the appropriate mail profile that you wish to load when OfficeTalk logs onto MAPI. The profiles listed in the drop down list are the same profiles listed in the Mail and Fax applet in Control Panel.

Note that Windows 3.1 and 3.11 users will only be able to send mail to a user via a Microsoft Mail address if that user's default mail service is set to MAPI

The Address page is only available in the User Settings property sheet if the associated user has been set up to use MAPI as their default mail service. Any OfficeTalk users sending mail to this user need to know the e-mail address to use. This may be any address that one of the MAPI services will take responsibility for. For example, if you have an Internet Mail MAPI service installed in the mail profile as specified in the Mail and Fax applet, then you could enter an Internet address into this field, however, you should prefix the address with 'SMTP:'. If you have a Microsoft Mail® service installed in the mail profile then you may enter a Microsoft Mail® address, for example, 'MS:Company/Post/User'.

The Settings page is only available in the User Settings property sheet if the associated user has been set up to use MAPI as their default Mail Service.

For information on installing MAPI forms, see "Installing Forms into Microsoft Exchange/Outlook" on page 365

Any OfficeTalk users sending mail to this user need to know whether that user is using Microsoft Exchange® as their mail client in order that they can use MAPI forms for certain mail messages, such as meeting invitations, project task assignments and task assignments.

The Checking page lets you specify how often the associated user will poll MAPI, checking for new mail.

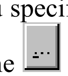
Checking the **Check for mail for this service on this machine** check box will enable the field below, allowing you to enter how often the user will check for new mail using the MAPI service.

Configuring the VIM Mail Service

From within Supervisor mode, you can configure each OfficeTalk user for sending and receiving messages via the VIM messaging subsystem. If an OfficeTalk user needs to be able to send messages to or receive messages from a Lotus Notes® or Lotus cc:Mail® user, from within OfficeTalk mail, then the VIM mail service should be activated for that user.

Setting Up Users

You can activate the VIM mail service for a particular user in the following way:

- From Supervisor mode, select **Mail Services** in the left hand list. This will show the available mail services in the right hand list.
- Click the right mouse button on the **VIM Service** and select **Edit…**. The VIM Service property sheet is shown. Select the Settings page. This page lets you specify the directory containing the VIM database. Use the  button to locate the required directory. Next, select the Users page.

- Select the check box to the left of the user that you wish to configure and press the **Settings…** button. The User Settings property sheet is displayed, showing the Credentials page.

Enter your cc:Mail® or Lotus Notes® login name and password into the fields provided.

The Checking page lets you specify how often the associated user will poll VIM, checking for new mail.

Checking the **Check for mail for this service on this machine** check box will enable the field below, allowing you to enter how often the user will check for new mail using the VIM service.

Administering Categories

Categories are *labels* which may be assigned to one or more items of data. For example, you may define a global category called 'In Progress'. You may then mark OfficeTalk data items as 'In Progress', for example, any unfinished documents, tasks and conversations etc. may be marked as 'In Progress'. At a later time, you may perform a global search to find all items of data which are marked as 'In Progress'.

Category Sets

OfficeTalk lets you define one or more category sets. A category set is a named list of categories which may be associated with one or more data types. For example, OfficeTalk comes supplied with a category set called 'Diary Categories' which is assigned to task, appointment and resource booking data types. Categories may then be added to the 'Diary Categories' set and these categories will only be available from the Task property sheet and the Appointment property sheet.

Adding a Category Set

You can add a category set in the following way:

- From Supervisor mode, select **Categories** from the left hand list. The list of category sets will be displayed in the right hand list.
- Bring up the context menu by clicking the right mouse button anywhere in the right hand window. Select **New…** from the context menu. The Category Set property sheet is displayed.

- Specify a name for the category set, for example, ‘My Own Categories’, and choose the data types to which the category set will be available. Press **OK**.

Adding a New Category

You can add a category to a category set in the following way:

- Expand **Categories** in the left hand list and select the category set to which you wish to add the category. Bring up the context menu by clicking the right mouse button anywhere in the right hand window. Select **New…** from the context menu. The Category property sheet is displayed.

- Specify a name for the category, for example, ‘Prospect’.
- If the category is a public category then ensure that ‘No Owner’ is selected in the **Owner** drop down list. If you wish the category to be private to a particular user then select the relevant user from the **Owner** drop down list.
- Finally select the category set to which you wish to add the category and press **OK**.

For more information, see "Using Categories" on page 349.

Administering Event Types

OfficeTalk lets you categorise different events using event types. OfficeTalk is supplied with some standard event types. These are:

- Holidays
- Anniversaries
- Birthdays

Any events made in Diary mode may be associated with one of these event types. The event will inherit the event type's marker.

You may wish to add your own event types. For example, you may wish to provide an event type called ‘Exhibitions’ which will represent any events associated with your organisation's exhibitions. You may add your own event types to OfficeTalk in the following way:

- Select **Event Types** from the left hand list in Supervisor mode.
- Click the right mouse button in the right hand list and select **New…** from the context sensitive menu. The Event Type property sheet is displayed.
- Enter a name for the event type and select an appropriate marker from the drop down list. Press **OK** to save your changes.

Administering Access Rights

This section describes how to grant and restrict local and remote users’ access to data in your workgroup through the creation and administration of security profiles.

Defining Security Profiles

OfficeTalk provides functionality for administering the security of data within your workgroup. Rather than granting and denying access to data on a per-user basis, OfficeTalk lets you define security profiles whose access to data may be fully specified. A security profile may then be assigned to one or more users. This gives you more control over the data security in your workgroup.

OfficeTalk provides four security options that will apply to most of the data in the workgroup. These are:

Security Option	Description
Private	Data marked as private may be seen and accessed only by the data’s owner.
Personal	Data marked as personal may be seen and accessed by the data’s owner. The data may also be accessed by other users according to their general access to the data’s owner.
Public	Data marked as public is fully accessible by all members of the workgroup, however only the data’s owner and any supervisors may change the access of this data.
Custom	Data marked as custom will be accessible to users based on the customised settings.

Note that it is possible to have no access to a user's personal data but still have full access to the user's tasks and appointments. For more information see "Defining a Security Profile's Access to a User" on page 39

The default security option for data, such as projects, planners, meetings, conversations etc is *personal*. This means that, for most cases, the workgroup data security may be defined simply by defining the general access of security profiles to each user. For example, if you have *read* general access to a particular user then you will also have read access to all of that user's personal data. If you have *visible* general access to a user then you will be able to send mail and notifications to the user as well as inviting the user to meetings, however you will not have any access to any of that user's personal data.

The Access page in the property sheet of most data types lets you choose whether the item is private, personal or public. It also lets you specify, in more detail, the individual access of certain security profiles to the data.

Note: Only the data's owner or a supervisor will see an Access page in the property sheet of an item.

OfficeTalk provides a default security profile called 'Default Access'. All new users are initially assigned this security profile. In order to specify that some users may have access to certain data while other users may not, you must create additional security profiles and assign each user to the appropriate profile.

You can create a new security profile from Supervisor mode in the following way:

- Click the right mouse button on **Security Profiles** in the left hand list and select **New…** from the context menu. The Security Profile property sheet is displayed.

- Enter a name for the security profile, for example, 'Managers', 'Support Staff', 'CEO', etc. and press **OK**. The new security profile will appear in the right hand list and will be made available in the Access page of the User property sheet.

Restricting Access to Modes

OfficeTalk lets you specify the access that each user has to a particular mode. In addition to letting you specify who can actually enter a particular mode, OfficeTalk also lets you specify what actions may be performed within the mode.

For example, you may wish to specify that certain people have access to all modes except Meeting mode. Alternatively, you may wish to allow all users to create companies and contacts but deny certain users from viewing the history of communication held with any companies or contacts. All this, and more, may be specified from Supervisor mode in the following way:

- Select **Modes** from the left hand list in Supervisor mode and double click on the mode for which you wish to define the security in the right hand list. OfficeTalk will display the Mode property sheet.

- Select the Access tab. Ensure that 'Mode' is selected in the **Type** drop down list. By selecting the relevant security profiles from the list and choosing the appropriate radio button, you can define which security profiles have access to the corresponding mode and which have no access. A user belonging to a security profile which has *no* access to a particular mode will not be able to enter the mode. The mode button will be disabled.
- Drop down the **Type** list to show all other attributes of the chosen mode for which access may be defined. For example, Contact mode lets you define the following:

1. Who has access to the mode.
2. Who may enter the Company/Contact and Directory views.
3. Who may access the History view.
4. Who has what level of access when adding, editing and deleting companies and contacts.
5. Who may create personal/public contact groups.
6. Who may create personal/public documents.
7. Who may create personal/public conversations.

A list of the attributes of each mode is shown below:

Mode	Attribute	Access
Bin	Mode	No Access/Access
Contact	Mode	No Access/Read Access
	Company/Contact/ Directory Views	No Access/Read Access
	History View	No Access/Access
	Companies/Contacts	Read/Create/Edit/Delete Access
	Contact Groups	Read/Create Personal/Create Public
	Documents	Read/Create

		Personal/Create Public
	Conversations	Read/Create Personal/Create Public
Diary	Mode	No Access/Access
Group	Mode	No Access/Read Access/Create Personal/Create Public
Mail	Mode	No Access/Access
Meeting	Mode	No Access/Access
	Meetings	Read/Create
	Folders	Read/Create Personal/Create Public
Notify	Mode	No Access/Access
Planner	Mode	No Access/Access
	Planners	Read/Create Personal/Create Public
	Planner Folders	Read/Create Personal/Create Public
Project	Mode	No Access/Access
	Projects	Read/Create Personal/Create Public
	Project Folders	Read/Create Personal/Create Public

Defining Custom Property Sheets for a Security Profile

This section discusses OfficeTalk's ability to present users with customised property sheets for editing OfficeTalk data which may contain custom fields. For more information about custom fields and custom property sheets, see "Custom Fields" on page 56.

User defined property sheets allow you to tailor OfficeTalk to your organisation's specific data needs

OfficeTalk lets you define custom property sheets for several different types of OfficeTalk data. The property sheets used to edit certain OfficeTalk data may be assigned on a per security profile basis. Members of a certain security profile will inherit its propery sheets. In this way. different users may be assigned different property sheets to view and edit the same OfficeTalk data. For example, users in the accounts department may need to access financial data about contacts, but users in the sales department may need to access just address and personal information held against contacts. These assignments may be made from the Custom Data wizard and they may also be made, on a per security profile basis, from the Security Profile property sheet.

Select the Property Sheets tab. The Property Sheets page contains a drop down list of OfficeTalk data types. Select the relevant data type. For example, if you wish to select a property sheet for the members of this security profile to use in order to edit contact records, select **Contacts** from this list. Next, from the **Dialog** drop down list, select the property sheet that you wish members of this security profile to use when editing contacts. You may choose between the following:

Dialog	Description
OfficeTalk default	This is the standard dialog box as supplied with OfficeTalk.
Workgroup default	This is the dialog box which has been selected as the workgroup default. This is the default setting.
User defined	Any user defined dialog boxes will appear next in the drop down list. Choose the dialog box that the user will access when adding or editing records of the associated data type.

The changes will effect the relevant users the next time they log on to OfficeTalk. Any changes effecting you will take effect immediately.

OfficeTalk Services

An OfficeTalk server is a machine configured to perform server based activities such as checking for new mail on behalf of all users or performing commands on behalf of the workgroup or performing data synchronisation with remote workgroups. OfficeTalk provides a set of services which perform certain workgroup-based functions that are described in more detail below.

Most server based activities are database intensive and it is therefore most efficient to configure the machine holding the workgroup database as the OfficeTalk server machine.

You can access the list of OfficeTalk services from the OfficeTalk Services dialog box by selecting **OfficeTalk Server…** from the **Options** menu.

Each service may be run manually by selecting the relevant service and pressing the **Kick…** button. Selecting a service and pressing the **Settings…** button displays a service dependent Settings property sheet from which you may set up service options or a schedule for automating the running of each service.

Internet Mail Gateway Service

The Internet Mail Gateway Service lets you configure the connection and scheduling aspects of the Internet mail gateway service. Selecting this service and pressing the **Settings…** button will display the Internet Service property sheet.

The Internet Mail Gateway Service does not provide any functionality that is not available from the Internet Service dialog box described on page 40

Both the Host page and Connection page shown here in the property sheet are also available from the full Internet Mail Service property sheet. These two pages together define all the information needed to specify when and how to connect to the Internet.

For more information on configuring this service see “Configuring the Internet Mail service” on page 66.

Mail Rule Service

OfficeTalk provides a mail rule service which lets the computer, running the service, perform any resulting actions on behalf of each user. This is a useful feature for users who wish for their mail rules to be carried out during a time when they plan not to log on to OfficeTalk. Consider the scenario where a specific OfficeTalk user plans to go on holiday for two weeks and so sets up a mail rule to redirect all incoming mail to a colleague. Only by using the mail rule service will the user’s mail be regularly checked and the rule promptly applied. If the mail rule service was not activated, then the rule would be carried out by the user’s machine only when the user returned from holiday and logged on to OfficeTalk.

You may activate the mail rule service by selecting the appropriate check box in the OfficeTalk Services dialog box. You can specify how frequently the server machine will try to perform this service by selecting **Mail Rule Service** and pressing the **Settings…** button.

You can add a number of schedules to define when to perform the rule. For example, you may wish to perform the rule at 6:00pm every week day and once on a Sunday at 1:00pm

The Rule Service Settings property sheet is displayed. Press the **New…** button to add a schedule for performing the service.

Command Processor Service

A command is a data message used as an efficient means of communicating data between and within OfficeTalk workgroups. In some cases, local OfficeTalk users may write commands to the database as an efficient way of performing a set of actions which would otherwise require a series of records to be written to the database. The commands remain until a command processor service processes the command and writes the relevant records.

More commonly, commands are used to communicate changes made between remote workgroups which replicate their data *asynchronously* or via *e-mail*. For more information on workgroup replication, see “Remote Workgroups” on page 377. When a remote workgroup updates another workgroup with its changes, in this way, the result is one or more commands being placed in the target database waiting for a command processor to interpret them. A supervisor may interpret commands from any OfficeTalk machine but by far the most efficient configuration is to interpret commands on the machine which contains the OfficeTalk database. This reduces network traffic.

Another way of processing commands is by pressing the  *button in the shortcut bar in Supervisor mode*

You may interpret commands manually by selecting **Command Processor Service** from the OfficeTalk Services dialog box and pressing the **Kick…** button. The length of time it will take to process commands will depend upon how many commands are pending and how much data is represented by each command. For example, if you receive a command containing the initial snapshot of another remote workgroup’s database, then the process will take quite a long time.

A gateway service exists in the OfficeTalk Services dialog box for all remote workgroups that you may replicate with

Typically, if you want to replicate data with another remote workgroup on a regular basis, you should set up a schedule for the associated gateway service.

The gateway service performs the processing of commands at the end of its operation. However, if you are being sent updates and requests for data and you are a slave workgroup (i.e. you may not initiate a replication) then you should set up a schedule to simply perform commands. You can do this by selecting the **Command Processor Service** and pressing the **Settings…** button. The Command Processor Settings property sheet is displayed.

Press the **New…** button to add one or more schedules.

The Return Addresses page lets you specify the e-mail address to which other workgroups should send their commands.

This is relevant only if you receive commands via e-mail. Select which service you expect to use to receive commands and specify the return address in the field below.

Polling Service

By default, every client machine will check the database for certain events, such as new incoming mail, pending notifications, overdue tasks and appointment reminders etc.

For larger workgroup sizes, this arrangement can lead to increased network traffic. OfficeTalk offers a solution to this by providing a polling service. The polling service checks the database on behalf of each client for such events. Since the polling server may be the machine which holds the OfficeTalk database, network traffic may be completely eliminated.

For more information on server based polling, see “Polling the Database” on page 101.

You can set up a machine as the polling server by checking the check box next to the **Polling Database Service** entry in the OfficeTalk Services dialog box and pressing the **Settings…** button. The Polling Service Settings property sheet is displayed.

Specify how frequently, in minutes, you wish this machine to check for database events. When the polling server finds a database event, it uses NetBIOS to inform the relevant OfficeTalk client. If the client machine is logged onto OfficeTalk, it will then respond accordingly retrieving the relevant data from the database.

Remote Workgroup Gateway Services

A gateway service is provided for each remote workgroup that is defined. Kicking a gateway service is equivalent to right clicking on the associated remote workgroup, in the list of remote workgroups in Supervisor mode, and selecting **Merge…** from the context menu. When you kick a service by selecting it from the OfficeTalk Services dialog box and pressing **Kick…**, it will, in most cases, display the Merge Remote Workgroup wizard.

The Merge Remote Workgroup Wizard is not shown for direct connections. Instead OfficeTalk asks you to confirm that you wish to merge.

You may choose from the following options:

- Send changes made to this workgroup to the remote workgroup.
- Receive changes made to the remote workgroup.
- Do Both.

Choose the required option and press **Finish**. OfficeTalk will perform the merge.

What OfficeTalk actually does depends entirely upon the replication method used. For example, if a synchronous replication method is chosen, OfficeTalk will perform the merge there and then. If the e-mail replication method is chosen, OfficeTalk will prepare an e-mail command and store it, ready to send, the next time you connect to the Internet.

The Merge Remote Workgroup wizard is not shown for direct connections since, in this case, changes to each workgroup are not exchanged. Instead, OfficeTalk asks you to confirm that you wish to merge, so that each workgroup may exchange certain information, such as mail messages, meeting invitations etc.

Usually, you would perform such data replications on a regular basis. You can specify a schedule for replication by selecting the appropriate gateway service and pressing the **Settings…** button. The Remote Workgroup Gateway Settings property sheet is displayed, showing the Merge Times page.

Press the **New…** button to add a schedule of times for merging data.

OfficeTalk gives you the choice of treating differently attachment data, such as e-mail, note attachments, documents and mail merge documents. In the Attachments page of the Remote Workgroup Gateway Settings property sheet, OfficeTalk gives you the following choices:

- Always replicate attachment data.
- Never replicate attachment data.
- Replicate attachment data at separate times from other data according to a specified schedule. Press the **Attachment Update Times** to specify a separate attachment replication schedule.

Publishing Data to the Web

OfficeTalk lets you publish diary and contact data to an Internet Web page. OfficeTalk searches any HTML file that you provide, replacing certain text with a link to pages containing diary information for selected OfficeTalk users and a link to pages containing contact name and address information. Furthermore, OfficeTalk can connect to the Internet and copy the files onto a World Wide Web server, making them accessible to the Internet community. Alternatively, the files may be used in a local Intranet configuration.

You can specify options for publishing diary and contact data to the Web by selecting **Data to HTML…** from the **File/Export** menu in Supervisor mode. This will display the Internet Export wizard.

Choose which users' and/or resources' diaries you wish to publish to the Web. Do this by selecting **Users** or **Resources** and pressing the **Details…** button. A further dialog box is displayed showing a list of all OfficeTalk users or resources. Choose the required users or resources and press **OK**.

From the Internet Export wizard, you may choose to export all companies or all contacts by checking the **All Companies** or **All Contacts** check box. Alternatively, if you only wish to publish a subset of companies or contacts, you can select a contact group containing the relevant companies and contacts. Do this by selecting **Contact Groups** and pressing the **Details…** button. The Contact Groups dialog box is displayed allowing you to select the appropriate contact groups.

Press **Next** when you have chosen what data you wish to publish. The Upload page is displayed.

Specify a local directory to which the generated HTML files are output. If you want OfficeTalk to copy the files to the Internet for you then check the **Copy files from this directory to the Internet** check box. When OfficeTalk creates HTML files representing contact and diary information, the entire set of files is created in a single directory. However, OfficeTalk provides functionality for replicating the file structure of the specified directory to the Internet. This means that you could use OfficeTalk as a tool for transferring your Intranet Web files to the Internet. If you wish to replicate the sub directories of the specified directory in this way then check the **Include Sub Directories** check box.

Prior to uploading your HTML data to the Internet, OfficeTalk must first connect to the Internet, so you must supply information on how to connect to your World Wide Web server. Firstly, select a dial-up connection entry from the drop down list or create a new one by pressing the **New Connection…** button. Next, specify the address of your World Wide Web server, for example, 'www.webserver.com'. Specify your login name and password for gaining access to the server. In the **Upload To** field, enter the directory on the server to which you must upload files. This directory must be relative to the initial directory when you first log onto the server. Usually, you will need to move files from this directory to another directory on the server. OfficeTalk lets you do this by entering an optional relative directory name.

If you have elected to publish diary information then pressing **Next** will display the Diary Date Ranges page.

This page lets you choose a date range over which to publish diary information for the selected users and resources. The default is to publish all diary information.

OfficeTalk is supplied with such a template file. This file is selected by default in this page

Pressing **Next** will display the Diaries Template Page. This page lets you specify an HTML file which contains the character sequence <@UserDiaries> or <@ResourceDiaries> or both.

Occurrences of either of these sequences will be replaced with a list of users or resources with each element in the list being a link to that user's or resource's diary information. Enter the full path name of such a file.

OfficeTalk is supplied with such a template file. This file is selected by default in this page

Pressing **Next** will display the Diary Display Options page. This page lets you specify an HTML file which is a template for the page which shows a specific user's or resource's diary information. You may also choose a font for displaying the date that is displayed above each day of appointments.

OfficeTalk is supplied with such a template file. This file is selected by default in this page

If you chose to output contact information, then the Contact Template page is displayed when you press the **Next** page. This page lets you specify an HTML file which will contain one or more of the character sequences: <@ContactIndex>, <@CompanyIndex> and <@ContactGroups>.

Occurrences of <@CompanyIndex> or <@ContactIndex> are replaced with an alphabetical index. Each letter of the alphabet is a hyperlink to a list of companies or contacts beginning with the associated letter.

Occurrences of <@ContactGroups> are replaced with a list of contact groups. Each contact group is a hyperlink to an automatically generated page of associated companies and contacts. Enter the full path of such an HTML file and press **Next**.

OfficeTalk is supplied with such a template file. This file is selected by default in this page

The next page shown is the Contact Display Options page. This page lets you specify an HTML file which is a template for the page which shows a specific company's or contact's details.

This file should contain the character sequence <@Contact>. This file also lets you choose the font for displaying the company or contact name which precedes the address information.

When you press the **Finish** button, OfficeTalk will generate the diary and contact information as requested and will place each generated file into the requested directory. If you elected to upload the generated files to the Internet, OfficeTalk will establish a connection with the World Wide Web server and will use the File Transfer Protocol (FTP) to copy the files to the requested directory on the server.

Browsing the generated files, using an ordinary Web browser, will produce a result similar to that shown below:

Customising the Working Day

OfficeTalk lets you specify which weekdays are normal working days for your organisation and, for each of those days, OfficeTalk lets you specify the normal working hours. This information is used primarily by the meeting manager so that it knows when people are generally available. Users have the choice of over-riding these settings if they operate flexi-hours or if they are shift workers.

You can customise the working day by pressing the button located in the shortcut bar in Supervisor mode. The Custom Day property sheet is displayed.

Place a check box next to each weekday that is a normal working day. For most organisations, this is Monday to Friday inclusive. Next, for each of those days, specify a start time and an end time representing the normal working hours for each day. Press **OK** to save your changes.

Task Priority Descriptions

OfficeTalk lets users associate a priority with tasks and project tasks. This is represented by a number from 1 to 5. A user defined description may be associated with each priority level and this may be specified

from within Supervisor mode by pressing the button, located in the shortcut bar. Pressing this button will display the Priorities dialog box.

Enter the appropriate description into each of the relevant fields. This dialog box also lets you choose the default priority level that is assigned to a task or project task when the task is first created. You can do this by selecting the appropriate **Default** radio button. Press **OK** to save your changes.

Workgroup Details

You can view the Workgroup Details by selecting **Workgroup Details** from the **Edit** menu. The Workgroup property sheet is displayed showing the Details page.

Specifying Workgroup Details

The workgroup name may only be changed from the Register OfficeTalk wizard. For more information, see "Registering OfficeTalk" on page 24

The Details page shows the workgroup name and the workgroup's location, phone and fax details. You may not edit the workgroup name from this dialog box since your license and keycode details are dependent upon your workgroup name.

Specifying Default Property Sheets

The Property Sheets page of this property sheet lets you choose the default property sheets for each data type for all members of the workgroup. Note that any settings applied here will not apply to users belonging to security profiles who have specifically selected custom property sheets other than *Workgroup default*.

Select the data type that you wish to affect from the **Data Type** drop down list and then choose the property sheet that you wish to set as the workgroup default for the selected data type.

For more information see “Assigning Custom Property Sheets to Different Security Profiles” on page 63.

Options for Duplicate Checking of Contacts

The Options page lets you specify whether or not OfficeTalk should perform duplicate checks every time a company or contact is added to the workgroup database.

You can specify that duplicate checks are performed by checking the **Check for duplicates when adding companies and contacts** check box. By default, duplicate checking will only be performed against contact records to which the user entering the data has at least read access. If you wish to extend duplicate checking to include records to which the user entering the data has no access then check the **Also check against records to which the user has no access** check box.

Restricting Users From Using Display Profiles

By default, all users may customise the look and feel of OfficeTalk, creating their own private display profiles. You can restrict non-supervisors from being able to create their own display profiles, forcing them to use the default workgroup display profile. You can do this by checking the **All users will use the public profile** check box in the Profiles page of the Workgroup property sheet and selecting the required profile from the drop down list. When this option is selected, non-supervisors will be unable to change the settings of the default display profile. Any changes that are made to list sort orders, column widths, list groupings etc are not saved to the database and remain only for the duration of the user’s OfficeTalk session.

The warning may be turned off by checking the check box on the warning dialog box. The warning may be turned on again from the Profiles page of the Workgroup property sheet

A supervisor may make changes to any public display profile but will be warned that changes made to the profile may affect other users and will be prompted to save changes on exiting OfficeTalk as shown below.

Disabling Public Links

OfficeTalk provides functionality for linking two or more items together using a user link. When an item is linked to one or more other items then a marker is displayed next to the item. Clicking on this marker pops up a menu which lets you view any of the linked items. User links may be either public or private, depending on how the user link is made. If a user makes a public link, then all users will see the link. You can prevent users from creating public links by checking the **Disable public links** check box in the Options page of the Workgroup property sheet. This will disable all public link buttons throughout OfficeTalk.

Option for Sending Mail via the Server

When a user sends a mail message, OfficeTalk has to write several records. The number of records written increases as the number of recipients increases. For slower networks, sending a message to 10 or more people can take a noticeable time on a 16-bit machine. OfficeTalk offers a feature which causes clients to send mail by writing a single record regardless of the number of recipients of the message. This single record is a command which may be interpreted at a later time by the command processor service. The OfficeTalk server machine should be the machine which holds the OfficeTalk database on its local hard disk. The advantage of this arrangement is that it is much quicker for a remote machine to write a single record to the database than to write many records. Furthermore, there is no network traffic created by the server machine reading the command record and writing all the mail records itself. Since the database is held locally, it is much more efficient for the OfficeTalk server machine to write records to the database than for a remote client machine to write to the database.

Note: It is not necessarily advantageous to use this function if you use a SQL Server database, since all database records are inherently performed by a server machine. In such an environment this function will simply *defer* the inevitable database writes.

Checking the **Sending of mail is done by server** check box will cause all clients, which log on subsequently, to send mail by writing a command to the database.

Mail messages will not be sent until the server machine processes commands. You can process commands manually from the OfficeTalk Services dialog box. Selecting **OfficeTalk Server…** from the **Options** menu will display the OfficeTalk Services dialog box.

Select **Command Processor Service** from the list of services and press the **Kick…** button. For information on automatically kicking the command processor, see "Command Processor Service" on page 89.

Note: A supervisor may kick the command processor service from any machine but it is most efficient if the machine holding the database performs this action since it involves no network activity.

Polling the Database

By default, every user will check the database every 5 minutes for the following:

- New incoming mail
- New pending notifications
- Overdue tasks
- Appointment reminders
- Remote log off requests

You may change the interval for each of these checks from within the Polling page of the Workgroup dialog box.

Polling, in this context, means that each user will check the database for new relevant data. The disadvantage of polling is that network traffic increases with larger workgroup sizes. Larger workgroups should use server-based checking.

The poll service is usually the same machine as the one that holds the database

Server-based checking requires you to designate one machine as the poll server and this machine is made responsible for performing each of the above checks periodically for all users in the workgroup. If new mail is found for a particular user or another user's task becomes overdue then the user is notified of this using NetBIOS and the client machine will then access the database in order to retrieve the new mail message or to update it's display to show the overdue task.

You may configure a machine to be a poll server from the OfficeTalk Services dialog box. Select **OfficeTalk Server…** from the **Options** menu. This will display the OfficeTalk Services dialog box.

Check the Polling Database Service check box in the list of services and press the **Settings…** button. This will display the Polling Service Settings property sheet.

Specify the interval between checks and press **OK** to save your changes.

Note: Any machine may be configured as the Polling Server but it is most efficient if the machine holding the database performs this action since it involves no network activity.

Supervisor Preferences

You can specify Supervisor mode preferences by selecting **Preferences…** from the **Options** menu in Supervisor mode. Below is a description of all the preferences specific to Supervisor mode.

Specifying a Workgroup E-mail Signature

An e-mail signature is text which is placed at the end of every mail message that you send. This is often just your name and your company name, but will sometimes include a telephone and fax number. OfficeTalk lets you specify a workgroup signature which will appear at the end of each mail message sent by any OfficeTalk user. Enter the signature into the **Signature** field and press **OK**.

Note: By default, each user does not send a signature with each message but may choose between sending a workgroup signature and their own personal signature.

If the signature contains the text '<@Workgroup>' then this will be replaced with the workgroup name. The text '<@User>' will be replaced with the name of the user sending the message.

Date Preferences

OfficeTalk lets you define the first day of the week, the first week of the year and the first month of the first quarter. These settings affect how certain views are displayed and also how week numbers are calculated.

To change the date preferences, select the Dates tab in the Preferences dialog box in Supervisor mode.

Select the first day of the week from the **First day of the week** drop down list. This may be any day from Monday through to Sunday. Monday is the default setting.

Select the first week of the year from the next drop down list. You may choose from the following:

- Starts on Jan 1
- First 4 day week
- First full week

Select the first month of the first quarter from the next drop down list. You may choose from any month of the year.

Specifying Special Notes

Special notes are messages containing substitution strings which are sent as part of an OfficeTalk function, for example, when inviting an OfficeTalk user to a meeting or assigning a project task to a non-OfficeTalk user. OfficeTalk lets you specify the message sent out when performing each function. Certain substitution strings are available so that you may design the messages to be context specific. For example, the message used when inviting an OfficeTalk user to a meeting is as follows:

Meeting Invitation

You are invited to attend a meeting on <@Meeting.Start Date> at <@Meeting.Start Time>.
The subject of the meeting is "<@Meeting.Subject>".
The meeting is planned to last for <@Meeting.Duration>
The meeting venue is: <@Meeting.Place>

Agenda

<@Meeting.Agenda>

People Coming

<@Meeting.GuestList>

Please let me know if you can attend as soon as possible by pressing the **I Can Attend** *button at the top of this message. If you cannot attend, please press the* **I Cannot Attend** *button.*

<@User.Name>

In this case, the meeting object and the user object are both available to you in order to create substitution strings. You may insert any field value of the associated meeting by specifying a substitution string of the format ‘<@Meeting.*field*>’. So, for example, you may specify the meeting name using ‘<@Meeting.Name>’, and the meeting start time by using ‘<@Meeting.Start Time>’. Additionally, you have, available to you, all the field values of the user who organises the meeting. Typically, the meeting invitation ends with the organisers name. This is achieved using the substitution string ‘<@User.Name>’ or, for a more informal message, ‘<@User.First Names>’.

There are many special notes in OfficeTalk. They are all based around the functions for inviting people to meetings, assigning people project tasks and assigning people normal tasks. The special notes may be designed using rich text. OfficeTalk lets you specify separate messages for OfficeTalk users and for non-OfficeTalk users.

You may customise any of the default special notes by selecting the appropriate special note from the drop down list and editing the text in the window below. You may use the format bar to add colour and formatting to any of the messages.

Diary Mode

Overview

By default, Diary mode is the mode shown when you start OfficeTalk. From within Diary mode, you may view and update your schedule of appointments and your list of things to do (tasks). Provided that you have sufficient access, you may even view and update the appointments and tasks of other users in your workgroup. If OfficeTalk is configured to access remote workgroups then you may also view and update the appointments and tasks of users in these remote workgroups.

OfficeTalk lets you define an unlimited number of resources, such as meeting rooms, pool cars and overhead projectors. OfficeTalk can keep a diary for each of these resources. Provided that you have sufficient access, you can view and update the diary held for any resource.

Diary mode provides a daily, weekly, monthly, custom and list view of appointments. The custom view lets you choose a user defined time span over which to view appointments. For example, you may wish to view three weeks of appointments at any one time.

Managing Your To-Do List

The Task List window is located to the right of Diary mode. It is a to-do list with a set of very powerful features to help you keep track of your workload.

OfficeTalk lets you record one or more of the following attributes against each task:

- A description of the task.
- A priority.
- A deadline.
- Whether or not the task has been completed.
- Detailed notes about the task.

Additionally, you may add any number of user defined fields to the task data type which means that you can store almost any data that you like with each task. For more information on adding user defined fields to tasks see "Administering Custom Data" on page 56.

Adding a Task

You can add a task in the following way:

- Click the left mouse button in a blank part of the task list.
- Type the description of the task.
- Press **Enter**.

If you wish to specify attributes such as deadlines, priorities, notes etc when adding a task then you should use the Task property sheet to add the task. You can add a new task via the Task property sheet in the following way:

Press the button in the shortcut bar in Diary Mode. The Task property sheet is displayed.

- Enter description, deadline and priority information into the Details page. You can add rich text notes for the task from the Notes page.
- Press **OK** to save your changes.

Marking a Task as Private

OfficeTalk lets you mark a task as *private*. When a task is marked as private, only you can see it. Any other user, who has at least read access to your task list will see the word 'Private' in place of the task's description when they view your task list.

You can mark a task as private in the following way:

- Bring up the Task property sheet by clicking on the task using the right mouse button and selecting **Edit** from the context menu.
- Check the **Private** check box and press **OK** to save your changes.

Marking a Task as Complete

Once you have finished a task, you can indicate that it has been complete by checking the check box to the left of the task description.

The colour of the task will change to green and a line will be drawn through the task description provided you have checked the **Lines through completed tasks** in the Diary page of the Preferences dialog box.

You can show the %Complete column in your task list. This will give an immediate indication of the status of each of your tasks

Sometimes, you may wish to indicate the partial completion of a task. You may choose a completion percentage in the following way:

- Bring up the Task property sheet by clicking on the task using the right mouse button and selecting **Edit** from the context menu.
- Enter a number between 0 and 100, representing the completion percentage, into the field to the right of the **Complete** check box and press **OK** to save your changes.

Setting a Task Deadline

Usually, any task that you add to your task list will need to be completed by a certain date. OfficeTalk lets you specify a deadline date and time for a task. You can do this in the following way:

- Bring up the Task property sheet by clicking on the task using the right mouse button and selecting **Edit** from the context menu.
- Check the **Require Deadline** check box and enter a date and time into the fields below. Press **OK** to save your changes.

If the task has not been completed by the specified deadline, the task colour will change to red to indicate that the task is overdue and requires immediate attention.

Prioritising Your Tasks

If you have a large number of tasks to do then you would naturally try and prioritise them so that the most important ones get your attention first. You can assign a priority to any task in the list. A supervisor may define up to 5 levels of task priority and may specify the default priority level for new tasks. The standard OfficeTalk configuration provides three levels of task priority named: ‘High’, ‘Medium’ and ‘Low’. The default priority is ‘Medium’.

You can change the priority of a task in the following way:

- Bring up the Task property sheet by double clicking on the task.
- Select the required priority from the **Priority** drop down list. Press **OK** to save your changes.

Tip: To quickly change the task priority, keep the **Ctrl** key pressed and click the left mouse button on the priority marker. The priority of the task will increase each time you click on the marker. If the task priority is already 1 then clicking on the priority marker will change the priority to 5.

You can sort by any of the columns shown simply by clicking on the relevant column header

Once each task has been assigned the appropriate priority, you may wish to sort the task list by priority such that the highest priority tasks are shown at the top of the list. You can do this by clicking the left mouse button on the priority column header.

Alternatively, you may wish to show only tasks with a certain priority. For example, you can filter the task list to show only priority 1 tasks in the following way:

- Locate a priority 1 task in the task list. Click the right mouse button on the priority 1 marker. The context menu will be displayed.
- Select **Filter by ‘high’**. Only priority 1 tasks will be shown in the task list.

To remove the filter, click the right mouse button anywhere in the list and select **Disable Filter** from the context menu.

Structuring Your Task List

Sometimes it is useful to break down tasks representing large amounts of effort into several smaller, more manageable, tasks and then hide away the detail of the smaller tasks. This kind of approach is known as task outlining. OfficeTalk lets you do this in the following way:

- Add the parent task by clicking the left mouse button at the bottom of the Task window, entering a description and pressing **Enter**.
- Add one or more additional tasks which will become *sub* tasks of the parent task.

Selecting the parent task and pressing the **Space bar** *will also show or hide sub tasks*

Select these additional tasks and drag them on to the parent task. The sub tasks will be indented underneath the parent task. A button will appear to the left of the parent task. Clicking the button will hide the sub tasks. Clicking it again will show the sub tasks.

An alternative way of adding sub tasks to a parent task is to *open* the parent task. This will cause the task list to display the *contents* of the parent task which, initially, will be empty. However, you may now add sub tasks to the parent task by simply adding the tasks to the task list in the normal way. When you have entered the relevant sub tasks, double click on the marker, on the top line of the task list, using the left mouse button and you will be returned to the previous task list contents.

Task Folders

Task folders provide a convenient way of structuring your task list. You may choose to keep all tasks relating to a particular project in a task folder or, alternatively, you could keep all completed tasks in a task folder called 'Completed Tasks'. Task folders are hierarchical which means that you can create task folders inside other task folders in just the same way that you can create nested sub-directories in Windows Explorer.

Tasks may be dragged and dropped onto folders in just the same way that sub tasks are dragged and dropped onto parent tasks. Task folders are different from parent tasks since you cannot expand a task folder to reveal it's contents. Instead you may *open* the folder by double clicking on it using the left mouse button. The contents of the folder are then displayed as top level tasks in the task list. A marker is displayed on the top line of the list. Double clicking on this line will show the tasks one level up.

To add a new task folder, do the following:

Another way to add a task folder is by clicking the right mouse button in the task list and selecting ***New Folder…*** *from the context menu*

- Select **New/Task Folder…** from the **Edit** menu in Diary mode. The Task Folder property sheet is displayed.
- Type in a name for the task folder and press **OK**. The task folder will be displayed at the top of the task list.

To delete a task folder, select it and press the **Delete** key on your keyboard. When you delete a task folder, any tasks inside the folder will also be deleted. If you want to avoid this then you should move the tasks out of the folder before you delete it. You can move tasks out of a folder in the following way:

- Double click on the folder to open it and show it's tasks.
- Select the tasks and drag them on to the marker. The tasks will be moved up one level. If you now double click on the marker, the task list will display the tasks one level up, including the tasks that you dragged.

Categorising Tasks

OfficeTalk lets you set up one or more categories which may be used to *classify* your tasks. To mark a task as belonging to a particular category, do the following:

- Bring up the Task property sheet by double clicking on the relevant task.

- Select the Categories page. The Categories page will display a list of diary categories in the bottom window. Each category is shown next to a check box.
- Check any check boxes which represent the categories that you wish to apply to the task.
- Press **OK** to save your changes.

You may add your own private categories by typing the name of the category into the **Categories** window in the Categories page and pressing the **Update** button. The new category will appear, checked, in the bottom window. Press **OK** to save your changes.

If you wish to add the task to categories in another category set, for example, the 'Contact' category set, then select the 'Contact' category set from the **Set** drop down list. The list of available categories in that set will appear in the bottom window. Select one or more categories and press **OK** to save your changes.

For more information on Categories, see "Using Categories" on page 349.

Keeping Notes for a Task

To add rich text notes to a particular task, do the following:

- Bring up the Task property sheet by double clicking on the relevant task in the task list. Select the Notes page.
- Type in notes, using the format toolbar to add colour, fonts and character style to your text. Press **OK** to save your changes.

You can quickly bring up the Task property sheet to automatically display the Notes page by double clicking on the marker

If a Task has some notes associated with it then a marker will be displayed against the task in the task list.

For more information see “Adding Notes to OfficeTalk Data” on page 354.

Scheduling Tasks into the Diary

Once you have entered a task into your task list, you may wish to specify *when* you will work on the task. OfficeTalk allows you to do this by letting you drag the task from your task list onto the Appointment window. Doing this creates an appointment in your diary with the task’s description. This is called *Scheduling* a task. You may schedule a task by dragging the task onto either the Daily, Weekly, Monthly or Custom Appointment windows. Sometimes you may want to schedule a task on more than one occasion. This is done simply by dragging the same task to a different time or day in your diary.

If you hold down the **Shift** key when you drop the task onto your diary, then all existing appointments made as a result of scheduling the task will be replaced by the new appointment.

If you show the *Scheduled Duration* column in your task list then you will be able to see exactly how long you have planned to work on each task. If you change the duration of one of the appointments created as a result of scheduling the task, then the value displayed for that task in the *Scheduled Duration* column will update to reflect the change.

Finding When a Task is Scheduled

OfficeTalk provides a way for you to find out when you scheduled a particular task. You can do this in the following way:

- Select the task from the task list and select **When** from the **Schedule** menu. OfficeTalk will show the Daily Appointments window and will locate and display the first appointment made as a result of scheduling that task.
- If the task was scheduled on more than one occasion, then selecting **When** from the **Schedule** menu once more will locate and display the next appointment made as a result of scheduling that task for a second time.
- The button may also be used to perform this function.

Note: Once you have scheduled a task then repeating the corresponding appointment has the same effect as scheduling that task multiple times.

Assigning a Task

Sometimes you may wish to delegate one or more of the tasks in your task list to another user or users, or perhaps to someone outside of your organisation. Once delegated, you may wish to track the progress of the task from your own task list. OfficeTalk lets you do this in the following way:

- Create the task by entering it into your task list in the normal way.
- Click the right mouse button on the task and select **Assign Task…** from the context menu. The Choose Recipient dialog box is displayed.

You can specify an e-mail recipient by typing the recipient's e-mail address into the ***Recipients*** *field at the top of the dialog box*

- Select one or more local or remote users from the list of available recipients and press the **Add…** button. Alternatively, or in addition, double click on the **Contacts** entry and select, from the address book, a contact, representing someone outside of your organisation. When the required persons are listed in the **Selected Recipients** list, press **OK** on the Choose Recipient dialog box.
- When you press **OK** on the Choose Recipient dialog box, OfficeTalk will show the Task Assignment Instructions dialog box. This is your opportunity to explain to the recipients of your task, exactly what you want them to do.

Specify your instructions or, otherwise, leave this dialog box blank and press **OK**.

Note that you will probably want to show the %Complete column in your task list. This will give you an accurate idea of the completion status of each task

When you press **OK**, your task assignment will be sent, via e-mail, to the selected recipients. If you assigned the task to one or more OfficeTalk users then they will receive their task via OfficeTalk mail. On reading their task assignment e-mail message, a task will be added to their task list. When they change the percentage done for their assigned task, this will be reflected in the percentage done of your original task. Similarly, if you sent the task to a person outside of your organisation, that person will receive the task assignment via Internet mail. They will be instructed to reply to the message on a periodic basis, updating you with its progress. OfficeTalk will automatically extract this information, on receiving their reply from the Internet, and will update the completion status of your task. In this way, you can track and fully monitor the progress of all assigned tasks.

The Resources Page

The Resources page, of the Task property sheet, lets you view the list of people that have been assigned the associated task. It lists their name and their progress in terms of a completion percentage.

You may use this page to both assign and un-assign the associated task.

To assign the task to one or more people, press the **Assign…** button and follow the instructions in the section "Assigning a Task" above.

To un-assign the task from one or more of the people listed in this page, select the relevant people from the list and press the **Unassign** button. OfficeTalk will remove the person(s) from the list and will send out e-mail messages informing the relevant people that they have been un-assigned the task.

Assigning a Task to a Microsoft Exchange or Microsoft Outlook User

OfficeTalk is supplied with several Electronic Forms templates for tight integration with Microsoft Exchange and Microsoft Outlook. One such template is a Task Assignment Form. If you send a task assignment to a Microsoft Exchange/Outlook user who does not have the MS Exchange Server service installed then the assignment message will arrive in the same format as it would to any e-mail recipient, as explained above. If the Microsoft Exchange/Outlook user does have the MS Exchange Server service installed, then the **OTTask** form may be installed onto their machine. This may be found in the shared server directory in the **Forms** sub directory, provided that the Microsoft Exchange Connectivity component was installed during OfficeTalk Setup. Once this form has been installed then any task assignments sent to the Microsoft Exchange/Outlook user will appear in their Incoming Mail folder as a Task Assignment form.

Double clicking on the new mail will display the following form:

The Exchange/Outlook user may use the form to update the originator with his/her progress. Instead of replying to the mail message, the Exchange/Outlook user simply types in the percentage completion value for the task into the Percentage Complete field and presses the **Submit** button.

Note that the originator of the task assignment will not receive this mail message

The completion information is sent back to the originator of the task assignment as a mail message. On receiving the mail message, OfficeTalk will recognise the instruction and will automatically update the completion status of the task.

For information on how to install the Task Assignment form into Microsoft Exchange or Microsoft Outlook, see "Installing Forms into Microsoft Exchange/Outlook" on page 365.

Searching for a Task

Since OfficeTalk lets you hide tasks in task folders and under parent tasks, it can sometimes be a little difficult to find a particular task. To overcome this, OfficeTalk provides a way of searching for tasks.

To search for one or more tasks, select **Search Tasks…** from the **Search** menu in Diary mode. The Search Tasks dialog box is displayed.

You may choose whether to search on just the Name field, on All text fields (including the task notes) or on *all* task fields. You can do this by making the relevant selection from the Field drop down list.

Enter some search text into the **Text** field. If you wanted to search for all tasks containing the word ‘report’ in any field then select the options in the Search Tasks dialog box as shown below:

*You may stop the search at any time by pressing the **Stop** button. Note that the **Search** button changes to the **Stop** button during a search.*

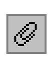
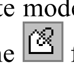
Press the **Search** button to begin the search. OfficeTalk will search for the specified text and will add any matching items to the **Results** list. You may view the actual record associated with any of the results by selecting the appropriate result from the list and pressing the **Goto** button. OfficeTalk will open the relevant folder or parent task, if necessary, and will select the corresponding task in the Task List window.

You may search on a specific field by performing an advanced search. For more information, see “Searching for Data” on page 342.

Linking a Task

You can link a task to any other OfficeTalk data item. Linking provides a way of making user-defined associations between different pieces of data and then easily viewing those linked items.

You can link a task to an item in the following way:

- Select the task that you wish to link.
- Select the  menu item from the window menu.
- From within the appropriate mode, select the other OfficeTalk data item and select the  from that item’s window menu.

The task is now linked to that data item. A  symbol will appear in the task’s Link column. You may access the item linked to the task by clicking on this symbol using the left mouse button. For more information, see “Linking Data” on page 347.

Printing Your Task List

You can print your task list by selecting **Print Tasks…** from the **File/Print** menu in Diary mode. Doing this will display the Print Tasks dialog box.

Note: You can also bring up the Print Tasks dialog box by pressing the  button located at the top of the task list or by selecting **Print the contents of the window** from the window menu.

The fields and buttons in the Details page of the Print Tasks dialog box are described in the table below:

Field/Button	Description
New page per task.	Check this check box if you wish to start a new page for every new task printed.
Line between each task.	Check this check box if you wish to print a line between each task printed
Print field titles	Check this check box if you wish to print the title of each field printed.
Print task notes	Check this check box if you wish to print the notes associated with each task.
Print folders	Check this check box if you wish to print task folders and the tasks held within them.
Print sub tasks	Check this check box if you wish to print all sub tasks.

The Font page lets you customise the appearance of the printout by letting you specify the following fonts.

Font	Description
Title Font	The font used to print the field titles. This is relevant only if you have selected the **Print field titles** check box
Folder Font	The font used to draw task folders. This is useful to

	distinguish task folders from ordinary tasks. It is applicable only if you checked the **Print folders** check box.
Task Font	The font used to draw each task.
Sub Task Font	The font used to draw each sub task.
Group Header Font	The font used to draw group headers. This is only appropriate if the task list has been grouped.

If you preview the task list printout, with careful selection of fonts, OfficeTalk will display a preview output similar to that shown below:

The Daily Appointments View

The Daily Appointments view provides the best way to view your appointments for a particular day and add appointments for that day.

You can view your daily appointments by clicking on the button in the shortcut bar.

The Daily Appointments view consists of the Daily Appointments window, to the left of the view, and the Task List window to the right of the view. There is also a background activities window which may be viewed by selecting **Show Background Activities** from the **View** menu.

The Daily Appointments window consists of a series of time slots ranging from midnight to midnight for the day shown. By default, each time slot represents 30 minutes but you can change this to either 15, 10 or 5 minutes. For example, if you were using OfficeTalk to keep the appointments for a dentist's surgery, you would probably choose each time slot to represent 5 minutes.

Changing the Timescale

OfficeTalk lets you choose a timescale for the Daily Appointments window from any one of the following scales:

- 5 minutes per timeslot
- 10 minutes per timeslot
- 15 minutes per timeslot
- 30 minutes per timeslot

To change the timescale displayed use the  and  buttons above the Daily Appointments window. Pressing the  button will zoom in, to give a finer scale with a maximum scale of 5 minutes per timeslot. Pressing the  button will zoom out, to give a coarser scale with a minimum scale of 30 minutes per timeslot.

The Daily Appointments window is capable of showing appointments as short as 5 minutes in duration regardless of the scale shown. If, for example, you have chosen a timescale of 30 minutes per timeslot, yet you have an appointment at 11:05am lasting 5 minutes, then OfficeTalk will show this by adding another timeslot to display your appointment.

Adding an Appointment

To add an appointment using the Daily Appointments window, do the following:

- Click and keep depressed the left mouse button in the time slot that you wish the appointment to start.
- While keeping the left mouse button depressed, drag the mouse down until the appropriate number of time slots have been selected, representing the appointment's duration. Release the mouse button.
- Now start typing the description of the appointment. When you have entered the description press **Enter** to save your changes or press **Esc** to discard your changes.

The Daily Appointments window can show several appointments occurring simultaneously. To add an appointment at the same time as an existing appointment, do exactly as above but ensure that you select the appointments duration by clicking and dragging in the time bar to the left of the appointment window. This will ensure that you do not mistakenly drag any existing appointments.

Another way of adding an appointment is by double clicking the left mouse button in the time slot that you wish the appointment to start. The Appointment property sheet is displayed and the duration of the appointment will default to 30 minutes.

Enter a description for the appointment. You may change the start time, the end time or duration. You may also specify the following additional attributes:

Attribute	Description
Remind Time	You can instruct OfficeTalk to remind you a certain length of time prior to an appointment's start time. To do this select the **Remind** check box and specify the amount of warning required in the **Remind Time** field. The remind time may be entered as a certain number of days, hours and minutes. For example, you could specify a remind time of two days by entering '2d', or a remind time of 1 hour and 45 minutes by entering '1h45m'. When you set a reminder for an appointment a marker will be shown on the appointment when viewed in the Daily Appointments window.
Private	If you do not want other people to be able to see the detail of a particular appointment then you can mark the appointment as *private* by checking the **Private** check box. Only *you* will be able to see the description of the appointment. Even if other users have full access to your appointments they will still only see the word 'Private' in place of the appointment's description and will not be able to edit the appointment.
Tentative	Sometimes you may want to *pencil in* an appointment, meaning that the appointment is not definite. Such an appointment is called a tentative appointment. You can mark an appointment as tentative by selecting this check box.

Reminding Yourself About an Appointment

OfficeTalk lets you set a reminder on any appointment so that you are alerted prior to the start of the appointment. There are two ways to set a reminder:

- The first way is to bring up the Appointment property sheet and check the **Remind** check box in the Details page and specify the amount of warning that you require.
- Another way is to select the appointment and press the button above the Daily Appointments window. This will add a reminder to the appointment. You will be reminded 5 minutes before the appointment is due to start. You may change the default advance remind time from 5 minutes to a time of your choice by modifying the **Default Remind Time** field in the Diary page of the Preferences dialog box. You can do this by selecting **Preferences…** in the **Options** menu.

The button may not be displayed above the window. To add this button, right click on the Daily Appointments window and select ***Window Buttons…*** *from the context menu. Instead, you can select the same function from the window menu*

In both cases, a symbol is shown on the appointment to indicate that a reminder is set for this appointment.

When the time comes, OfficeTalk will remind you of the appointment by displaying a message box. You may choose not to remind yourself again about this appointment by selecting the **Do not remind** again radio button or you may change the remind time for the appointment so that you are reminded again, nearer the start of the appointment. Do this by selecting the **Remind again** radio button and specifying a new remind time. Press **OK** for your choice to take effect. If you chose the **Do not remind** radio button, the symbol is removed from the appointment.

Marking an Appointment as Private

Any user which has at least read access to your diary may view your appointments. 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 do this by marking an appointment as *private* to you. You can do this in the following way:

- Bring up the Appointment property sheet by double clicking on an appointment in the Daily Appointments Window using the left mouse button.
- Check the **Private** check box and press **OK**.

All other users will see this appointment’s description as 'Private', including users who have full access to your diary.

Categorising Appointments

The Appointment dialog box also lets you categorise appointments. You can do this by selecting the Categories page and selecting and adding categories to the appointment in just the same way as described in “Categorising Tasks” on page 110. For more information on Categories see "Using Categories" on page 349.

Keeping Notes for Appointments

To add rich text notes to a particular appointment, do the following:

- Select the Notes page in the appointments dialog box.
- Type in any notes, using the format toolbar to add colour, fonts and character style to your text. Press **OK** to save your changes.

If an appointment has some notes associated with it then a marker is displayed on the appointment when shown in the Daily Appointment window..

You can quickly bring up the Appointment dialog box to automatically display the Notes page by double clicking on the marker

For more information on adding Notes see “Adding Notes to OfficeTalk Data” on page 354.

Changing an Appointment’s Start Time and Duration

To change an appointment's start time within a particular day, simply drag and drop the appointment on the appropriate time slot. If you wish to move the appointment to another day on the same month then drag the appointment to the calendar in the top right of the Diary View and drop the appointment on the appropriate date in the calendar. The appointment will be moved to the same time on that date.

To change the appointment’s start time to a date on a different month, bring up the appointment dialog box and enter the required date into the Start Time field. Press **OK** to save your changes.

You can change an appointment’s duration from the Appointment dialog box. Alternatively, move the mouse over the bottom-most part of the appointment, depress the left mouse button and drag the mouse to stretch the appointment outline. Releasing the left mouse button will change the appointments duration.

Changing the Day Shown

You can change the date shown in the Daily Appointments window by clicking on the required date in the calendar in the top right corner of Diary mode. For more information, see "The Calendar" on page 352. Another way of changing the date shown in the Daily Appointments window is by selecting **Change Date** from the **Date** menu. The Date dialog box is displayed. Enter a date into the *Date* field and press **OK**.

Note you can change the date in this way from any of the Daily, Weekly, Monthly and Custom views

The Daily Appointment window will change to show the specified date.

Searching for an Appointment

OfficeTalk provides a way for you to search for appointments quickly and easily.

Select **Search Appointments** from the **Search** menu. The Search Appointments dialog box is shown.

You may choose whether to search on just the Name field, on All text fields (including the appointment notes) or on *all* appointment fields (including date field values). You can do this by making the relevant selection from the Field drop down list.

Enter some search text into the **Text** field.

If you wish to confine your search to a specific date range then check the **Date** check box and specify the desired start and end date.

You may stop the search at any time by pressing the ***Stop*** *button. Note that the* ***Search*** *button changes to the* ***Stop*** *button during a search.*

When you have entered the relevant search criteria, press the **Search** button. OfficeTalk will search for the specified text and will add any matching items to the **Results** list. You may view the actual record associated with any of the results by selecting the appropriate result from the list and pressing the **Goto** button. OfficeTalk will change to Daily view and will display the date containing the corresponding appointment.

For more information on searching, see “Searching for Data” on page 342.

Showing Through Planner Bookings into the Daily View

OfficeTalk lets you show through planners and events onto your diary, making it possible to see short term appointments and long term bookings within the same view. This is explained in detail in the section “Showing a Planner in Your Diary” on page 196. When a planner booking is shown through onto the Daily Appointments view, it appears as a bar down the left hand side of the appointment window. The colour and pattern of the bar matches the colour and pattern of the planner booking. When an event is shown through on to the Daily Appointments window, it also appears as a bar down the left hand side of the appointment window, however the colour of the bar representing an event is always yellow.

Printing Your Daily Appointments

OfficeTalk lets you print out your daily appointments by selecting **Print Daily Appointments** from the **File/Print** menu. This will bring up the Print Daily Appointments dialog box showing the Details page.

Note: You can also bring up the Print Daily Appointments dialog box by pressing the button at the top of the Daily Appointments view or by selecting **Print Contents of Window** from the window menu.

The fields and buttons in the Details page of the Print Daily Appointments dialog box are described in the table below:

Field/Button	Description
From/To Fields.	The From and To date fields specify the date range that you wish to print. You may choose either an actual date by pressing the or a *smart* date by pressing the button and selecting a date, such as "Today", or "Yesterday" from the drop down list.
New page per day.	Check this check box if you wish to start a new page for every new day printed.
Print shown through planners	Check this check box if you wish to print planners shown through onto your diary.
Print shown through events	Check this check box if you wish to print events shown through onto your diary.

The Font page lets you customise the appearance of the daily appointments print out by letting you specify the following fonts.

Font	Description
Title Font	The font of the date title which is printed at the beginning of every new day.
Appointment Font	The font of the appointment description.

If you *preview* the daily appointments print out, with careful selection of fonts, OfficeTalk will display a preview output similar to that shown below:

OfficeTalk provides common print functionality in all Print dialog boxes. This functionality includes:

- Defining headers and footers
- Printer setup
- Page Style Selection
- Saved Print Settings
- Preview capability

For more information on this common print functionality, see “Printing” on page 355.

The Weekly View

You can view your appointments a week at a time by pressing the

button in the Shortcut bar in Diary mode. The Weekly View is shown below:

The Weekly Appointments window consists of seven *cells* representing Monday to Sunday. The Saturday and Sunday cells are smaller since most people will tend to have less appointments on these days. If this is not true in your case then you can use the “The Appointment Custom View”, described on page 134, to achieve your requirements.

OfficeTalk will remember your settings between sessions

By default, the size of the Weekly Appointments Window is maximised such that it fills the view. If you want to display the calendar and the task list in the Weekly view then you can un-maximise the window by selecting from the drop down window menu.

Select the window menu item again to re-maximise the view

You can change the week shown by clicking on the and window buttons. Alternatively, if the Weekly Appointments window is not maximised, you can select a date from the calendar. The Weekly Appointments window will change to show the week containing the selected date.

Adding an Appointment

To add an appointment using the Weekly Appointments window, do the following:

- Click the left mouse button in the day that you wish to add the appointment, making sure that you click below the last appointment.
- Now start typing the description of the appointment. When you have entered the description, press **Enter** to save your changes or **Esc** to discard your changes.

The duration of the appointment will be set to 30 minutes. The appointment start time will be set to the earliest time that you are available, after the start of the working day. For example, if you add an appointment on a Wednesday and the working day is set to start at 09:30 but you already have a 1 hour appointment at 9:45am then the new appointment will be added at 10:45am.

Another way of adding an appointment is to specify the start time and duration of the appointment as you add it. This can be done in the following way:

- Click the left mouse button in the day that you wish to add the appointment.
- Press the **Insert** key. The Appointment property sheet is displayed with the start date set to the selected day.
- Specify the start time and duration and specify a description for the appointment. Press **OK** to save your changes.

You can press this button from each of the Daily, Weekly, Monthly, Custom and List views

Alternatively you can use the button to add a new appointment to the Weekly Appointments view. This will bring up the Appointment property sheet. The start date will be set to the current date. Change the date, time and duration to the required values, specify a description for the appointment and press **OK** to save your changes.

Changing Appointment Details

You can move an appointment from one day to another within the Weekly Appointments window by dragging the appointment and dropping it onto the required day. The appointment start time will remain unchanged when moved from one day to another even if there is an existing appointment at the same time in the destination day.

You can change an appointment's description by selecting the appointment and pressing the **F2** function key. A caret will appear in the appointment description, allowing you to type in a modified description. Press **Enter** to save your changes.

To modify other appointment details such as the start date, start time, duration, category information and notes, bring up the Appointment property sheet by double clicking the left mouse button on the appointment.

You can delete an appointment from the window by selecting the relevant appointment and pressing the **Delete** key on the keyboard.

Keyboard Control

If you want to use the keyboard within the Weekly Appointments window then the relevant keys are as follows:

Key	Action
The cursor keys	Move you around the day cells. If you move beyond the last day of the week or before the first day of the week then the week shown will change accordingly.
The **Insert** key	Adds a new appointment on the selected date.
The **Delete** key	Deletes the selected appointment

Changing the Week Shown

*Another way to change the date is by selecting **Change Date** from the **Date** menu*

There are several ways of changing the date in the Weekly Appointments window. If you change the week of the calendar then the Weekly Appointments window will display appointments for that week. The  (Previous Week),  (This Week) and  (Next Week) buttons may also be used to change the date shown by the Weekly Appointments window.

Printing The Weekly Appointments View

OfficeTalk lets you print out the Weekly Appointments view by selecting **Print Weekly Appointments** from the **File/Print** menu. This will bring up the Print Weekly Appointments dialog box showing the Details page.

Note: You can also bring up the Print Weekly Appointments dialog box by pressing the button at the top of the Weekly Appointments view or by selecting **Print Contents of Window** from the window menu.

In most cases, all you will need to do in order to print out your weekly appointments is select the paper style and press the **Print** button. OfficeTalk lets you customise your print out by providing several check boxes, radio buttons and fields. The functionality of the Print Weekly Appointments dialog box is summarised below:

Field	Description
From/To	The From and To date fields specify the date range that you wish to print.
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.
Indicate 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.

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

Option	Description
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 per 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.

When printing appointments, you can choose the following fonts:

Field	Description
Time Font	The appointment start times font
Appointment Font	The appointment description font.
Date Font	The font of the date text in each day cell.

If you preview the Weekly Appointments print out, with careful selection of fonts, OfficeTalk will display a preview output similar to that shown below:

OfficeTalk provides common print functionality in all Print dialog boxes. This functionality includes:

- Defining headers and footers
- Printer setup
- Page Style Selection
- Saved Print Settings
- Preview capability

For more information on this common print functionality, see “Printing” on page 355.

The Monthly Appointments View

You can view your appointments a month at a time by pressing the

button in the Shortcut bar in Diary mode. The Monthly Appointments window is shown below:

The Monthly Appointment window looks similar to a wall calendar. It contains a *cell* for each day of the month, listing the appointments for each day in the appropriate cell.

Like the Weekly Appointments window, the default size of the Monthly Appointments window is maximised such that it fills the Monthly view. If you want to display the calendar and the task list in the Monthly view then you can un-maximise the window by selecting from the drop down window menu.

Select the window menu item to re-maximise the view

You can change the month shown by clicking on the and buttons. Alternatively, if the Monthly Appointments window is not maximised, you can select a month from the calendar. The Monthly Appointments window will change to show the selected month.

Adding and Editing Appointments

You can add, edit and delete appointments directly from the Monthly Appointments window in just the same way as described for the Weekly Appointments window. For more information, see “Adding an Appointment” on page 127 and "Changing Appointment Details" on page 128.

Keyboard Control

If you want to use the keyboard to move around the Monthly Appointments Window then the relevant keys are as follows:

Key	Action

The cursor keys	Move you around the day cells. If you move beyond the last day of the month or before the first day of the month then the month shown will change accordingly.
The **Insert** key	Adds a new appointment on the selected date.
The **Delete** key	Deletes the selected appointment

Printing The Monthly Appointments View

OfficeTalk lets you print out the Monthly Appointments View by selecting **Print Monthly Appointments** from the **File/Print** menu. This will bring up the Print Monthly Appointments dialog box showing the Details page.

Note: You can also bring up the Print Monthly Appointments dialog box by pressing the  button at the top of the Monthly Appointments view or by selecting **Print Contents of Window** from the window menu.

In most cases, all you will need to do in order to print out your monthly appointments is select the paper style and press the **Print** button. OfficeTalk lets you customise your print out by providing several check boxes, radio buttons and fields. The functionality of the Print Monthly Appointments dialog box is summarised in the table below:

Field	Description
From/To	The *From* and *To* date fields specify the date range over which you wish to print.
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.
Indicate 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 start and end times.
Print sub calendars	If you check the **Print sub calendars** check box, OfficeTalk will display previous month and next month calendars at the bottom of the page.
Print shown through planners	Check this check box to print any shown through planner bookings onto the appointment print out
Print shown through events	Check this check box to print any shown through events onto the appointment print out

When printing appointments, you can choose the following fonts:

Font	Description
Time Font	The appointment start/end 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.
Sub Calendar Font	The font used to display the sub-calendars.
Day Font	The font used to display the day names.

If you preview the Monthly Appointments print out, with careful selection of fonts, OfficeTalk will display a preview output similar to that shown below:

OfficeTalk provides common print functionality in all Print dialog boxes. This functionality includes:

- Defining headers and footers
- Printer setup
- Page Style Selection
- Saved Print Settings
- Preview capability

For more information on this common print functionality, see “Printing” on page 355.

The Appointment Custom View

You can show the Appointment Custom View by pressing the button in the Shortcut bar in Diary mode. The Appointment Custom View lets you define the layout and span of days shown in the view. For example, you could define the view to show two weeks of appointments without showing weekends. Alternatively, you might wish to show seven weeks of appointments including weekends.

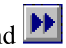
To customise the view, press the button in the Shortcut bar. The Customise dialog box is displayed.

The Customise dialog box lets you specify how many rows and columns will be shown in the view. Additionally, you may specify whether consecutive days will be displayed from left to right or from top to bottom. You can do this by selecting either the **Days across** or **Days Down** radio button respectively.

For many people it is less likely that weekends will contain many appointments. For this reason, OfficeTalk lets you choose whether or not to show weekends in this view. Furthermore, if you choose to show weekends, you are given the additional option of showing Saturday and Sunday in a single *cell*.

Like the Weekly Appointments window, the default size of the Custom Appointments window is maximised such that it fills the Custom view. If you want to display the calendar and the task list in the Custom view then you can un-maximise the window by selecting  from the drop down window menu.

Another way to change the date is by selecting **Change Date** *from the* **Date** *menu*

You can change the date span shown by clicking on the  and  buttons. Alternatively, if the Custom Appointments window is not maximised, you can select a date from the calendar. The Custom Appointments Window will change to show the selected date.

Adding and Editing Appointments

You can add, edit and delete appointments directly from the Custom Appointments window in just the same way as described for the Weekly Appointments window. For more information, see “Adding an Appointment” on page 127 and "Changing Appointment Details" on page 128.

Keyboard Control

If you want to use the keyboard to move around the Custom Appointments Window then this can be done in exactly the same way as described in “Keyboard Control” on page 128

Printing the Custom View

OfficeTalk lets you print out the Custom View by selecting **Print Custom Appointments** from the **File/Print** menu. This will display the Print Custom dialog box showing the Details page.

In most cases, all you will need to do in order to print out the project is select the paper style and press the **Print** button.

OfficeTalk lets you customise your print out by providing several check boxes, radio buttons and fields. The functionality of the Print Custom dialog box is summarised below:

Field	Description
From, To	The **From** and **To** fields represent the date range

	that will be printed. These fields are initially set to the date range shown in the Custom Appointments window. If you wish to print appointments over a different date range then specify the start and end dates in these fields.
Print appointment times	If you check the **Print appointment times** check box, OfficeTalk will prefix each appointment with its start and end times.
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.
Indicate overflow	If you check the **Indicate overflow** check box, OfficeTalk will draw an arrow to indicate when too many appointments exist to fit in a single day cell. You will need to reduce the Appointment Font size if you wish to see all of the appointments.
Print shown through planners	Check this check box to print any shown through planner bookings onto the custom appointment print out
Print shown through events	Check this check box to print any shown through events onto the custom appointment print out
Indicate non working days	Check this check box to shade non working days, such as Saturday and Sunday, in a light grey colour.
Indicate blocked out days	Check this check box to shade the day cell header of blocked out days in a red colour.
Rows	Select the number of rows shown in the Custom Print out. This is applicable only if you have selected the **Print Using Selected Fields** radio button.
Cols	Select the number of columns shown in the Custom Print out. This is applicable only if you have selected the **Print Using Selected Fields** radio button.
No Weekends	Select this radio button if you never want to print weekends.
Weekends in two cells	Select this radio button if you want to print weekends in two separate cells.
Weekends in one cell	Select this radio button if you want to print Saturday and Sunday together in a single cell.

The Fonts page lets you choose suitable fonts for the following:

Font	Description
Appointment Font	The font used to print the date in the top left corner of each cell.
Time Font	The font used to print the appointment start times.
Appointment Font	The font used to print appointment description.

To preview the printing of the Custom Appointment window, press the **Preview** button. When you are happy with the preview, print the Custom Appointment window by pressing the **Print** button.

If you preview the Custom Appointments print out, with careful selection of fonts, OfficeTalk will display a preview output similar to that shown below:

OfficeTalk provides common print functionality in the Custom Appointment dialog box, including

- Defining headers and footers
- Printer set-up
- Page Style Selection
- Saved Print Settings
- Preview capability

For more information on this common print functionality, see "Printing" on page 355.

The Appointment List

OfficeTalk provides a list view of your appointments letting you manipulate appointment data in just the same way as any other data that may be shown in a list. For example, you can filter, search, group, sort and show any custom data associated with appointments.

You can show the Appointment List view by pressing the button.

By default, the list is sorted such that the most recent appointments appear at the top of the list. The list is also grouped such that appointments falling on the same date are shown under the appropriate date header. For more information on manipulating data in lists, see “Sorting Data” and the following sections starting on page 335.

Printing the Appointment List View

OfficeTalk lets you print out the Appointment List view by selecting **Print Appointment List** from the **File/Print** menu. This will display the Print Bookings dialog box showing the Details page.

In most cases, all you will need to do in order to print out the Appointment List View is select the paper style and press the **Print** button.

OfficeTalk lets you customise your print out by providing several check boxes, radio buttons and fields. The functionality of the Print Custom dialog box is summarised below:

Field	Description
Print As Shown	Select this radio button if you wish to print the same fields as shown in the appointment list view.
Print using selected fields	Select this radio button if you wish to select which appointment list fields to print. When you select this radio button, the **Fields** list will become enabled, letting you place a check box next to each field that you wish to print.
New page per Item	Check this check box to print each appointment on a separate page.
Print field titles	Check this check box to print the field/column titles at the top of each page.
Print appointment notes	Check this check box to print any notes associated with each appointment.

The Fonts page lets you choose suitable fonts for the following:

Font	Description
Title Font	The font used to print the column headers.
Appointment Font	The font used to print appointment details.

To preview the printing of the Appointment List window, press the **Preview** button. When you are happy with the preview, print the Appointment List window by pressing the **Print** button.

If you preview the appointments list print out, with careful selection of fonts, OfficeTalk will display a preview output similar to that shown below:

OfficeTalk provides common print functionality in the Appointment List dialog box, including

- Defining headers and footers
- Printer set-up
- Page Style Selection
- Saved Print Settings

- Preview capability

For more information on this common print functionality, see “Printing” on page 355.

Opening Another User’s Diary

When you open another user’s diary, the current view remains the same, but the information shown in both the Appointments window and the Task List window changes to show the selected user’s appointments and tasks. Once you have opened another user’s diary then, provided you have sufficient access rights, you may add, edit and delete both appointments and tasks just as if they were your own.

To open another user’s diary, simply select the user from the drop down list above the Appointments window.

If one or more Remote Workgroups exist then opening a remote user’s diary is a two stage process. Firstly select the remote workgroup from the drop down list. OfficeTalk will then try to open the remote workgroup’s database. If successful, the diary of the first remote user in the list will be opened. The drop down list will now be populated with remote users belonging to the selected remote workgroup. Drop down the list and select the relevant remote user.

Your ability to open another user’s diary and then modify that user’s data is entirely dependent upon the access that you have been granted to that user’s diary. If you have no access to the user’s diary then the user will not even appear in the drop down list. If you have read access then you will be able to open the diary but you will not be able to make any changes to the data. The highest level of access lets you read, edit, create and delete data in that user’s diary. For more information on access rights, see "Controlling Access to a User’s Diary" on page 38.

Opening a Resource’s Diary

You can access the diary for a resource by selecting the resource from the drop down list above the Appointments window. All resources will appear at the bottom of the list after the list of users.

Your ability to open a resource’s diary and then modify that resource’s appointment data is entirely dependent upon the access that you have been granted to that resource’s diary.

Representation of Non Working Days

OfficeTalk lets you mark certain days as *non-working* days. An example of a non-working day is a holiday or a weekend. The ability to mark certain days as *non-working* is particularly useful for meeting organisers who can see at a glance which users are unavailable as a result of holidays or days away from the office. Planners and Events may be used to define non-working days. For more information see “Blocking Out a Diary with a Planner” on page 200.

OfficeTalk uses colour to distinguish between working days and non-working days. The default setting for Weekly and Monthly Appointment windows is to show *working* days with a white background and *non-working* days with a light grey background. Similarly, the default setting for the Daily Appointment window is to show *working hours* and *working days* in white and *non-working hours* and *non working days* in light grey. You can change this to suit your personal taste. For more information, see "Customising the Display" on page 401.

Events

An Event is any single occurrence or activity which may take place on a single day or may be repeated over a number of days. Events may be either public or personal, which means that they may be used to keep personal events such as birthdays and anniversaries for individual users and they may also be used to record workgroup wide data such as public holidays, company holidays and other company events.

Once defined, events may either be shown in the Background Activities window or shown through onto the Appointment windows. In this way they achieve the same end result as a planner booking but without the need to define a planner and a set of planner keys.

Events may also be used to block out users’ diaries. This can be useful if, for example, you wish to define a set of public holidays and you wish to ensure that meeting organisers will not accidentally arrange meetings on these days.

Adding a New Event

To add a new event, do the following:

Press the button located in the Shortcut bar in Diary mode. The Events dialog box is displayed showing a list of events which have already been defined.

- Press the **New…** button. An Event dialog box is displayed.

You can add your own event types from Supervisor mode. For more information, see "Administering Event Types " on page 82

- Type in a description for the event, for example, “My Birthday”. Select an event type from the **Type** list. Specify a date for the event. If the event will be a repeated event, then the date that you specify represents the first occurrence of this particular event. In this example, the event, “My Birthday”, is an *annual* event. It reoccurs, indefinitely, on the same date every year. Select the **Annual Event** radio button in the Occurrences page.
- By default, all events are personal. To make the event into a public event, which all users will be able to see, select the Access tab and select the public radio button.
- Press **OK** to save your changes.

Repeated Events

OfficeTalk lets you repeat an event one or more times. To repeat an event, do the following:

- Select the event from the Events dialog box and press the **Edit** button. The Event property sheet is displayed.
- From the Occurrences page, select the **Repeated** radio button and press the **Repeat** button. The Repeat wizard is displayed.

- The Repeat Frequency page lets you choose how frequently the event will be repeated. You may choose between repeating the event every n days, every n weeks, every n months or every n years.
- Pressing **Next** will display the Non-Working Days page.

- This page lets you choose what action to take when a repeated event occurs on a non-working day. You may choose between the following:

1. Skipping this occurrence of the event
2. Keeping the occurrence
3. Using the last working day before this date
4. Using the first working day after this date

- Select the appropriate radio button and press **Next**.
- The Ending page lets you choose the total number of times the event will be repeated. You can choose this either by specifying an ending date or by specifying a number, representing the number of event occurrences.

- Press **Finish** to repeat the events.

Setting Reminders for Events

OfficeTalk can remind you of events any number of days prior to their occurrence. By default, you are not reminded about events. You can turn on the reminder by checking the **Remind me of this event** check box in the Remind page of the Event property sheet.

You can specify how many days advance warning you require by entering a number into the **Days to remind** field.

If the event is a public event, then OfficeTalk will not remind all users of the event. Only the owner of the event will be reminded. This is the user selected in the **Owner** drop down list in the Details page.

Event reminders are displayed when you log in to OfficeTalk. If there is more than one event reminder queued up then each reminder will be shown in succession. An event reminder informs you of the pending event as shown below:

If you would like OfficeTalk to remind you the next time you log in then press the **Remind Again** button. If you do not want OfficeTalk to remind you of this event again then press the **Do not remind again** button.

Showing Through Events onto Your Diary

For convenience, OfficeTalk lets you show through *long term* activity, such as events and planner bookings, onto your diary. To show an event through onto your diary do the following:

- Bring up the Event property sheet by selecting the appropriate event from the Events dialog box and pressing the **Edit** button.
- Select the Diary tab. Select the users whose diary you wish the event to show through onto.
- Check the **Show through onto diary** check box and press **OK**.

The event is shown in the Daily Appointments window, for the selected users, as a yellow strip, running down the left margin of the window, when viewing the day or days during which the event occurs.

The event is shown in the appropriate cells in the Weekly, Monthly and Custom windows as shown below:

Using Events to Block Out Days in Your Diary

Events may be used to block out individual days in your diary or in another user's diary. One use for this feature would be to block out certain users diaries with each public holiday defined. This would prevent meetings from being booked with these users during public holidays. It would also help prevent those users from arranging appointments during those non working days.

To block out a user's diary with an event, do the following:

- Bring up the Event property sheet by selecting the appropriate event from the Events dialog box and pressing the **Edit** button.
- Select the Diary tab. Select the users whose diaries you wish to block out using the event.
- Select the **Block Out** check box and press **OK**.

Blocked out days will be shown as dark grey in the Daily, Weekly, Monthly and Custom Appointments window, however this may be changed to suit your personal tastes. For more information, see "Customising the Display" on page 401.

Show Through and Block Out of Planners on Your Diary

Planners may be shown through onto your diary in just the same way as events. However, you do not have to show through planner bookings on an individual basis. You have the choice of either showing through planner bookings created by a particular planner key or showing through an entire planner. For more information on how to show through planners onto your diary, see “Showing a Planner in Your Diary” on page 196.

When a planner booking is shown through onto the Daily Appointments window, it appears as a coloured strip running down the left margin of the window. The colour and pattern of the strip takes on the same colour and pattern as the associated key of the planner booking.

A planner booking is shown in the appropriate cells in the Weekly, Monthly and Custom windows as a horizontal strip showing the planner booking’s description. Again, the colour and pattern of the strip takes on the same colour and pattern as the associated key of the planner booking.

OfficeTalk lets you use planner bookings to block out days in your diary in just the same way as events. You have the choice of blocking out your diary either using planner bookings created by a particular planner key or using an entire planner. For more information on how to block out your diary using planners, see "Using a Planner to Block Out Days in your Diary" on page 199.

Viewing Background Activities

The Background Activities window is a great way of seeing what tasks are due and on which dates

Planner bookings, Events, and Due Tasks are collectively called *Background Activities*. The Background Activities window provides another way of showing such activity alongside your appointment information. Unlike planner and event *show through*, the information shown in the Background Activities Window remains constant regardless of whose diary is currently selected. The Background Activities window can show any of the following:

Option	Description
Bookings in Selected Planners	This may be any combination of planners to which you have at least read access. Note that, unlike planner *show through*, you cannot select to show bookings associated with a particular planner key.
All public events	Those events marked as public
All personal events	Those events marked as personal to you
All due tasks	This is the deadline dates of tasks which have a deadline but have not been completed.

To specify what is shown in the Background Activities window, select **Preferences** from the **Options** menu. The Preferences property sheet is displayed. Select the Background Activities tab.

To display one or more planners in the Background Activities window, select the **Planners** check box and press the **Planners…** button. The Viewed Planners dialog box is displayed. Select the required planners from the **Unselected Planners** list and press the **Add** button. Press **OK** to save your changes.

To display public events, private events or due tasks, select the relevant check box from the Background Activities page and press **OK**.

The Background Activities window is not shown by default. To show it, select **Background Activities** from the **View** menu.

*Note that you can only display the Background Activities window if the view is **not** maximised*

The Background Activities window shows background activities in the same date range as that displayed in the Appointments window. For example, if Daily View is selected and 12th March is shown in the Daily Appointments window then all background activities occurring on the 12th March will be displayed in the Background Activities window. However if Monthly View is selected and April is shown in the Monthly Appointments window, then all background activities occurring during April will be displayed in the Background Activities window.

Booking Repeat Appointments

Once you have added an appointment, OfficeTalk lets you repeat the appointment at regular intervals. 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.

To repeat an appointment, do the following:

- The appointment must first exist. Click the right mouse button on the appointment from either the Daily, Weekly, Monthly or Custom Appointment window and select **Repeat** from the context menu. The Repeat Wizard is displayed showing the Repeat Frequency page.

- The Repeat Frequency page lets you choose whether to repeat the appointment every n days, every n weeks, every n months or every n years. Select the relevant radio button and enter a value into the corresponding field. Press **Next**.

- If you selected **Every n months**, the next page lets you choose further options about how the appointment is repeated on each month. You may choose whether the repeated date should be on the nth day of the month (e.g. 6^{th} of the month), on the nth weekday of the month (e.g. the 1st Monday) or the last day of the month. The table below summarises the possible options:

Field	Description
nth of the month	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 non working days, where you have elected to skip non working days (see Non Working Days page below).
Nth weekday of the month	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.
Last Day	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 non working days, where you have elected to skip non working days (see Non Working Days page below).

- The next page lets you choose how to handle the possibility of repeated appointments occurring on non-working days. In such a case, you may choose whether to skip creating the appointment, to accept the appointment as is, to place the appointment on the previous working day or to place the appointment on the next working day.

- The next page lets you choose either the date up to which the appointment should be repeated, or the number of times to repeat the appointment. Make your selection and press **Finish**. OfficeTalk will repeat the appointment accordingly.

Note: OfficeTalk will always try and repeat the appointment at the same time as the original appointment.

Importing and Exporting Diary Data

OfficeTalk lets you import and export appointments and tasks to and from CSV files. A CSV (Comma Separated Values) file is an ASCII file which can represent a series of data records. Each line of the CSV file represents a record of data with the exception of the first line which is an optional header line that describes the format of each record. An example of a simple CSV file is shown below:

```
"Name", "Date", "Start Time", "Duration"
"Write Report", "25/10/97", "12:00", "30m"
"Sales Meeting", "26/10/97", "17:00", "1h"
"Visit Bank", "27/10/97", "10:00", "2h"
"Appraisal", "28/10/97", "09:00", "1h"
```

Importing Task and Appointment Data

The CSV file shown above contains four fields of information: Name, Date, Time and Duration. It has sufficient fields to import into OfficeTalk as either Appointment data or Task data. OfficeTalk requires the following fields for each data type:

Data Type	Required Fields
Appointments	Name, Date, Time, Duration
Tasks	Name

Note: If the Date, Time and Duration fields are missing, OfficeTalk will still import the data, however each appointment imported will begin at the current date and time with a default duration of 30 minutes.

To import Task or Appointment data, do the following:

- Select either **CSV Tasks** or **CSV Appointments** from the **File/Import** menu in Diary mode. The CSV Import Wizard is displayed, showing the File page.
- The File page lets you choose the CSV file whose data you wish to import. Either type in a filename into the **Import File** field or press the **Browse…** button and search for the required file. Once you have specified a valid filename in this field, you may view the file by pressing the **View File** button. Press **Next** to continue
- The Connections page lets you connect the available fields in the selected CSV file with the relevant data type's available fields. For example, if you were importing the sample file above into your diary as appointments, the Connections page would show the following:

- You must connect up the fields from the selected file to the appropriate appointment fields. For example, **Name** should be connected to **Description**, **Date** to **Date**, **Start Time** to **Time** and **Duration** to **Duration**. To connect two fields, select the relevant field from each list and press the **Connect** button. If you make a mistake you can disconnect a field by selecting the relevant field from the right hand list and pressing **Disconnect**. Alternatively, just connect the field in the right hand list to a different field in the left hand list.

Note: The CSV Import Wizard will let you connect a field in the right hand list to more than one field in the left hand list. The result is that data held in the relevant field in the CSV file is copied to each connected field in the task or appointment.

- Pressing **Next** will display the Preview page. This page lets you verify that the connections you have made are correct by allowing you to step through each record that will be added. This way, you will be able to spot any mistakes prior to loading the data into OfficeTalk.

- The **Prev** and **Next** buttons may be used to step through each record in the CSV file. When you are happy that the data will import correctly, press **Finish**. OfficeTalk will import the data as either Tasks or Appointments, depending upon whether you selected **Import CSV Tasks** or **Import CSV Appointments**.

Exporting Task and Appointment Information to a CSV File

To export your task list or appointments to a CSV file, do the following:

- Select either **CSV Tasks** or **CSV Appointments** from the **File/Export** menu in Diary mode. The CSV Export wizard is displayed showing the Choice page.

- This page lets you choose between outputting information for either the currently viewed diary or for a selection of other user's diaries. If you choose **Output a Selection of Diaries** then pressing **Next** will display the Diaries page.

- Place a tick next to the name of each user whose diary you wish to export and press **Next**.

- If you are exporting appointment data, the next page is the Date Range page. This page lets you specify a date range, such that only appointments which fall inside the specified date range will be exported. Select a date range and press **Next** to display the Filter page.

This page is only appropriate if you are outputting tasks or if you are outputting appointments from the Appointment List View

- The Filter page lets you choose whether to apply the currently selected filter (if any) to the outputted data. If you are exporting tasks, then this page refers to the filter currently applied to the Task List window. If you are exporting appointments, then this page refers to the filter currently applied to the Appointment List view. Check the check box if you wish to use the currently selected filter. Press **Next**.

- The next page lets you choose a name for the CSV file that you are about to create. Enter a fully qualified filename into the **Export File** field. You may use the **Browse…** button to select an existing file which you would like to over-write. When you have specified a suitable filename, press **Next**.

The options page lets you decide the format of the output CSV file. You may choose whether or not to write a header, describing the structure of the data. You may also choose whether or not to encapsulate each value in quotes. You can choose the character which will be used to separate each value. This is usually a comma, but you may require to delimit each field with a TAB character. Finally, you may specify whether or not to end each line with a delimiter, since some CSV reading applications require this.

Showing a Time Zone Bar

OfficeTalk lets you display a second time bar in the Daily Appointments view which represents a different time zone. This is useful if you are travelling between time zones and wish to arrange meetings or make appointments in a different time zone.

You can show a second time bar by clicking the right mouse button in the Daily Appointments window and selecting **Show Second Time Bar** from the context menu. Once the second time bar is displayed, you may change the time zone that it represents by clicking the right mouse button in the Daily Appointments window and selecting **Select Second Time Zone…** from the context menu. The Time Zone dialog box is displayed.

Choose the required time zone from the **Time Zone** drop down list and press **OK**.

You may hide the second time bar by clicking the right mouse button in the Daily Appointments window and selecting **Hide Second Time Bar** from the context menu.

Diary Preferences

You may specify certain preferences for Diary mode by selecting **Preferences** from the **Options** menu. The Preferences property sheet is displayed. Select the Diary page.

This page lets you choose various options associated with Diary mode. These are detailed in the table below:

Option	Description
Default remind time	The default value that should be shown in the **Remind Time** field in the Appointment property sheet. For example, when setting appointment reminders, if you generally wish to be reminded of appointments 1 hour and 30 minutes before they are about to start then you should enter '1h30m' into the **Default remind time** field.
Lines through completed tasks	Check this check box if you wish OfficeTalk to draw a line through each completed task in the Task list.
Show instructions dialog when assigning task	Check this check box if you wish OfficeTalk to display an Instructions dialog box every time you assign a task. The Instructions dialog box lets you provide the recipient of the assigned task with instructions on how to perform the task.
Change timebar to timezone of viewed remote workgroup	Check this check box if you wish to show the time bar in the Daily Appointments view in the timezone of the viewed remote workgroup. If you do not check this check box then, when you view the diary of a user in a remote workgroup, the timezone of your remote workgroup is displayed in the Daily Appointments view.

Group Mode

Overview

Pressing the button in the main toolbar will take you into Group mode. This mode is ideal for looking at the activities of a group of users and resources. From within Group mode you may add new groups and administer existing groups.

What is a Group?

A Group is a collection of one or more users and/or resources. It is useful to group users and resources together since this may then reflect how your company or workgroup is structured. Groups can be *hierarchical*, which means that one group may contain one or more sub groups. Additionally, users and resources may belong to more than one group. As a result, the structure of your organisation can be represented by a combination of one or more groups and sub groups. For example, your organisation may be split by geographical location into four departments, each serving a different area of the world. In turn, each department might have its own Sales, Marketing and Development teams. OfficeTalk lets you represent such a structure and gives you the tools to view diary information held within each group and sub group.

Adding a New Group

Supervisors may add new groups and administer existing groups from within Supervisor mode. Group mode lets supervisors add new groups in just the same way and allows non-supervisors to set up their own personal groups.

To add a new group do the following:

- Press the located in shortcut bar in Group mode. The Group property sheet is displayed showing the Details page.

- Enter a name for the group, e.g. 'Sales Team'. OfficeTalk lets you define the group's owner by selecting a user's name from the Owner drop down list. Only those users to whom you have at least create *general* access will appear in the drop down list.
- Select the Members tab and define which users and resources will belong to the group by selecting the required users and resources from the **Non Members** list and pressing the **Add** button.

You can select multiple items from the Non Members *list by clicking on each item in turn whilst keeping the **Ctrl** key depressed*

- Select the Access tab. From here you can specify the access rights that each user has to the group. By default, the group is marked as *personal* which means that all users that have general access to you will have the same access to this group. For further information on granting access rights, see "Administering Access Rights" on page 83.
- Press **OK** to record your changes.

The fields in the Details tab of the Group property sheet are summarised below:

Field	Description
Group Name	This is the name of the group, for example, 'Sales', or 'Support Team'.
Owner	This is the owner of the group. When you create a group, OfficeTalk automatically makes you the owner of the group. This means that only you (and any supervisors) are able to delete the group or edit its name or its members.

Creating a Public Group

A *public* group is accessible to all users in the workgroup. You may make a group into a public group by selecting the **Public** radio button in the Access page of the Group property sheet.

If this radio button is disabled, then this means that you are not permitted to make public groups. A supervisor may grant you the ability to make public groups. For more information, see “Restricting Access to Modes” on page 84.

Administering Existing Groups

Group Mode lets Supervisors administer existing public groups and allows non-supervisors to administer existing personal groups in the following way:

- From the list of groups in group mode, click the right mouse button on the group that you wish to administer and select **Edit…** from the context menu. The Group property sheet is displayed showing the Details page.
- You can use the Details page to modify the group’s name and, if you are a supervisor, you may change the ownership of the group.
- Select the Members tab. From here you may add members to the group by selecting the relevant members from the **Non Members** list and pressing the **Add** button. You may also remove members from the group by selecting the relevant members from the **Members** list and pressing the **Remove** button.
- Select the Access tab. From here you can modify the access rights that each user has to the group. You may choose between making the group either private, personal or public. Alternatively, you may set specific access on a per security profile basis. For more information, see “Administering Access Rights” on page 83.
- Press **OK** to record your changes.

Viewing A Group’s Appointments

To view a group’s appointments, double click on the group in the left hand list. Alternatively, select the group from the drop down list of groups.

Any users, resources and sub groups belonging to the group will appear in the left hand list. The appointments belonging to the group’s members will be displayed in the right hand window.

You can return the left hand list back to showing the list of groups either by double clicking the marker displayed at the top of the left hand list or by selecting **All Groups** from the drop down list of groups.

Viewing a Group in a Remote Workgroup

If you have access to a remote workgroup, then provided that the remote workgroup has one or more groups and given that you have sufficient access to these groups, OfficeTalk will let you view those remote groups from within Group mode.

To do this, firstly drop down the list of groups. The name of the remote workgroup will appear after all the local groups. Select the remote workgroup. The drop down list will close and OfficeTalk will attempt to open the remote workgroup database. When this is done, drop down the list of groups again. This time, the list of local groups will have disappeared. However the remote workgroup will be shown together with it's groups listed underneath. Selecting one of the groups will display its members and their associated appointments.

Group mode provides two different views onto diary information. These are:

- Group Chart View
- Group Table View

Group Chart View

To select Group Chart View, press the located in the sub toolbar.

Group Chart view represents the appointments of users and resources, belonging to the selected group, in a Gantt chart format. Each appointment is represented by a blue rectangle. The appointment’s description is displayed inside the rectangle and the width of the rectangle represents the duration of the appointment.

Zooming In and Out

The  and  buttons let you zoom in and out of the Group Chart View. Doing this lets you control what time span is displayed in the view. Usually you will want to see the detail of users’ appointments on any particular day and so generally, you will want to be zoomed in as far as possible. OfficeTalk lets you view a group’s appointments at several different zoom levels. The levels are:

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

Appointment Colour Representation

OfficeTalk uses different colours to represent the status of appointments in the Group Chart View. The background colour of the rectangle is normally light blue. If an appointment was created by scheduling 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 all the ongoing *scheduled* tasks for a particular group of users.

Editing Appointments in the Group Chart View

If you have at least edit access to a particular user's diary, then you may modify the start time, end time and duration of that user's appointments directly from the Group Chart view. To move an appointment in the Group Chart view, position the cursor over the appointment that you wish to move, press, and keep depressed, the left mouse button. An outline will appear around the appointment. Moving the mouse left or right will move the appointment accordingly. An appointment may only move horizontally. It is not possible to move an appointment from one user/resource to another from this view. Releasing the left mouse button will save the changes. To change the duration of an appointment, position the cursor over either end of the appointment and, whilst keeping the left mouse button depressed, drag the mouse to change the width of the appointment rectangle. Releasing the left mouse button will save the changes. To edit other appointment details, double click on the appointment rectangle. The Appointment property sheet is displayed. Make any changes and press **OK**.

Printing the Group Chart View

To print the Group Chart View, select **Print Chart** from the **File/Print** menu. The Print Group Chart dialog box is displayed.

The fields and buttons in the Details page of the Print Group Chart dialog box are summarised in the table below:

Field	Description
From, To	The From and To fields represent the time range that will be printed. These fields are initially set to the time range shown in the Group Chart window. If you wish to print appointments for the group over a different time range then specify the start and end times in these fields.
Member list on each page	Checking this check box ensures that the list of group members is displayed down the left margin of every sheet printed.

Banner on each page	Checking this check box ensures that the time banner is displayed along the top of every sheet printed.

The Scale page lets you specify how many pages wide and how many pages tall into which to fit the print out of the Group Chart window. You may choose to fit the print out to a specified number of pages wide or you may specify how many inches or centimetres will represent a certain time period. The default setting is to fit the print out to 1 page wide.

The Scale page also lets you choose which scale will be used to display the time banner. You may choose between labelling the time banner every 15 minutes, 30 minutes, 1 hour, 3 hours, 6 hours, 12 hours, day, week or month. Alternatively, you can specify an *auto* setting where OfficeTalk will choose a suitable scale.

The Fonts page lets you choose suitable fonts for the following:

Font	Description
Banner Font	The font for the Time Banner
Name Title Font	The font for the header above the member list
Name Font	The font for the list of members.
Appointment Font	The font for the appointments drawn in the Chart view.

To preview the printing of the Group Chart window, press the **Preview** button. When you are happy with the preview, print the Group Chart window by pressing the **Print** button.

OfficeTalk provides common print functionality in the Print Chart dialog box, including

- Defining headers and footers
- Printer setup
- Page Style Selection

- Saved Print Settings
- Preview capability

For more information on this common print functionality, see "Printing" on page 355.

Group Table View

To select Group Table View, press the button, located in the shortcut bar.

Group Table view represents the appointments of users and resources which belong to the selected group, in a tabular format. Each cell in the table represents a day's appointments for a particular member. Each column represents a different member of the group. Each row represents a different day of the week. The default is to show five days of appointments but you may show any date range from 1 day to 7 days

using the and buttons.

Adding and Editing Appointments

Provided you have sufficient access, OfficeTalk lets you add appointments for any group member from within the Group Table View. To add an appointment for a member on a particular day, double click in the relevant cell. The Appointment property sheet is displayed. Enter a description for the appointment. The starting time of the appointment defaults to the earliest available half hour slot after the start of the working day. Change this to the required start time. Press **OK** to save your changes.

To edit an appointment, select the appointment using the right mouse button and choose **Edit…** from the context menu. The appointment property sheet is displayed. Make any changes and press **OK**.

Dragging and Dropping Appointments

OfficeTalk lets you change the date of an appointment and lets you move an appointment from one member to another. You can do this using drag and drop. Select the appointment that you wish to move and whilst keeping the left mouse button depressed, drag the appointment to the appropriate cell.

Planner and Event Show Through

If any planners or events are set up to show through onto the diaries of any of the members of the group then anyone viewing that group in Table View will see the associated planner bookings and events shown through into the relevant day cells.

Changing the Field Widths

OfficeTalk lets you change the width of the cells in the Group Weekly View so that you can see any appointments whose text is longer than the width of the cell. You can do this by placing the mouse over the vertical line dividing each cell header and then pressing the left mouse button and dragging the field to be wider or thinner as appropriate.

You can simultaneously change the width of all the cells together by changing the width of one cell whilst holding down the **Ctrl** key. The width of all the other cells will change to match the width of the cell that you change.

Printing the Group Table View

OfficeTalk lets you print out your Group Table view by selecting **Print Table…** from the **File/**Print menu. The Print Group Table dialog box is displayed.

In most cases, all you will need to do in order to print out the Group Table View is select the paper style and press the **Print** button.

OfficeTalk lets you customise your print out by providing several check boxes, radio buttons and fields. The functionality of the Print Group Table dialog box is summarised below:

Field	Description
From/To	The From and To date fields specify the date range that you wish to print.
Fit to n page(s) wide	Specify how many pages wide the print out will be (the default is 1).
Print Weekends	Checking this check box will print appointments which occur on weekends.
Days per page	Specifies how many days per page to print. The default is 5.
Print shown through planners	Check this check box if you wish to print shown through planners.
Print shown through events	Check this check box if you wish to print shown through events.

The Font page gives you complete control over the fonts used to print out the Group Table view. You may choose the following fonts:

Font	Description
Name Font	This font is used to draw the users' and resources' names at the top of the page.
Date Font	This font is used to draw the day names down the left side of the page.
Appointment Font	This font is used to draw the appointment text.

To preview the printing of the Group Table window, press the **Preview** button. When you are happy with the preview, print the Group Table window by pressing the **Print** button.

OfficeTalk provides common print functionality in the Print Group Table dialog box, including

- Defining headers and footers
- Printer setup
- Page Style Selection
- Saved Print Settings
- Preview capability

For more information on this common print functionality, see "Printing" on page 355.

Project Mode

Overview

Project mode is ideal for planning and monitoring projects within your organisation. A project consists of a group of project related tasks and a plan for when those tasks will be completed and by whom.

From within Project mode you can define tasks and specify planned start dates and durations for each task. You can assign tasks to one or more local users, to remote users or to anyone with an Internet address and OfficeTalk will automatically track the completion status of every task.

You can choose which columns to show in the Task List window by selecting **Columns…** *from the context menu*

Project mode consists of two main windows: The Task List window and the Project window. Details of each project task are shown in the Task List window, such as the task's description, planned start date, planned duration, priority, completion status etc. The Project window shows a bar chart representing the planned start times and planned duration of each task shown in the Task List window.

Creating a New Project

To create a new project, do the following:

- Press the button located in the Shortcut bar in Project mode. The Project property sheet is displayed showing the Details page. Enter a description for the project. You may also select an owner for the project from the drop down list of users. The drop down list contains only those users to whom you have at least create general access.
- Select the Access tab. From here you can specify the access rights that each user has to the project. By default, the project is marked as *personal* which means that all users

that have access to you will have the same access to this project. For further information on granting access rights, see “Administering Access Rights” on page 83.

When you have specified the project’s description and have granted the relevant access rights, press **OK** on the Project property sheet. The new project will be created and will be automatically opened, ready for you to start adding project tasks.

Opening a Project

When you create a project, it is automatically opened for you. However when you subsequently enter Project mode having just logged into OfficeTalk, no project will be opened initially. A list of available projects will be shown in the left hand window. You can open one of these projects either by double clicking on the relevant project in the left hand list or by selecting the project from the drop down list of projects. In either case, opening the project in this way will replace the list of projects with the list of tasks held within that project.

You can close the project and return to showing the list of available projects in the left hand window either by selecting **--All Projects--** from the drop down list of projects or by double clicking on the  marker at the top of the task list.

Viewing a Project in a Remote Workgroup

If you have access to a remote workgroup, then provided that the remote workgroup has one or more projects and given that you have sufficient access to those projects, OfficeTalk will let you view those remote projects from within Project mode.

To do this, firstly drop down the list of projects. The name of the remote workgroup will appear after all the local projects. Select the remote workgroup. The drop down list will close and OfficeTalk will attempt to open the remote workgroup database. When this is done, drop down the list of projects again. This time, the list of local projects will have been replaced with projects belonging to the remote workgroup. Selecting one of the projects will display its tasks in the Task List window.

The Project Task List

The Project Task List is displayed to the left hand side of the Project mode. It is very similar in behaviour to the Task List in Diary mode.

OfficeTalk lets you record one or more of the following attributes against each project task:

- A description of the task
- A priority
- A deadline
- A planned start date
- A planned duration
- The percentage completion
- Detailed notes about the task

Additionally, you may add any number of user defined fields to the project task data type which means that you can store almost any data that you like with each task. For more information on adding user defined fields to projects and project tasks see "Administering Custom Data" on page 56.

Creating a New Project Task

To add a project task, you must first have opened a project. You can add the project task in one of two ways:

- Using a dialog box
- By clicking and typing

The quickest way of adding a project task is by clicking the left mouse button anywhere under the last project task in the task list. A caret will appear. Type a description for the project task and press the **Enter** key. Entering a task in this way does not let you specify other details such as planned start dates and planned durations, although you may subsequently edit the task and specify these details.

To specify such details when you create a project task, use the Project

Task property sheet to create the task. Pressing the button will display the Project Task property sheet showing the Details page.

Enter a description for the task, specify whether or not the task should have a deadline by checking the **Has Deadline** check box and specifying a deadline date. If you wish to enter start date and duration information, you must first check the **Planned** check box. Doing this will display a bar in the Project window representing the chosen planned start date and planned duration.

You may wish to add notes to a project task, for example, to describe the resource requirements and detail more fully the steps needed to complete the task. By selecting the Notes tab you can enter rich text notes for the task. Type in the notes, using the format toolbar to add colour, fonts and character style to your text.

Note: If a Task has some notes associated with it then a marker will be displayed against the task in the task list, under the Notes column (if you have chosen to display it). Double clicking on the marker will bring up the Project Task property sheet, automatically displaying the Notes page.

When you have specified the relevant project task details, press **OK** to save your changes.

Planning a Project Task

Once you have added some tasks to the project task list, OfficeTalk will let you plan the tasks. *Planning* a task means assigning a planned start time and duration to the task. You can plan a task in one of two ways:

Action	Description
Drag and Drop.	Drag the task from the Task List and drop it into the Project Window. The position at which you drop the task determines the task's planned start time. The planned duration will default to one day. You can change this by stretching the rectangle representing the task in the Project Window.
From the Project Task property sheet.	Double click on the task that you wish to plan. The Project Task property sheet is displayed. Check the **Planned** Check box and enter a planned start date and duration. Press **OK** to save your changes.

Specifying a Deadline

You can set a deadline for any project task. This represents a date by which time the project task must be complete. If the task has not been completed by the deadline date, then OfficeTalk will alert you by colouring the project task *red* in the Project window.

To specify a deadline, bring up the Project Task property sheet by double clicking on the relevant project task. Check the **Has Deadline** check box and enter a deadline date (and time if required). Press **OK** to save your changes.

Prioritising Your Tasks

You can assign a priority to any task in the list. A supervisor may define up to 5 levels of task priority and may specify the default priority level for when new tasks are added. The standard OfficeTalk configuration provides three levels of task priority named: “High”, “Medium” and “Low”. The default priority is “Medium”.

You can change the priority of a project task in the following way:

- Show the Priority Marker column.
- Whilst keeping the **Ctrl** key depressed, click on the priority marker. The project task's priority will increase.
- Repeatedly click on the priority marker until the desired priority is displayed. The priority of the task will increase each time you click on the marker. If the task priority is already 1 then clicking on the priority marker will change the priority to 5.

Once each task has been assigned the appropriate priority, you may wish to sort the task list by priority such that the highest priority tasks are shown at the top of the list. You can do this by clicking the left mouse button on the priority column header.

Alternatively, you may wish to show only tasks with a certain priority. For example, you can filter the project task list to show only priority 1 tasks in the following way:

- Locate a priority 1 task in the task list. Click the right mouse button on the priority 1 marker. The context menu will appear.
- Select “Filter by High”. Only priority 1 tasks will be shown in the task list.

Structuring Your Task List

Your task list can grow only so long until it is necessary to structure it in some way. OfficeTalk provides an excellent way to structure your task list by using *sub tasks*.

Sub Tasks

Sometimes it is useful to break down project tasks representing large amounts of effort into several smaller, more manageable tasks, called *sub tasks*. This kind of approach is known as *task outlining*. OfficeTalk lets you do this in the following way:

- Add a parent project task by clicking the left mouse button at the bottom of the Project Task window, entering a description and pressing **Enter**.
- Add one or more tasks in just the same way. These tasks will become *sub* tasks of the parent.
- Select these tasks and *drag* them on to the parent task. The sub tasks will be indented underneath the parent task. A button will appear to the left of the parent task. Pressing the button will hide the sub tasks. Pressing it again will show the sub tasks.

Note: OfficeTalk lets you *open* a task. This filters the task list window to show only the task’s sub tasks. Opening a task is a good way of adding sub tasks since any tasks that you add when the list is filtered in this way will automatically become sub tasks of the opened task. To open a task, click the right mouse button on the task and select **Open…** from the context sensitive menu.

Categorising Project Tasks

OfficeTalk lets you define a set of categories which may be used to classify your project tasks. To mark a task as belonging to a particular category, do the following:

- Bring up the Project Task property sheet by double clicking on the relevant task.

- Select the Categories page. The Categories page will display a list of project categories in the bottom window. Each category has a check box to the left of the description.
- Select one or more check boxes representing the classification of the task into the relevant categories.
- Press **OK** to save your changes.

You may add your own private categories by typing the name of the category into the Categories window in the Categories page and pressing the **Update** button. The new category will appear, checked, in the bottom window. Press **OK** to save your changes.

For more information on Categories, see "Using Categories" on page 349.

Project Task List Columns

You may view one or more of the following columns in the project Task List:

Column	Description
Type	Shows the objects type marker. Only project tasks may be displayed in this list so this marker will always be .
Name	The project task's description.
Link	An active marker which gives you access to objects linked to the associated project task.
Priority	The priority of the project task. The actual priority labels may be specified in Supervisor mode. The default values are "Urgent", "High", "Medium", "Low". For more information, see "Task Priority Descriptions" on page 97.
Priority Marker	The priority of the project task represented by this active marker. This marker may be one of 1, 2, 3, 4, or 5. Clicking on the marker using the left mouse button whilst keeping the **Ctrl** key pressed will increase the priority of the project task.
Note	An active marker giving you access to the project task's notes. The is shown only if the project task has notes.
Overdue Marker	This marker is shown if the project task has not been completed by the deadline date.
Deadline	If the project task has a deadline, by which time it must be complete, then this field contains the deadline date.
Categories	A comma separated list of categories to which this

	project task belongs.
%Complete	This field contains a number between 0 and 100 representing the percentage completion of the task.
Complete Marker	A marker is shown in this field if the project task has been completed.
Last Edited	This field shows a date and time which represents the last time this project task was edited by any user.
Planned Duration	Shows the planned duration of the project task, e.g. 5d (five days) or 12h (twelve hours).
Planned Start	Shows a date and time representing the project task's planned start time.
Planned Start Date	Shows a date representing the project task's planned start.
Status	A text field which contains the word "Complete" when the task is complete and "Overdue" when the task has become overdue.
Status Marker	This field shows either the marker or the depending upon whether the task is complete or overdue.

Importing and Exporting Project Data

OfficeTalk lets you import and export project data to the MPX format which is a standard interchange format recognised by other project management products such as Microsoft Project. OfficeTalk also lets you export the currently viewed project task list to a CSV file.

Exporting Project Tasks to a CSV File

To export the currently viewed project task list to a CSV file, select **CSV Records** from the **File/Export** menu. The CSV Export Wizard is displayed, showing the File page.

The File page lets you choose a name for the CSV file that you are about to create. Enter a fully qualified filename into the **Export File** field. You may use the **Browse…** button to select an existing file which you would like to over-write. When you have specified a suitable filename, press **Next**.

The Filter page lets you choose whether to apply the filter currently applied to the viewed project task list. Check the check box if you wish to use the currently selected filter. Press **Next**.

The Options page lets you decide the format of the output CSV file. You may choose whether or not to write a header, describing the structure of the data. You may also choose whether or not to encapsulate each value in quotes. You can choose the character which will be used to separate each value. This is usually a comma, but you may require to delimit each field with a TAB character. Finally, you may specify whether or not to end each line with a delimiter, since some CSV reading applications require this.

Exporting a Project to an MPX File

To export the currently viewed project to an MPX file, select **Project** from the **File/Export** menu. An Export Project dialog box is displayed, allowing you to choose a location for the MPX file.

Select a suitable filename and press **OK**. OfficeTalk will then write the MPX file.

Importing an MPX File

You can import an MPX file by selecting **Project** from the **File/Import** menu. An Import Project dialog box will be shown, allowing you to select the MPX file to be imported.

Select a suitable MPX file and press **OK**. OfficeTalk will read the file and will then create the project. The new project will appear as a top level project in the project list.

Printing the Project Task List

Note that printing the project task list does not print a graphical representation of planned project tasks. It prints only a tabular textual list of project tasks. To print the graphical representation, see "Printing a Project Plan" on page 185.

OfficeTalk lets you print out the Project task list by pressing the  window button above the Project Task List Window. When you press this button, the Print Project Tasks dialog box is displayed.

In most cases, all you will need to do in order to print out the project task list is select the paper style and press the **Print** button.

OfficeTalk lets you customise your print out by providing several check boxes, radio buttons and fields. The functionality of the Print Project Tasks dialog box is summarised below:

Field/Button	Description
New page per task.	Check this check box if you wish to start a new page for every new task printed.
Line between each task.	Check this check box to draw a horizontal line

	between each task.
Print Field Titles	Check this check box to print the field/column titles at the top of each page.
Expand tasks	Check this check box to print all sub tasks in the task list.
Print task notes	Check this check box if you wish to print the notes associated with each task.

The Font page lets you customise the appearance of the Project Task List print out by letting you specify the following fonts.

Font	Description
Title Font	The font used to print the field titles. This is relevant only if you have selected the **Print Field Titles** check box.
Group Header Font	The font used to draw group headers. This is only appropriate if the task list has been grouped.
Task Font	The font used to draw each task.
Sub Task Font	The font used to draw each sub task.

If you preview the Project Tasks print out, with careful selection of fonts, OfficeTalk will display a preview output similar to that shown below:

The Project Window

The Project window lets you view planned project tasks in a chart format. A Time Bar runs across the top of the window. Horizontal and vertical scrollbars allow you to view any part of your project.

When you plan a task in the Project Window, the task is represented, in the project window, by a yellow rectangle which lines up with the Project Task in the Task List.

Changing the Date Displayed

You can change the date and time shown in the Project Window in one of two ways:

Action	Description
Drag the Time Bar.	Click the left mouse button down on the Time Bar. The Time Bar will scroll while you keep the mouse button depressed and move the mouse. Release the mouse and the Project Window will be updated to reflect the new scale. This method is intended for when making small changes in time.
Using the scroll bar.	If you press and keep pressed the left or right horizontal scrollbar button, the Project Window will change date indefinitely, until you release the button.

Showing Slack Time

Slack Time is the length of time between the project task's planned end date and the task's deadline date. Showing Slack Time is a good way of seeing, graphically, task deadlines and the amount of slippage that can safely occur.

The picture below shows the Project window displaying *Slack Time* and containing several tasks, each of which have been assigned deadlines.

To display slack time, select **Show Slack** from the **View** menu. To hide slack time, select **Hide Slack** from the **View** menu.

Assigning Project Tasks To People

OfficeTalk lets you assign any project task to one or more OfficeTalk users. Additionally, you may assign the same project task to remote OfficeTalk users, belonging to a remote workgroup, and to anyone to whom you can send mail. This includes users of Microsoft Exchange, with whom OfficeTalk communicates via MAPI forms. OfficeTalk provides a way for recipients of assigned tasks to report on their progress and the result is represented in the project.

If you assign a project task to a local or remote OfficeTalk user, then in both cases, they will be issued with a mail message informing them of the assignment and containing any instructions that were added. They will also receive a task in their personal task list which may be used to schedule time in their diary and to update the project with their progress on that task in terms of percentage completion.

The format and content of the project task assignment mail message is completely configurable by a supervisor and may be changed from within Supervisor mode. For more information, see *"Specifying Special Notes" on page 103*

If you assign a project task to a non OfficeTalk recipient, for example, to a contact (who has an e-mail address), then the recipient will also receive a mail message informing them of the assignment. The mail message that the recipient will receive is slightly different from the message sent out to OfficeTalk users. Firstly the message is a plain text message. It does not contain rich text formatting. Secondly, it contains a unique character sequence which allows the recipient to reply to the sender, providing task completion details, and lets OfficeTalk extract this information automatically and update the project accordingly.

If you assign a project task to a Microsoft Exchange user, then OfficeTalk sends the task assignment using a special Project Task Assignment form which Exchange is capable of displaying.

Assigning a Project Task

You may assign a project task from the Resource page of the Project Task property sheet. You can show this page in one of two ways: Either select the task using the right mouse button and select **Assign Resource…** from the context menu or double click the project task to bring up the Project Task property sheet and select the Resources page.

The Resources page shows a list of people to whom this task has already been assigned. If the task has never been assigned to anyone then this list will be empty. To assign the task, press the **Assign…** button. The Choose Recipient dialog box is displayed.

The contents of the Available Recipients list will vary depending upon the configuration of your workgroup. If you have configured one or more remote workgroups, then you will see an entry for each remote workgroup in this list. By default, the local workgroup will be expanded to show a list of local users, user groups, contact groups and a contact address book from which you may select one or more contacts. To assign the task to one or more local users, select the relevant users and press the **Add** button. You may also select a user group in order to assign the task to a group of users, and you may select a contact group in order to assign the task to a group of contacts. To assign the task to a specific contact, double click on the 'Contacts' address book. Doing this will display a Contact Address Book dialog box from which you may select one or more contacts.

You can choose whether to show only contacts with an e-mail address by selecting the appropriate radio button in top right of the Contact Address Book dialog box

To assign the task to a remote user, expand the relevant remote workgroup entry to show the list of remote users in that workgroup. Select the relevant users and press the **Add** button.

To assign the task to a Microsoft Exchange user or to any MAPI recipient, firstly ensure that you are configured to use the MAPI Mail Service. Locate and double click on the MAPI Address Book in the Choose Recipient dialog box. The MAPI Address Book dialog box will appear letting you choose the relevant MAPI recipients. Pressing **OK** on the MAPI Address Book dialog box will return you to the Choose Recipient dialog box.

All selected recipients will appear below in the Selected Recipients window. You can deselect a recipient by selecting the relevant recipient from the bottom window and pressing the **Remove** button. When you have chosen the recipients to whom you wish to assign the task then press **OK** on the Choose Recipient dialog box. From the Resources page, select the appropriate *weighting* for each assigned user and press **OK** on the Project Task property sheet. OfficeTalk will automatically send out the task assignment mail messages and will subsequently manage any replies.

OfficeTalk lets you choose the weighting either by changing the Weight % values or by changing the Units values of each recipient

The *weighting* that you specify for each assigned user may be used to represent the relative amounts of work that each user will do on the task. For example, if the task is assigned to user A and user B and user A is expected to perform 80% of the work and user B is expected to perform the remaining 20%, then user A should be given a weighting of 80 and user B should be given a weighting of 20.

Tracking Project Progress

It is possible to assign a task to a contact who does not have an e-mail address. In such a circumstance, you will be responsible for updating the status of the project task

You can assign a project task to one or more OfficeTalk users or to anyone capable of receiving an e-mail message. Regardless of who you assign the task to, you will probably wish to know when that task has been completed by that person or you may even wish to know the percentage completion at any time. If you have assigned the same task to more than one person, you might want to know this information on a per user basis. OfficeTalk provides you with this information and makes it easy for the recipient of your task assignment to provide you with this detail.

OfficeTalk lets recipients of your task assignment report back the task's completion status at any time. In the case of an OfficeTalk user, the user may change the task completion status using the Task property sheet from within Diary mode. Non OfficeTalk recipients can continually reply to your original message, entering task completion status information in their reply.

OfficeTalk automatically updates the project with this information, shading all or part of the task in a green colour to represent it's completion status.

If the project task was assigned to more than one user then the task's completion status will depend on the completion status reported back by each of the assignees and the relevant weightings that you specified when you originally assigned the task.

To view the assigned resources for a particular task and to view the task completion status on a per user basis, you can use the Assigned Resources window. To show the Assigned Resources window, select **Resource Assignment** window from the **View** menu in Project mode. The view will be split horizontally to show the Task window and Project window in the top half of the view and the Project Assignment window in the bottom half.

Selecting a task in the Task window will show, in the Project Assignment window, a list of the task's assignees. The weighting and percentage completion is shown for each assignee.

Note: A project task's percentage completion is calculated by OfficeTalk based upon the individual completion percentages and weightings of each task assignee. For example, if a task was assigned to user A and user B and supposing user A had completed 50% of his part of the task whereas user B had completed 100% of his part of the task and the weighting for user A was 80% and the weighting for user B was 20% then the task's overall completion percentage would be 80%*50 + 20%*100 = 60%.

Receiving a Project Task Assignment

When someone assigns you a project task, you receive a mail message in your Incoming Mail with a subject "Project Task Assignment". When you read the message, OfficeTalk informs you that the assigned task has been added to your personal task list.

If you are assigned a *parent* project task which has a number of sub tasks then each of these sub tasks will appear in your task list under the parent task keeping the original structure.

Once the assigned task is in your personal task list, you may treat it in just the same way as any other task. For instance, you may schedule it into your diary, change its priority, mark it as completed, add notes to it or even delegate it to another user. If you mark the task as completed or set it's percentage complete property then OfficeTalk will update the associated project with this information.

Assigning Project Tasks To Ordinary E-Mail Users

The recipient of Project Tasks does not have to be an OfficeTalk user. OfficeTalk lets you assign a project task to an e-mail address. The recipient will receive an e-mail message containing the project task details. The recipient may reply to the message one or more times and, in the reply, may specify what percentage of the task has been complete. OfficeTalk can recognise the replies and will automatically update the project with the completion information. The E-mail recipient will get the following message:

```
Project Task Assignment
===================

The project task 'Compile Sales Report' has been assigned to
you.

Details
=======
Please calculate the sales for this quarter in a form which
we can present to the director. It would be good if we could
include a comparison of last years figures.


It is intended that the task should be 3d in duration.
Please keep me informed with regards to your progress with
this task by replying to this message on a regular basis and
typing a number between 0 and 100, representing the task
completion, at the end of the line which starts 'Percent
Done:'

$$$$P234234234&T76438746
Percent Done:
```

The message sent when assigning Project Tasks to non OfficeTalk users may be changed by a supervisor. This can be done from Supervisor mode. For more information, see "Specifying Special Notes" on page 103

The code at the bottom of the message identifies the project task to which the reply refers. OfficeTalk uses this to update the project with information that the assignee sends. Typically the assignee will reply with Percent Done set to 100% when the task has been completed. For longer tasks which may stretch over weeks, the assignee may repeatedly reply to the message indicating how complete the task is on, say, a weekly basis.

Assigning Project Tasks to Microsoft Exchange Users

OfficeTalk is supplied with several Electronic Forms templates for tight integration with Microsoft Exchange and Microsoft Outlook. One such template is a Project Task Assignment Form. If you send a project task assignment to a Microsoft Exchange/Outlook user who does not have the MS Exchange Server service installed then the assignment message will arrive in the same format as it would to any e-mail recipient, as explained above. If the Microsoft Exchange/Outlook user does have the

MS Exchange Server service installed, then the **OTProj** form may be installed onto their machine. This may be found in the shared server directory in the **Forms** sub directory, provided that the Microsoft Exchange Connectivity component was installed during OfficeTalk Setup. Once this form has been installed then any project task assignments sent to the Microsoft Exchange/Outlook user will appear in their Incoming Mail folder as a Project Task Assignment form.

Double clicking on the new mail will display the following form:

The Exchange/Outlook user may use the form to update the OfficeTalk project with his/her progress. Instead of replying to the mail message, the Exchange/Outlook user simply types in the percentage completion value for the task into the Percentage Complete field and presses the **Submit** button.

Note that the originator of the project task assignment will not receive this mail message

The completion information is sent back to the originator of the project task assignment as a mail message. On receiving the mail message, OfficeTalk will recognise the instruction and will automatically update the completion status of the project.

For information on how to install the Project Task Assignment form into Microsoft Exchange or Microsoft Outlook, see “Installing Forms into Microsoft Exchange/Outlook” on page 365.

Using Project Baselines

What is a Project Baseline

A Project Baseline is a snapshot of the start and end times for each of the project tasks belonging to a particular project. Tracking and planning a project is a continual process. As your project plan becomes live things don't always go to plan and sometimes certain tasks slip while others may get brought forward. A Project Baseline lets you see the project plan as it was at a certain instance in time. A project plan along with its baseline is shown below:

Creating a Baseline

To create a Project Baseline, to the following:

- Select **Baseline…** from the **Edit/New** menu in Project mode
- A Baseline dialog box is displayed. Type in a description for the baseline or accept the default description.
- Press **OK** on the dialog box. The baseline will be represented by a set of shadow tasks in the Project Task window. You can move any of the project tasks in the Project Task window but you cannot move any part of the project baseline.

Showing a Baseline

To show an existing baseline, you must first be viewing a project which contains one or more baselines. To show the baseline, do the following:

- Select **Baseline…** from the **View** menu. This will show the Select Baseline dialog box.
- Select the required baseline from the drop down list and press **OK**. The selected baseline will be overlaid onto the project.

To hide the baseline, select **– No Baseline –** from the drop down list in the Select Baseline dialog box.

Deleting a Baseline

OfficeTalk lets you delete a project baseline in the following way:

- Open the project containing the baseline that you wish to delete.
- Select **Baselines…** from the **Edit** menu. A Baselines dialog box is displayed.
- Select the baseline that you wish to delete and press the **Delete** button. The selected baseline is removed from the list and deleted.

Project Folders

Project folders provide a convenient way of structuring your projects. Project folders are hierarchical which means that you can create them inside other project folders in just the same way that you can create nested sub-directories in the Windows Explorer.

Another way of opening a project folder is by selecting it using the right mouse button and selecting **Open** *from the context menu*

Projects may be dragged and dropped onto folders in just the same way that sub tasks are dragged and dropped onto parent tasks. You may *open* a project folder by double clicking on it using the left mouse button. The Task List window is then filtered to show just the contents of the project folder. A marker is displayed on the top line of the list. Double clicking on this line will display the top level projects and project folders.

To add a new Project Folder, do the following:

- Select **New/ Folder** from the **Edit** menu in Project mode. The Project Task Folder property sheet will appear.
- Type in a name for the Project Folder and press **OK**. The Project Folder will be displayed at the top of the Task List window above any top level projects.

To delete a project folder, select it and press the **Delete** key on your keyboard. When you delete a folder, any projects inside the folder will also be deleted. If you want to avoid this then you should move the projects out of the folder before you delete it. You can move projects out of a folder in the following way:

- Double click on the folder to show the folder's projects.
- Select the projects and drag them on to marker. The projects will be moved up one level. If you now click on

the marker, you will see the projects along with all the other projects in the Task List window.

Printing a Project Plan

Note that OfficeTalk lets you print out the project plan or the project task list. The project plan print out includes the graphical chart of planned project tasks.

OfficeTalk lets you print out the Project plan by selecting **Print Project Chart** from the **File/Print** menu. The Print Project dialog box is displayed.

In most cases, all you will need to do in order to print out the project is select the paper style and press the **Print** button.

OfficeTalk lets you customise your print out by providing several check boxes, radio buttons and fields. The functionality of the Print Project dialog box is summarised below:

Field	Description
From, To	The From and To fields represent the time range that will be printed. These fields are initially set to the time range shown in the Project window. If you wish to print a different time range then specify the start and end times in these fields.
Task list on each page	Checking this check box ensures that the project task list is displayed down the left margin of every sheet printed.
Banner on each page	Checking this check box ensures that the time banner is displayed along the top of every sheet printed.
Fully expand list	Checking this check box ensures that the project task list is expanded such that all sub tasks are printed.
Label boxes	Check this check box if you wish to label each box in the chart with the task descriptive text.
Fix description width	Check this check box if you wish to specify a fixed width for the project task list. If no restriction is specified then the list will be as wide as the widest task description.

The Scale page lets you specify how many pages wide and how many pages tall the print out of the Project window will be restricted to. You may choose to fit the print out to a specified number of pages wide or you may specify how many inches or centimetres will represent a certain time period. The default setting is to fit the print out to 1 page wide.

The Scale page also lets you choose which scale will be used to display the time banner. You may choose between labelling the time banner every 15 minutes, 30 minutes, 1 hour, 3 hours, 6 hours, 12 hours, day, week or month. Alternatively, you can specify an *auto* setting where OfficeTalk will choose a suitable scale.

You may also choose whether to fit the print out vertically to a certain number of pages or to let OfficeTalk choose a suitable setting. From the **Height** grouping, choose either **Auto** or **Fit to n pages high**.

The Fonts page lets you choose suitable fonts for the following:

Font	Description
Title Font	The font for the header above each project list column
Banner Font	The font for the Time Banner
Task font	The font used to print tasks in the task list down the left hand side of the print out.
Sub Task font	The font used to print sub tasks in the task list down the left hand side of the print out.
Project Window Font	The font used to print task descriptions in the project window.

If you preview the Project print out, with careful selection of fonts, OfficeTalk will display a preview output similar to that shown below:

To preview the printing of the Project window, press the **Preview** button. When you are happy with the preview, print the Project window by pressing the **Print** button.

OfficeTalk provides common print functionality in the Print Project dialog box, including

- Defining headers and footers
- Printer setup
- Page Style Selection
- Saved Print Settings
- Preview capability

For more information on this common print functionality, see "Printing" on page 355.

Planner Mode

Overview

Planners provide a way of planning and sharing long term activity information. Planners contain planner bookings which represent activity of one or more days in duration. A typical example of the usage of a planner would be a ‘Holiday’ planner. You can create a planner which keeps the holiday commitments of all members of the workgroup. This information becomes available to all OfficeTalk users for use in their own planning and scheduling.

OfficeTalk lets you use planners to show planner bookings through onto users’ diaries. This makes it possible to bring together short term and long term information and display it in one view, the Diary view. OfficeTalk also lets you use planners to block out users’ diaries. This lets meeting organisers use planner information and its association with users’ diaries when choosing a suitable time to book a meeting.

Planner mode consists of two windows: a Key window and a Planner window. The Key window contains a list of keys each of which has a description, a colour and, optionally, a pattern. Planner bookings are shown in the Planner window as a coloured block spanning one or more days. Each planner booking must be associated with a key. A planner booking is created by selecting a key and then *drawing* the booking into the planner window.

Creating a New Planner

To create a new planner, do the following:

- Press the button located in the Planner mode shortcut bar. The Planner property sheet is displayed, showing the Details page.

- Specify a name for the planner, for example, 'Holidays Planner'. Also specify the *owner* of the planner. When you create a planner, OfficeTalk automatically makes you the owner of the planner. This means that only you, any supervisors and any users belonging to security profiles, which have sufficient access to you, are able to view, edit or delete the planner or the bookings contained within it. The planner will not be visible to any other users unless you specify otherwise.

Note: Supervisors may only edit or delete your personal planners from within Supervisor mode. Supervisors have no access to any *private* planners that you create.

- You may specify another user as the owner of the planner. Doing this will give the new owner full access to the planner and will limit your access to it as soon as you press the **OK** button. You must have at least create general access to any user that you select.
- The Diary tab lets you choose whether or not to show through or block out certain users' diaries. For more information, see "Showing a Planner in Your Diary" on page 196.
- Select the Access tab. From here you can specify the access rights that each user has to the planner. By default, the planner is marked as *personal* which means that all users that have general access to you will have the same access to this planner. For further information on granting access rights, see "Administering Access Rights" on page 83.

- To create the planner, press **OK** on the Planner property sheet. The new planner will be selected into planner mode. The next step is to create some planner keys and then add planner bookings to the planner window.

Planner Keys

Each planner has a set of keys. A key comprises a colour, an optional pattern and a description. A key has two purposes. Firstly, it acts as a template for creating planner bookings and secondly it acts as a colour coding representation for each planner booking shown in the Planner window.

Having selected a key in the Key Window, you can then *draw* planner bookings into the planner. These bookings will inherit the same colour and description as the key. Every planner booking shows it's description, however, sometimes the planner booking is not long enough, in duration, to display the full description. Instead, the key may be used to colour-match any booking in the planner to find its description. Alternatively, positioning the cursor over the planner booking will display a *tool tip* showing the planner's full description.

Creating a Key

In order to create a new key, you must firstly have opened a planner.

Press the button. A Planner Key property sheet will appear showing the Details page.

Specify a description for the planner key and then design the appearance of the new key. By default, the key will be displayed with a blue background, white text and no pattern. You may select the pattern, the pattern colour, the text colour and the background colour. The **preview** box at the bottom of the dialog box shows you how an associated planner booking will be drawn.

The Diary page lets you associate the key with a specific user or resource. Once a key is associated with a user or resource then you may select the **Show through onto associated diary** and **Blockout associated diary** check boxes. For more information on diary show through and blockout, see "Showing a Planner in Your Diary" on page 196 and "Using a Planner to Block Out Days in your Diary" on page 199.

Pressing **OK** on the Planner Key property sheet will create the planner key and add it to the Key Window.

Creating a Set of Keys

Often you will want to create a set of keys which correspond to each OfficeTalk user or resource defined in your workgroup. One example is a Holiday planner. In this case, each user is represented by a key. Additionally, you may want to specify diary show through or block out options. In the case of the Holiday planner, this would mean that each user would see his own holiday allocation in his diary and that meeting organisers would not try to book a meeting with any user when they were on holiday.

OfficeTalk lets you automatically create a set of keys, associating each one with either a user or a resource, by using the New Key Set Wizard. You can do this in the following way:

- Bring up the New Key Set Wizard by selecting **New Key Set** from the **Edit/New** menu in Planner mode.

The first page lets you choose whether to make keys for all users and/or for all resources. Select the appropriate check box(es) and press **Next**.

- The next page lets you choose whether to show through or block out using bookings created with each key onto the associated user's diary. Select the appropriate check boxes and press **Finish**.

When you press **Finish**, a set of keys will be created and will be added to the Key window.

The Planner Window

The Planner Window is shown to the right of Planner mode. Each planner booking is represented in this window by a coloured block. The left side of the block represents the starting date of the planner booking. The right side of the block represents the ending date of the booking.

Zooming In and Out

By default, the Planner Window shows twelve months at a time and provides two booking rows for each month. In some cases, you may have more than two bookings overlapping at any time. In such a case, you will want to zoom in so that you can see more booking rows per

month. The and buttons let you zoom in and out of a planner, letting you see more booking rows per month or more months, respectively. The maximum zoom lets you see just one month, showing twenty four booking rows.

Changing the Date Shown

When you are zoomed in, you may scroll up a month or down a month

using the and buttons. You may change the year

displayed by pressing the and buttons.

Adding a Planner Booking

To add a planner booking to the planner, you must firstly select a key to represent the booking. Do this by single clicking on the relevant key in the Key Window. Next create the booking in the Planner window by pressing the left mouse button when the cursor is 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.

Note: To add a booking to the Planner window you must have at least create access to the selected planner.

Selecting a Planner Booking

You can select a planner booking by clicking on it using the left mouse button. The booking will highlight to indicate that it has been selected. Once a planner booking is selected, you may use the cursor keys to move the booking and the **Del** key to delete the booking. You can also use the **Tab** key on the keyboard to select the next nearest planner booking. If you keep the **Shift** key pressed when you press the **Tab** key, the previous nearest booking will be selected.

Moving and Stretching Planner Bookings

Once you have created a planner booking, you may move the booking to an empty slot in the planner by dragging the booking from its original position to the new position. When moving a booking, you must drag the booking from its centre. Another way of moving a planner booking is by selecting the booking (using the mouse or the **TAB** key) and pressing one of the cursor keys. This will move the planner booking one square at a time.

To stretch a booking, you must drag the left or right edge of the booking, using the mouse. The cursor will change to reflect when you are over the edge of a booking.

Editing a Planner Booking

Although a planner booking inherits the associated key's description, you can edit the booking to change it's description. Furthermore, you can change which key a particular booking is associated with.

You can edit the booking by double clicking on it in the Planner window. This will bring up the Planner Booking property sheet.

Enter a new description for the booking and, if appropriate, select a new key with which to associate the booking. Press **OK** to save your changes.

Deleting a Planner Booking

You must have delete access to a planner in order to be able to delete its bookings.

To delete a planner booking from the planner, select the booking and press the **Del** key on the keyboard. OfficeTalk will confirm that you wish to delete the booking.

To permanently delete the planner booking, depress the **Shift** key and then press the **Del** key. OfficeTalk will show a different confirmation.

For more information on deleting items, see “The Recycle Bin” on page 346.

Selecting a Planner

When you first enter Planner mode, the list of existing planners will be displayed in the left hand window. You can view the bookings of a planner simply by selecting the planner from the left hand window. You can view the bookings of several planners, all at once, by selecting the relevant planners from the left hand list.

In order to add keys and bookings to the planner, you must *open* the planner. You can open a planner in one of two ways:

- Either by double clicking on the planner in the left hand list
- Or, by selecting the planner from the drop down list of planners situated above the left hand list.

Once you have opened a planner, you may add, edit and delete planner keys and you may add bookings to the Planner Window.

You can close the planner and return to showing the list of available planners in the left hand window either by selecting **--All Planners--** from the drop down list of planners or by double clicking on the marker at the top of the left hand window.

Viewing a Planner in a Remote Workgroup

If you have access to a remote workgroup, then provided that the remote workgroup has one or more planners and given that you have sufficient access to these planners, OfficeTalk will let you view the remote planners from within Planner mode.

To do this, firstly drop down the list of planners. The name of the remote workgroup will appear after all the local planners. Select the remote workgroup. The drop down list will close and OfficeTalk will attempt to open the remote workgroup database. When this is done, drop down the list of planners again. This time, the list of local planners will have disappeared. However the remote workgroup will be shown together with it's planners listed underneath. Selecting one of the planners will display its keys and associated bookings.

Showing a Planner in Your Diary

Sometimes, you may wish to view the bookings of one or more planners in your diary. For example, if you keep a planner which details the days on which you plan to make customer site visits, then you could show this planner through onto your diary, making it a lot more difficult to accidentally schedule appointments on these days. Alternatively, you may only be responsible for making customer visits to a particular customer. If this customer is represented as a key in the Customer Site Visits planner then you may choose to show through just the planner key onto your diary. This means that only bookings made using this key will appear in your diary. The Holiday planner is also a good example of showing through planner keys. Typically, a holiday planner represents each person using a different planner key and holiday dates for a particular person are represented by drawing bookings, using the appropriate key, into the relevant dates in the Planner window. Each key would usually be shown through onto the user's diary whom it represents. Such a configuration ensures that users are less likely to schedule appointments during their holidays.

Planner bookings are shown through onto your diary in different ways depending on which view you have selected. Planner bookings shown through onto your Daily Appointments window are shown down the left margin of the window, drawn in the same colour and pattern as the planner key associated with the booking.

Planner bookings shown through onto your Weekly, Monthly or Custom Appointment windows are shown in the relevant day, again drawn in the same colour and pattern as the planner key associated with the booking.

If you select a different user to view in Diary mode then the planner bookings shown through onto that users diary will be shown. In the same way, the Table View in Group mode shows through the relevant planner bookings into the relevant user's diary column.

Showing Through All Bookings in the Planner

Sometimes, you may wish to show through all planner bookings from a particular planner onto your diary. For example, you may keep a planner representing your team's holiday commitments and you may wish to be made aware of every person's holiday movements. You can show all the bookings in a planner onto a user's diary in the following way:

- Edit the relevant planner from the left hand window by clicking the planner using the right mouse button and selecting **Edit** from the context sensitive menu. The Planner property sheet is displayed. Select the Diary page.

- Select the diaries onto which you would like to show the planner's bookings. You must have at least create access to each diary that you select. Select the **Show through onto associated diary** check box and press **OK**.

Showing Through a Planner Key

You can show all the bookings associated with a specific key onto a user's diary in the following way:

- Open the planner containing the key you wish to show through.
- Edit the relevant key from the left hand window by clicking the key using the right mouse button and selecting **Edit** from the context sensitive menu. The Planner Key property sheet is displayed. Select the Diary page.
- Select the user whom you would like to associate with the planner key. You must have at least create access to this user's diary. Select the **Show through onto associated diary** check box and press **OK**.

Using a Planner to Block Out Days in your Diary

Sometimes you may wish to block out days in your diary by using planner bookings from a specific planner. Blocking out days in your diary prevents other users from trying to schedule meetings with you on these days. For example, if you keep a planner representing the days on which you are conducting interviews, then you can use this planner, or one of its keys to block out the relevant days in your diary.

You may customise the display by selecting ***Edit Profile*** *from the* ***Edit*** *menu*

A *blocked out* day is represented differently in each diary view. In the Daily Appointments window, the colour of the slots is shown in light grey for blocked out days. You may customise this colour according to your personal preference. In the Weekly, Monthly and Custom views, a blocked out day is represented by a red cell header. Again, you may customise this colour according to your personal preference.

For more information on customising OfficeTalk, see "Customising the Display" on page 401.

If a meeting organiser tries to invite you to a meeting then any days blocked out in your diary will be shown as unavailable in the Meeting window.

Blocking Out a Diary with a Planner

You can block out a diary using all the bookings in a planner in the following way:

- Edit the relevant planner from the left hand window by clicking the planner using the right mouse button and selecting **Edit** from the context sensitive menu. The Planner property sheet is displayed. Select the Diary page.

- Select the diaries that you wish to block out. You must have at least create access to each diary that you select. Select the **Block out associated diary** check box and press **OK**.

Blocking Out a Diary with a Planner Key

You can block out a diary using just the planner bookings associated with a specific planner key in the following way:

- Open the planner containing the key you wish to use to block out the diary or diaries.
- Edit the relevant key from the left hand window by clicking the key using the right mouse button and selecting **Edit** from the context sensitive menu. The Planner Key property sheet is displayed. Select the Diary page.
- Select the user that you would like to associate with the planner key. You must have at least create access to this user's diary. Select the **Block out associated diary** check box and press **OK**.

Using Planner Folders

Planner folders provide a convenient way of structuring your list of Planners. Planner folders are hierarchical which means that you can create folders inside other folders in just the same way that you can create nested sub-directories in the Windows Explorer.

Another way of opening a planner is by clicking on the planner using the right mouse button and selecting ***Open*** *from the context menu*

You can add a planner to a planner folder by dragging the planner in the left hand window and dropping it onto the folder. The planner will then disappear from the left hand window. To view the planners held in a folder you must *open* the folder by double clicking on it in the left hand window or by selecting the folder from the drop down list of planners.

When you open a folder, the left hand window will show only those planners contained in that folder. A marker is displayed on the top line of the list of planners. Double clicking on this line will re-display the top level planners and planner folders.

To add a new Planner Folder, do the following:

- select **New Folder** from the **Edit/New** menu in Planner mode. The Planner Folder dialog box will appear.
- Type in a name for the Folder and press **OK**. The Planner Folder will be displayed at the top of the left hand window.

To delete a planner folder, select it and press the **Delete** key on your keyboard. When you delete a folder, any planners inside the folder will also be deleted. If you want to avoid this then you should move the planners out of the folder before you delete it. You can move planners out of a folder in the following way:

- Double click on the folder to show the folder's planners.
- Select the planners and drag them on to the marker. The planners will be moved up one level. If you now double click on the marker, you will see the planners along with all the other planners in the planner list.

Printing Planners

OfficeTalk lets you print out your planners by selecting **Print** Planner from the **File/**Print menu. The Print Planner dialog box is displayed.

In most cases, all you will need to do in order to print out your planner is select the Paper Style and press the **Print** button. OfficeTalk lets you customise your print out by providing several check boxes, radio buttons and fields. The functionality of the Print Planner dialog box is summarised below:

Field	Description
From/To	The *From* and *To* date fields specify the date range that you wish to print.
Print Dates	If you check the **Print Dates** check box, OfficeTalk will print the date in every square on the planner which is not occupied by a booking.
Keys on Separate Page	If you select the **Keys on Separate Page** radio button, OfficeTalk will print the planner keys on a separate page to the planner.
Keys on Every Page	If you select the **Keys on Every Page** radio button, OfficeTalk will print the planner keys at the bottom of each page printed.
Do Not Print Keys	If you select the **Do Not Print Keys** radio button, OfficeTalk will not print the keys.

Span	OfficeTalk will automatically select the span according to your current zoom. You may manually change this from 12 months down to 1 month.

OfficeTalk gives you complete control over the fonts used to print out your planner. You may choose the following fonts:

Font	Description
Key Font	This is the font of the key descriptions (relevant only if you choose to print the keys).
Month Font	This is the font of the abbreviated month names displayed down the left side of the planner.
Day Font	This is the font of the abbreviated day names at the top of the planner e.g. M T W T F S S...etc.
Booking Font	This is the font of the booking descriptions. Note that, by default, this text is *white*, since it prints out more clearly. Also note that brightly coloured keys always have *black* text.
Date Font	This is the font used to display the date drawn in each square. This is relevant only if the **Print dates** check box is checked.

OfficeTalk provides common *print* functionality in all Print dialog boxes. This functionality includes:

- Defining headers and footers
- Printer setup
- Page Style Selection
- Saved Print Settings
- Preview capability

For more information on this common print functionality, see “Printing” on page 355.

If you preview the planner print out, with careful selection of fonts, OfficeTalk will display a preview output similar to that shown below:

Meeting Mode

Overview

Meeting mode gives you the tools to organise meetings with local OfficeTalk users, with remote OfficeTalk users and with any person who is capable of receiving e-mail. When you organise a meeting, you choose who to invite and you specify the subject, venue, duration, date and time of the meeting. OfficeTalk automatically shows you the availability of any local or remote users that you invite by looking into their diaries and can even suggest the next time during which everyone is available. OfficeTalk automatically sends out meeting invitations by e-mail and tracks the replies. Meeting mode lets you monitor exactly who has replied and who has accepted or rejected your invitation.

Organising a Meeting

To organise a meeting, select the button in the Shortcut bar in Meeting mode. The Organise view contains an Availability window and a list of people to invite.

To invite someone to the meeting, do the following:

Selecting the Date

First, select the date on which you wish to hold the meeting. Use the calendar to do this. For more information see "The Calendar" on page 352.

Inviting people to the Meeting

If there are resources defined in your workgroup,

To invite people to the meeting, double click on the relevant persons in the recipient list located to the right of the view. Each selected person *you can book a resource for a meeting by expanding the* ***Resources*** *entry and double clicking on the appropriate resource*

will appear in the list of invited recipients underneath and, if the selected person is either a local or a remote OfficeTalk user, the person's availability will be displayed in a column in the Availability window. A series of black vertical bars will be displayed, representing the person's non availability on the selected date. A colour coded key helps you match up the selected user with the corresponding column in the Availability window.

If you wish to invite a contact to a meeting, double click on the 'Contacts' address book. Doing this will display a Contact Address Book dialog box from which you may select one or more contacts. If you want OfficeTalk to send out a meeting invitation to the selected contact, then the contact must have an e-mail address.

Specifying the Time and Duration of the Meeting

You can specify the meeting time and duration by clicking the left mouse button down on the relevant timeslot in the Availability window (defining the start of the meeting) and, whilst keeping the left button depressed, dragging the mouse down to define the meeting duration. The duration of the meeting will be defined by how many timeslots you highlight. If you select any timeslots containing black unavailability bars, the bars will highlight red to indicate that person's non availability during the selected time. If one or more recipients are unavailable for your meeting, you have three choices:

1. You can choose another date or time for the meeting using the calendar.

2. You can press the button . This will look for the next time when all invited people are free for the duration of the meeting. For more information, see "Finding the Next Available Meeting Time" on page 208.
3. If the meeting *must* go ahead at the specified date and time, you can choose to go ahead and book the meeting, letting the recipients decide for themselves whether or not to attend the meeting instead of doing what they originally planned. You should remember that their original bookings may not easily be changed and if they are definitely required to attend the meeting then it may help to go into their diary and look at exactly what they had planned.

The Meeting Wizard

Once you have selected the people and resources to invite and you have chosen the time and duration of the meeting, you can use the Meeting Wizard to help finish book the meeting.

Bring up the Meeting Wizard by pressing the button located in the Shortcut bar in Meeting mode. This button will only be enabled when you have selected at least one person to invite to the meeting and you have defined the time and duration in the Availability window.

In the Details page specify a subject, for example, ‘Sales Meeting’ and a venue for the meeting. You may either type in a venue, for example, ‘Board room’, or you may select a fixed resource from the drop down list . You can specify an agenda for the meeting by pressing the **Agenda…** button. Doing this will display an Agenda page which lets you enter a free format rich text meeting agenda.

Press **Next**. The Inform Recipients page lets you choose whether to inform recipients using e-mail, notifications or not inform the recipients at all. You would typically choose not to inform the meeting recipients if you were organising a group activity which everyone involved already knows they will be attending.

If the meeting is being arranged at short notice, you may choose to inform all meeting recipients using notifications. This will ensure that the invited meeting members reply promptly to your invitation.

Note: Any meeting members who are not OfficeTalk users will not be able to receive notifications. These people are sent mail messages instead.

If you wish to mail yourself with details of the meeting, then check the **Send myself invitation** check box.

Press **Next**. The Single/Repeat page lets you choose whether the meeting is a single, one-off meeting or a repeated meeting. For more information on repeated meetings, see “Organising a Repeat Meeting” on page 214. Select Single and press **Next**.

Pressing **Next** will display the Reminder page. This page lets you choose whether or not OfficeTalk should automatically remind invited users prior to the meeting.

If you choose to remind users, by selecting the **Reminder** radio button, then you should choose the required number of minutes fore-warning. The specified number of minutes prior to the meeting, each invited OfficeTalk user will receive a notification reminding them to attend.

To book the meeting, press the **Book** button in the Reminder page. If you chose to e-mail meeting recipients, OfficeTalk will send out pre-formatted mail messages describing, to each recipient, the details of the meeting, including the meeting agenda.

Finding the Next Available Meeting Time

OfficeTalk can automatically find a time when all selected recipients are available for the duration specified. You can do this in the following way:

- Select the recipients that you wish to invite

- Specify the time and duration for the meeting by clicking the left mouse button on the appropriate timeslot (to specify the start time) and, while keeping the left mouse button depressed, drag the mouse downwards to specify the duration. Then release the left mouse button.

- Press the button

OfficeTalk will look for the next available time that all invited recipients can attend.

Note: OfficeTalk can only look for the next time when all OfficeTalk users (both local and remote) and resources are available. It cannot check availability of e-mail addressed recipients.

The display will change to show the available time slots. The search for the next available time will begin from the currently selected time slots, or from the current time (if no slots are selected) and will end when the next available time has been found. Once OfficeTalk has found an available time, you can either book the meeting straight away, by

pressing the button, or you can instruct OfficeTalk to search for

another time by pressing the button again. Find Slot works in conjunction with the Meeting Range button.

Meeting Range

OfficeTalk lets you define a range over which the Find Slot functionality will operate. For example, you may wish to hold your meeting in the afternoon on any weekday except Tuesdays.

You can do this by pressing the button to display the Custom Day dialog box.

Choose the range for the availability searches and press **OK**. The Find Slot functionality will use this range for the remainder of the OfficeTalk session or until the range is changed again.

Note: When OfficeTalk starts up, the range is set to be the same as the workgroup custom day.

Meeting Invitations Sent to an OfficeTalk User

When you invite a local or remote OfficeTalk user to a meeting, the user receives a tentative appointment in their diary and a pre-formatted message describing the subject, date, time and duration of the meeting along with the meeting agenda and a list of invited guests.

You can specify the message sent out to all OfficeTalk users from within Supervisor mode. For more information on changing this message, see “Specifying Special Notes” on page 103.

When you receive a meeting invitation, the body of the message is formatted as shown below:

Meeting Invitation

You are invited to attend a meeting on 25/11/97 at 12:00.
The subject of the meeting is “Sales Meeting".
The meeting is planned to last for 1h
The meeting venue is: Meeting Room 2

Agenda

1. Agree minutes from previous meeting
2. Engineering Plan
3. Sales Strategy
4. Any Other Business

People Coming

John Smith
Paul Johnson
Peter May

Please let me know if you can attend as soon as possible by pressing the ***I Can Attend*** *button at the top of this message. If you cannot attend, please press the* ***I Cannot Attend*** *button.*

Paul Tyson

The message is displayed with two buttons, an Accept and a Decline button, at the top of the message window.

Press the **Yes, I Can Attend** button if you are able to attend the meeting. Alternatively, press the **No I Cannot Attend** button. Doing this will pop up a Reason dialog box which lets you specify why you cannot attend. If you do not wish to supply a reason then leave the Reason dialog box empty and press **OK**.

Your reply will be accessible by anyone looking at the progress of the meeting using the Meeting List view.

Meeting Invitations Sent to Non OfficeTalk Recipients

When you invite an ordinary e-mail recipient to a meeting, OfficeTalk sends a textual e-mail message to the recipient which describes the subject, date, time and duration of the meeting along with the meeting agenda and a list of invited guests.

You can specify the message sent out to all e-mail recipients from within Supervisor mode. For more information on changing this message, see “Specifying Special Notes” on page 103.

When e-mail recipients receive a meeting invitation, the body of the message is formatted as shown below:

```
Meeting Invitation
==================

You are invited to attend a meeting on 25/11/97 at
12:00.
The subject of the meeting is "Sales Meeting".
The meeting is planned to last for 1h
The meeting venue is: Meeting Room 4

Agenda
======
Agree minutes from previous meeting
Engineering Plan
Sales Strategy
Any Other Business

People Coming
=============
John Smith
Paul Johnson
Peter May

To indicate whether or not you can attend the meeting,
reply to this mail message ensuring that you include the
line beginning with '$$$$' without changing it. Type
'Yes' or 'No' at the end of the line 'Can you attend?'
and enter any comments after 'Comment:'.

Can you attend?:
Comment:
```

The recipient will respond to the meeting invitation by replying to the message from their e-mail client, entering 'Yes' or 'No' at the end of the line beginning 'Can you attend' and specifying a reason after the line beginning 'Comment:' if unable to attend the meeting. When OfficeTalk receives the e-mail recipient's reply, the message is interpreted and the meeting status is updated accordingly.

Integration with Microsoft Exchange/Outlook

Meeting mode integrates tightly with Microsoft Exchange or Microsoft Outlook, letting meeting organisers invite Exchange/Outlook users to meetings by using Exchange forms.

Note: An Exchange form is an electronic form which may be viewed in Microsoft Exchange or Microsoft Outlook.

When you invite an e-mail recipient to a meeting using the MAPI Mail Service, OfficeTalk sends out an ordinary text-only message to the e-mail recipient. OfficeTalk also sends information which will be ignored by the recipient's e-mail client unless the client is Microsoft Exchange with the OfficeTalk Meeting form installed.

If the OfficeTalk Meeting Form is installed, the Microsoft Exchange user will receive an invitation form as shown below:

The Exchange/Outlook user can accept or decline your meeting invitation by selecting the appropriate radio button and pressing the **Submit** button. Any relevant comments may be added into the **Comments** field.

Note that the originator of the meeting invitation will not receive this mail message

When the Exchange/Outlook user presses the **Submit** button, the reply information is sent back to the originator of the meeting invitation as a mail message. On receiving the mail message, OfficeTalk will recognise the instruction and will automatically update the status of the associated meeting.

For information on how to install the Meeting Invitation form into Microsoft Exchange or Microsoft Outlook, see "Installing Forms into Microsoft Exchange/Outlook" on page 365.

Viewing the Status of Meetings

Once you have booked a meeting you can monitor the responses to your invitation from Meeting List View. Enter Meeting List View by

pressing the button, located in the Shortcut bar in Meeting mode.

The Meeting List view consists of two windows. The top window is called the Meeting List and displays a list of organised meetings. The Meeting List shows the description, the organiser, the start time, duration and place of each meeting. Additionally, the list shows a ? marker next to each unconfirmed meeting, a ✓ marker next to each confirmed meeting and a ✗ marker next to each meeting where one or more members have declined the invitation.

When you select a meeting from the top window, the bottom window, called the Member Window, will show a list of meeting members. The list shows which members have accepted (displayed with a ✓ marker), which members have declined (displayed with a ✗ marker) and which members have not yet replied to the selected meeting (displayed with a ? marker).

The Meeting List and Member List behave like all other lists in OfficeTalk. You may sort, filter and group both these lists, as described in “Sorting Data” on page 335 and subsequent sections.

Reminding People

Once you have booked a meeting, OfficeTalk lets you remind any of the invited members to attend the meeting. OfficeTalk sends out different reminder messages to each member depending upon whether the member has replied to your original invitation. Any members who have already replied are sent a mail message that simply reminds them to attend the meeting. Any members who have not yet replied are sent a message reminding them to reply to the original invitation message.

Members who are OfficeTalk users will receive a rich text message. Members who are e-mail addresses will receive a text only version of the same message.

You can specify the reminder message sent out to all members from within Supervisor mode. For more information on changing this message, see “Specifying Special Notes” on page 103.

Organising a Repeat Meeting

Sometimes you will want to organise a meeting which will take place on a regular basis, for example, a weekly team meeting. OfficeTalk lets you organise such meetings using the Meeting Wizard. To organise the repeated meeting do the following:

- Select the date of the meeting, choose the people to invite to the meeting, select a time and duration for the meeting and

  press the button to bring up the meeting wizard.
- Enter a subject, a place and an agenda as usual in the Details page and press the **Next** button. The Single/Repeat page will be displayed. Select **Repeat Meeting** and press **Next**.

- The Repeat Frequency page lets you choose whether to repeat the appointment every n days, every n weeks, every n months or every n years.

- Select the relevant radio button and enter a value into the corresponding field. Press **Next**.

- If you selected **Every n months**, the next page lets you choose further options about how the meeting is repeated on each month. You may choose whether the repeated date should be on the nth day of the month (e.g. 4th of the month), on the nth weekday of the month (e.g. the 2nd Tuesday) or the last day of the month. The table below summarises the possible options:

Field	Description
nth of the month	If the original meeting occurs on, for example the 15th of a particular month then selecting this radio button will book all repeated meetings on the 15th of every month, except in the case of non working days, where you have elected to skip non working days (see Non Working Days page below).
Nth weekday of the month	If the original meeting occurs on, for example the 2nd Thursday of a particular month then selecting this radio button will book all repeated meetings on the 2nd Thursday of every month.
Last Day	If the original meeting occurs on the last day of a particular month then this radio button will become enabled. Selecting this radio button will repeat the meeting on the last day of every month, except in the case of non working days, where you have elected to skip non working days (see Non Working Days page below).

- The next page lets you choose how to handle the possibility of repeated meetings occurring on non-working days. In such a case, you may choose whether to skip creating the meeting, accepting the meeting as is, placing the meeting on the previous working day or placing the meeting on the next working day.

- The next page lets you choose either the date up to which the meeting should be repeated, or the number of times to repeat the meeting. Make your selection and press **Next** to show the Reminder page.

Note: OfficeTalk will always try and repeat the meeting at the same time as the original meeting.

- The Reminder page lets you specify whether or not OfficeTalk should remind each meeting member prior to the meeting. If you do not wish to remind each member then select the **No Reminder** radio button. If you do wish to remind each member, then select the **Reminder** radio button and specify the number of minutes prior to the meeting that you wish each member to be reminded. Finally, press **Book** to Book the repeated meeting.

Note: When you book a *repeated* meeting, OfficeTalk does not send out meeting invitations.

Rescheduling a Meeting

If certain key people decline your meeting invitation, you may choose to reschedule the meeting so that they can attend at another time. OfficeTalk lets you reschedule a meeting so that all you need do is choose another time and place for the meeting. OfficeTalk will then handle the rest, mailing all invited users, informing them that the meeting has been rescheduled and asking them to confirm that they can attend. You can reschedule a meeting in the following way:

- From Meeting List View, select the meeting that you wish to reschedule from the top window, and using the right mouse button, select **Reschedule** from the context sensitive menu.

- OfficeTalk will switch to the Availability window. The list of recipients and meeting members is replaced by a **Reschedule** and a **Cancel Reschedule** button. Use the calendar to select a new date for the meeting. Use the Availability window to select the time and duration for the rescheduled meeting. Next press the **Reschedule** button.

- The Book Meeting Wizard is displayed, showing the Details page. The subject of the meeting may not be changed. You may change the meeting venue and the Agenda, if required. Pressing **Next** will display the Inform Recipients page. Choose whether to inform each member via e-mail or via notifications or not at all.
- Pressing **Next** will display the Remind page, letting you choose whether or not to remind each member prior to the meeting. Finally, press **Book** to reschedule the meeting.

When you reschedule a meeting, provided that you have elected to inform each member via e-mail, each meeting member will be mailed a message informing them of the details of the rescheduled meeting.

You can specify the meeting rescheduled message sent out to all OfficeTalk users from within Supervisor mode. For more information on changing this message, see "Specifying Special Notes" on page 103.

When you receive a rescheduled meeting message, the body of the message is formatted as shown below:

Meeting Rescheduled

The Meeting "Sales Meeting" has been rescheduled to the following time and place:

Date/Time: 27/10/97 at 12:30.
Duration: The meeting is planned to last for 30m
Place: The meeting venue is: Meeting Room 42

Agenda

1. Agree minutes from last meeting
2. Outline Sales Strategy for November
3. Report of September Sales
4. A.O.B.

People Coming

John Rush
Paul Noble

Peter Smith
Russell Kane

Please let me know if you can attend as soon as possible by pressing the ***I Can Attend*** *button at the top of this message. If you cannot attend, please press the* ***I Cannot Attend*** *button.*

John Rush

Removing Meeting members

If one or more members decline your meeting invitation yet you still wish the meeting to go ahead, then you may remove the declining members from the meeting. You may remove a meeting member from a meeting in the following way.

- Select the relevant meeting from the Meeting View List. The list of mmeting members is displayed in the Member List window below.
- In the Member list window, click on the member that you wish to remove from the meeting using the right mouse button and select **Delete** from the context menu.
- OfficeTalk will ask you to confirm deletion of the selected meeting member. Press **Yes.**

If there are no more declined meeting members then the status of the meeting will change from ✗ to ✓or to ? depending upon the replies of the remaining meeting members.

Cancelling a Meeting

If you wish to cancel a meeting, then OfficeTalk will let you do this automatically by sending out the appropriate cancellation messages to each meeting member.

To cancel a meeting, do the following:

- Using the right mouse button, click on the meeting that you wish to cancel in the Meeting View List and select **Cancel** from the context menu.
- OfficeTalk will ask you to confirm that you wish to cancel the meeting informing you that if you do cancel the meeting then the relevant members will be informed and the meeting will be sent to the recycle bin.

If you press **Yes**, OfficeTalk will send out the appropriate mail messages to inform the original members of the meeting and will remove any tentative appointments from the relevant users' diaries.

Inviting People at a Later Stage

Sometimes, you may wish to invite users or book resources to a meeting which has already been set up. You can do this in the following way:

Note that adding a new member to a fully confirmed meeting will mark the meeting as unconfirmed until that member replies

Click on the relevant meeting in the Meeting View List using the right mouse button and select **Add Member** from the context sensitive menu. The Choose Recipient dialog box is displayed. Select the required members and press **OK**. The new meeting members will be invited to the meeting in just the same way as the original members. Each new member that you add will appear in the Member list when you select the meeting in the Meeting List.

Using Meeting Folders

Meeting folders provide a convenient way of structuring the list of meetings. Meeting folders are hierarchical which means that you can create meeting folders inside other meeting folders in just the same way that you can create nested sub-directories in the Windows Explorer.

To move a meeting into a meeting folder, drag the meeting and drop it onto the folder. You may *open* a meeting folder by double clicking on it using the left mouse button. The contents of the folder are then displayed as top level meetings in the list. A marker is displayed on the top line of the list. Double clicking on this line will display the top level meetings again.

To add a new Meeting Folder, do the following:

- Select **New Meeting Folder** from the **Edit** menu in Meeting mode. The Meeting Folder dialog box is displayed.
- Type in a name for the Meeting Folder and press **OK**. The Meeting Folder will be displayed at the top of the list.

To delete a meeting folder, select it and press the **Delete** key on your keyboard. When you delete a meeting folder, any meetings held inside the folder will also be deleted. If you want to avoid this then you should move the meetings out of the folder before you delete it. You can move meetings out of a folder in the following way:

- Double click on the folder to show the folder's meetings.
- Select the meetings and drag them on to the marker. The meetings will be moved up one level. If you now double click on the marker, you will see the meetings along with all the other meetings in the list.

Finding Out Why a Person Cannot Attend

If someone declines your meeting invitation then, provided the person states a reason why they cannot attend, OfficeTalk will let you view their reason in the following way:

- From the Meeting List view, select the meeting containing the member who has declined the meeting invitation.
- Using the right mouse button, click on the member in the Member List and select **Reason** from the context sensitive menu.

Another way of showing the reason for declining is by

- The Reason dialog box is displayed, showing any text that the responding member has entered. If the member has not left *displaying the Reason column in the Member List.*

a reason, then you will not be able to show the Reason dialog box.

Contact Mode

Overview

Contact mode provides a rich set of shared contact management features. As well as letting you store contact addresses, telephone and fax numbers, e-mail and WWW addresses and rich text notes for each contact, Contact mode also lets you record conversations, compose letters and faxes, using standard templates, and perform mail merges. Additionally, Contact mode can record and display a history trail of all communication that any user or users have with a particular contact or company.

Contact mode may be customised to store any additional information for each Contact, Company, Document or Conversation that you define. In this way, you can tailor the product to suit the way in which your organisation works.

What is a Company?

A Company is any organisation with whom you deal on a business or personal basis. OfficeTalk lets you store address, phone, fax, rich text notes and e-mail information for each Company. Any company may be associated with one or more contacts, representing the company's employees.

What is a Contact?

A Contact is any person with whom you, or any other member of your workgroup is likely to have or has had some form of communication, on a business or personal basis. OfficeTalk lets you store home address, phone, fax, rich text notes and e-mail information for each contact. Any contact may be associated with a company, representing the contact's employer.

The Available Views

Contact Mode contains several different views on your contact data. These views are:

- Company View
- Contact View
- Directory View
- History View

Company View shows company information, namely the site address and a list of employees (contacts) who work for the company. Contact View shows information specific to a particular contact, for example, the name and address of the company to which the contact belongs, if any, and the contact's home address, title and position.

The Directory View shows both company and contact information in a telephone directory format.

The History View lets you view all communications that have taken place between any company or contact and any of the users in your organisation.

Company View

When you enter Contact Mode initially, the Company View is displayed. The view consists of a Contact Group window, a Company window and a Details window. The Contact Group window shows all contact groups to which you have at least visible access. When you first enter Contact mode, provided you have sufficient access, the **All** Contact Group is open, giving you access to all public companies.

The Company Window contains fields representing a company's full address, phone and fax numbers. The Details window contains three tabs, giving you access to the company's employees, its contact history with members of your organisation and a list of pending tasks associated with the company.

Adding a New Company

You can add a new company in the following way:

Press the button, located in the Shortcut bar in Contact mode. A Company property sheet is displayed showing the Details page.

- Enter a name for the company along with any address, phone, fax and e-mail information and press **OK**

There are several other ways to add a company record. All the possible ways to add a company record are shown in the table below:

Action	Description
Using the button or menu item.	Press the button or select the entry from the window menu. This brings up the Company property sheet . Enter the relevant details and press **OK**.
Using the button.	Press the button in the Shortcut bar. This brings up the Company property sheet . Enter the relevant details and press **OK**.
Using the menu.	Select **New Company** from the **Edit/New** menu. This brings up the Company property sheet. Enter the relevant details and press **OK**.
Pressing the **INSERT** key on the keyboard.	Pressing the **INSERT** key brings up the Company property sheet . Enter the relevant details and press **OK**.
Double clicking.	Provided that there is no record shown in the Company Window, double click using the left mouse button in the Company Window. This brings up the Company property sheet . Enter the relevant details and press **OK**.

Adding an Employee to a Company

A Company can be associated with one or more contacts, each contact representing an employee of the company. To add an employee to a company from within Company view, do the following:

- Display, in the Company window, the company to which you wish to add the employee.
- Select the Employees tab in the Details window in Company View.
- Double click on a blank part of the employees list. The Contact property sheet is displayed. Enter the title, first name and

last name of the employee and press **OK**. The employee will appear in the Details window when the relevant company is shown in the Company window and the Employees tab is selected.

Quick Searching for a Company

To quickly look up the details of a particular company, type the first few letters of the company in the **Search** field above the Company window. The letters that you type must be entered in quick succession. As soon as you have entered the first few letters of the company, OfficeTalk will search for the company and display it's details in the Company window. You can change the width of the **Quick Search** field by positioning the cursor to the right of the field and dragging left or right. To hide the field completely, change the field width to zero. To re-display the field, position the cursor to the left of the **?** index tab and drag to the right.

If more than one company exists which begins with the letters that you typed then OfficeTalk will find the first matching company. Use the

button to view the correct company.

Viewing History for a Company

If a company has employees with whom you, or other members of your workgroup, have:

- Sent and received mail messages
- Recorded conversations
- Sent documents (such as letters and faxes)
- Included as part of a mail merge
- Arranged meetings

then OfficeTalk will have recorded these actions as contact history. Selecting the History tab in the Details window will display the contact history for the selected company.

The list of items in the History window represent the combined contact history of all local users, to which you have at least read access, with all employees of the selected company. OfficeTalk also shows the history of actions performed only with the company itself rather than with the employees of the company. For example, it is possible to record conversations, write documents (such as letters and faxes) and perform mail merges with a company, but with no associated employee, and such contact history will be displayed in the History window.

Any e-mail that you send to or receive from any of the employees of a company will be displayed in the History window. You will not have access to any e-mail belonging to other users in your workgroup.

Viewing Pending Tasks for a Company

The Pending window makes it easy to see any outstanding tasks related to the selected Company. These include:

- Tasks associated with the company, assigned to local users
- Project tasks assigned to the company's employees.

When you assign a follow up task for a company or for any of the employees of that company, the task will appear in the Pending Tasks window whenever that company is displayed in the Company window.

On assigning the follow up task, you choose which user is responsible for completing the task. That user receives the task into his personal task list. When the user marks the task as complete, the task will disappear from the Pending window.

Any project tasks assigned to any of the company's employees will also be shown in the Pending window. When a project task is assigned to a contact, the contact receives an e-mail message informing him of the assigned task. The contact can reply to the message, indicating his progress. The project task will remain in the Pending window until the contact replies that he has completed the project task.

Viewing History and Pending Details

You can view the detail of any of the history or pending items in one of two ways:

- Double clicking on the item
- Using the Detail window

If you double click on a history or pending item, depending upon the type of item and your access to that item, OfficeTalk will either display the detail of the item in a property sheet or will switch to History view in order to display the item's detail.

A more convenient alternative is to use the Detail window to show the history or pending item detail. You can do this by positioning the mouse at the bottom of the history list and then clicking the left mouse button and dragging the window separator up to define the top of the Detail window. When you release the left mouse button the Detail window is displayed. The detail of any selected history or pending items is displayed in this window.

Specifying Other Addresses for a Company

Larger companies are often spread over more than one site. OfficeTalk lets you represent this by adding a company to represent each of the sites and then linking the companies using the Other Addresses page of the Company property sheet.

To add an alternative address for a company, bring up the company's property sheet and do the following:

- To add a new alternative address for this company, press the **New** button. A Company property sheet will appear, letting you enter the details of the additional site. Fill out the details and press **OK**. The additional address will appear in the list.
- If you wish to link the company to the address of an existing company, then press the **Add…** button. A Search Company dialog box will appear allowing you to search for and select an existing company.
- If you wish to remove the link associating the addresses of two companies, then select the *other address* from the list and press the **Remove** button.

When a company is linked to one or more companies in this way, a **More…** marker is displayed in the Company view. Clicking on this text will let you view the other linked companies. The order in which these companies are linked is dependent upon the order in which they appear in this dialog box. You can change the order in which companies appear in the list by selecting the company and pressing the **Raise** and **Lower** buttons.

Contact View

The Contact view consists of a Contact Group window, a Contact window and a Details window. The Contact Group window shows all contact groups to which you have at least visible access. When you first enter Contact mode, provided you have sufficient access, the **All** Contact Group is open, giving you access to all public contacts.

The Contact Window contains fields representing a contact's full work and home address, phone and fax numbers. The Details window contains two tabs, giving you access to the contact's history and a list of pending tasks associated with the contact.

Adding a New Contact

You can add a new contact in the following way:

Press the button, located in the Shortcut bar in Contact mode. The Contact property sheet is displayed showing the Details tab.

- Enter the first name and last name for the contact along with any phone, fax or e-mail information. You can specify that the contact is an employee of an existing company by selecting a company from the *Employee of* field. You may specify details of the contact's home address by pressing the Home Address tab and entering the relevant details. Press **OK** to save your changes.

There are several other ways to add a contact record. All the possible ways to add a contact record are shown in the table below:

Action	Description
Using the button or menu item.	Press the button or select the entry from the window menu. This brings up the Contact property sheet. Enter the relevant details and press **OK**.
Using the button.	Press the button in the sub toolbar. This brings up the Contact property sheet. Enter the relevant details and press **OK**.
Using the menu.	Select **New Contact** from the **Edit/New** menu. This brings up the Contact property sheet. Enter the relevant details and press **OK**.
Pressing the **INSERT** key on the keyboard.	Pressing the **INSERT** key brings up the Contact property sheet. Enter the relevant details and press **OK**.
Double clicking.	Provided that there is no record shown in the Contact Window, double click using the left mouse button in the Contact Window. This brings up the Contact property sheet. Enter the relevant details and press **OK**.

Quick Searching for a Contact

To quickly look up the details of a particular contact, type the first few letters of the contact's last name in the **Search** field above the Contact window. The letters that you type must be entered in quick succession. As soon as you have entered the first few letters of the contact's last name, OfficeTalk will search for the contact and display it's details in the Contact window. You can change the width of the **Quick Search** field by positioning the cursor to the right of the field and dragging left or right. To hide the field completely, change the field width to zero. To re-display the field, position the cursor to the left of the **?** index tab and drag to the right.

If more than one contact exists whose last name begins with the letters that you typed then OfficeTalk will find the first matching contact. Use

the button to view the correct contact.

Viewing History for a Contact

If a contact exists with whom you, or other members of your workgroup, have:

- Sent and received mail messages
- Recorded conversations
- Sent documents (such as letters and faxes)
- Included in a mail merge
- Arranged meetings

then OfficeTalk will have recorded these actions as contact history. Selecting the History tab in the Details window will display the contact history for the selected contact.

The list of items in the History window represent the combined contact history of all local users, to which you have at least read access, with the selected contact.

Only e-mail that *you* send to or receive from the selected contact will be displayed in the History window. You will not have access to any e-mail belonging to other users in your workgroup.

Viewing Pending Tasks for a Contact

The Pending window makes it easy to see any outstanding tasks related to the selected Contact.

When you assign a follow up task for a contact, the task will appear in the Pending window whenever that contact is displayed in the Contact window.

On assigning the follow up task, you choose which user is responsible for completing the task. That user receives the task into his personal task list. When the user marks the task as complete, the task will disappear from the Pending Tasks window.

Any project tasks assigned to the contact will also be shown in the Pending window. When a project task is assigned to a contact, the contact receives an e-mail message informing him of the assigned task. The contact can reply to the message, indicating his progress. The project task will remain in the Pending window until the contact replies that he has completed the project task.

Viewing History and Pending Details

You can view the detail of any of the history or pending items in one of two ways:

- Double clicking on the item
- Using the Detail window

If you double click on a history or pending item, depending upon the type of item and your access to that item, OfficeTalk will either display the detail of the item in a property sheet or will switch to History view in order to display the item's detail.

A more convenient alternative is to use the Detail window to show the history or pending item detail. You can do this by positioning the mouse at the bottom of the history list and then clicking the left mouse button and dragging the window separator up to define the top of the Detail window. When you release the left mouse button the Detail window is displayed. The detail of any selected history or pending items is displayed in this window.

Moving Around the Database

The company and contact records are stored in alphabetical order. You can view the previous or next record in the database by pressing the

or buttons. Alternatively, provided the company or contact window has focus, you can use the **Left** or **Right** keys on the keyboard to move to the previous or next record. Pressing the **Home** key on the keyboard will take you to the first company or contact record in the database and pressing the **End** key will take you to the last record. If the company or contact window does not have focus then the **Left** and **Right** cursor keys may not be used since they will perform other actions specific to the window that has focus. Instead, depressing the **Ctrl** key whilst using the **Left** and **Right** cursor keys will move to the previous or next record accordingly. You can use the alphabetical index at the top of the Company or Contact Window to show the first record beginning with the letter that you select. For example, to move directly to the first record beginning with the letter **P**, press the **P** tab in the alphabetical index. If there are no records beginning with **P**, OfficeTalk will display a blank Company or Contact view.

Private and Personal Companies and Contacts

The Access page in the Company and Contact property sheet lets you specify whether the company or contact will be public, giving access to all users who have at least read access to the All Contact Group, or whether the company or contact will be private to you. If you select the **Private** radio button, then only you will be able to see the Company or Contact.

Keeping Notes for a Company or Contact

OfficeTalk lets you keep rich text notes for a particular company or contact. You can do this by selecting the Notes tab from the company or contact property sheet.

Type in the notes, using the format toolbar to add colour, fonts and character style to your text.

Note: If a Company or Contact has notes associated with it then a marker will be displayed in the top right corner of the Company or Contact window. Double clicking on the marker will bring up the Company or Contact property sheet, automatically displaying the Notes page.

Categorising Companies and Contacts

OfficeTalk lets you set up one or more categories which may be used to classify your companies and contacts. To mark a company or contact as belonging to a particular category, do the following:

- Bring up the company or contact property sheet.

- Select the Categories page. The Categories page will display a list of Contact Categories in the bottom window. Each category has a check box to the left of the description.
- Select one or more check boxes representing the classification of the company or contact into the relevant categories.
- Press **OK** to save your changes.

You may add your own private categories by typing the name of the category into the Categories window in the Categories page and pressing the **Update** button. The new category will appear, checked, in the bottom window. Press **OK** to save your changes.

If you wish to add the company or contact to categories in another category set, for example, the Diary category set, then select the Diary category set from the **Set** drop down list. The list of available categories in that category set will appear in the bottom window. Select one or more categories and press **OK** to save your changes.

For more information on Categories, see "Using Categories" on page 349.

Adding a Duplicate Company Record

If you add a company record whose name already exists, OfficeTalk detects this and pops up a Company Exists dialog box.

OfficeTalk gives you three choices of what to do.

- If you wish to add the record as a separate record, keeping the same company name but in no way relating it to the record already existing with that name then press the **Add Separate** button.

- If you wish to add the record, making it an *other 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 top right of the Company Window when this record is displayed. Pressing the left mouse button while the cursor is over the “*More...*” text will cause OfficeTalk to display the next record in that group of sites.

- If you wish to cancel the operation such that the record is not added at all, then press the **Cancel** button.

Adding a Duplicate Contact Record

If you add a contact record whose first name and last name matches an existing contact record, OfficeTalk detects this and displays a Contact Exists dialog box.

OfficeTalk lets you choose whether or not to add the contact. Press **Add Contact** to add the contact. Otherwise press **Do Not Add Contact**.

Note: The option to check for duplicate companies and contacts must be turned on by a Supervisor from within Supervisor mode. For more information see “Options for Duplicate Checking of Contacts” on page 99.

Manually Checking For Duplicate Companies

OfficeTalk lets you perform a manual check for duplicate companies. You should typically perform this operation on a regular basis if you do not have automatic duplicate checking turned on.

To perform a manual check for duplicate companies, do the following:

- Select **Check for Duplicates** from the **Edit** menu in Contact mode. OfficeTalk will search all the company records looking for two companies with identical names. If a duplicate is found, OfficeTalk displays the Duplicate Company dialog box.

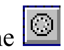
- The first address line of each company is displayed so that you can distinguish each company. To look more closely at the details of either company, press the relevant **Details…** button. This will show the Company property sheet for the corresponding Company.
- OfficeTalk gives you four choices. You may choose between
  1. Making the second company a linked site of the first company. This means that both companies will exist as separate records but each one will be accessible from the other by pressing the **More…** marker which will appear at the top of the Company window when either company is displayed.
  2. Skipping this duplicate match.
  3. Deleting the first Company.
  4. Deleting the second company.
- Select the required option by pressing the relevant button in the Duplicate Checking dialog box. Alternatively, press **Cancel** to cancel the duplicate checking operation.

Auto Dialing a Company or Contact

You may auto dial a company or contact provided:

- You have a modem connected directly to your computer using the same phone line as your handset phone.

- One or more company or contact phone number details have been entered.

You can auto dial a company or contact by pressing the  window button above the Company or Contact Window. Pressing this button will bring up the Dial dialog box.

When dialing a company or contact, OfficeTalk will replace a '+' character preceding the number with the international dialing prefix code.

The Dial dialog box lets you type in a phone number manually into the **Phone Number** field or lets you select from a list of phone numbers defined for the company or contact. When you press **OK**, OfficeTalk will initialise the modem and dial the selected number.

Directory View

Directory view displays a columnar list of companies or contacts. The View consists of a Contact Group window and a Directory window. The Directory window has two tabs: A Companies tab and a Contacts tab. Selecting the Companies tab will display a list of all companies in the selected contact group. Likewise, selecting the Contacts tab will display a list of all contacts in the selected contact group.

Note: The All contact group contains all public companies and contacts as well as all your personal companies and contacts.

Quick Searching for a Company or Contact

To quickly look up the details of a particular company or contact, select either the Companies tab or the Contacts tab as appropriate and type the first few letters of the company name or the contact's last name in the **Search** field above the Directory window. The letters that you type must be entered in quick succession. As soon as you have entered the first few letters, OfficeTalk will search for the record and display it in the Directory window. You can change the width of the **Quick Search** field by positioning the cursor to the right of the field and dragging left or right. To hide the field completely, change the field width to zero. To re-display the field, position the cursor to the left of the **?** index tab and drag to the right.

Using the Tab Bar

The Tab Bar lets you search for the first company or contact which starts with a particular letter. For example, you could find the first company beginning with **P** by pressing the **P** tab in the tab bar.

Note: The directory list may be sorted by any column and is not necessarily sorted by *Name*. In such circumstances, pressing one of the tabs in the Tab Bar will re-sort the list by name prior to searching.

Viewing a Company's Employees

If a company has employees, the company will appear in the Directory window with a ⊞ button next to it. Pressing the button will expand the company to show a list of the company's employees.

Pressing the button a second time will contract the company, hiding the list of employees.

Sorting, Grouping and Filtering

From within the directory view, you can sort company and contact data by any of the available columns. For example, you may wish to sort by the Last Contacted Date. To do this, pop up the context menu by clicking the right mouse button anywhere in the Directory window and selecting **Sort…** from the menu. The Sort/Group dialog box will appear.

Select *Town/City* from the first drop down list and press **OK**. This will sort the list accordingly. Alternatively, show the Town/City column and then click on the Town/City header using the left mouse button.

You can group the list by the Town/City column by clicking on the header using the left mouse button while you keep the **Shift** key depressed. Grouping the list by Town/City column displays the list as shown below:

You may wish to filter on all companies that are located in a particular town or city, for example, London. The easiest way to do this is to find a company which is located in London and then click on the Town/City field using the right mouse button. The context menu will be displayed as shown below.

Select **Filter By 'London'**. The list will show only those companies which are located in London. A marker will appear in the Window Title, showing that the list has been filtered. To disable the filter, click the right mouse button anywhere in the Directory window and select **Disable Filter** from the context menu.

For more information on sorting, grouping and filtering, see "Sorting Data" and the following sections on page 335.

Searching for Companies and Contacts

If you need a more powerful way of searching for companies and contacts other than using the quick search techniques, as described above, then you should use the Company or Contact Search dialog box. You can display the Company or Contact Search dialog box by selecting **Search Companies** or **Search Contacts** from the **Search** menu. Both dialog boxes are identical. The Search Companies dialog box is shown below.

The Company and Contact Search dialog boxes provide both a Simple search page and an Advanced search page. The Advanced search page lets you create more complex searches by letting you specify boolean expressions. For more information, see “Searching for Data” on page 342. The Simple search page lets you decide which fields to search and what to search for. You may choose to search on any of the following field choices by selecting the required choice from the **Field** drop down.

Field Choice	Description
Name field only	Searches just the name of the company or contact.
Name and address fields	Searches the name and address fields and, in the case of contacts, the home address fields.
Postcode begins with…	Performs an indexed search on the postcode.
All text fields	Searches all textual fields including name, address, e-mail, phone and comment fields.
All fields	Searches all text fields as well as rich text notes associated with the company or contact.

Enter the required search text into the **Text** field and press the **Search** button. OfficeTalk will display the results in the **Results** list as and when they are found. You may view any item found by selecting it from the **Results** list and pressing the **Goto** button.

Deleting Companies and Contacts

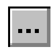
You may delete a company by viewing the company from within Company view, clicking on the company, using the right mouse button and selecting **Delete** from the context menu. Alternatively, provided the Company view window has focus, press the **Delete** key on the keyboard. In both case, OfficeTalk will ask you to confirm that you wish to send the company to the recycle bin. Press **Yes** to confirm deletion. If you wish to permanently delete the company then ensure that the **Shift** key is depressed when deleting the company. In this case, OfficeTalk will not send the company to the recycle bin but will instead permanently delete the company.

Contacts may be deleted in exactly the same way from within Company view.

Note: You must have been granted sufficient access in order to delete companies and contacts. A supervisor can grant this access from within Supervisor mode. For more information, see “Restricting Access to Modes” on page 84.

Specifying a Contact’s E-Mail Address

You can specify an e-mail address for a contact from within the Contact property sheet in the following way:

- Bring up the Contact property sheet by double clicking on the relevant contact from within Contact view.
- Type in the e-mail address into the **Email Address** field.
- Press the  button. This will bring up the Select Service dialog box.
- Choose which Mail Service will be used to send mail to this contact. If you have specified an Internet address such as mailbox@company.com, then OfficeTalk will automatically select the Internet Mail Service. Select the appropriate mail service and press **OK**.
- Press the  button. This will bring up the Per Recipient Settings dialog box. The format of this dialog box will depend on selected mail service. The Per Recipient Setting dialog box for the Internet Mail Service lets you choose options for encoding and for rich text.
- You may choose to encode messages sent to this contact in either MIME format or UUENCODE format. If you choose **Use Service Default**, messages sent to this contact will always be sent using MIME. This may change in future versions of the product.
- You may also choose whether or not to send messages to this contact in rich text format or in plain text format. The default is to send using plain text. If you wish to send to the contact using rich text then select the **Use rich text**

radio button, otherwise, select the **Do not use rich text** radio button.

Note: If you send rich text messages to contacts whose mail client does not support RTF, then the contact will receive a plain text version of the message in addition to a file attachment containing a rich text version of the message. If the contact is an OfficeTalk user or uses any other mail client which does support RTF mail messages then the rich text message will be displayed in the mail clients message window.

The Per Recipient Setting dialog box for the MAPI Mail Service lets you specify whether or not the contact uses Microsoft Exchange. If the contact does use Microsoft Exchange, then OfficeTalk makes use of Exchange forms whenever this contact is invited to meetings or assigned project tasks using this e-mail address.

Sending an E-mail Message to a Contact

If you specify an e-mail address for a contact then you may send a mail message to that contact by clicking the right mouse button in the Contact view and selecting **Send Mail** from the context sensitive menu.

Selecting **Send Mail** will switch to Compose View in Mail Mode with the contact selected in the To: window. Fill out the subject field, enter a message and press **Ctrl+S** to send the message. For more information see "" on page 287.

If you specify more than one e-mail address for a particular contact, for example by specifying both a work and home e-mail address, then you may send to either address by selecting the required address from the context menu.

Note: If there are additional custom e-mail fields then these will also be available from the context menu.

Organising a Meeting with a Contact

Sometimes you will want to organise a meeting with a contact from within Contact mode. You can do this in the following way:

- View the appropriate contact in Contact View.
- Click the right mouse button somewhere inside the Contact window and select **Organise Meeting…** from the context menu.

- OfficeTalk will change to Meeting mode and will add the chosen contact and yourself as recipients of a new meeting. You may add further recipients if you wish and you may then proceed to book the meeting in the normal way. For more information see “Organising a Meeting” on page 205.

Creating a Follow-Up Task

A follow-up task is a task which is associated with a company or contact. A follow-up task is displayed in the Pending tab of the Company, Contact or History views until it has been completed. When completed, the task will be displayed in the History tab of the relevant view.

OfficeTalk lets you create follow-up tasks for companies, contacts, conversations and documents (such as letters and faxes). You can create a follow-up task in the following way:

- Click the right mouse button on either a company, contact, document or conversation from the Company, Contact or History view and select **Assign Task…** from the context sensitive menu.

- The Select User dialog box will appear, prompting you to specify the user to whom the follow-up task should be assigned.

- Only users to whom you have at least create access will appear in the drop down list. Select the relevant user and press **OK**. The Task property sheet is displayed.
- Fill out the fields of the Task property sheet, optionally specifying a deadline by which time the task must be completed. Press **OK** to save your changes. If you assign the task to a user other than yourself, an Instructions dialog box is displayed next, letting you enter instructions for completing the task. When you press **OK** on the Instructions dialog box, provided you selected a user other than yourself, an e-mail message is sent to that user, informing them of the task assignment. The task will appear in the Pending list against the relevant company or contact. For example, if you create a follow up task for a conversation then the task is associated with the company or contact with whom you had the conversation. A public user link is created which links the task with the associated item (the conversation in this example).

Printing Companies and Contacts

You may print out companies by selecting **Print Companies** from the **File/Print** menu. When you do this, the Print Companies dialog box is displayed, showing the Details page.

You may print out contacts by selecting **Print Contacts** from the **File/Print** menu. When you do this, the Print Contacts dialog box is displayed, showing the Details page.

The fields and buttons in the Print Companies dialog box and the Print Contacts dialog box are described in the table below:

Field/Button	Description
All companies/ Current group/ Current company	You may choose what to print by selecting one of these radio buttons. You can print either all companies in the entire database, or, if there is a contact group currently selected, you can print that group or you can print the current company.
Draw line between records	Check this check box if you wish to print a horizontal line between each record printed.
New page per alphabetical section	Check this check box if you wish to start a new page for every new alphabetical section.
One record per page	Check this check box if you wish to print only one company record per page.
Print Company Name	Check this check box if you wish to print the company name in a different font from the other printed fields. The name is printed using the Name Font which may be defined in the Fonts tab.
Print Field Names	Check this check box if you wish to print field names. Field names will be printed using the Title Font which may be defined in the Fonts tab.
Show Empty Fields	By default, any fields selected for printing which are empty are not printed. You may print empty fields by selecting this check box
Print Employees (Print Company dialog box only)	Check this check box if you wish to print the list of employees underneath each company.

OfficeTalk provides common print functionality in all Print dialog boxes. This functionality includes:

- Defining headers and footers
- Printer setup
- Page Style Selection
- Saved Print Settings
- Preview capability

For more information on this common print functionality, see the "Printing" on page 355.

Contact Groups

Often, you will want to classify your companies and contacts into one or more groups. For example, you may wish to create a group of sales prospects, or you may wish to keep a list of applicants to a vacancy in your organisation. OfficeTalk lets you do this using Contact Groups.

A company or contact may belong to several contact groups and each contact group may contain any number of companies or contacts.

Contact groups are hierarchical, which means that one contact group may contain one or more sub contact groups. This adds considerable flexibility to the way in which you structure your companies and contacts.

The *All* Contact Group

The **All** contact group is a special contact group which, provided you have sufficient access, will let you see all companies and contacts in the OfficeTalk database, except for company and contact records which are private to other users. The **All** contact group may not be deleted and it’s properties, such as description and access rights, may only be edited by a supervisor.

Note: Access to the **All** contact group may be fully defined by a supervisor. This is used when a supervisor wishes to restrict one or more users to specific contact groups. Denying a user access to the **All** contact group prevents that user from being able to view every public company or contact. Instead the user will have access only to those companies and contacts belonging to contact groups to which the user has been granted access. For more information, see "Specifying Access to a Contact Group" on page 250.

Creating a New Contact Group

You can create a new contact group in the following way:

- Double click on a blank part of the Contact Group list. The Contact Group dialog box is displayed.

- Enter a name for the contact group, for example, ‘Potential Prospects’.
- Select the Members tab. The Members page lets you specify which companies and contacts will belong to the contact group.

- Find the relevant companies and contacts by selecting either the **Companies** or **Contacts** radio button and searching for records which begin with or contain the text that you enter into the **Search Text** field. When you press the **Search** button, any records found will be displayed in the Results list. For more advanced searching, you can use the Company or Contact Search dialog box. Pressing the **Company Search Results** or the **Contact Search Results** button will add the results of the Company or Contact search dialog box into the **Results** list. Any companies shown in the **Results** list are displayed along with the list of associated employees.
- Select the records from the **Results** list that you wish to add to the contact group and press the **Add** button. The selected companies will be added to the Members list. Press **OK** to save your changes. The Contact group will appear in the Contact Group list.

Adding Companies and Contacts to a Contact Group

OfficeTalk lets you add companies and contacts to an existing contact group using drag and drop. You can do this in the following way:

- Firstly view the company or contact that you wish to add in the appropriate view. Click the left mouse button down in Company or Contact view and whilst keeping the left mouse button depressed, drag the cursor to the relevant contact group in the Contact Group list and then release the left mouse button.
- Alternatively, from Directory view, select one or more companies or contacts and drag them to the relevant contact group in the Contact Group list.

OfficeTalk provides several options for when you drop a company or a contact onto a contact group, with regards to associated contacts or companies. For example, if you add a company to a contact group, you may or may not wish to include all employees of the company as members of the contact group. Likewise, if you add a contact to a contact group, you may or may not wish to add the contact's associated company as a member of the contact group. The Drag/Drop page of the Preferences dialog box lets you choose which options you require. The options for when you drop a company onto a contact group are as described in the table below:

Radio Button	Description
Do not add contacts	When you add a company to a contact group through drag and drop, OfficeTalk will not add any of the employees of the company to the contact group.
Add all contacts	When you add a company to a contact group through drag and drop, OfficeTalk will add all of the employees of the company to the contact group.
Prompt	When you add a company to a contact group through drag and drop, OfficeTalk will prompt you with a dialog box, letting you choose which employees will be added as members of the contact group.

If you choose the **Prompt** radio button, OfficeTalk will display a Select Employees dialog box.

Select which employees you wish to add to the contact group and press the **Add** button. If you do not wish to add any employees then just press **OK**.

The options for when you drop a contact onto a contact group are as described in the table below:

Radio Button	Description
Do not add company	When you add a contact to a contact group through drag and drop, OfficeTalk will not add the associated company to the contact group.
Add company	When you add a contact to a contact group through drag and drop, OfficeTalk will add the associated company to the contact group.
Prompt	When you add a contact to a contact group through drag and drop, OfficeTalk will prompt you with a message box, letting you choose whether or not to add the associated company to the contact group.

If you choose the **Prompt** radio button, OfficeTalk will pop up a message box asking you if you wish to add the contact's associated company to the contact group.

Opening a Contact Group

Once you have defined a contact group, you may open the contact group by double clicking on the group in the Contact Group list.

When you open a contact group, only those companies or contacts that belong to the group will be visible from the Company, Contact and Directory Views. The and buttons will scroll through only those companies or contacts belonging to the open group. Any function that you perform in Contact mode, such as exporting, printing and searching will use only those companies and contacts belonging to the open contact group.

The window title of each view will reflect the currently opened contact group.

Any companies or contacts that you add will automatically get added to the currently open contact group. Note that they will also be added to the **All** contact group.

Note: If you open a contact group and view the employees of a company, belonging to that group, in Company view, then OfficeTalk will show all employees that do **not** belong to the contact group in a light grey colour. This distinguishes them from employees which do belong to the group. These employees are displayed in the usual employee font. These fonts are user definable. For more information, see “Customising the Display” on page 401.

Deleting Companies and Contacts from a Contact Group

If you open a contact group other than the **All** contact group and attempt to delete a company or contact in the usual way, for example, by pressing the **Delete** key then, provided you have sufficient access, OfficeTalk will ask you if you wish to *remove* the company or contact from the contact group.

If you press **Yes**, OfficeTalk will not delete the company or contact from the database but will instead remove the company or contact from the currently open contact group.

Note: You can only *delete* a company or contact from the database if the **All** contact group is currently open.

Structuring Your Contact Groups

Suppose you had a contact group called ‘Prospects’ which you wanted to further categorise into prospects to which you planned to send a prospective letter. Having two separate unconnected contact groups: ‘Prospects’ and ‘Prospective Letter Contacts’, for example, will not properly represent the structure that you intend. Instead, OfficeTalk lets you create a hierarchy of contact groups to properly represent the intended structure:

To make one contact group a sub group of another, do the following:

- Create two top level contact groups, ‘Contact Group 1’ and ‘Contact Group 2’.
- Drag ‘Contact Group 2’ and drop it onto ‘Contact Group 1’. ‘Contact Group 2’ will appear indented under ‘Contact Group 1’. A button will appear to the left of ‘Contact Group 1’. Pressing the button will hide the sub group. Pressing it again will show the sub group.

Note: Hierarchical contact groups still remain separate contact groups. This means that any companies or contacts belonging to a sub contact group will not inherently belong to the parent contact group.

Finding Which Groups a Company or Contact Belongs To

OfficeTalk lets you view which contact groups a particular company or contact belongs to. You can do this by selecting the company or contact into the Company or Contact Window and selecting  from the window menu. If the selected company or contact does not belong to any groups then a dialog box will appear as shown below.

If the company or contact does belong to one or more groups then selecting  from the window menu will pop up a window listing all the groups to which the company or contact belongs:

Specifying Access to a Contact Group

OfficeTalk lets you specify the access that users have to a specific contact group. A user’s access to a contact group defines the user’s access to the companies and contacts contained in the contact group. For example, if a user has read access to a contact group, then the user may open the contact group but may not add or remove companies and contacts to and from the contact group. If the user has no access to a contact group then the contact group will not be visible to that user. It is possible for supervisors to give users no access to the **All** contact group.

This means that a particular user will not necessarily be able to see all the contacts and companies held in the database. Instead, the user will have access only to those companies and contacts belonging to specific contact groups.

You may specify other users' access to a contact group only if you are a supervisor or if you are the owner of the contact group.

To specify access for a contact group do the following:

- Select the contact group using the right mouse button and choose **Edit** from the context menu. This will display the Contact Group dialog box.
- Select the Access page.

If you selected the **All** contact group, the Access page consists of a list of security profiles and a set of radio buttons.

Select the security profiles representing the users whose access you wish to change and then choose the appropriate radio button to represent the access that you wish to grant.

If you selected a contact group other than the **All** contact group, the Access page consists solely of a set of radio buttons representing the available access settings.

Specify whether this is a private, personal or public contact group by selecting the appropriate radio button. If you select the **Private** radio button, then only the owner of the contact group will have access to the contact group. If you select the **personal** radio button then other users' access to this contact group will depend on their general access to you. If you select the **public** radio button, then all users will have full access to the contact group.

Conversations

OfficeTalk lets you document any conversations that you have with contacts or companies. A Conversation is either an incoming or outgoing telephone call or a face to face conversation. Once recorded, a conversation will be kept as a history item against the related company or contact and may be viewed in the history tab in Company or Contact View or from within History View.

Recording a Conversation

You can record a conversation with a contact or company in the following way:

- From within Contact, Company or Directory View, select the contact or company with whom you have had the conversation.

Note: Recording a conversation with a company, rather than with a contact, is useful when it is not important who the contact is.

- Press the button. The Conversation property sheet is displayed, showing the Details page.

- Enter a subject for the conversation. The Company and Contact fields will be already set up to show the selected company or contact. You may select a different company or contact using the  button or the  buttons, respectively.
- Specify whether the conversation was initiated by you or by the contact. Do this by selecting **Outgoing** or **Incoming** from the **Direction** drop down list.
- A useful way of timing the conversation is to use the timer in the Conversation property sheet. Press the  button when the conversation starts and, at the end of the conversation, press the  button. This will time the duration of the conversation. Alternatively, type in the duration of the conversation into the adjacent **Timer** field.

- If this is a private conversation, which you wish no-one else to see, then check the **Private** check box. Otherwise, leave the check box unchecked.
- Enter the conversation into the text window, using the format toolbar to add colour, fonts and character style to your text. You may attach one or more files to a conversation by pressing the button.. Press **OK** to save your changes.

Reading Existing Conversations

Once a conversation has been created it is available either in the History tab in Company or Contact view when the associated company or contact is displayed or from within History View. If you select a conversation from within History View from the top window, the body of the conversation will appear in the bottom window.

The subject of the conversation is shown at the top of the window showing the conversation body along with the *thread number* of this conversation. (See ‘Adding to a Conversation Thread’ later in this section).

Editing Existing Conversations

Provided that you have sufficient access, you may edit a conversation from either Company, Contact or History View by double clicking on the relevant conversation. The Conversation property sheet is displayed, showing the Details page. You may edit any of the properties of the conversation, including the conversation subject and body.

Deleting Conversations

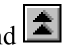
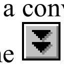
Provided that you have sufficient access, you may delete a conversation from either Company, Contact or History View. Do this by selecting the conversation that you wish to delete and pressing the **Delete** key on the keyboard. OfficeTalk will ask you to confirm that you wish to send the conversation to the recycle bin. Press **Yes** to delete the conversation. For more information, see “The Recycle Bin” on page 346.

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:

- Select the conversation that you wish to add to. 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 in the middle of a thread (for example if the title read **(1 of 3)**).
- Click on the conversation using the right mouse button and select **Continue Thread** from the context menu. A Conversation property sheet will appear with the subject field already filled out. Enter the body of the new conversation and press **OK** on the Conversation property sheet. The new conversation will be linked to the selected conversation.

Following a Conversation Thread

Conversations which are *threaded* together are not usually consecutive entries in the Conversations Window. For this reason, OfficeTalk lets you move back and forward along any particular thread using the  and  buttons located in the title bar of the botton window. To do this, select a conversation which is part of a thread. If there is a conversation *previous* to the selected conversation in the thread, then the  button will be enabled. Pressing this button will take you to the previous conversation. If there is a conversation after the selected conversation in the thread then the  will be enabled. Pressing this button will take you to the next conversation in the thread.

Categorising Conversations

OfficeTalk lets you set up one or more categories which may be used to classify your conversations. To mark a conversation as belonging to a particular category, do the following:

- Bring up the Conversation property sheet by double clicking on the relevant conversation in the History window.
- Select the Categories page. The Categories page will display a list of contact related categories in the bottom window. Each category has a check box to the left of the description.
- Select one or more check boxes representing the classification of the conversation into the relevant categories.
- Press **OK** to save your changes.

You may add your own private categories by typing the name of the category into the **Categories** window in the Categories page and pressing the **Update** button. The new category will appear, checked, in the bottom window. Press **OK** to save your changes.

If you wish to add the conversation to categories in another category set, for example, the Diary category set, then select the Diary category set from the **Set** drop down list. The list of available categories in that category set will appear in the bottom window. Select one or more categories and press **OK** to save your changes.

For more information on Categories, see "Using Categories" on page 349.

Specifying Access Rights to your Conversations

OfficeTalk lets you define other user's access to any conversation that you create. If a user is given full access to a conversation then the user may edit the conversation or even delete the conversation from the system.

You can grant access to a conversation in the following way:

- Bring up the conversation property sheet by double clicking on the relevant conversation and select the Access page.

Note that only supervisors and you may change the access to the conversation

- Specify whether this is a private, personal or public conversation by selecting the appropriate radio button. If you select the **Private** radio button, then only you, the owner of the conversation, will have access to the conversation . If you select the **personal** radio button, then other users' access to this conversation will depend on their general access to you. If you select the **public** radio button, then all users will have full access to the conversation.

Note that you may not have sufficient access to mark the conversation as a public conversation. This may be changed by a supervisor. For more information, see "Restricting Access to Modes" on page 84.

Customising Conversations

OfficeTalk lets you store additional custom data with each conversation. For example, you may wish to attribute a *cost* to the conversation. Additional custom fields must be stored in the Conversation property sheet in a separate page. For example, you may create an additional page in the Conversation property sheet, called "Costing". The **Cost** field may then be added to this page. You may add any number of additional custom pages to a property sheet and you may add any number of additional fields to a custom page.

For more information on custom fields and custom dialog boxes, see "The Custom Field Wizard" on page 59

Searching For Conversations

OfficeTalk provides a way for you to search for conversations quickly and easily.

Select **Search Conversations** from the **Search** menu. The Search Conversations dialog box is shown.

You may choose whether to search on just the subject field, on the subject field and conversation body, on all text fields (including the conversation notes and any custom data) or on *all* conversation fields (including date field values). You can do this by making the relevant selection from the **Field** drop down list.

Enter some search text into the **Text** field.

If you wish to confine your search to a specific date range then check the **Date** check box and specify the desired start and end date.

You may stop the search at any time by pressing the ***Stop*** *button. Note that the* ***Search*** *button changes to the* ***Stop*** *button during a search.*

When you have entered the relevant search criteria, press the **Search** button. OfficeTalk will search for the specified text and will add any matching items to the **Results** list. You may view the actual record associated with any of the results by selecting the appropriate result from the list and pressing the **Goto** button. OfficeTalk will change to History view and will display the correpsonding conversation in the bottom window.

For more information on searching, see “Searching for Data” on page 342.

Printing a Conversation

Typically, you would print conversations by using the Print History dialog box. However, OfficeTalk provides functionality to print either a single conversation or all the conversations in a particular thread.

You can print a conversation or a conversation thread by selecting **Print Conversation** from the **File/Print** menu. Thei Print Conversation dialog box is displayed.

The fields and buttons in the Print Conversation dialog box are described in the table below:

Field/Button	Description
Selected Conversation/ All in selected thread	You may choose what to print by selecting one of these radio buttons. You can print either the selected conversation on its own or the selected conversation and all other conversations in the same thread.
New page per conversation	Check this check box if you wish to start a new page for every new conversation.
Draw line between conversations	Check this check box if you wish to print a horizontal line between each conversation printed.
Print field titles	Check this check box if you wish to print field names. Field names will be printed using the Title Font which may be defined in the Fonts tab.
Print conversation subject	Check this check box if you wish to print the conversation subject separately from the other field titles using the Subject font which may be defined in the Fonts page.
Print conversation text	Check this check box if you wish to print the the body of each conversation.

OfficeTalk provides common print functionality in all Print dialog boxes. This functionality includes:

- Defining headers and footers
- Printer setup
- Page Style Selection
- Saved Print Settings

- Preview capability

For more information on this common print functionality, see "Printing" on page 355.

Documents

OfficeTalk provides functionality for writing letters or faxes or other such documents to contacts based on pre-defined templates. Writing a letter or composing a fax to someone is simply a case of selecting the relevant contact, selecting a document template and pressing a **Create Document** button. OfficeTalk does the rest. Furthermore, once you have created a document from within OfficeTalk, it becomes part of the history trail for the relevant company or contact and the document's content is instantly accessible without having to start a word processor in order to view it.

Such functionality is useful for both one-off documents and for standard documents, such as a rejection letter for a job candidate.

OfficeTalk will work with any word processor capable of supporting either plain text or RTF.

Designing Document Templates

A Document template is a plain text or an RTF file containing standard text and replacement fields. OfficeTalk comes supplied with standard document templates. These include:

- Standard Letter (RTF)
- Standard Letter (Text)
- Standard Fax (RTF)
- Standard Fax (Text)

You can create your own document templates in the following way:

- Select **Document Templates** from the **Edit** menu. The Document Templates dialog box is displayed.

- Press the **New** button. The Document Template dialog box is displayed.

- Enter a description for the template and select whether the template will contain rich text formatting or plain text formatting. Note that if you select **Rich Text** you must have a word processor capable of supporting RTF (Rich Text Format) that is associated with the .RTF extension.
- Select whether the template is public to all users in the workgroup or whether it is personal to you. Finally, press the **Design…** button. This will start your word processor, showing a new document
- Lay out the document, using any of the replacement fields listed below. When you create a document, OfficeTalk uses the document template and substitutes any replacement fields with the appropriate text.

Replacement Field	Description
<@Company>	The selected company name and address1 field.
<@Company.Name>	The selected company name.
<@Company.Description>	The selected company name and address1.
<@Company.Creation Date>	The date when the company record was created (short date format)
<@Company.Creation Time>	The date and time when the company record was created.
<@Company.Address>	The company full address. Any blank fields are removed.
<@Company.Address 1>	The company address1 field.
<@Company.Address 2>	The company address2 field.
<@Company.Address 3>	The company address3 field.
<@Company.Town/City>	The company town/city field.
<@Company.County>	The company county.
<@Company.Postcode>	The company postcode.
<@Company.Country>	The company country.
<@Company.Phone 1>	The company phone1 field.
<@Company.Phone 2>	The company phone2 field.
<@Company.Fax>	The company fax field.
<@Contact>	The selected contact name.
<@Contact.Name>	The selected contact name.
<@Contact.Title>	The selected contact title.
<@Contact.First Names>	The selected contact first names.
<@Contact.Last Name>	The selected contact last name.
<@Contact.Creation Date>	The date when the contact record was created (short date format)
<@Contact.Creation Time>	The date and time when the contact record was created

<@Contact.Address>	The contact full home address field.Valid only if a contact is selected. Blanked otherwise.
<@Contact.Address 1>	The contact home address 1 field. Valid only if a contact is selected. Blanked otherwise.
<@Contact.Address 2>	The contact home address 2 field. Valid only if a contact is selected. Blanked otherwise.
<@Contact.Address 3>	The contact home address 3 field. Valid only if a contact is selected. Blanked otherwise.
<@Contact.Town/City>	The contact home town/city field. Valid only if a contact is selected. Blanked otherwise.
<@Contact.County>	The contact home country. Valid only if a contact is not selected. Blanked otherwise.
<@Contact.Postcode>	The contact home postcode fieldValid only if a contact is selected. Blanked otherwise.
<@Contact.Country>	The contact home country. Valid only if a contact is not selected. Blanked otherwise.
<@Contact.Phone 1>	The contact home phone 1 field. Valid only if a contact is selected. Blanked otherwise.
<@Contact.Phone 2>	The contact home phone 2 field. Valid only if a contact is selected. Blanked otherwise.
<@Contact.Fax>	The contact home fax field. Valid only if a contact is selected. Blanked otherwise.
<@Contact.Company Address>	The contact's company address field.Valid only if the contact is associated with a company. Blanked otherwise.
<@Contact.Company Address 1>	The contact's company address 1 field.Valid only if the contact is associated with a company. Blanked otherwise.
<@Contact.Company Address 2>	The contact's company address 2 field.Valid only if the contact is associated with a company. Blanked otherwise.
<@Contact.Company Address 3>	The contact's company address 3 field.Valid only if the contact is associated with a company. Blanked otherwise.
<@Contact.Company Town/City>	The contact's company town/city field.Valid only if the contact is associated with a company. Blanked otherwise.
<@Contact.Company County>	The contact's company county field.Valid only if the contact is associated with a company. Blanked otherwise.
<@Contact.Company Postcode>	The contact's company postcode field.Valid only if the contact is associated with a company. Blanked otherwise.
<@Contact.Company Country>	The contact's company country field.Valid only if the contact is associated with a company. Blanked otherwise.

<@Contact.Company Phone 1>	The contact’s company phone 1 field.Valid only if the contact is associated with a company. Blanked otherwise.
<@Contact.Company Phone 2>	The contact’s company phone 2 field.Valid only if the contact is associated with a company. Blanked otherwise.
<@Contact.Company Fax>	The contact’s company fax field.Valid only if the contact is associated with a company. Blanked otherwise.
<@Contact.Position>	The contact’s position. Valid only if a contact is selected. Blanked otherwise.
<@Contact.Department>	The contact’s department. Valid only if a contact is selected. Blanked otherwise.
<@User>	Your full name.
<@User.Name>	Your full name.
<@User.Last Name>	Your last name.
<@User.First Names>	Your first names.
<@User.Creation Date>	The date when your user record was created (short date format)
<@User.Creation Time>	The date and time when your user record was created
<@Date>	The current date. The format of the date is taken from the *long date* format of the regional settings specified for your computer.
<@Short Date>	The current date. The format of the date is taken from the *short date* format of the regional settings specified for your computer.
<@Year>	The current year in long format, e.g. '1998'.
<@Short Year>	The current year in short format, e.g. '98'.
<@Month>	The current month in long format, e.g. 'January'.
<@Short Month>	The current month in short format, e.g. 'Jan'.
<@Month Number>	The current month represented as a number from 1 to 12.
<@Day>	The current day number from 1 to 31.
<@Day Of Week>	The current day of the week in long format, e.g. 'Monday'.
<@Short Day Of Week>	The current day of the week in short format, e.g. 'Mon'.
<@Day Of Week Number>	The current day of the week represented as a number from 0 to 6. 0 is a Sunday.
<@Time>	The current time in 24 hour format.
<@Time 12>	The current time in 12 hour format.
<@Workgroup>	The workgroup's name.
<@Subject>	The document’s subject which was entered when the document was made.

OfficeTalk may replace certain fields with nothing. For example, if a document is written to a company (with no contact selected) and if the replacement field <@Contact.First Names> occurred in the template, then since no contact details exist, the replacement field is replaced with nothing. The replacement field would also be replaced with nothing if a contact was selected, but there were no first name details.

OfficeTalk lets you safeguard against such incidents by providing you with a way of supplying a default replacement. For example, you might be mailing a set of companies, some of whom have contacts that may be addressed as Dear '<@Contact.First Names>' and others which do not have contacts that should be addressed 'Dear Sir/Madam'.

OfficeTalk lets you provide default replacements by entering a ';' or ':', followed by your default text, immediately before the closing field delimiter '>'. Taking the above example, any text after a ':' character will be used as the default replacement if the contact object exists but the relevant field is empty. Any text after a ';' character will be used as the default replacement if the contact object does not exist, for instance, if the document was written to a company and no contact was selected.

To achieve the result in the above example, the greeting in the Document template would be as follows:

Dear <@Contact.First Name:Sir/Madam;Sir/Madam>

It is also possible to include replacement fields in the default text, for example:

Dear <@Contact.First Name:Sir/Madam;employee of <@Company>>

An example of a document template is as follows:

Sareen Software Plc
Northgate House
72 Northolt Road
South Harrow
Middx   HA2 0DW

<@Day> <@Month> <@Year>

<@Contact.Company Address:<@Company.Address>;<@Contact.Address>>

Dear <@Contact.First Names:Sir/Madam;Sir/Madam>,

If you would like to receive information via our mailing list then please write to us at the above address.

Yours Sincerely,

<@User.First Names> <@User.Last Name>
<@Workgroup>

The above example uses the fields Dear **<@Contact.First Names:Sir/Madam;Sir/Madam>**. The combination of these fields handles the following cases:

- Writing a document to a company with no contact selected. In such a case the default is taken from the text after the ';' character.
- Writing a document to a contact whose first name is blank. In such a case the default is taken from the text after the ':' character.
- Writing a document to a contact whose first name is filled out.

The above example also uses the fields **<@Contact.Company Address:<@Company.Address>;<@Contact.Address>>** for displaying a receiver address. The combination of these fields handles the following cases:

- Writing a document to a company with no contact selected.
- Writing a document to a contact whose company address is blank, in which case the contact's home address is used.
- Writing a document to a contact who belongs to a company whose address fields are filled out.

Design Warning

Certain rich text editors such as Microsoft Word include the title of the document in the generated RTF. If you do not provide a document title then the title may be automatically generated by using the first few characters of the document. If the first few characters of your document is a replacement string then this will be used as the document title and will possibly render the template unusable. If you are designing an RTF template then always ensure that you specify a sensible document title. You can usually locate the document title field by selecting **Properties** from the **File** menu of your RTF word processor.

Creating a Document

To create a document, such as a letter or a fax, for a specific company or contact, do the following:

- Select the company or contact in either Company or Contact

  view and press the button situated in the Contact mode shortcut bar. Alternatively, press **Ctrl+W** together. A Document dialog box is displayed, showing the Details page.

- The intended recipient of the document is displayed at the top of the Details page. Enter a subject for the document and choose a document template on which this document will be based.
- Press the **Create Document** button. Your word processor will be launched, showing the document that you have just

created. Add any additions to the document, save it, optionally print it and close down the word processor.

OfficeTalk will record the document as a history trail against the selected company or contact.

Categorising Documents

OfficeTalk lets you set up one or more categories which may be used to classify your documents. To mark a document as belonging to a particular category, do the following:

- Bring up the Document dialog box by double clicking on the relevant document from the history window in either Company or Contact View, or from within History View.
- Select the Categories page. The Categories page will display a list of contact related categories in the bottom window. Each category has a check box to the left of the description.
- Select one or more check boxes representing the classification of the document into the relevant categories.
- Press **OK** to save your changes.

You may add your own private categories by typing the name of the category into the Categories window in the Categories page and pressing the **Update** button. The new category will appear, checked, in the bottom window. Press **OK** to save your changes.

If you wish to add the document to categories in another category set, for example, the Diary category set, then select the Diary category set from the **Set** drop down list. The list of available categories in that category set will appear in the bottom window. Select one or more categories and press **OK** to save your changes.

For more information on Categories, see "Using Categories" on page 349.

Specifying Access Rights to your Documents

OfficeTalk lets you define other users’ access to any documents, such as letters and faxes, that you create. If a user is given full access to a document then the user may edit the document and even delete the document from the system.

You can grant access to a document in the following way:

- Bring up the Document property sheet by clicking on the document using the right mouse button in the History tab under the appropriate company or contact, and selecting **Edit…** from the context menu. Select the Access page.

Note that only supervisors and you may change the access to the document

- Specify whether this is a private, personal or public document by selecting the appropriate radio button. If you select the **Private** radio button then only you, the owner of the document, will have access to the document. If you select the **personal** radio button then other users' access to this document will depend on their general access to you. If you select the **public** radio button, then all users will have full access to the document.

Note that you may not have sufficient access to mark the document as a public document. This may be changed by a supervisor. For more information, see "Restricting Access to Modes" on page 84.

Changing the Company or Contact for a Document

If you wish to change the Company or Contact associated with a particular document, then do the following:

- Bring up the Document dialog box by double clicking on the relevant document from the history window in either Company or Contact View, or from within History View.
- Select the Contact tab. The Contact page lets you choose the company or contact with which you wish the document to be associated.
- Press **OK** to save your changes.

Keeping Notes for a Document

OfficeTalk lets you keep rich text notes for a document in order to record additional related information which you do not want to include in the content of the document. You can do this by selecting the Notes tab from the Document dialog box.

Type in the notes, using the format toolbar to add colour, fonts and character style to your text.

Performing a Mail Merge

A Mail Merge is the process of merging a list of contact names and addresses with a template in order to create one or more letters. For example, you may perform a mail merge with a list of all your customers in order to create a letter notifying them of your latest products or services.

OfficeTalk lets you perform mail merges with a specific document template and with a contact group representing your list of contact or company names and addresses. Once you have created a mail merge, OfficeTalk will record it as a history trail against each company and contact involved.

You can perform a mail merge in the following way:

- Prior to performing a mail merge there must exist at least one document template. For more information on creating document templates, see “Designing Document Templates” on page 257
- Select **Mail Merge** from the **Edit/New** menu. The Mail Merge wizard is displayed.

- Enter a subject describing the purpose of the mail merge, for example, ‘Product Update Letter’. Press **Next**.

- The next page lets you select a contact group with which to perform the mail merge. You may also choose whether or not to mail either the companies belonging to the contact group or the contacts belonging to the contact group, or both. Pressing Next will display the Record page.

- The Record page lets you choose whether to record a history record for each company or contact involved in the mail merge or whether to record a single record for the entire mail merge. Select the appropriate radio button and press Next.

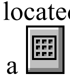
- The Template page lets you choose which document template will be used to generate the mail merge. Select the appropriate template and press **Finish**. OfficeTalk will create the mail merge document and will launch your default word processor to show the mail merge document. OfficeTalk will also add history records according to the options chosen in the Record page. The mail merge history will be available from the history tabs in Company or Contact View or from within History view.

History View

History View lets you view the contact history between all companies and contacts and all users in your workgroup. This view is ideal for monitoring all forms of communication taking place within your organisation. The History tab in History View lists all conversations, documents, mail merges, incoming e-mail, outgoing e-mail, meetings and completed tasks held between users and companies or contacts.

The Pending tab in History View lists any forthcoming meetings and any outstanding tasks associated with companies and contacts.

Changing the Date Filter

By default, OfficeTalk shows your contact history for all companies and contacts for the current month. You may show the contact history over a different period by using the **From** and **To** drop down lists located at the top of the view. Each date control contains two buttons: a  button and a  button.

To select a date using the calendar, click on the  button. A calendar will drop down underneath the date field. Use the calendar to locate the required month and then press on the required date. Once selected, OfficeTalk will remember this date.

A *smart* date lets you specify dates such as: 'Yesterday', 'Last Week', 'Last Month', 'Next Year' etc. You can select a *smart* date by pressing the  button. This will drop down a list of smart dates. You may choose from the following:

Once selected, OfficeTalk will remember the selected smart dates. This is useful if you always wish to view history over a certain relative date range, for example, from Last Quarter to This Quarter.

When you change the dates in either of the date controls, the history list will update to show history over the new date selection.

Changing the User Filter

By default, only contact history relating to you is shown in the History window. Provided that you have at least read access to one or more other users, then you may view the contact history relating to these other users. You can do this by selecting the relevant user from the **User** drop down list. When you do this the history list will update to show the relevant history.

Note: When you view another user's contact history you will not have access to that user's sent or received mail.

If you wish to view the combined contact history of all users to which you have access, then select **–All Users—** from the drop down list.

Changing the Company and Contact Filters

By default, contact history is displayed for all contacts and all companies defined in the workgroup. You may wish to view only history or pending actions for the company or contact currently selected in either the Company or Contact view. You can do this by pressing the button next to the Contact or Company controls. Pressing this will display the relevant search dialog box.

Select **–Current Contact—** or **–Current Company--** from either the Search Contact or Search Company dialog box and press the **Select** button.

If you wish to view the history for a specific company then search for the company by entering the first few letters of the company name into the **Search** field of the Search Companies dialog box and pressing the **Search** button. Any matches will be displayed in the Results window. Select the relevant company from the results window and press **Select**. The History list will update to show only history for the selected company. You may perform a similar action for contacts.

Printing History

To print the contents of the History list, apply the appropriate filters to the list in order to display the history items that you wish to print and then select **Print History** from the **File/Print** menu. The Print History dialog box is displayed.

The Details tab of the Print History dialog box contains two radio buttons which control which fields you print with each history item. If you select the **Print As Shown** radio button, OfficeTalk will print only those fields corresponding to the columns that are currently shown in the History list. By default, these columns are *Date*, *Subject*, *Owner*, *Contact* and *Company*. If you select the **Print using options** radio button then the Fields list will become enabled, allowing you to manually select which fields to print with each history item. You may choose from the following fields:

Field	Description
Subject	The subject of the history item
Date/Time	The date and time when the history item was created
Date	The date when the history item was created
Time	The time when the history item was created
Owner	The user who created the history item
Contact	The contact with whom the history item is related
Company	The company with which the history item is related
Categories	Any categories to which the history item belongs

If you check the **Print history text** check box then, depending upon the type of history item, OfficeTalk will print either the body of an incoming or sent e-mail message, the body of a conversation, the contents of a document or mail merge, the agenda and minutes of a meeting or the notes of a task. By default this check box is checked. If you wish only to print one line containing the fields relating to each history item and you do not wish to print the detail then ensure that the **Print History Text** check box is unchecked.

Any fields that are selected are printed from left to right, across the page. If you wish to print the field titles, such as "Subject", "Contact" etc, then check the **Print Field Titles** check box. The field titles will be printed above each field as shown below:

Selecting the **New Page per Item** check box will start a new page for each history item. Similarly, selecting the **Line between each item** check box will draw a horizontal line after each history item. This is useful if you do not start a new page for each record, yet you wish to be able to distinguish the end of one history item from the start of the next.

The Fonts page of the Print History dialog box contains two buttons which let you choose the font of any titles that you print and the font of all fields which are printed for each history record.

Note: There is no button to choose the font of the History detail text since this is rich text and is therefore already formatted.

OfficeTalk provides common print functionality in all Print dialog boxes. This functionality includes:

- Defining headers and footers
- Printer setup
- Page Style Selection
- Saved Print Settings
- Preview capability

For more information on this common print functionality, see "Printing" on page 355.

Once you have selected the required options in the Print History dialog box, press the **Preview** button to check the appearance of your print out and then send it to the printer by pressing the **Print** button.

Importing Company and Contact Data

OfficeTalk lets you import companies and contacts from CSV files. A CSV (Comma Separated Values) file is an ASCII file which can represent a series of data records. Each line of the CSV file represents a record of data with the exception of the first line which is usually a header line that describes the format of each record. An example of a simple contact CSV file is shown below:

```
"Name", "Company", "Address 1", "Address 2"
"John Noble", "XYZ Ltd", "103 High Street", "Wycombe"
"Mike Price", "GreenBurrows", "St Ives", "Cornwall"
"Peter Lord", "ABC Plc", "1, Wote St", "Aylesbury"
```

OfficeTalk requires the following fields for each data type:

Data Type	Minimum Fields
Companies	Name
Contacts	Last Name

To import Company or Contact data, do the following:

- Select either **Company CSV Records** or **Contact CSV Records** from the **File/Import** menu in Contact mode. The CSV Import Wizard is displayed, showing the File page.

- The File page lets you choose the CSV file that you wish to import. Either type in a filename in the **Import File** field or press the **Browse…** button and search for the required file. Once you have specified a valid filename in this field, you may view the file by pressing the **View File…** button. Pressing **Next** will show the Address Book Options Page.

- The Address Book Options page lets you select whether or not all imported records will be marked as private to you. This may be done by checking the **Import as Personal Items** check box. If a contact group is currently open (other than the **All** contact group), then the **Import into current contact group** check box will be enabled. Checking this check box will add all imported records to the current contact group. Pressing **Next** will show the Connections page.
- The Connections page lets you connect the available fields in the selected CSV file with the relevant data type's available fields. For example, if you were importing the sample file above into your contact address book the Connections page would show the following:

You can also connect fields by selecting a field in one of the lists and double clicking on another field in the other list

Connect up the fields contained in the CSV file with the appropriate company or contact fields from the right-hand list. For example, if you are importing companies, connect 'Company' in the left-hand list to 'Company Name' in the right-hand list and connect 'Address 1' and 'Address 2' in the left-hand list to the corresponding fields in the right-hand list. To connect two fields, select the relevant field from each list and press the **Connect** button. If you make a mistake you can disconnect a field by selecting the relevant field from the right hand list and pressing **Disconnect**. Alternatively, just connect the field in the right hand list to a different field in the left hand list.

Note: The CSV Import Wizard will let you connect a field in the right hand list to more than one field in the left hand list. The result is that data held in the relevant field in the CSV file is copied to each connected field in the company or contact.

- Pressing **Next** will display the Preview page. This page lets you verify that the connections you have made are correct by allowing you to step through the first few records that will be added. This way, you will be able to spot any mistakes prior to loading the data into OfficeTalk.

- The **Prev** and **Next** buttons may be used to step through each record in the CSV file. When you are happy that the data will import correctly, press **Finish**. OfficeTalk will import the data as either Companies or Contacts, depending upon whether you selected **Import CSV Companies** or **Import CSV Contacts**.

Note: Importing companies does just that, it does not import contact information. If you have a CSV file containing both company and contact information then you must firstly import the companies and then import the contacts using the same CSV file. For details on how to do this, see "Connecting Contacts to Companies via a CSV Import" below.

Connecting Contacts to Companies via a CSV Import

If you have a CSV file which contains both company and contact information in the same record and you wish to import the company records and show the associated contacts as employees, then you should perform two imports as follows;

- Firstly import the company information, as described in "Importing Company and Contact Data" on page 271.
- Using the same CSV file, import the contact information, but ensuring that the **[Company]** field in the **OfficeTalk Fields** list is connected to the field representing the name of the company in the **Available Fields** list.
- Once the contacts have been imported, they will each be associated with the relevant companies.

Exporting Company and Contact Data

OfficeTalk lets you export company and contact records to a CSV file. You can do this in the following way:

- Select **Company CSV Records** or **Contact CSV Records** from the **File/Export** menu in Contact Mode. The CSV Export wizard will appear showing the File page.

- Select a filename for the output CSV file. Do this either by typing a full path name into the Export File field or by pressing the **Browse…** button and selecting an existing file. Press **Next** to display the Filter page.
- The Filter page lets you choose whether or not to use the filter currently applied in Directory View when exporting companies. If you wish to use the filter then ensure that the **Use Filter** check box is checked.

- Press **Next** to display the Options page. The Options page lets you choose various output options for your exported file. If you want each item of data to be encapsulated by quotes, then ensure that the **Quoted Fields** check box is selected. If you want to output a header record at the top of the file then check the **Output Header** check box. If you want to end each record line with a delimiter (the default is not to) then check the **End line with delimiter** check box.
- Choose a delimiter (field separator) by selecting from the **Delimiter** field. You can choose between a TAB character and a COMMA.

- Press **Finish**. OfficeTalk will then export the records in the selected group (or all records in the database if no group is selected) to the specified CSV file.

Note: Note that only the companies or contacts in the currently open contact group are exported. If the **All** contact group is selected then all companies or contacts are exported. You will only be able to export those companies to which you have at least read access.

Viewing a Remote Workgroup's Address Book

If you have access to a remote workgroup, then provided that the remote workgroup has one or more companies, contacts or contact groups and given that you have sufficient access to this information, OfficeTalk will let you view contact information belonging to the remote workgroup.

To do this, firstly drop down the list of contact groups and select the appropriate remote workgroup. The drop down list will close and OfficeTalk will attempt to open the remote workgroup database. When this is done, the contact group list will change to show the list of contact groups in the remote workgroup. Selecting any one of these contact groups, by double clicking on it, will give you access to the companies and contacts belonging to that contact group.

If you have sufficient access to the opened contact group, you may add, edit and even delete companies and contacts belonging to the remote workgroup.

Note: In order to add a company or contact to a remote workgroup database, ensure that you have opened a contact group in the remote workgroup and simply add companies or contacts as normal.

Designing Company and Contact Views

OfficeTalk lets you completely configure the layout and presentation of both the Company View and the Contact View. You may choose which fields are displayed and how they are displayed.

You can design the Company or Contact View by first entering the relevant view and then clicking the right mouse button inside the view and selecting **Layout** from the context menu. When you do this, a grid will appear over the view, splitting the view into a series of cells. A format toolbar and an alignment toolbar will appear at the top of the view. To stop designing the view, select **Layout** once more from the context menu.

By default, the view shows four columns of cells. The cells in the first and third column contain text representing the field labels. The cells in the second and fourth columns contain representations of the field values. For example, **<Address 1>** and **<Phone 1>**, in the picture above, represent the first company address field and the company phone field, respectively.

Positioning Fields and Field Labels

You may change the position of any of the fields or the field labels by simply dragging them from one cell to another. If you want to move multiple cells then select the relevant cells and drag them together.

Changing the Width and Height of the Rows and Columns

If you want to change the width or height of a particular row or column then depress the left mouse button when the cursor is over one of the cell's vertical or horizontal boundaries and drag the column or row to the appropriate width or height. If you want to change the width or height of *all* of the rows or columns then follow the previous instructions but, additionally, keep the **Ctrl** key depressed.

Adding Labels

You can add a label to a blank cell by selecting the cell and then typing the label description. A Cell dialog box is displayed and you will continue to type into the **Text** field.

You can specify the justification of the contents of the cell by selecting the appropriate Horizontal Alignment or Vertical Alignment radio button.

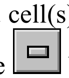
Adding Fields

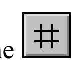
You can add a field to one of the cells by double clicking on the relevant cell. This will pop up the Cell dialog box. Select the field that you wish to show in the cell from the *Field* drop down list. The drop down list contains the default company or contact fields as well as any custom fields that have been added to your workgroup database.

You can specify the justification of the contents of the cell by selecting the appropriate **Horizontal Alignment** or **Vertical Alignment** radio button.

Changing the Appearance of each Cell

You may change the font of one or more cells by selecting the appropriate cells and choosing the font face, size and colour from the format toolbar at the top of the view. You may also use the format toolbar to change the vertical and horizontal alignment of each of the selected cells.

You may give the selected cell(s) a button-like three dimensional appearance by pressing the  button in the format toolbar.

If you wish to overlay a grid on the view, then press the  button. The grid will be visible when you finish the view layout

Adding and Deleting Rows and Columns

By default, OfficeTalk uses four columns of fields to represent a single company or contact record. You may add additional columns or rows to either the Company or Contact views by selecting **Add Row** or **Add Column** from the context menu. If you add a row it will appear underneath all the existing rows. If you add a column it will appear to the right of all the existing columns.

Another way of adding rows and columns is by selecting **Cells…** from the context menu. This will display the Cells dialog box which lets you choose the number of rows and columns in the associated view.

You can delete one or more rows or columns by selecting one or more cells and choosing **Delete Rows** or **Delete Columns** from the context menu. The number of rows or columns deleted will depend upon which cells are selected. You may not undo this action.

Auto Fitting the Cells

Once you have made the appropriate changes to the design of the Company or Contact view, you will probably want to change the width and height of each of the rows and columns such that all the fields and field labels fit completely inside the view. This can be done quite simply by selecting **Fit to Window** from the context menu. The widths and heights of each of the rows and columns will be adjusted accordingly.

More Company and Contact View Display Options

If you wish to customise any other fonts in the Company or Contact view, such as the alphabetical tabs or the Company or Contact name banner then this is done by changing the display profile. For more information see "Customising the Display" on page 401.

Customising the Contact Database

OfficeTalk lets you add an unlimited number of custom fields to both the Company and Contact records. This makes it possible to tailor Contact mode to suit the specific needs of your organisation. For example, an estate agent may wish to keep his list of potential buyers as contacts in the OfficeTalk database. The estate agent may wish to keep additional information for each of his potential buyers describing what property the buyer is seeking. Such additional information may translate to the following fields:

Field name	Field type
Maximum property price	Numeric
Required number of bedrooms	Numeric
Desired location	String selection
Is there an existing house to sell	Boolean

A supervisor may extend the contact table to include these fields and may then add a page to the contact property sheet, allowing users to enter this information. Additionally, the Contact user view may be designed, as described in the previous section, such that it displays the additional custom fields.

For information on how to define custom fields and custom property sheets, see "Administering Custom Data" on page 56.

Contact Mode Preferences

You may specify certain preferences for Contact mode from the Preferences dialog box. This dialog box lets you specify Name Styles, Vocabulary used within Contact mode, preferences for auto dialing, options for when dragging and dropping companies and contacts onto contact groups and also options for setting up an auto dialing modem. To display the Preferences dialog box, select **Preferences** from the **Options** menu.

Name Styles

OfficeTalk lets you choose how you display the name of contacts. The following styles are available, shown below based on the name ‘John Smith’:

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

Changing the contact’s name style will affect the way that contacts are displayed throughout OfficeTalk. To change the name style for contacts, do the following:

- Select the **Contacts** radio button in the Name Style page. Select one of the *style* radio buttons according to how you wish to display the contacts names. Also select whether you wish to include a title in the name style, e.g. Mr, Dr, Mrs, Miss etc. Do this by checking the **Use Title** check box.

- Press **OK**. The name style will be remembered for future login sessions.

Vocabulary

The Vocabulary page lets you specify the words to use to represent the following company and contact address titles:

- Address 3
- Town/City

- State/County
- Zip Code/Post Code

Specify the desired vocabulary in the relevant fields in the Vocabulary page and press **OK** to save your changes. If you wish to accept the default vocabulary then leave the fields blank.

Drag and Drop Options

The Drag and Drop page lets you specify what actions to take when you drag companies and contacts and drop them onto contact groups.

When adding a company to a contact group using drag and drop, you may specify the following options:

- None of the employees of the company are added to the contact group.
- All employees of the company are added to the contact group regardless.
- OfficeTalk will prompt you asking you to specify which employees will be added to the contact group via a Select Employees dialog box.

When adding a contact to a contact group using drag and drop, you may specify the following options.

- Do not add the employing company
- Always add the employing company
- OfficeTalk will prompt you asking whether or not you wish to add the employing company.

Select the required options and press **OK** to save your changes.

Mail Mode

Overview

OfficeTalk provides an easy to use mail client which lets users send and receive mail over a variety of mail transports. OfficeTalk Mail is both MAPI and VIM compliant which means that it will interface with Microsoft Mail, Microsoft Exchange Server, Lotus cc:Mail, Lotus Domino mail and many other popular Email packages. In addition, OfficeTalk mail is fully integrated with the Internet which means that all OfficeTalk users may send and receive Internet mail with only a single connection to an Internet provider. OfficeTalk lets you send mail to any other local or remote OfficeTalk user using *rich text*. This means that you can add font formatting and colour to any mail messages that you send.

Read Mail View

When you enter Mail Mode for the first time, the Read Mail View is displayed. The Read Mail View consists of three windows: a Mail window, a Message window and a Folder window. The Mail window is the uppermost window in the Read Mail View. By default, it displays mail messages in date order by showing the date, time and subject text of the message along with the sender of the message on a single line.

You can change the order in which OfficeTalk displays mail messages by clicking on the relevant header at the top of the list. For example, if you wish to order the messages by sender, then single click on the **Sender** header. For more information about sorting fields, see “Sorting and Grouping Mail” later in this chapter.

You can change which columns OfficeTalk displays in the Mail Window. Do this by positioning the cursor over the list header, pressing the right mouse button and selecting **Columns** from the context sensitive menu. For more information on selecting columns, see “Choosing Which Columns To Display” later in this chapter.

The Folder window contains two default folders. These are the Incoming Mail and the Sent Mail folders. You may add additional public or personal mail folders. For more information on folders see “Mail Folders” on page 304.

The Message window is located beneath the Mail window. It displays the body of any mail message that you select in the Mail window. The Message window is capable of displaying either plain text or rich text mail messages.

Sorting and Grouping Mail

By default, mail is shown in the Incoming Mail folder sorted by received date, showing the most recent messages at the top of the list. If you wish to sort your messages such that the oldest messages are shown at the top of the list then click on the **Received Time** header using the left mouse button. Repeatedly pressing the Received Date header will toggle between sorting in an ascending fashion and sorting in a descending fashion.

You may sort by any other field, simply by clicking on the relevant field header. Another way of sorting mail shown in the Mail window is by clicking the right mouse button in the Mail window and selecting **Sort…** from the context sensitive menu. The Sort/Group dialog box is displayed showing the Sort page.

Select the field by which you wish to sort and choose whether to sort ascending or descending by selecting the appropriate radio button. When you press **OK** the list will be redrawn using the new sort criteria.

Grouping is the same as sorting but with *headings* inserted between differing values of the grouped column. For example, you may wish to sort your mail by sender. If you did this, the resulting output may look something like this:

However, if you grouped the list by *sender*, the resulting output may look more pleasing:

By default, the message list is not grouped. To group any list, click on the header of the field by which you wish to group the list whilst keeping the **Shift** key depressed. This will group the list, in an ascending fashion. To group items in a descending fashion, click on the header once more whilst keeping the **Shift** key depressed. Another way of grouping mail shown in the Mail window is by clicking the right mouse button in the Mail window and selecting **Group…** from the context sensitive menu. The Sort/Group dialog box is displayed showing the Group page.

Select the field by which you wish to group and choose whether to sort the grouped items in an ascending or descending fashion by selecting the appropriate radio button.

Filtering Mail

Sometimes you may wish to filter the Mail window so that it displays mail sent by a specific person or mail sent on a specific date. This can be done very simply in the following way:

- If you wish to filter the Mail window to show mail sent by a specific person, then find an item of mail sent by the relevant person and click on that person's name in the Sender column using the right mouse button. The context menu is displayed.
- Choose **Filter by '*Person's Name*'** from the context menu.

The Mail window will redisplay only those messages which were sent by that particular person. If you wish to filter the Mail window by mail sent on a particular date, then this can be done in a similar way by finding a message sent on that date and clicking on the date using the right mouse button and then selecting **Filter by '*Date*'** from the context menu.

You may remove the filter by clicking the right mouse button in the Mail window and selecting **Disable Filter** from the context menu.

OfficeTalk lets you perform more advanced filtering. For example, you may wish to filter the Mail window to show messages sent by a particular person between certain dates. For more information, see "Filtering Data" on page 339.

Choosing Which Columns To Display

By default, OfficeTalk shows the following columns in each folder:

Folder	Columns
Incoming Mail	Is Urgent, Has Attachment, Sender, Subject, Received Time, Link.
Sent Mail	Is Urgent, Has Attachment, Type, Receiver, Message, Sent Time, Status, Link.
All personal folders	Status, Has Attachment, Sender, Subject, Received Time, Link
Bulletin boards	Status, Sender, Subject, Received Time, Link

You may change which columns are displayed for each of the folders above in the following way:

- Open the folder whose displayed columns you wish to change.
- Click the right mouse button in the Mail window and select **Columns…** from the context sensitive menu. The Columns dialog box is displayed showing a list of the possible columns that may be displayed for the list.
- Use the **Add** and **Remove** buttons to move the columns that you wish to display from the **Not Shown** list into the **Shown** list. Press **OK** to save your changes.

Compose View

You can select the Compose View by pressing the button located in the Shortcut bar within Mail mode.

The Compose View consists of a Recipients Address Book window at the top left of the view, containing a list of recipients to whom you may send mail, a Selected Recipients window at the bottom left of the view, containing a list of selected recipients, a To: window, a Subject window and a Message window.

In addition to the To: window, you may also display a Cc: and a Bcc: window. You can do this by selecting **Edit Profile** from the **Edit** menu. This will display the Profile dialog box. Select the Mail page.

The To, Cc and Bcc fields may be used for typing in recipients directly. Once entered use Ctrl+K to check the names

Select the **Show Cc window** and **Show Bcc window** check boxes accordingly. When you press **OK**, the Cc: and Bcc: windows will appear under the To: window. The Mail page of the Profile dialog box also lets you choose whether or not to display the Recipient Address Book window and the Selected Recipients window.

Sending Mail

To send mail, select the Compose View by pressing button. From compose view, you may send mail messages to other OfficeTalk users, Internet recipients, Microsoft Exchange users, Microsoft Outlook Users, Lotus cc:Mail users and Lotus Domino users or any recipients that use MAPI or VIM clients.

Sending a Mail Message to an OfficeTalk User

Sending mail to another OfficeTalk user is very simple and may be done in the following way:

- Double click on each user that you wish to send mail to from the list of users in the Recipient Address Book window.
- Enter a subject into the **Subject** field.
- Enter your message into the Message window. You may use the format bar to add formatting and colour to the text that you enter.
- Press the button. The Send Mail dialog box is displayed.
- Specify a priority for the mail message if you wish and press the **Send** button. Instead of pressing the button you can press **Ctrl+S** instead. This will send the message as normal priority and will not display the Send Mail dialog box.

Sending Mail to Internet Recipients

To send a simple message to an Internet recipient enter the Compose Mail View by pressing the button and do the following:

- Enter a subject for the message into the **Subject** field.
- Enter the message text into the Message Window underneath.
- Type the Internet address of the recipient(s) in the To: window.

- Press the button. OfficeTalk will display the Send Mail dialog box. Press the **Send** button in the dialog box. The mail message will then be delivered.

Note: Instead of pressing the button you can press **Ctrl+S** which will by-pass the Send Mail dialog box altogether and will send the message immediately.

You can store an entry for your Internet recipients in the Contacts address book. This means you can choose the Internet recipients name from a list rather than having to manually enter their e-mail address in the To: recipient window. For more information, see "The Contact Address Book" on page 292.

Note: Before you can send mail to Internet recipients, the Internet Mail service must be set up for your Workgroup and you must be logged onto the service. For more information, see the "Internet Service Settings" on page 312.

The Recipients Address Book Window

The Recipients Address Book window is located at the top left of Compose View, titled **Send To**. The Recipients Address Book window contains all the address books defined within OfficeTalk. The first address book listed in this window contains a list of all local OfficeTalk users. Any of the users listed may be selected as recipients of a message by simply double clicking on the relevant user(s). If there are any remote workgroups defined, the Recipients Address Book will contain expandable entries representing those remote workgroups. Expanding a remote workgroup entry will give you access to all the users held within that remote workgroup. Double clicking on any of the remote users will select those users as recipients of a message.

The Recipients Address Book contains an entry called ‘Contacts’. Double clicking on this entry will pop up the Contact Address Book which contains a list of contacts for which you have specified an e-mail address. For more information see the "The Contact Address Book" on page 292.

If you have access to any Contact Groups held in the Workgroup, then the Recipients Address Book will contain a Contact Groups entry. Expanding this entry will show a list of Contact groups. Double clicking on a contact group will select all contacts that belong to the contact group and who have e-mail addresses, as recipients of the message.

OfficeTalk provides a MAPI e-mail service and a VIM e-mail service for tight integration with Microsoft and Lotus messaging systems. If you are logged on to the MAPI or VIM Mail services, then the Recipients Address Book will contain a MAPI Address Book and/or a VIM Address Book. Double clicking on either address book displays a dialog box, letting you select MAPI or VIM recipients. For more information, see “The MAPI and VIM Address Books” on page 292.

Attaching Files to a Message

OfficeTalk lets you attach any kind of file to a mail message. You can attach anything from a bitmap file to an executable program file. You

can attach a file by pressing the button. Pressing this button will display the Attach dialog box. Choose the relevant file and press **OK**. The file will be attached to the message and will appear in the Message Window as an icon.

Checking Names

When you send a mail message after having manually entered the recipients into the **To:**, **Cc:** or **Bcc:** fields, OfficeTalk tries to match the manually entered recipients with entries in one or more of the address books used by Mail mode. If one or more recipients were not matched, OfficeTalk does not send the mail message, but instead displays a Check Names dialog box for each of the recipients that were unknown. This dialog box lets you create a new entry for the recipient in the contact address book.

You can try to match the manually entered recipients with address book

entries prior to sending the message by pressing the button, located in the shortcut bar in Mail mode. This function tries to match the manually entered recipients by using the list of local and remote OfficeTalk users, the MAPI and VIM address book (if enabled) the Contacts address book and the list of user and contact groups. Any recipients that match an entry in one of the address books are underlined. Double clicking on an underlined recipient will bring up a window showing the recipient details.

If you manually entered the first few letters of a recipient's name, OfficeTalk will try to match the recipient. However, if OfficeTalk finds one or more possible matches, it will display the Check Names dialog box, listing all the matched recipients and will ask you to select the appropriate one. You may either select an existing match or you may create a new entry in the contact address book.

You may manually enter more than one recipient at a time by separating each recipient with a ';' character. If your workgroup contained the users 'John Smith' and 'Bob Brown' and you entered **Bob; John S** into the **To:** field, OfficeTalk will resolve this to **Bob Brown**; **John Smith**

Addressing Recipients using the To:, Cc: and Bcc: fields

By default, only the To: field is displayed. You can show the Cc and Bcc fields by selecting ***Edit Profile…***

If you wish to manually type in recipients then OfficeTalk provides a **To:**, **Cc:** and **Bcc:** field into which you may enter the recipient's name. You can enter OfficeTalk user names, Internet recipient names and addresses, MAPI or VIM recipients (if the relevant service is active), *from the* **Edit** *menu and choosing the relevant options in the Mail page of the Profile dialog box*

contact names, contact group names and user group names. If the recipient has an Internet address but is not held within any of the address books, OfficeTalk lets you type in the Internet address instead. You can address several recipients by separating the recipients with the semi-colon ‘;’ character.

If you are manually entering an Internet address but you wish to specify both a name and address, then enter the address using the format “First-Name Surname”<mailbox@company.com>. For example: “Tim Lawes” <tlawes@sareen.com>.

The Contact Address Book

You can use the contact address book to select recipients for your mail. The contact address book shows all contacts in the Contacts database who have been assigned an e-mail address and a mail service. The e-mail address and mail service together describe where and how OfficeTalk will send mail to that recipient.

You can quickly search for a contact by typing in the first few letters of the contact’s surname into the quick search field at the top of the dialog box. If a match is found the recipient is selected in the left hand window. To add the contact as a recipient, select the contact in the left hand window and press the **To->**, **Cc->** or **Bcc->** button accordingly.

You can view the properties of a contact by selecting the contact in the left hand list and pressing the **Properties** button.

When you press **OK**, the chosen recipients will be added to the appropriate recipient windows.

The MAPI and VIM Address Books

OfficeTalk provides a MAPI e-mail service and a VIM e-mail service for tight integration with Microsoft and Lotus messaging systems. If you are logged on to the MAPI e-mail service then the **Send To** window will contain a **MAPI Service** address book. You may open this address book by double clicking on the **MAPI Service** entry in the **Send To** window. A MAPI Address book dialog box is displayed.

The table below summarises the various options available in the MAPI Address book.

Options	Description
Show Names From The	Select the address list that contains the names that you want.
Type Name Or Select From List	Type a name or select one from the list. As you type the letters of the name, the address list scrolls to match the letters that you type.
To/Cc/Bcc	Adds the selected names to the corresponding box on the right.
Message Recipients	Displays the names that you have added. Multiple names are separated by a semicolon (;). When you choose **OK**, these names are added to the Recipients window.
New	Opens the New Entry dialog box, where you can create a new entry for your personal address book or for the active message only.
Properties	Displays details about the selected name.
Find	Opens the Find dialog box, where you can specify advanced conditions to search for names. When the search is complete, all matching names are displayed in the search results list.

If you are logged on to the VIM e-mail service then the **Send To** window will contain a **VIM Service** address book. You may open this address book by double clicking on the **VIM Service** entry in the **Send To** window. A VIM Address book dialog box is displayed.

The table below summarises the various options available in the VIM Address book.

Options	Description
Address	Use this field to perform a quick search lookup on the required recipient. Type the first few letters of the recipient's name into this field. Any matches will be highlighted in the window below.
Address Book	Choose which VIM address book to look in.
To/Cc/Bcc	Adds the selected names to the corresponding box below as To, CC or BCC recipients.
Recipients	Displays the names that you have added. When you choose **OK**, these names are added to the Recipients window.
Remove	Remove recipients from the **Recipients** list by selecting them and pressing the **Remove** button.

Formatting Messages

OfficeTalk lets you send rich text mail messages. You can use the format bar at the top of Compose View to add font formatting and colour to your message. To format certain characters within the message, do the following:

- Select the characters that you wish to format in the Message window.
- Specify the font face and font size by selecting the appropriate font and size from the format bar at the top of the Compose View.

  You may mark the selection as bold, italic or underline by pressing one of the , or buttons. Alternatively press **Ctrl+B**, **Ctrl+I** or **Ctrl+U** respectively.
- Add colour to your selection by pressing the button and choosing one of the drop down colours.

- You may left, right or centre justify text within a particular paragraph by selecting the text and pressing either the , or button.

Sending Urgent Mail

When you press the button in order to send a mail message, OfficeTalk displays a Send Mail dialog box showing the Priority page. This page lets you specify what priority to attach to the mail message. You may choose between normal and urgent priority. By default, all messages are sent as normal priority. You may mark the mail as urgent by selecting the **Urgent** radio button.

If you send an urgent message to another OfficeTalk user then a ! marker will be shown next to the mail message when it arrives in their Incoming Mail folder.

Note: Rules may be set up to perform actions based upon the sending or receiving of urgent messages. For more information, see "Rules" on page 314 later in this chapter.

Routing Mail

Note that mail may only be routed amongst local users. Mail destined for internet recipients, for example, will be sent as soon as the last user in the route list passes the message on

Sometimes you may wish to circulate a document amongst several people, letting them review and comment on the document, in turn. OfficeTalk lets you do this through *mail routing*. Mail routing works only with the users in your local workgroup. The mail message is sent to the first person in the list. Once that person has read the mail message, he can *pass on* the message by pressing a button located at the top of the message. The message is then sent to the next person on the list. This continues until the mail message has been circulated around the entire list. To route a mail message, do the following:

- Create a mail message containing a subject, some body text and any attached documents as appropriate.
- Select the recipients of the message as usual. Note that non-OfficeTalk recipients may be specified but these recipients will be mailed the message after the last person in the route list passes the message on.
- Press the button. The Send Mail dialog box is displayed. Select the Route page.

- Select the **Send As Routed Document** check box and then using the **To Top**, **To Bottom**, **Raise** and **Lower** buttons, specify the order in which the users should receive the message.
- If you have not selected yourself as a recipient of the message, then you may optionally check the **Return To Sender** check box if you wish to be mailed the document as soon as the last person has passed on the message.
- You may specify that each recipient must enter their password in order to pass on the message to the next recipient. Do this by checking the **Require Signature** check box.

Send the message by pressing the **Send** button. The first recipient will be sent the mail message immediately. When the recipient opens the message, OfficeTalk will display a Pass on document button at the top of the message. When the recipient has read the message and made any modifications to any attached documents then pressing this button will automatically mail the message and the updated document to the next recipient in the circulation list.

Note: If a message containing a file attachment is circulated amongst a set of users then each user's message will reference the same physical attachment file. This makes it possible for one user to modify a document contained in the message such that the next user in the list receives any changes made.

Since a routed message does not get sent to external recipients until the last user has passed on the message then this functionality is extremely useful for those organisations which require thorough checking of correspondence before it is sent to the intended recipient.

Advanced Send Options

The Advanced page of the Send Mail dialog box lets you specify additional advanced options for when sending a mail message. OfficeTalk provides two advanced options for sending messages. These are:

- Sending delayed messages
- Specifying read confirmation

Sending Delayed Messages

OfficeTalk lets you send a delayed mail message. This is sometimes useful if you wish to remind yourself or a colleague to do something in the future by sending them a mail message. You can send a delayed message in the following way:

- Compose the message in the normal way and then press the button. The Send Mail dialog box is displayed. Select the Advanced page.
- Check the **Delayed Send** check box and specify a date and time when the message should be sent. Press the **Send** button.

The message will not arrive at the recipients until after the date and time specified.

Note: Delaying the sending of a message only works for messages sent to local OfficeTalk users. Delayed messages sent to other recipients are sent immediately.

Specifying Read Confirmation

Sometimes when you send a mail message to someone, you would like to know when they received the message. You can instruct OfficeTalk to send you a confirmation message when the recipient of your message has opened the message. You can do this in the following way:

- Compose the message in the normal way and then press the button. The Send Mail dialog box is displayed. Select the Advanced page.
- Check the **Require Read Confirmation** check box. Press the **Send** button. When the message is opened, you will be sent back a confirmation message informing you that the message has been read.

Note: Read Confirmation only works for messages sent to local or remote OfficeTalk users. Messages sent to other recipients will not return a read confirmation message.

Checking For New Mail

OfficeTalk provides both manual and automated ways for checking for new incoming mail.

Checking Manually

You can check for new mail manually by pressing the button located in the Shortcut bar in Mail mode. When you do this, OfficeTalk checks each mail service that you use for receiving mail and adds any new mail to your Incoming Mail folder.

You may wish to check a specific mail service for new incoming mail, such as the Internet Mail Service. You can do this using the menu. Select **Check For New Mail** from the **Mail** menu in Mail mode.

From the sub-menu, select **Using Internet Service**. OfficeTalk will check only the Internet Mail Service for incoming mail sent to you. Each service has a shortcut key which is shown next to each menu item in the sub menu. For example, the shortcut key to check for new mail using *all* services is **Ctrl+M**. The shortcut key for checking for new mail using individual mail services will depend upon which services are currently loaded. Press **Ctrl+1** to check for new mail using the first mail service shown, **Ctrl+2** to check using the second mail service shown and so on.

Note: If your machine is set up as a gateway machine for Internet Mail then, when you check for new mail, OfficeTalk first connects to the Internet and checks on behalf of all users in the workgroup who are currently set up to use the Internet mail service. For more information on setting up your machine as an Internet Mail Gateway, see "Setting Up Per-User Information" on page 67.

Automated Checking

By default OfficeTalk checks the workgroup database for new local mail every 5 minutes. This period may be changed from within Supervisor mode. For more information, see "Polling the Database" on page 101. This section also describes how you can set up a single machine to check for new mail for all users thereby reducing network traffic.

You may independently specify how frequently to check for new MAPI and VIM mail. For more information, see MAPI Service Settings and "VIM Service Settings" on page 311.

If your machine is a gateway machine for the Internet mail service then you may specify a comprehensive connection schedule, letting you choose which days of the week and which times on those days that you wish to connect to the Internet in order to receive Internet mail for the entire workgroup. For more information, see “Scheduling Connection Times” on page 72.

Viewing Incoming Mail

All messages sent to you will automatically appear in your Incoming Mail folder. When you first enter Mail mode, the Mail window will display the contents of the Incoming Mail folder. If the Mail window is displaying the contents of another folder, you can view the contents of the Incoming Mail folder by double clicking on it in the Folder window.

The Mail window displays mail messages by showing the date, time and subject text of the message along with the sender of the message on a single line. The full list of default columns is as follows:

Column	Description
Is Urgent	Shows a marker if the mail message is marked as urgent.
Has Attachment	Shows a marker if this message contains a binary attachment
Status	Shows a marker if the message has been opened or a marker if the message has not yet been opened.
Sender	The sender’s name and e-mail address
Subject	The subject of the message
Received Time	The time when the message was received
Link	Shows a marker if this message is linked to some other data within OfficeTalk.

You can change the columns shown. For more information on this, see "Choosing Which Columns To Display" on page 286 . To read a message, single click the left mouse on the relevant message in the Mail window. When you do this, the body of the message is displayed in the Message window along with any attached files.

To read the next message in the Mail Window, press the button located in the Shortcut bar in Mail mode. To read the previous message

in the Mail Window, press the button located in the Shortcut bar in Mail mode.

If a message has already been read then it will be displayed with a marker. If the message has not yet been read then the message header is displayed in bold with a marker.

In addition to showing Incoming Mail, the Mail window can display messages stored in any of the folders in the Folder window. For more information about folders see "Mail Folders" on page 304.

Viewing Sent Mail

When you send mail to people, OfficeTalk keeps a copy of each message that you send in the Sent Mail folder. You can open the Sent Mail folder by double clicking on the folder from within Read View.

The columns shown in the Sent Mail folder are slightly different from those shown in the Incoming Mail folder. The Sent Mail folder contains the following columns:

Column	Description
Is Urgent	Shows a ! marker if the mail message is marked as urgent.
Has Attachment	Shows a marker if this message contains a binary attachment
Receiver	The receiver's name and e-mail address
Message	The subject of the message
Sent Time	The time when the message was sent
Status	Shows status information for the sent mail.
Link	Shows a marker if this message is linked to some other data within OfficeTalk.

Sent Mail Status

OfficeTalk displays the status of sent messages in the Status column. For a message sent to a local OfficeTalk user, OfficeTalk displays whether or not the message has been opened. If the message has been opened, the status column indicates when the message was opened.

When you send mail to an Internet recipient, the Status column indicates whether or not the gateway machine has sent the message to the Internet. The status of the message in this case is either 'Sent' or 'Waiting to be Sent'.

Resending Mail

OfficeTalk lets you re-send any message existing in the Sent Mail folder. You can do this by clicking on the message using the right mouse button and selecting **Resend** from the context menu. OfficeTalk will switch to Compose View, setting up the To: field, subject field and message window with the appropriate content. Press **Ctrl+S** to re-send the message.

Disabling Sent Mail

By default, OfficeTalk will keep a sent mail record for each recipient that you send mail to. You may disable sent mail in the following way:

- Select **Preferences** from the **Options** menu. The Preferences dialog box is displayed. Select the Send page.

- Uncheck the **Save a copy of sent messages in the Sent Mail folder** check box. Press **OK** to save your changes. The next time you send a mail message, OfficeTalk will no longer save a copy of the message in the Sent Mail folder.

Replying to Messages

You can reply to a received message by selecting the message and pressing the button located in the Shortcut bar in Mail mode. When you do this, the view will switch to Compose View and OfficeTalk will automatically set up the subject, prefixed with '**Re:**', and will copy the original text positioning the caret ready for you to type in your reply. The original sender of the message will be set up as the recipient of the replying message. Once you have entered your reply into the message window, press **Ctrl+S** to send the message.

Note: You may also reply to a message by clicking the right mouse button on the message and selecting **Reply** from the context sensitive menu.

The button may be used to reply to the author of the original message. If you wish to reply to both the author and all the recipients of the original message, then select the message and press the button. This will behave exactly as described above except that all the recipients of the original message will become recipients of the new message.

Note: When you reply to a message, any attachments in the original message are also included in the reply message.

Forwarding Received Messages

You can forward a received message to another person by selecting the

message from the Mail window and pressing the button located in the Shortcut bar in Mail mode. When you do this, the view will switch to Compose View and OfficeTalk will automatically set up the subject, prefixed with 'FW:', and will copy the original text, positioning the caret ready for you to add any further comments to the message. Select a recipient for the message in the usual way and press **Ctrl+S** to send the message.

Note: When you forward a message, any attachments in the original message are also included in the forwarded message.

Categorising Mail

OfficeTalk lets you set up one or more categories which may be used to classify your mail. To mark a mail message as belonging to a particular category, do the following:

- Bring up the Mail property sheet by clicking on the received mail item or sent mail item in the Mail window using the right mouse button and selecting **Edit** from the context menu.
- Select the Categories page. The Categories page will display a list of mail related categories in the bottom window. Each category has a check box to the left of the description.
- Select one or more check boxes representing the classification of the message into the relevant categories.
- Press **OK** to save your changes.

You may add your own private categories by typing the name of the category into the Categories window in the Categories page and pressing the **Update** button. The new category will appear, checked, in the bottom window. Press **OK** to save your changes.

If you wish to add the mail message to categories in another category set, for example, the Global category set, then select the 'Global Categories' from the **Set** drop down list. The list of available categories in that category set will appear in the bottom window. Select one or more categories and press **OK** to save your changes.

For more information on Categories, see "Using Categories" on page 349.

Public and Private Mail

When you send and receive mail to and from contacts held in your contact address book, you can view the messages as history items from within Contact mode. By default, no other users may see your e-mail messages.

Changing the Default Setting

You may change whether or not e-mail sent or received, by you, to and from contacts, is publicly available by default in the following way:

- From within Mail mode, select **Preferences** from the **Options** menu. The Preferences dialog box is displayed. Select the Access page.

- E-mail sent from now on may be made publicly available, by default, by selecting the **Sent and received mail is publicly available to all users by default** radio button. Selecting the other radio button will make all mail, sent or received from now on, private to you by default.

Marking Individual Messages as Public or Private

You may mark individual mail messages as private or publicly available in the following way:

If you cannot see the Access page in the Mail property sheet then a supervisor has denied you the ability to change the mail access

- Bring up the Mail property sheet by clicking on the received mail item or sent mail item in the Mail window using the right mouse button and selecting **Edit** from the context menu.

- Select the Access page. Select either the **Public** or **Private** radio button as appropriate and press **OK** to save your changes.

When you send a mail message, you may specify whether or not it will be private or public in the following way:

If you cannot see the Access page in the Mail property sheet then a supervisor has denied you the ability to change the mail access

- Compose the message in the normal way and then press the button. The Send Mail dialog box is displayed. Select the Access page.

- Select either the **Public** or **Private** radio button as appropriate and press **Send**. Note that if you send the message by pressing **Ctrl+S**, you will not be given the chance to change the default setting.

Mail Folders

Several different types of folders are displayed in the Folder window in Read View. They are:

Incoming Mail folder

Sent Mail folder

Bulletin Board folder (public discussion folder)

Personal Mail folder

Incoming Mail Folder

When OfficeTalk finds new mail for you, it is automatically placed in your Incoming Mail folder. You can view the contents of the Incoming Mail folder by double clicking on it in the Folder Window. Its contents are displayed in the Mail window.

Note: You can also open a folder by selecting it using the right mouse button and selecting **Open** from the context sensitive menu.

Sent Mail Folder

Whenever you send a mail message, a copy of the message is automatically placed in the Sent Mail folder. 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 “Viewing Sent Mail” on page 300.

Bulletin Boards

A *bulletin board* is a public folder. Received and sent messages may be moved into a bulletin board and you may also send messages directly to a bulletin board. Any message placed in or sent to a bulletin board may be read by any OfficeTalk user, provided that the user has been granted sufficient access to the bulletin board. Bulletin boards are useful for discussion groups or for posting public information. For more information, see "Using Bulletin Boards" on page 307.

Personal Folders

A personal mail folder is a convenient place to which to move messages 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, select **New Folder** from the **Edit** menu. A New Folder dialog box is displayed.

Enter the name of the new folder into the **Name** field and press **OK**. The new folder will appear in the Folder window in alphabetical order underneath the Incoming Mail folder and the Sent Mail folder.

The *red* numbers along the right margin of the Folder window indicate the number of messages stored in each folder.

Creating Sub Folders

OfficeTalk lets you create hierarchical folders enabling you to structure the way in which you store mail. For example, you may create a folder called Personal Mail which is to be the root folder for all your personal mail. Under this folder you may wish to create a folder representing each person that sends you personal mail. You may wish the structure to look similar to the picture below:

The folders representing each of the personal contacts are *sub folders* of the 'Personal' folder. To create a sub folder, simply drag an existing folder and drop it onto another folder. The folder that you drag will become a sub folder of the receiving folder.

Renaming Folders

You can change the name of a folder by selecting the folder and then selecting **Edit Folder** from the **Edit** menu. A Folder dialog box is displayed. Modify the contents of the **Name** field and then press **OK**.

A quicker way to edit the name of a folder is to select the folder and then press the **F2** key. The folder name will become editable. Modify the name as appropriate and press the **Enter** key.

Deleting Personal Mail Folders

You can delete folders in one of two ways:

- Select the folder and press the **Delete** key on your keyboard.

or

- Drag the folder and drop it onto the Deleted Items button in the Shortcut bar.

OfficeTalk will ask you to confirm that you wish to send the selected items to the recycle bin.

If the folder contains mail messages, the messages will also be removed, however the messages will be kept inside the folder within the recycle bin and so in order to restore those messages from the recycle bin you must restore the deleted folder.

If you wish to permanently delete a mail folder then keep the **Shift** key pressed when you press the **Delete** key. OfficeTalk will then ask you to confirm that you wish to permanently delete the items.

Any messages stored inside the folder will also be permanently deleted.

Moving Mail Messages to a Folder

You can move a message from one folder to another by dragging it from the Mail window 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. The *red* message count, next to the folder name, will increase to show the new number of messages stored in that folder.

Opening a Folder

You can open a folder to view its contents by double clicking on it in the Folder window using the left mouse button. Alternatively, select the folder using the right mouse button and choose **Open** from the context sensitive menu.

When you open the folder, the Mail window will display the contents of the selected folder. The name of the opened folder is shown in the Mail Window title.

Using Bulletin Boards

Bulletin boards are public mail folders to which you may send or move messages. Messages in a bulletin board may be read by any user who has sufficient access rights. Furthermore, users may reply to specific messages in the bulletin board. Consequently, bulletin boards may be used as discussion groups, working in a similar way to news groups on the Internet.

The fundamental difference between bulletin boards and mail folders is that it is possible for users to reply to messages held within bulletin boards rather than to the authors of the messages. OfficeTalk represents a reply to a message by indenting the message reply underneath the original message. The replies to a particular message may be displayed by pressing the ⊞ button to the left of the message entry.

Note: OfficeTalk displays any unread messages in a bold font. Any messages that you have read are displayed in the normal font chosen for the message list window.

Sending Messages to a Bulletin Board

You may send a new message to a bulletin board in the following way:

- Double click on the relevant bulletin board in the Recipient Address Book window.
- Enter a subject into the **Subject** field.
- Enter your message in the Message window. You may use the format bar to add formatting and colour to the text that you enter.
- Press **Ctrl+S** to send the message to the bulletin board.

Another way of sending a message to a bulletin board is by simply dragging the message from another folder and dropping it onto the bulletin board. You may only add top level messages to the bulletin board in this way.

Replying to a Bulletin Board Message

You may reply to a bulletin board message in the following way:

- Open the relevant bulletin board, select the message that you wish to reply to and press the button. The view will switch to Compose View and OfficeTalk will automatically set up the subject, prefixed with 'Re:', and will indent the original text, positioning the caret ready for you to type in your reply. The bulletin board containing the message will be set up as the recipient of the message.
- Enter your reply into the message window and press **Ctrl+S** to send the message.

Your message will appear indented under the original message in the bulletin board.

Editing Messages Posted to a Bulletin Board

If you use bulletin boards as a way of posting public information, then it is likely that this information will need to be updated at some point. For this reason, OfficeTalk lets you edit the contents of a bulletin board message. You can edit the contents of a bulletin board message in the following way:

- Click on the bulletin board message that you wish to edit using the right mouse button and select **Edit** from the context menu. The Mail property sheet is displayed.
- Select the Notes page. The body of the message is shown in this page. Make any changes to the message body and press **OK**.

The Mail Services

OfficeTalk provides a number of different mail services which may be used to send and receive mail over different mail transports. For example, in addition to using the OfficeTalk Mail service, you may also send and receive mail using the following mail services:

- **MAPI Service** - providing connectivity to other MAPI compliant applications such as Microsoft Exchange and Microsoft Outlook.
- **VIM Service** - providing connectivity to Lotus Notes mail and cc:Mail.
- **Internet Service -** providing connectivity to all users of Internet mail world-wide.

Note, this option is available only to supervisors

To activate any of the services, select **Mail Services** from the **Options** menu. The Mail Services dialog box is displayed.

Check the check box next to the mail service that you wish to activate and press the **Settings…** button to specify service specific information. The dialog box that is shown will depend upon the mail service that you are setting up.

MAPI Service Settings

Selecting the MAPI Service and pressing the **Settings…** button will display the MAPI User dialog box showing the Credentials page.

Specify the MAPI Profile that you wish to load when the MAPI Service is started. Dropping down the drop list will show a list of available profiles set up on the current machine. The same list of MAPI profiles is available in the Mail and Fax applet in Control Panel.

Note: If you are using Windows for Workgroups 3.x then you should enter your Microsoft Mail login name into the Login Profile field. You should also specify your Microsoft Mail password in the password field.

The Address page is applicable to you only if you have specified the MAPI Mail service as your default mail service. The Address page lets you specify an address by which other users may mail you over the MAPI messaging transport. You may specify any address which may be recognised by one of the mail services contained in the selected MAPI profile.

The Settings page in the MAPI User dialog box is applicable to you only if you have specified the MAPI Mail service as your default mail service. This page lets you specify whether or not you plan to receive your mail using Microsoft Exchange in preference to the OfficeTalk mail client. If you specify this to be the case, by selecting the **Using Microsoft Exchange** radio button, then, when other users invite you to meetings or assign you tasks, you will receive the appropriate MAPI form into your Microsoft Exchange incoming mail folder.

The Checking page in the MAPI User dialog box lets you specify how frequently to automatically check for new mail using the MAPI service. If you wish OfficeTalk to automatically check for new mail using the MAPI Mail service then, ensure that the **Check for mail for this service on this machine** check box is checked and specify the number of minutes between checks.

VIM Service Settings

Selecting the VIM Service and pressing the **Settings…** button will display the VIM User dialog box showing the Credentials page.

Specify your VIM Login name and password into the relevant fields. The Checking page in the VIM User dialog box lets you specify how frequently to automatically check for new mail using the VIM service.

If you wish OfficeTalk to automatically check for new mail using the VIM mail service then, ensure that the **Check for mail for this service on this machine** check box is checked and specify the number of minutes between checks.

Internet Service Settings

Selecting the Internet Service and pressing the **Settings…** button will display the Internet User dialog box, showing the Address page.

The Address page lets you specify your mailbox name. The name you enter in the **Mailbox** field specifies your full Internet address within the workgroup and determines the mail that is directed to your Incoming Mail folder. For example, if the workgroup address has been set up by a Supervisor as **company.com** and you specify your mail box name as **John**, then you will receive all mail received for **john@company.com**. If a supervisor sets up an additional workgroup address, **thiscomp.com**, then you will receive mail sent to both **john@company.com** and **john@thiscomp.com**.

Note: It is not possible for two users to share the same mailbox name. If you enter an exiting mailbox name into the **mailbox** field then OfficeTalk will warn you of the problem and will not let you save your changes.

The **Workgroup address** and **Custom address** radio buttons let you specify your e-mail address as seen by recipients of your mail. For example, a Supervisor may set up two workgroup addresses,

company.com and **thiscomp.com**, say. Selecting **thiscomp.com** from the drop down list will specify your out-going e-mail address as **john@thiscomp.com**. It will not affect what mail you receive. Alternatively, you may enter a custom workgroup address by selecting the **Custom address** radio button and entering, for example, **myhome.com**. This will specify your out-going e-mail address as **john@myhome.com**. Note that when recipients of your mail reply to subsequent messages sent by you, they will send the mail to this address so you should ensure that the address entered corresponds to a valid e-mail address.

The POP3 page lets you specify your own POP3 details if relevant. If the workgroup receives mail using SMTP rather than POP3 or receives mail via one multiple user POP3 mailbox using a single POP3 login name and password then you should leave this page blank.

If your company collects mail for each of its users from a series of single user POP3 accounts then the details of your POP3 account should be entered into this page. If this is the case, specify the login name and password for the POP3 account used to collect mail for you.

The Format page in the Internet User dialog box is only available if you have specified the Internet Mail service as your default mail service. This page lets you specify whether mail attachments sent to you by other OfficeTalk users should be MIME encoded or UU encoded. This is useful only if you plan to receive mail sent to you from other users using a mail client other than OfficeTalk which may recognise only one of the encoding formats.

Additionally, you may specify whether you are to receive messages in plain text format or in the original rich text format.

Note: If you choose rich text format and you receive your Internet mail using a client other than OfficeTalk, then you will receive the message in plain text along with an attachment containing the rich text version of the message. You will need a rich text viewer, such as Wordpad, in order to be able to successfully read the rich text message attachment.

The Forwarding page is useful if you wish to auto forward mail arriving for you to another user or address. This functionality is particularly useful if, for example, you are going away on holiday and will not be logging into OfficeTalk during that time and want your mail to be forwarded to a colleague or assistant.

To forward your mail to another user, select the **Forward to user** radio button and select the appropriate user from the drop down list. To forward your mail to an external e-mail address, select the **Forward to address** radio button and specify the required address.

Checking the **Keep a copy** check box will ensure that you receive each incoming message as well as the user or address specified.

Rules

You may designate any machine as a Rule Server so that your rules are performed even if you are not logged into OfficeTalk. *For more information, see "Mail Rule Service" on page 88.*

OfficeTalk has a simple rules engine which lets you automate certain activities when mail is sent and received. For example, you may be going on holiday and for a two week period you may wish to forward your mail to a colleague or to an Internet mail address. Or you may wish to automatically file all incoming mail from your boss into a folder called **Important**. OfficeTalk lets you do both these things and more.

A rule comprises an event, a condition and an action. For example, the event may be ‘On Receiving mail’, the condition may be ‘Sender is my boss’ and the action may be ‘Move mail to the Important folder’.

Creating a new Rule

To create a new rule, do the following: Select **Rules…** from the **Mail** menu. The Rules dialog box is displayed. To add a new rule, press the **New** button. A Rule wizard is displayed showing the Details page.

Enter a name for the rule, for example, ‘File all mail from boss to Important folder’. By default, the rule is enabled. You may disable the rule by un-checking the **Enable** check box. By default, the rule will be private to you. If you are a Supervisor, then you may make this rule public to all users by checking the **Public** check box.

Press **Next** to show the Event page. Select the event for which you wish the action to be performed. In the case of the example, you would select the event ‘On Receive mail’.

Press **Next** to show the Condition page. Select the condition which must hold true for the action to be performed. In the case of the example, the condition would be ‘Mail Sender is specific OfficeTalk User’. When you select this condition, a dropdown list of OfficeTalk users will appear. Select your boss from this list.

Press **Next** to show the Action page. Select the action that you wish to perform. In the case of the example, the action will be ‘Move to folder’. When you select this action, a dropdown list of mail folders will appear.

Select the folder to which you wish to file the mail. Press **Finish**. The rule is now active.

Events

OfficeTalk can perform automated actions on the following events:

Event	Description
On Receiving mail	When mail is received into the Incoming Mail folder.
On Sending mail	When mail is sent by you.

Conditions

OfficeTalk will perform automated actions only if one of the following conditions is met:

Condition	Event	Description
Always	Sending/ Receiving	The action is performed every time mail is sent or received.
Never	Sending/ Receiving	The action is never performed.
Mail sent from an OfficeTalk user	Receiving	The action is performed every time mail is received from an OfficeTalk user.
Mail sent from a specific user	Receiving	The action is performed every time mail is received from a specific OfficeTalk user. The Condition page contains a drop down of local OfficeTalk users to choose from.
Mail sent from non OfficeTalk user	Receiving	The action is performed every time mail is received from a non-OfficeTalk user, for example, from someone over the Internet.
Sender address contains	Receiving	The action is performed every time mail is received from a person whose address contains certain text. A **contains text** field is shown in the Condition page letting you enter some qualifying text.
Body contains	Sending/ Receiving	The action is performed every time mail is sent or received with the body of the message containing certain text. A **contains text** field is shown in the Condition page letting you enter some qualifying text.
Subject contains	Sending/ Receiving	The action is performed every time mail is sent or received with the subject of

		the message containing certain text. A **contains text** field is shown in the Condition page letting you enter some qualifying text.
Mail is urgent	Sending/ Receiving	The action is performed every time mail is sent or received and the message is marked as urgent.
Mail is not urgent	Sending/ Receiving	The action is performed every time mail is sent or received and the message is *not* marked as urgent.
Mail received between dates	Receiving	The action is performed every time mail is received between two specific dates. The Condition page contains two fields for entering the two dates.
Mail received outside dates	Receiving	The action is performed every time mail is received outside two specific dates. The Condition page contains two fields for entering the two dates.
Mail has attachment	Receiving	The action is performed every time mail is received containing attached files.

Actions

OfficeTalk is capable of performing the following actions:

Action	Description
Pop up message box	The Action page contains a text field for entering the specific text that the message box will contain.
Add sender to contact address book	The sender of the message is added as a contact to the contact database if he does not already exist as a contact. The e-mail address is automatically set up.
Create conversation for incoming mail	A conversation is created containing the body of the mail message. If a contact does not already exist which represents the sender then a new contact is created and the conversation is associated with the contact.
Move message to folder	Moves the message to a specific folder. The Action page contains a drop down list of available mail folders to choose from.
Copy message to folder	Copies the message to a specific folder. The Action page contains a drop down list of available mail folders to choose from. The original message remains in the Incoming folder.
Redirect to OfficeTalk user	Redirects mail to a specific OfficeTalk user. The mail will not arrive in the Incoming mail folder. The Action page contains a drop down list of users to choose from.
Redirect to e-mail address	Redirects mail to a specified e-mail address. The mail will not arrive in the Incoming mail folder. The Action page contains a field in which to enter the e-mail address.
Forward to OfficeTalk user	Forwards mail to a specific OfficeTalk user. The mail will also arrive in the Incoming mail folder. The Action page contains a drop down list of users to choose from.
Forward to e-mail address	Forwards mail to a specified e-mail address. The mail will also arrive in the Incoming mail folder. The Action page contains a field in which to enter the e-mail address.
Reply to sender	Sends an e-mail message to the sender of the message.

Send mail to Internet address	Sends an e-mail message to an Internet address.
Send mail to OfficeTalk user	Sends mail to a specific OfficeTalk user. The Action page contains a drop down list of users to choose from.

Disabling a Rule

If you wish to disable a rule temporarily, rather than deleting the rule, you can mark it as disabled. You can do this in the following way:

Select **Rules…** from the **Mail** menu. The Rules dialog box is displayed. Select the rule that you wish to disable and press the **Edit** button. A Rule dialog box is displayed with the Details page selected.

Uncheck the **Enabled** check box. The rule will now be disabled. To re-enable a disabled rule, check the **Enabled** check box.

Deleting a Rule

To delete a rule, do the following: Select **Rules…** from the **Mail** menu. The Rules dialog box is displayed. Select the rule that you wish to delete and press the **Delete** button. OfficeTalk will ask you to confirm the deletion of the rule. Press **Yes**.

Mail Preferences

OfficeTalk lets you specify certain preferences for Mail mode using the Preferences dialog box. Display the Preferences dialog box by selecting **Preferences** from the **Options** menu.

Adding a Signature

A signature is a series of characters, usually including your name, added to the end of each mail message that you send. OfficeTalk lets you choose between using no signature, using a workgroup signature, or using a personal signature.

If you select the **Use Workgroup Signature**, OfficeTalk will add the workgroup signature to the end of each message that you send. A supervisor may add a workgroup signature from Supervisor mode. For more information, see "Specifying a Workgroup E-mail Signature" on page 102.

Selecting the **Use personal signature** radio button will enable the **Text** and **File** radio buttons. Selecting the **Text** radio button will enable a text box, letting you specify a textual signature. Selecting the **File** radio button will enable the **Browse…** button letting you search for a file containing the signature text.

Searching for Mail Messages

OfficeTalk lets you search through mail messages for any text. You can do this by selecting **Search Mail** from the **Search** menu.

When you select this, the Search Mail dialog box is displayed showing the Simple page.

The Simple page lets you choose which fields to search and what text to search for. You may choose any of the following field options:

Field Option	Description
Subject field only	Searches the subject field of the message.
Subject field and message body	Searches the subject field and the message body.
All text fields	Searches all fields, including subject, body, sender and category fields.
All fields	Searches all fields, including subject, body, sender, received date, sent date and category fields.

The time taken to perform the search will depend upon the field option chosen. Electing to search through the Subject field only is a lot quicker than any of the other field options.

Select the required field option from the **Field** drop down list. Enter the text that you wish to search for into the **Text** field. Choose which mail folders to search. You may select either the **Sent and received** radio button, the **Received only** radio button or the **Sent only** radio button. If you wish to search through bulletin boards, check the **Search Bulletin Boards** check box. If you want to confine your search to a certain date range then check the **Date** check box and select the relevant date range from the **Start** and **End** date controls.

When you have specified your search criteria, press the **Search** button. OfficeTalk will perform the search and add the results into the **Results** window as they are found.

To view a particular result, select the result from the Results window and press the **Goto** button. OfficeTalk will close the dialog box, load the mail message and display it in the Read Mail window.

If you wish to perform a more complex search then you may use the Advanced tab of the Search dialog box. The Advanced page lets you build a complex search expression from a series of simple search expressions using the logical AND and logical OR operators. Additionally, the Advanced page lets you include any of the fields available in the Mail window as part of your search.

For example, you may wish to search for all mail messages whose sender address contains the characters **john@address.com** and whose received time is after 1/1/98 or for all messages that are urgent.

You may achieve this in the following way:

- From the Advanced page of the Search Mail dialog box, press the **Add…** button. This will show the Expression dialog box. Select ‘Sender’ from the **Field** field, select ‘Contains No Case’ from the **Operator** drop down and enter ‘john@address.com’ into the **Value** field. Press **OK**. The full expression will appear as a single line in the **Expressions** list in the Advanced page.

- Select the **AND** radio button and press the **Add…** button again. From the Expression dialog box, select ‘Received Date’ from the **Field** field, select ‘>=’ from the **Operator** drop down and select ‘1/1/98’ from the **Value** field. You can select the date either by typing in a date value or by pressing the button and selecting the date from the popup calendar. Press **OK**. The expression will also appear in the **Expressions** list in the Advanced page.
- Next, combine the two expression into a single line by selecting all lines in the Expression list and pressing the **Combine** button.
- Next, select the **OR** radio button and press the **Add…** button once again. From the Expression dialog box, select ‘Is Urgent’ from the **Field** field, select ‘==’ from the **Operator** drop down and select ‘TRUE’ from the **Value** field. Press **OK**. The full expression will appear as shown below:

- Perform the search by pressing the **Search** button.

Printing Mail

OfficeTalk lets you print out mail messages by selecting **Print Mail** from the **File/Print** menu. When you select this, the Print Mail dialog box is displayed showing the Details tab.

You may choose between printing the currently selected message, the currently open folder or the search results in the Search Mail dialog box. You can do this by selecting one of the **Current message**, **Open folder** and the **Mail search results** radio button.

By default, in addition to printing the body of each message, OfficeTalk also prints out the contents of each of the fields currently displayed in the Mail window. You may specify different fields to be printed by selecting the **Print using options** radio button. When you do this, the **Fields** list becomes enabled, allowing you to select the relevant check boxes next to each of the fields that you wish to print.

The Details tab of the Print Mail dialog box contains several other options used when printing mail. These are described in the table below:

Check box	Description
New page per message	Starts a new page for each message.
Line between messages	Draws a horizontal line separating each message.
Print fields titles	Prints the title of each field printed above the contents of each field.
Print subject line	Prints a separate subject line for each message. The default is to print a separate subject line.
Print message text	Prints the message body text for each message. The default is to print the message body text.

The Fonts tab of the Print Mail dialog box contains four buttons detailed below:

Button	Description
Title Font	The font used to draw field titles. Relevant only if the **Print Field Titles** check box is selected.
Field Font	The font used to draw field information.
Group Header Font	The font used to draw group headers.
Subject Font	The font used to draw the subject line. Relevant only if the **Print subject line** check box is checked.

Note: There is no button to choose the font of the mail body text since this is rich text and is therefore already formatted.

OfficeTalk provides common print functionality in all Print dialog boxes. This functionality includes:

- Defining headers and footers
- Printer setup
- Page Style Selection
- Saved Print Settings
- Preview capability

For more information on this common print functionality, see "Printing" on page 355.

Once you have selected the required options in the Print Mail dialog box, press the **Preview** button to check the appearance of your print out and then send it to the printer by pressing the **Print** button.

Notify Mode

Overview

Notify mode lets you compose and send messages directly to other users screens. This may be considered a more urgent form of E-mail. Provided that the recipient is running OfficeTalk and OfficeTalk is the active application, a yellow coloured notification will appear on the user's desktop. If OfficeTalk is not the active application, the program's button will start flashing on the task bar. When the user clicks on the OfficeTalk button in the task bar, OfficeTalk will become the active application, displaying the yellow coloured notification. If the recipient is not running OfficeTalk, the notification is stored until the recipient next logs onto OfficeTalk.

You may send notifications to both local and remote OfficeTalk users. You may also send notifications to non OfficeTalk users, for example, Internet recipients. Such recipients will simply receive a formatted mail message.

Notify mode provides four different notification styles. These are:

- Simple Format
- While You Were Out Format
- Yes/No Format
- Respond Format

Simple Format

The Simple format notification is used to send one-way messages to other OfficeTalk users. You can send a Simple notification in the following way:

- Press the button located in the Shortcut bar. Write the required message into the Message window.
- Select the recipients to whom you wish to send the message.
- Specify a date and time into the **Notify time** field when you want the notification to be sent. If you want the notification to be sent as soon as possible then do not change the **Notify time** field.
- Press the button or press **Ctrl+S**.

When the Simple notification arrives, it appears as shown below:

The Simple notification displays the message and who it was from. Pressing the **Snooze** button will close the notification and instruct it to pop up at a later time, depending upon the specified snooze time. The **Mail** button allows you to mail the notification to yourself so that you can store it in a folder. Pressing the **Mail** button will pop up the Mail Notification dialog box.

You may specify the subject for the mail message and any additional comments. When you press **OK** the notification will be mailed to your Incoming Mail folder in Mail Mode, along with the additional information provided.

Pressing the **OK** button on the pop up notification will close the notification.

While You Were Out Format

The While You Were Out format notification is used to send telephone messages to other OfficeTalk users. You can send a While You Were Out notification in the following way.

If you select the caller by pressing the button to the right of the **Name** *field, then OfficeTalk will automatically fill out the company name and the phone number*

- Press the button located in the Shortcut bar. Enter the name of the telephone caller into the **Name** field. Enter the caller's company into the **Of** field and the caller's phone number into the **Phone no**. field. Select the appropriate check box(es) to indicate the reason for calling and enter any other message into the Message window.
- Select the recipients to whom you wish to send the message.
- Press the button or press **Ctrl+S**.

When the While You Were Out notification arrives, it appears as shown below:

The While You Were Out notification displays the message and who it was from. Pressing the **Snooze** button will close the notification and instruct it to pop up at a later time, depending upon the specified **Snooze time**. The **Mail** button allows you to mail the notification to yourself so that you can store it in a mail folder.

Yes/No Format

The Yes/No format notification is used to send messages to other OfficeTalk users, allowing them to reply either 'yes' or 'no'. You can send a Yes/No notification in the following way:

- Press the button located in the Shortcut bar. Write the message into the Message window.
- Select the user(s) to whom you wish to send the message.
- Specify a date and time (using the calendar) into the **Notify Time** field when you want the notification to be sent.
- Press the button or press **Ctrl+S**.

When the Yes/No notification arrives, it appears as shown below:

The Yes/No notification displays the message and who it was from. Pressing the **Snooze** button will close the notification and instruct it to pop up at a later time, depending upon the specified **Snooze time**. The **Mail** button allows you to mail the notification to yourself so that you can store it in a mail folder.

You may press either the **Yes** or **No** button on the popup notification, depending on the required response to the message.

The originator of the Yes/No notification will be informed of the recipients reply with a Simple notification, as shown below:

Respond Format

The Respond format notification is used to send messages to other OfficeTalk users, allowing them to reply to the message. You can send a Respond notification in the following way:

- Press the button located in the Shortcut bar. Write the message into the Message window.
- Select the user(s) to whom you wish to send the message.
- Specify a date and time into the **Notify Time** field when you want the notification to be sent.
- Press the button.

When the Respond notification arrives, it appears as shown below:

The Respond notification displays the message and who it was from. Pressing the **Snooze** button will close the notification and instruct it to pop up at a later time, depending upon the specified **Snooze time**. The **Mail** button allows you to mail the notification to yourself so that you can store it in a mail folder.

You may reply to the message in the Respond window. When you have entered your response, press the **OK** button on the popup notification.

The originator of the Respond notification will be informed of the recipients reply with a Simple notification, as shown below:

Checking for Pending Notifications

By default, OfficeTalk will check for new notifications every 5 minutes. This period may be changed by a supervisor. Alternatively, you may manually check for pending notifications, You can do this by selecting **Popup Pending Notifications** from the **Notify** menu in Notify mode. Alternatively, press **Ctrl+O**.

Checking for Snoozed Notifications

By default, OfficeTalk will re-display snoozed notifications only after the snooze time that you specified has expired. You may wish to refer to a notification that you have snoozed sooner than this. OfficeTalk lets you do this by selecting **Popup Snoozed Notifications** from the **Notify** menu in Notify mode. Alternatively, press **Ctrl+N**.

The Contact Address Book

You can use the contact address book to select recipients for your notification. The contact address book shows all contacts in the Contacts database who have been assigned an e-mail address and a mail service. The e-mail address and mail service together describe where and how OfficeTalk will send the notification to that recipient.

You can quickly search for a contact by typing in the first few letters of the contact's surname. If a match is found the recipient is selected in the left hand window. To select the contact as a recipient, press the **To->** button.

You can view the properties of a contact by selecting the contact in the left hand list and pressing the **Properties** button.

When you press **OK**, the chosen recipients will be added to the To: window.

Notification Preferences

Since there is no task bar in Windows 3.x, only the title bar will flash. This will only be useful if the OfficeTalk title bar is visible. A more appropriate setting for OfficeTalk running under Windows 3.x is to popup the notification in front of other applications

When a notification arrives and OfficeTalk is not the active application, you have the choice of how the notification should present itself to you. You may wish to have the notification pop up in front of the application that you are working in. Alternatively, you may wish to be told that there is a notification waiting to be read. OfficeTalk does the latter by flashing the OfficeTalk title bar and the OfficeTalk task bar button, if the task bar is displayed. The notification will appear when OfficeTalk is made the active application.

You may choose either of these options by selecting **Preferences** from the **Options** menu in Notify mode. The Preferences dialog box is displayed. Select the Notifications page.

Select the appropriate radio button and press **OK**. The default setting is to flash the title bar.

General Features

Sorting Data

Any data that you view in a list in OfficeTalk may be sorted in a variety of ways. Nearly all lists display one or more columns of data. For example, when you view the Incoming Mail folder in Mail mode, OfficeTalk displays, amongst others, a Sender column and a Received Time column. By default, OfficeTalk sorts mail in the Incoming Mail folder by Received Time, so that the most recent mail is displayed at the top of the list. If you wanted to sort this list by another column, for example, the Sender column, then you simply click the relevant column header using the left mouse button.

This will sort the data in an ascending fashion according to the data type of the column. If the column is a text column, such as the Sender column, then OfficeTalk sorts the list showing mail from senders whose name begins with ‘A’ at the top of the list and senders whose name begins with ‘Z’ at the end of the list. If the column is a date column, then items in the list are sorted with earliest dates displayed at the top of the list.

Data may be sorted in a descending fashion by clicking again on the column header.

If you wish to sort by a column which is not displayed in the list then this is possible by using the Sort dialog box. You can show the Sort dialog box by clicking the right mouse button anywhere inside the list and selecting **Sort…** from the context sensitive menu.

The Sort dialog box lets you perform a multi-level sort which you cannot achieve simply by clicking on a column. A multi-level sort consists of a primary sort and optional secondary and tertiary sorts. For example, you may sort Incoming mail by Received Time and then by Sender.

Choose the primary sort by selecting a column from the top most drop down list in the dialog box. Choose a secondary sort from the next drop down list and so on. For each sort level you may choose whether to sort ascending or sort descending by selecting the relevant radio button next to each drop down list.

Grouping Data

Any data that you view in a list within OfficeTalk may be grouped in a variety of ways. Grouping is similar to sorting except that header lines are inserted into the appropriate places in the list.

For example, you may wish to group your Incoming Mail folder by Sender. This will display all mail sent from a particular person grouped together shown underneath an appropriate group heading. The result is shown below:

You can group a list by a particular column simply by clicking on the column using the left mouse button whilst keeping the **Shift** key depressed. Clicking on the Sender column within Mail mode whilst depressing the **Shift** key will achieve a result similar to that shown in the picture above. The list is grouped in an ascending fashion. Data may be grouped in a descending fashion by clicking again on the relevant header whilst keeping the **Shift** key depressed.

If you wish to group by a column which is not displayed in the list then this is possible by using the Group dialog box. You can show the Group dialog box by clicking the right mouse button anywhere inside the list and selecting **Group…** from the context sensitive menu.

Choose a column by which to group the list by selecting a column from the drop down list in the dialog box. Choose whether to sort ascending or sort descending by selecting the relevant radio button next to the drop down list.

Group Ranges

By default, a header is inserted into the list every time the value of the grouped column changes. Sometimes you may wish to specify your own rules for grouping a list. For example, you may wish to group the sender column into the following three ranges:

- Sender names (A to J)
- Sender names (K to R)
- Sender names (S to Z)

You can do this by specifying a group range. Having selected 'Sender' in the **Field** drop down list in the Group dialog box, press the **Edit Ranges** button. The Ranges dialog box is displayed.

Press the **New** button. The Range Wizard will appear showing the Name page.

Enter a name for the range, for example, ‘Three way alphabetic split’, and press **Next** to display the Ranges page.

The Ranges list will contain a single item called ‘All’. You may split this item into the various ranges using the **Split** button. Press the **Split** button to display the Data dialog box.

Enter the ‘K’ character and press **OK**. The Ranges list will contain the following items:

- Up to K
- K and above

Press the **Split** button once more and enter the ‘S’ character and press **OK**. The Ranges list will now contain the following items:

- Up to K
- K to S
- S and above

Press **Finish** on the Ranges page and press **OK** on the Ranges dialog box. Select the ‘Three way alphabetical split’ range from the **Ranges** drop down list in the Group dialog box and press **OK**. The mail shown in the Incoming Mail folder will be re-grouped as shown below:

The Data dialog box, shown when you press the **Split** button in the Ranges page, will vary depending upon the data type of the grouping column. If the grouped column is a *string* type then the Data dialog box will let you split the groupings by string-based ranges. If the grouped column is a *date* type then the Data dialog box will contain a Date control letting you split the groupings by Date-based ranges as shown below:

A different Data dialog box is displayed for each of the following column data types:

String	Number	Real
Yes/No	Date	Time
Date/Time	Duration	Currency
Phone	Email Address	Web Address
Colour	Link	Selection

Filtering Data

Any data that you view in a list in OfficeTalk may be filtered in a variety of ways. The simplest way of filtering is by using the **Filter By** and **Filter Excluding** commands available in most lists from the context sensitive menu. Using the example of the Incoming Mail folder, if you click on the right mouse button whilst positioning the cursor over a particular field under the Sender column, the context menu will give you the choice of filtering the list showing only records whose sender column matches the value of the field or filtering the list excluding records whose sender column matches the value of the field.

Choosing the **Filter By John Smith** command will filter the list to show only incoming mail sent by John Smith. Choosing the **Filter**

Excluding John Smith will filter the list to show all currently shown incoming mail except mail sent from John Smith.

When a list is filtered, a marker is displayed in the window's title bar as shown below:

Having filtered the list in this way, you may disable the filter by selecting **Disable Filter** from the context sensitive menu. Once disabled, you may re-apply the filter by selecting **Enable Filter** from the context menu.

You can use the **Filter By** and **Filter Excluding** commands to build a complex filter. For example, you may wish to view all mail except mail from John Smith and Fred Bloggs. You could achieve this by selecting **Filter Excluding John Smith** and then selecting **Filter Excluding Fred Bloggs**.

Using the Filter dialog box

An alternative to using the **Filter By** and **Filter Excluding** commands is the Filter dialog box. You can show the Filter dialog box by selecting **Filter…** from the context sensitive menu.

The Filter dialog box lets you perform either a quick simple filter or a more advanced, multi stage filter. It does this by providing a separate Simple and Advanced page.

The Simple page lets you select a field, for example, "Sender", an operator, for example, "==" and a value, for example, "Fred Smith".

The Field drop down list is filled with all the fields available in the list that you are filtering. The Operator drop down list is filled with all the operators available for the chosen field. The table below shows which operators are available on which field types:

Field Type	Available Operators
String	!=, != (no case), <, <=, ==, == (no case), >, >=, begins with, begins with (no case), contains, contains (no case), does not begin with, does not begin with (no case), does not contain, does not contain (no case), does not end with, does not end with (no case), ends with, ends with (no case).
Boolean	!=, ==.
Integer	!=, < <=, ==, >, >=
Date	!=, < <=, ==, >, >=
Date/Time	!=, < <=, ==, >, >=

The Value control will vary also depending upon the data type of the selected field. For example, if you are filtering the Incoming Mail folder and you select “Sender” from the Field drop down then the Value control will be an Edit box, letting you type in a *string* type value. If you select “Received Date” from the Field drop down then the Value may be selected from a date control.

When you have specified your simple filter, press **OK**. The list will be filtered accordingly.

If you wish to perform a more complex filter then you can use the Advanced page. The advanced page lets you build a complex filter based on a series of simple expressions operated on by logical AND and logical OR operators.

For example, if you wanted to filter on all mail sent from John Smith between 1/1/98 and 3/1/98, you would need to build a complex filter in the following way:

- From the Advanced page of the Filter dialog box, press the **Add** button. This will display another Filter dialog box showing the Simple page.
- Enter the expression ‘Received Date > 1/1/98’ into the page and press **OK**.
- Press the **Add** button again and enter the expression ‘Received Date < 3/1/98’ into the page and press **OK**.
- Select the **AND** radio button, select the contents of the list box and press the **Combine** button. This will combine the two expressions into a single expression.
- Press the **Add** button once more. This time enter the expression ‘Sender == John Smith’ and press **OK**. The Filter dialog box will be as shown below:

Finally press **OK** on the Filter dialog box. The list will be filtered accordingly.

Saving Filters

Once you have defined a filter you may save it for future use. You can save a filter by pressing the **Save** button in the Filter dialog box. Pressing the **Save** button will display the Save Filter dialog box.

Enter a description for the filter and choose whether to make the filter personal to you or publicly available to all users in the workgroup. Press **OK** to save the filter.

Once saved, a filter may be retrieved from the Saved Filters page by simply selecting the appropriate filter from the drop down list.

You may delete a filter completely by selecting the filter from the drop down list and pressing the **Delete** button.

Searching for Data

OfficeTalk lets you search for the following types of data:

- Tasks
- Appointments
- Project Tasks
- Meetings
- Companies
- Contacts
- Conversations
- Documents
- Mail

You can search for data of a certain type using the appropriate search dialog box which may be accessed from the **Search** menu in the relevant mode. For example, to search through conversations, select **Search Conversations** from the **Search** menu in Contact mode.

Each search dialog box provides two ways of searching. You may perform either a simple search or an advanced search. To perform a simple search, select the Simple page.

Simple Searching

The Simple page lets you choose which fields to search through. You may choose from the following options:

Field option	Description
Name/Subject field only	Searches just the name or subject field of the associated data type.
Subject field and body	Available in mail, conversation and document searching. Enables you to search the name or subject field and the mail body, conversation

	body or document contents, accordingly.
All text fields	Searches all text fields of the associated data type. This includes category fields and any custom fields.
All fields	Searches all text fields and any date fields

You may enter the text that you wish to search for into the **Text** field. OfficeTalk searches for data items *containing* any text that you enter into this field.

The appointment, meeting, conversations, documents and mail search dialog boxes provide a way of confining the search to a certain date range. You can do this by checking the **Date** check box and entering the relevant date range into the **Start** and **End** date controls.

When you have specified the search criteria, press the **Search** button. The **Search** button will change to a **Stop** button which enables you to halt the search at any point during the search. The results of the search will be added to the **Results** list as and when the results are found. At any time, you may view a particular result by selecting the result from the **Results** list and pressing the **Goto** button.

Advanced Searching

A more powerful form of searching may be achieved using the Advanced page of the Search dialog box. The Advanced page lets you specify complex search expressions involving logical AND and logical OR operators.

For example, you may wish to search for all mail messages whose sender address contains the characters ‘john@address.com’ and whose received time is after ‘1/1/98’ or for all messages that are urgent.

You may achieve this in the following way:

- From the Advanced page of the Search Mail dialog box, press the **Add…** button. This will show the Expression dialog box. Select ‘Sender’ from the **Field** field, select ‘Contains No Case’ from the **Operator** drop down and enter ‘john@address.com’ into the **Value** field. Press **OK**. The full expression will appear as a single line in the **Expressions** list in the Advanced page.

- Select the **AND** radio button and press the **Add…** button again. From the Expression dialog box, select 'Received Date' from the **Field** field, select '>=' from the **Operator** drop down and select '1/1/98' from the **Value** field. You can select the date either by typing in a date value or by pressing the button and selecting the date from the popup calendar. Press **OK**. The expression will also appear in the **Expressions** list in the Advanced page.
- Next, combine the two expression into a single line by selecting all lines in the Expression list and pressing the **Combine** button.
- Next, select the **OR** radio button and press the **Add…** button once again. From the Expression dialog box, select 'Is Urgent' from the **Field** field, select '==' from the **Operator** drop down and select 'TRUE' from the **Value** field. Press **OK**. The full expression will appear as shown below:

- Perform the search by pressing the **Search** button.

Performing Database Searches

Sometimes you may wish to search through all data in OfficeTalk for specific text. OfficeTalk lets you perform a database search by selecting **Search Database** from the **Search** menu from within any mode. The Search Database dialog box is displayed.

The Search Database page lets you choose which fields to search through. You may choose from the following options:

Field option	Description
Name/Subject fields only	Searches just the name or subject field of the associated data type.
Category fields	Searches the category fields of the associated data items.
All text fields	Searches all text fields of the associated data type. This includes category fields and any custom fields.
All fields	Searches all text fields and any date fields

You may enter the text that you wish to search for into the **Text** field. OfficeTalk searches for data items *containing* any text that you enter into this field.

In the **Search what** list, place a tick next to each data item that you wish to include as part of the database search. If you wish to search through a subset of any data type, for example, you may wish to search through a particular user's tasks rather than all users' tasks, then you may do this by selecting the **Tasks** data type and pressing the **Details…** button. A further dialog box is displayed allowing you to select which users' tasks will be searched.

When you have specified the search criteria, press the **Search** button. The **Search** button will change to a **Stop** button which enables you to halt the search at any point during the search. The results of the search will be added to the **Results** list as and when the results are found. At any time, you may view a particular result by selecting the result from the **Results** list and pressing the **Goto** button.

The Recycle Bin

Nearly all data in OfficeTalk gets transferred to the Recycle Bin when deleted. OfficeTalk lets you view the contents of the Recycle Bin and lets you either restore data back to its original state or permanently delete it.

Deleting Data

Any item of data, such as a task or an appointment may be moved to the Recycle bin by selecting the item and pressing the **Delete** key on the keyboard. Alternatively, the item may be dragged over and dropped onto the Recycle bin in the Shortcut bar. In both cases, OfficeTalk will ask you to confirm the action by displaying the following message box:

Viewing the Recycle Bin Contents

You may view the contents of the Recycle bin by pressing the button in the Shortcut bar from within any mode.

The Recycle bin displays a list of deleted data which may be sorted, filtered and grouped in just the same way as any other OfficeTalk list. By default, the list is grouped by data type as shown below:

The list displays the type of deleted data, for example, Tasks, Appointments, Planners etc. The list also displays the description of the deleted data, the original owner of the data, when the data was deleted and who deleted the data.

By default, only data that you have deleted is shown. If you are a supervisor then you may view and restore deleted items belonging to other users. You can view other users deleted items by selecting **All Deleted Items** from the **View** menu.

Restoring Data

Data that you have previously sent to the Recycle bin may be restored back to its original state by viewing the contents of the Recycle bin,

selecting the data that you wish to restore and pressing the in the Shortcut bar. For example, if you deleted a planner, all the keys and bookings associated with the planner would also be deleted, however you would only see the planner in the recycle bin. Restoring the planner will also restore the associated keys and bookings.

Permanently Deleting Data

An item may be deleted permanently without going to the recycle bin by keeping the **Shift** key depressed whilst pressing the **Delete** key. OfficeTalk will ask you to confirm this action by displaying the following message box:

You may permanently delete data from the Recycle bin by selecting the

items in the Recycle bin and pressing the button located in the Shortcut bar. OfficeTalk will ask you to confirm the permanent deletion prior to performing the action.

Linking Data

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 action a task as a result of a conversation that you had with a particular contact. OfficeTalk will let you link together the task, the conversation and the contact so that you can quickly access each piece of information from the other.

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

How to link two items together

Note that OfficeTalk does not show the button by default. For information on how to show window buttons, see "Customising Window Buttons and Menus" on page 408

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 their appearance to indicate that OfficeTalk is expecting you to *finish* the link. When you press the button to finish the link, all link buttons will change back to their original appearance.

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

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

Cancelling a Link

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

Deleting Links

To delete an existing link, select one of the linked items and select **Delete Links** from the **Links** menu. OfficeTalk will ask you to confirm that you wish to delete all links associated with the selected item. Press **Yes**. All links attached to the selected object will be deleted.

Viewing Links

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

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

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

Start-up Mode

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

Select **Preferences** from the **Options** menu. The Preferences dialog box is displayed. Select the Startup page.

This page also lets you turn off the bypassing of the login dialog box. Do this by un-checking the ***Save login Password*** *check box.*

Select which mode you wish to start up in by choosing a mode from the **Startup Mode** drop down list. The **Sub View** drop down list will contain a list of available sub views. Choose the required sub view and press **OK**.

Using Categories

Categories provide a useful way of classifying pieces of information. For example, you may wish to categorise contacts and companies into 'potential customers', 'existing customers' and 'old customers' and then have a way of searching any record by category. Alternatively, you may wish to have a wider category definition such as 'Personal' or 'Business' and then use these categories to classify any piece of information in OfficeTalk. Again, you may then wish to search the entire database for any *personal* information.

Category Sets

Usually, you will want certain categories to apply only to certain data types in OfficeTalk. For example, you might wish to associate a category such as 'Customer' with a company or contact but you may wish to associate a category such as 'Personal' with Task, Company, Contact and Planner data types. OfficeTalk lets you do this using Category Sets.

A Category Set is a named list of categories which may be assigned to one or more data types. This means that the categories contained in a particular category set will be available from within the Category page of only certain OfficeTalk data property sheets.

OfficeTalk is supplied with a number of category sets, however, you may create your own categories and category sets. For more information on defining Category Sets, see "Administering Categories" on page 81.

Categorising OfficeTalk Data

OfficeTalk lets you apply categories to the following data types:

- Tasks
- Appointments
- Resource Bookings
- Project Tasks
- Meetings
- Mail
- Companies
- Contacts
- Conversations
- Documents (such as letters and faxes)

In order to apply categories to any data of the above types, you must have at least edit access to the data. To apply one or more categories, bring up the property sheet for the data item by selecting the data item using the right mouse button and choosing **Edit** from the context menu. Alternatively, double click on the data item. In either case, the associated property sheet is displayed. Select the Categories page. The picture below shows the categories page for the Task property sheet.

The **Set** drop down list lets you choose which category set to view. You may choose either the ‘Global Categories’ category set, the ‘All Categories’ category set or any additional category sets which are associated with the specific data type. The categories belonging to the selected set will appear in the **Available Categories** list. If the set contains categories which are already applied to the data then these categories will appear in the Categories field and the check box next to the relevant category in the **Available Categories** list will be checked.

To apply a category to the data item, simply check the relevant check boxes next to the required category in the **Available Categories** list. If you wish to add a new category to the set and apply that category to the data item, then type the description of the category in the Categories field, separating it from other categories using a *comma* ‘,’ character.

Searching for Data by Category

Once you have categorised data, you will, at some point, wish to search for the data by category. Whenever you search for data across all fields using the Simple Search page, OfficeTalk will always include category information as part of the search. For example, if you search for tasks using the Simple page of the Search Tasks property sheet and you select ‘All Fields’ from the **Field** drop down list then any text that you enter in the **Text** field will be used to try to match any of the tasks associated categories.

So, if you entered ‘person’ as your search text, OfficeTalk would find, as one of the results, a task associated with the *Personal* category.

The Search Database dialog box may be displayed by selecting **Search Database** from the **Search** menu from within any mode. The Simple page of this dialog box contains a **Field** drop down list which contains a ‘Category Fields’ entry. Selecting ‘Category Fields’ ensures that OfficeTalk will search through only the category fields of any data. Enter the required search text into the **Text** field.

This search text should contain part or all of the relevant category description. When you press the **Search** button, OfficeTalk will search for all relevant items whose category fields match the specified search text.

The Calendar

The Calendar is shown in Diary and Meeting mode and is also shown when selecting a date from any date control within OfficeTalk.

You can select a date from the calendar by clicking on the ◀ button and ▶ button, using the left mouse button, to select the appropriate month and then simply clicking on the appropriate date.

In Diary mode, you can drag appointments onto the calendar in order to move them from one date to another. You can also drag tasks onto the calendar in order to schedule time for those tasks on the relevant date. You can also use the calendar to change the date shown in the diary.

In Meeting mode, you can use the calendar to select the date for showing resource availability prior to booking a meeting.

The calendar is also used in the date control available in several dialog boxes and in certain lists. For example, the Task property sheet contains a date control to let you choose a deadline date for the task. The Date control presents two buttons. The rightmost button lets you pop up the calendar in order to specify a date.

As soon as you select a date, the calendar will disappear and the selected date will appear in the associated field.

Defining the Working Day

OfficeTalk needs to know about each user's normal working hours. This information is used by the meeting manager when finding availability time during the process of booking a meeting. This information is also represented graphically in diary mode so that anyone looking at a particular user's diary can see that user's availability time at a glance.

Typically, most users will have the same working hours and, for this reason, OfficeTalk lets you define the working hours or Custom Day for the workgroup as a whole. For more information, see "Task Folders" on page 109. By default, all users will use the workgroup Custom Day but if certain users work to different working hours then those users may over-ride these settings, specifying their own Custom Day settings. You may specify your own Custom Day settings by selecting **Preferences** from the **Options** menu from within any mode. The Preferences dialog box is displayed. Select the Custom Day page.

By default, the **Use workgroup custom day** check box is selected. Uncheck the check box and press the **Custom Day** button. The Custom Day property sheet is displayed.

Place a check box next to each weekday that is a normal working day. For most people, this is Monday to Friday inclusive. Next, for each of those days, specify a start time and an end time representing your normal working hours for each day. Press **OK** to save your changes.

Adding Notes to OfficeTalk Data

You may add rich text notes to the following OfficeTalk data items:

- Tasks
- Appointments
- Projects
- Project Tasks
- Contacts
- Companies
- Documents

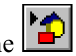
You can do this in the following way:

- Select the Notes page in the item's property sheet.
- Type in notes, using the format toolbar to add colour, fonts and character style to your text. Press **OK** to save your changes.

The task list and project task lists let you show a **Has Notes** column. This column will display a marker if the associated record contains notes. Additionally, if an appointment has associated notes, a marker will be displayed on the appointment window. Double clicking on this marker will bring up the relevant property sheet, showing the Notes page.

Inserting Objects

OfficeTalk lets you insert objects into any notes window. An object may be anything from a Microsoft Word document to a link to a sound file.

You can insert objects into a notes window by pressing the  button. This will pop up the Insert Object dialog box.

The Insert Object dialog box contains two pages: A Create New page and a Create From File page. The Create New page lets you select, from a list, one of the objects registered on your computer. Select the required object and choose whether or not you wish to display the object as an icon within the Notes window and press **OK**. OfficeTalk will open a new document for whichever object type you selected.

Alternatively, you may insert an object that is represented by a file. For example, you may wish to insert a bitmap file into the Notes window.

Do this by selecting the Create From File page and entering the full path of the file into the **File Name** field. Again, select whether or not you wish to display the object as an icon within the Notes window. Also select whether or not you wish to embed the object into the notes page or link the object to the original file. Doing the former will make a copy of the object, embedding all the data in OfficeTalk. Doing the latter will link the object to the original file such that any changes you make to the object within the Notes window will be reflected in the File and vice versa.

Printing

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

- Daily Appointments
- Weekly Appointments
- Monthly Appointments
- Custom Appointment View
- Task List
- Group Chart View
- Group Weekly View

- Meetings
- Project Plan
- Project Task List
- Planners
- Contacts
- Companies
- Conversations
- History
- Mail

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

You can display any Print dialog box by pressing the  button above the appropriate window. Alternatively, if the button is not available, then you may select the appropriate menu item from the **File/Print** menu.

Setting Up The Printer

Every Print dialog box has a 

button. Pressing this button will display a Print Setup dialog box. This dialog box lets you choose which printer you wish to use.

You can choose either the default printer or a specific printer from the list of printers. Since this dialog is standard to most other Windows applications, it also lets you choose the orientation and size of your paper. OfficeTalk does not use this functionality since paper orientation and size is defined in OfficeTalk's Paper Style dialog box. For more information, see "Paper Styles" on page 359.

If you press the 

button, another dialog box is displayed which will be specific to the particular printer that you have selected.

Previewing

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

Headers and Footers

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

OfficeTalk provides a Headers and Footers page in every Print dialog box.

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

Column	Description
%Page	Page number
%TotalPages	Total number of pages
%Row	Row number for xy printing
%Column	Column number for xy printing
%Date	Current date
%Time	Current time
%%	Percent sign
%User	OfficeTalk user
%Workgroup	OfficeTalk workgroup name

When a view has a date/time associated with it, for example, when printing your diary information or printing a project, the following substitutions may be used:

Column	Description
%YearShort	Year without century (00-99)
%Year	Year with century

%MonthShort	Abbreviated month name
%Month	Full month name
%MonthNum	Month number (1-12)
%WeekDayShort	Abbreviated weekday name
%WeekDay	Full weekday name
%WeekDayNum	Weekday number (1-7)
%Week	Week of the year (00-51)
%Day	Day of month as a decimal (01-31)
%DayOfMonth	Day of month as a decimal (01-31)
%DayOfYear	Day of year as a decimal (01-365)
%Hour	Hour in 24 hour format (00-23)
%Hour12	Hour in 12 hour format (01-12)
%Minute	Minute as a decimal (00-59)
%Second	Seconds as a decimal (00-59)
%TimeZone	Time zone abbreviation if known

The substitutions below apply only when printing certain views. For example, %StartMonthStart would represent the first month printed in a project chart print out or a monthly appointments print out, but it would be invalid for a task list print out.

Column	Description
%s or %Section	Section letter (company/contact, e.g. A, B ...Z)
%o or %Owner	Owner of a schedule/task list
%n or %Name	Name of a project/group/planner
%StartYearShort	Start year of page without century (00-99)
%EndYearShort	End year of page without century (00-99)
%StartYear	Start year of page with century
%EndYear	End year of page with century
%StartMonthShort	Abbreviated start month name for page
%EndMonthShort	Abbreviated end month name for page
%StartMonth	Full start month name for page
%EndMonth	Full end month name for page
%StartMonthNum	Start month number for page(1-12)
%EndMonthNum	End month number for page(1-12)
%StartWeekDayShort	Abbreviated start weekday name for page
%EndWeekDayShort	Abbreviated end weekday name for page
%StartWeekDay	Full start weekday name for page
%EndWeekDay	Full endweekday name for page
%StartWeekDayNum	Start weekday number for page (1-7)
%EndWeekDayNum	End weekday number for page (1-7)
%StartWeek	Start week of the year for page (00-51)
%EndWeek	End week of the year for page (00-51)
%StartDay	Start day of month for page as a decimal (01-31)
%EndDay	End day of month for page as a decimal (01-31)
%StartHour	Start hour for page in 24 hour format (00-23)
%EndHour	End hour for page in 24 hour format (00-23)
%StartHour12	Start hour for page in 12 hour format (01-12)
%EndHour12	End hour for page in 12 hour format (01-12)
%StartMinute	Start minute for page as a decimal (00-59)
%EndMinute	End minute for page as a decimal (00-59)
%StartSecond	Start seconds for page as a decimal (00-59)

%EndSecond	End seconds for page as a decimal (00-59)
%StartDate	Start date of page
%StartTime	Start time of page
%EndDate	End date of page
%EndTime	End time of page

Example: The following text could be put into the footers field:

Printed by %u on %D at %T

If the current user is called Joe Smith and you print using this text in your footer field then OfficeTalk will print something similar to the following:

Printed by Joe Smith on 21/02/98 at 14:10

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

You can specify the fonts for the header and footer using the **Header Font** button and the **Footer Font** button. The header and footer fonts will apply only to the Print dialog from which this dialog was invoked. Once defined, the font settings will remain between OfficeTalk sessions.

Paper Styles

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

OfficeTalk comes supplied with several pre-defined paper styles. These are as follows:

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

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

You can create or edit paper styles by selecting **Paper Styles** from the **Print** sub menu in the **File** menu or by pressing the **Paper Styles…** button in the Print dialog box. When you select this menu option or press the button, the Paper Styles dialog box is displayed.

You can create a new paper style by pressing the **New** button. Alternatively, you can edit an existing paper style by selecting the paper style from the list and pressing the **Edit** button. In both cases a Paper Styles dialog box is displayed.

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

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

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

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

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

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

The Shortcut Bar

The Shortcut bar is located down the left hand side of the screen. It provides access to specific functions within each mode, essentially behaving as a sub tool bar. Each icon shown in the Shortcut bar is termed a *Shortcut button* and is the means to activating either a specific function within a mode or is a shortcut to a file or application.

The Shortcut bar can contain several groups of buttons. By default, OfficeTalk shows a single group containing the buttons for the mode shown. You can show all the mode groups in the shortcut bar by clicking the right mouse button in a blank part of the Shortcut bar and selecting **Mode Groups** from the context menu.

Doing this will show a group tab for each of the modes in OfficeTalk. Clicking on a mode group tab will display that mode's shortcut buttons in the Shortcut bar. If you change mode using the mode tool bar at the top of the screen, the associated mode group tab is automatically selected, showing the mode's buttons in the Shortcut bar. If you select a different mode group and click on one of the buttons in that group, the associated mode will be selected and the action, associated with the button, will be performed.

Adding a Group

You are not restricted to displaying mode groups in the Shortcut bar. You can add your own group by clicking the right mouse button in the Shortcut bar and selecting **Add New Group** from the context menu. A new group tab is displayed at the bottom of the Shortcut bar in an activated state, ready for you to enter a name for the tab. Type in a name and press **Enter**.

Removing a Group

You cannot permanently remove mode groups from the Shortcut bar since these are special groups which are automatically selected when you change mode, but you can hide mode groups by clicking the right mouse button in a blank part of the Shortcut bar and selecting **Mode Groups** from the context menu.

Any groups that you have added may be deleted from the Shortcut bar by clicking on the relevant group tab using the right mouse button and selecting **Remove Group** from the context menu.

Adding a Shortcut Button to the Bar

You can add a shortcut button to any group by first selecting the group and then clicking the right mouse button in a blank part of the Shortcut bar and selecting **Add To Bar** from the context menu. The Select Shortcut dialog box is displayed.

From the drop down list, choose the mode containing the shortcut button that you wish to add to the selected group, select the relevant shortcut button from the **Shortcuts** list and press the **Add** button. The shortcut button will be added to the bottom of the selected group.

Adding a File to the Bar

OfficeTalk lets you create shortcuts to any file or application on your computer or network. You can do this by selecting the group to which you wish to add the shortcut file and by selecting **Add File To Bar** from the context menu.

A file chooser dialog box is displayed letting you locate and select the relevant file. Press **OK** on the file chooser dialog box. A shortcut, representing the file, will appear at the bottom of the selected group. Clicking on the shortcut will activate the associated file or application.

Renaming a Shortcut Button

OfficeTalk provides default descriptions for each shortcut button in the Shortcut bar. You may change the description of any shortcut button by clicking on the shortcut using the right mouse button and selecting **Rename Shortcut** from the context menu.

An edit box is displayed over the shortcut description. Enter a new description and press **Enter**.

Removing a Shortcut Button

You may permanently remove any shortcut button or shortcut file from a group by clicking on the shortcut using the right mouse button and selecting **Remove Shortcut** from the context menu.

OfficeTalk will ask you to confirm that you wish to permanently remove the shortcut. If you press **Yes**, the shortcut will be permanently removed.

Ordering the Shortcuts

You may change the order of any of the shortcut buttons within a group by simply depressing the left mouse button on a particular shortcut and dragging the shortcut up or down to the new location. Releasing the left mouse button will fix the shortcut’s new location.

Viewing Who is Logged On

Sometimes, you will want to know which other users are logged on to OfficeTalk. For example, you may wish to send a notification to someone in order that they receive your message immediately. If you know that the person is not logged on, then it is likely you will decide to contact them by other means.

At any time, you may view the list of users who are currently logged on. You can do this by selecting **Who…** from the **View** menu. This will display the Who Is Logged On dialog box. The list of currently logged on users is displayed in the Users list.

Remotely Logging a User Off

Occasionally, as a supervisor, you will want to ensure that no other users are logged on to OfficeTalk. For example, you might wish to compact the database. Such a process requires all users to be logged off.

You can log another user out of OfficeTalk by selecting **Who…** from the **View** menu in Supervisor mode. When you do this the Who Is Logged On dialog box is displayed with an additional **Log Off** button.

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

Database Password Automation

If a password has been set on the OfficeTalk database for security purposes, then to avoid each user having to manually enter this password every time they log onto OfficeTalk, a password automation program is supplied. This program is called the OfficeTalk Password Automation applet and is installed only on the first OfficeTalk installation into the OfficeTalk program group.

Start this program by double clicking on the program item in the OfficeTalk program group. A dialog box is shown asking you to specify the correct database password.

Enter the database password and press **OK**. The Password Automation applet will tell you if you have entered the wrong password.

If you entered the correct password, the applet will feed this information to OfficeTalk, such that the next time that any user logs on, this password is automatically used to open the database.

If the database password changes, then you must re-run the Password Automation applet and enter the new password.

Note: The database password is completely different to your login password. Your login password is used to identify you as an OfficeTalk user once the database has been opened. The database password is required in order to open the database and acts as another level of security.

Installing Forms into Microsoft Exchange/Outlook

Several electronic forms are supplied with OfficeTalk which provide a mechanism for OfficeTalk users to invite Microsoft Exchange/Outlook users to meetings and to assign them tasks. The following forms are supplied:

- Meeting invitation form
- Task assignment form
- Project task assignment form

The forms are intended to be installed into Microsoft Exchange or Microsoft Outlook. In the absence of such forms, the Microsoft Exchange/Outlook user will receive a text based message inviting them to a meeting or assigning them a task. Responses to these invitations or task assignments are achieved by replying to the message. If these forms are installed, then responding to the invitations or task assignments may be done simply by pressing a button. This leads to tighter integration between OfficeTalk and Microsoft Exchange/Outlook.

To install any of the supplied forms into Microsoft Exchange/Outlook, do the following:

- Firstly, ensure that the Microsoft Exchange Server service is installed.
- Select **Options** from the **Tools** menu. The Options property sheet is displayed. Select the Exchange Server page.

Press the **Manage Forms** button. The Forms Manager dialog box is displayed.

Press the **Install…** button. A file chooser dialog box is displayed. Locate and select one of the following files from the **Forms** sub directory in the shared database directory:

Form	Description
OTProj.cfg	The project task assignment form
OTTask.cfg	The task assignment form
OTMeeting.cfg	The meeting invitation form

When you press **OK** on the the file chooser dialog box, the Form Properties dialog box is displayed. You may change the display name of the form and add any relevant comments. Pressing **OK** on the Form Properties dialog box will install the form.

Importing Data From Microsoft Outlook

Note that the utility will not work with Windows 3.x

OfficeTalk is supplied with a utility which can import data from Microsoft Outlook into OfficeTalk. The utility is called **OUTLK2OT.EXE** and may be found in the **Import** directory of your installation CD.

The **OUTLK2OT.EXE** utility is able to transfer the following data from Outlook into OfficeTalk:

- Appointments
- Tasks
- Companies and Contacts
- E-mail and folders

When you run the utility, you may select which data you wish to convert. Make your selection by checking the appropriate check box.

To begin the import, press **Import**. As the data import progresses, the utility will display the number of records converted.

Note: This utility should be run only once. Running this utility twice will add duplicate records to your database.

Spell Checking In OfficeTalk

Before you send mail or save conversation or note text, you may wish to check that you have spelt everything correctly. OfficeTalk lets you do this by pressing the  button located in the toolbar in the following views:

Alternatively, press F7 in any of these views

- Compose view in Mail mode
- Details page of conversation property sheet
- Notes page of any item property sheet

If there are any mis-spelt words in your document, the spell checker dialog box is displayed showing the first incorrect word. The spell checker suggests one or more words to correct the word. Select the appropriate word from the **Suggestion** list and press **Replace**.

If you wish to replace all occurences of this mis-spelt word then press **Replace All**. If you wish the spell checker to ignore the word then press **Ignore**. If you wish the spell checker to ignore all occurences of this word throughout the remainder of the document then press the **Ignore All** button.

You can manually edit the wordsin the custom dictionary by loading the file SPELL_CS.DCT into Notepad and editing as appropriate. This file is located in the SpellAPI sub directory under your Windows directory.

The spell checker lets you add your own words to the dictionary. Rather than ignore any words that the spell checker does not know about, you may add them to the dictionary by pressing the **Add** button. The spell checker will treat any words that you add as acceptable words for all future spell checks.

The spell checker can suggest similar words to any word that you enter into the **Replace With** field. It will do this when you press the **Suggest** button.

When the spell checker has completed checking your document, it will display a message box as shown below, including a word count of your document.

Working Offline

If you wish to use OfficeTalk when you are not connected to the main database, then you can do so using the Work Offline feature. When you work offline, OfficeTalk constructs a subset of the main database on the local drive of your computer. You have full control over how little or how much of the main database that you copy. Whilst you are working offline, every time that you log in to OfficeTalk you will use the offline database. Any changes that you make to the offline database may be applied to the main database either directly over the network, when you are back in the office, or by e-mail over the Internet.

Any member of your workgroup may log onto your offline database by supplying their own login name and password and they may add, edit and delete their own data. When you synchronise with the main database their changes will also be synchronised. In this way, it is possible to use the Work Offline feature for a group of people to work remotely. An alternative is to use the Remote Workgroup features which offer a richer set of synchronisation features.

Preparing to Work Offline

You may work offline by selecting **Work Offline** from the File menu in any mode. When you do this, OfficeTalk will display the Work Offline wizard, showing the Details page. This page lets you choose which type of data you wish to bring with you from the main database to the offline database.

You may specify which user's information to copy by selecting the Users item and pressing the **Details…** button. The Users dialog box will appear, showing a list of the users in the workgroup.

For each user, you may choose whether or not to copy the following data:

- Tasks
- Appointments
- Mail
- Notifications
- Events
- Viewed Planners
- User Links

You can do this by selecting the relevant user from the list and pressing the Details button. This will display a list of user related data types from which you may choose.

You may also select whether or not to take down resource data, planner data, project data, meeting data and contact data. Selecting any of these items and pressing the **Details…** button will display additional dialog boxes letting you select sub components. For example, if you select the Planners check box and press the **Details…** button, an additional dialog box will pop up showing a list of planners to choose from.

When you press **Finish**, OfficeTalk will copy all the selected data and will then ask you to confirm whether or not you wish to log onto the offline database.

The 16-bit version of OfficeTalk requires you to log out of OfficeTalk prior to logging onto the offline database.

If you press **No**, OfficeTalk will close down. The next time you log onto OfficeTalk you will automatically be logged onto the offline database. If you press **Yes**, OfficeTalk will log you onto the offline database.

Working Offline Subsequent Times

Once you have created the offline database, the next time you work offline the Offline wizard will contain two pages. The first page is the Details page as described above. The second page is the Existing Workgroup page. It gives you the choice of creating a new offline database, over-writing the existing one or updating the existing offline database with the latest changes to the main database.

The second option is more efficient since the database does not have to be recreated. Instead, only changes made since the last time the offline database was updated will be copied.

If you choose to update the existing offline database with the latest changes then the **Next** button is enabled. If you chose to create a new offline database then your next step is to press **Finish**. Pressing **Next** displays the Additional Data Synchronisation page which lets you choose various options relating to how documents and notes will be handled when you work offline.

This page lets you choose whether or not to update the offline database with all new and changed documents (such as letters and letter templates and any file attachments attached to notes). It also lets you choose whether or not to update the offline database with all new and changed notes (such as notes associated with tasks, appointments, companies and contacts etc).

When you press **Finish**, OfficeTalk will copy the relevant data and will then ask you to confirm whether or not you wish to log onto the offline database.

Synchronising With the Main Database

While you are working offline, you may at any time synchronise with the main database. Synchronising with the main database will copy changes made to the main database over to the offline database. It will also copy changes made to the offline database to the main database.

You may synchronise by selecting **Synchronise** from the **File** menu. This will display the Synchronisation wizard showing the Method page.

This page lets you choose between synchronising directly, synchronising via a command or synchronising via e-mail. If you are in the office and have access to the main database, over the network, then you should select the **Synchronising Directly** option. If you are away from the office but have access to the main database over a dial up network, then you should choose the **Synchronising by Command** option. If you are away from the office and have access to Internet mail via the OfficeTalk Internet Service, then you may select the **Synchronising via E-mail** option. Select the appropriate radio button and press **Next**.

If you choose **Synchronising via E-mail** and you have not set up your Internet Mail Service in the offline database, then OfficeTalk will inform you of this and will ask you if you wish to set up the service now.

Press **Yes** and follow the instructions for setting up the Internet Mail Service as described in “Configuring the Internet Mail service” on page 66.

When the Internet Mail Service is set up, the Email page is shown.

Enter the e-mail address used by any of the mail gateway computers logged on to the main OfficeTalk database and press **Next**. In order for the main database to send back its changes to update your offline database, it needs to know a *Return Address* to which it can send synchronisation data. If you have not previously specified a return address, OfficeTalk will prompt you to specify one now

Press **Yes**. OfficeTalk will display the Command Return Address dialog box. Enter your e-mail address that you use while away from the office.

Note: OfficeTalk will suggest a return address based on information that you provided in the Internet Mail Service property sheet.

If you have chosen to synchronise directly or synchronise by command, the page shown after the Method page is the Dial-up Service page. This page lets you specify whether or not OfficeTalk should use dial up networking in order to connect to the main database.

If you have access to the main database over the network then leave the check box un-checked. If you are genuinely working remote and need to use dial up networking in order to see the main database, then check the check box and select the appropriate dial up service. Press **Next**.

If you have chosen to synchronise directly or synchronise by command, the page shown after the Dial-up Service page is the Direction page.

This page lets you choose whether to update the main database from changes made to this offline database or whether to update this offline database from changes made to the main database, or both. Select the appropriate radio button and press **Finish**.

If you have chosen to synchronise directly, OfficeTalk will connect directly to the main database and will perform the synchronisation.

If you have chosen to synchronise via e-mail, OfficeTalk will generate a command which will get sent the next time you connect to the Internet in order to send and receive Internet mail. If you have chosen to update this workgroup from the main database, then when your command has been processed by the gateway computer on the main database, you will, some time later, receive a command, via e-mail, which OfficeTalk will automatically interpret as the synchronisation data from the main database.

If you have chosen to synchronise by command, OfficeTalk will connect directly to the main database and will transfer a single command to the database. This command will contain all the information that the main database needs to update itself with your changes. The command also contains a request to receive changes made to the main database. This command will be processed the next time that one of the machines, connected to the main database, runs the Command Processor. You will receive changes made to the main database the next time you synchronise.

Working On-line

When you have returned to the office you may wish to log onto the main OfficeTalk database. This process is called *Working Online*. You can work online in the following way:

Note that you must have direct access to the main database in order to work on-line. You cannot work on-line via e-mail.

- Select **Work Online** from the **File** menu. OfficeTalk will ask you whether or not you wish to update the main database with any changes made to the offline database prior to working online. Press **Yes** to perform the one way synchronisation or **No** to work online without updating the main database.

- OfficeTalk will log you onto the main database. Logging on to OfficeTalk subsequent times will log you straight on to the main database.

Working On-line Temporarily

Once you have worked offline, then each time that you log onto OfficeTalk, you will be automatically logged onto the offline database. It is possible to log onto the main database without marking your machine as *working online*. You can do this by selecting 'Main Database' from the **Database** drop down in the Login dialog box.

When you log in, you will be logged onto the main database. However your machine will not be marked as *working online* and subsequent logins will log you onto the offline database unless you select Main Database from the **Database** drop down.

Remote Workgroups

What Is Remote Workgrouping

Remote Workgrouping is an OfficeTalk feature which lets separate OfficeTalk Workgroups have access to each other's data.

Remote Workgrouping includes the ability to replicate data between OfficeTalk databases and it can do this in a variety of ways to suit many different organisations.

For example, your company may have several sites, each with a separate OfficeTalk Workgroup. It may be company policy that every individual should be able to look at the diary of any other individual at any of the company's sites. OfficeTalk can achieve this through Remote Workgrouping.

Your company may be managing a project which is being implemented by off-site contractors, each one having only Internet Mail access to you. You may wish to be updated with their progress on a twice daily basis. OfficeTalk can achieve this and much more through Remote Workgrouping.

Different Remote Workgroup Configurations

There are three types of Remote Workgroup Configurations. Each have their advantages. The three types are as follows:

Mirrored Configuration

When two or more workgroups connect in a mirrored configuration, each workgroup will inherit each other's data and any changes made to the data in one workgroup will be reflected in all the other workgroups.

The advantage of a mirrored configuration is that all users, regardless of which database they come from or where they are physically located, appear as if they all belong to the same local Workgroup.

This means that a user can view the diary of a user belonging to another workgroup, just as if that user was a member of the same workgroup. In addition, all users will share the same contact address book, meetings, planners and projects etc. It also means that a user, visiting another site, can access his own diary from that site and see his changes reflected exactly at his own site.

All this may be considered an advantage for certain Organisations, but a disadvantage for others where less intimate data sharing is favoured.

One disadvantage of the Mirrored Configuration is that the data you access will not be up-to-date with the actual data held in the remote workgroup since the data that you access is a copy of the original data. The accuracy of your data depends entirely on how frequently data is synchronised.

Direct Workgroup Configuration

A Direct Workgroup Configuration consists of two separate workgroups each containing their own data. In this configuration, there is no data replication involved. Neither workgroup keeps a copy of any of the data in the other workgroup. Any accesses made from one workgroup to another are done *directly*. It is possible to access most of the data in the remote workgroup via a Direct Configuration, however access to the workgroup depends entirely on what data that workgroup wishes to let you see.

Depending upon the mechanism you choose for accessing data via the Direct Workgroup Configuration (see "Remote Workgroup Replication Strategies" on page 379), you may have either *full* or only *partial* access to the data held in the workgroup. If you have *partial* access, you will be restricted to sending e-mail, notifications, meeting requests and task assignments to users belonging to the remote workgroup. If you have *full* access then, from within OfficeTalk, you will be able to open the remote workgroup and you will have access to a lot more data including diaries, projects, planners, meetings and contacts.

For example, to access the diary information of a user belonging to a remote workgroup via a direct configuration, you can simply select the workgroup name from the user drop down list in diary mode. This will open the remote workgroup.

Once you have done this, the drop down is populated with users belonging to the remote workgroup. Simply select the required remote user from the drop down list to show their diary information.

An advantage of a Direct Workgroup configuration over a Mirrored Workgroup configuration is that the workgroups can remain independent databases and do not need to merge with each other. A further advantage is that, since the remote workgroup data is accessed directly, all data is always fully up to date.

One disadvantage is that access to *all* data in the remote Workgroup is not possible. For example, you do not have access to any history information held in the remote workgroup. A further disadvantage is that any immediate data access requires that all users have direct or dial-up access to the Remote Workgroup's database. As a result, data transfer must be made over a potentially slow direct ODBC connection, hence the term Direct Workgroup Configuration.

Replica Workgroup Configuration

A Replica Workgroup Configuration is a configuration whereby the remote workgroup is replicated to a local database which remains separate from your own local workgroup's database. The advantage of a Replica Workgroup Configuration is that you have fast access to data held in the remote workgroup without the need for connecting directly to the remote workgroup. One disadvantage is that the data you access will not be up-to-date with the actual data held in the remote workgroup since the data that you access is a copy of the original data. The accuracy of your data depends entirely on how frequently data is synchronised.

You may access data in the replica workgroup in the same way as the direct configuration, except this time you are directly accessing a local replica database rather than the data of the main remote workgroup database itself. As an example, to access the diary information of a user belonging to a remote workgroup via a replica configuration, you can simply select the workgroup name from the user drop down list in diary mode. This will open the remote workgroup.

Once you have done this, the drop down is populated with users belonging to the remote workgroup. Simply select the required remote user from the drop down list to show their diary information.

Remote Workgroup Replication Strategies

Once one workgroup has connected to another workgroup in one of the configurations described above, the data in each workgroup must be synchronised from time to time. OfficeTalk provides three different methods for synchronising data with remote workgroups. Each method has its own advantages.

Synchronous Replication Method

The Synchronous method involves opening the database of the remote workgroup in order to transfer data between the workgroups. The data transfer is *synchronous* which means that when the local OfficeTalk synchronisation server sends and receives changes to and from the remote workgroup database, it does it there and then.

The advantage of the Synchronous method is that OfficeTalk only needs to connect once to the Remote Workgroup database in order to send and receive changes and any changes are made immediately to the remote workgroup.

A disadvantage of this method is the fact that the OfficeTalk synchronisation server machine must have either direct or dial-up access to the Remote Workgroup's database. Also this method requires the highest network bandwidth of the three methods and as a result is the slowest in terms of data transfer.

Asynchronous Replication Method

The Asynchronous method involves opening the database of the remote workgroup in order to transfer a single record to the remote workgroup's database and a single record from the remote workgroup's database. The data transfer is *asynchronous* which means that when the local OfficeTalk synchronisation server sends and receives changes, the changes are not made there and then. Instead, the synchronisation server of the remote workgroup makes the changes in it's own time.

The advantage of the Asynchronous method is that network bandwidth is considerably reduced which makes it a more suitable synchronisation strategy for slower networks or for dial-up connections.

A disadvantage of this method is that OfficeTalk needs to connect on two separate occasions in order to synchronise. The first connection transfers any data to be sent and makes a request for any data to be prepared. The second connection, made later, collects any data waiting as a result of the request.

Another disadvantage of this method is the fact that the OfficeTalk synchronisation server machine must have either direct or dial-up access to the Remote Workgroup's database.

E-mail Replication Method

The E-mail method does not require the synchronisation server to be able to see the Remote Workgroup's database. Instead, OfficeTalk's Internet Mail service can handle the delivery of replication data and replication requests. This method is asynchronous and has the same advantages and disadvantages as the Asynchronous method except that no direct database access is necessary. All that is required is an e-mail address for the Remote Workgroup.

This method uses the least network bandwidth of the three methods but does require that each workgroup has access to an Internet Service Provider or has its own SMTP/POP3 based mail backbone.

The Effect of the Replication Method on Data Access

Your choice of replication method has no effect on your access to data in the remote workgroup except in the case of the Direct workgroup configuration. Since this configuration involves directly accessing the remote workgroup database, then in order to access that data, the Synchronous replication method must be used. If the Asynchronous or E-mail replication methods are chosen, access is restricted to sending e-mail, notifications, meeting requests and task assignments.

Remote Workgrouping Scenarios

Introduction

This section considers several different workgroup scenarios and makes a recommendation for each one in terms of the replication strategy that may be applied using OfficeTalk replication.

Scenario 1

A company is split into two sites, A and B, with 50 users at each site. All users wish to be able to view any other users diary. Both sites should operate from the same Contact address book. There is a fast wide area network connecting both sites. Data must be no more than 4 hours out of date.

Solution 1

The replication strategy for this company would be to implement a Synchronous Mirrored Configuration between the two sites. One site, Site A, would be made the *controlling site*. Every 4 hours, Site A will connect to Site B and perform a synchronous replication.

Scenario 2

A company is split into three sites A, B and C, with 50 users at each site. All users wish to be able to view any other users diary. All three sites should operate from the same Contact address book. There is no

Wide Area Network connecting the three sites but all three sites have Internet Mail access. Data must be no more than 1 day out of date.

Solution 2

The replication strategy for this company would be to implement a Mirrored Configuration between the three sites. Each site should schedule an e-mail replication with the other two sites at a pre-determined time every day. For example, at 8:00pm Site A would schedule an e-mail replication to Site B and Site C. At the same time Site B would schedule an e-mail replication with Site A and Site C. Similarly, Site C would schedule an e-mail replication with Site A and Site B. Each Site would send the resulting e-mail *commands* and should each then connect an hour or so later in order to receive the changes from the other sites.

Scenario 3

A company is split into three sites with 50 users at each site. All users wish to be able to view any other users diary. All three sites should operate from the same Contact address book. There is no wide area network connecting the three sites but two of the sites have Internet Mail access and one of these sites has a dial-up connection to the site without Internet Mail access. Data must be no more than 1 day out of date.

Solution 3

The replication strategy for this company would be to implement a Mirrored Configuration between the three sites making one of the sites the *controlling* site. The *controlling* site (Site A) should be one of the sites with Internet access which has the dial up connection facility. The *controlling* site should synchronise data with the other Internet enabled site (Site B) using E-mail Replication and should synchronise data with the remaining site (Site C) using the Asynchronous method over the dial up connection.

The *controlling* Site A should connect to Site C at, say, 8:00pm and then should issue an e-mail replication to Site B at 8:30pm. Site B should be set to check for Internet mail at 9:00pm. By 9:30pm, both Site B and Site C will have been updated with the Site A's changes for that day and Site C will have prepared it's changes for Site A and Site B will have sent back, via Internet mail, it's changes for Site A. Site A may then check for Internet mail at 10:00pm, knowing that it should receive Site B's changes for that day. Site A will then connect to Site C at 10:30pm and receive its changes and will update Site C with Site B's changes which it has just received. Site A will now be updated with the changes from Site B and Site C. Site C will also have been updated with Site B's changes. However, Site B will not yet have been updated with Site C's changes and so Site A should issue another e-mail replication to Site B for 11:00pm. Site B should schedule a check for Internet mail at 11:30pm.

Given that all connections are dial-up connections, then all 3 sites may be updated with each others changes with 7 phone calls over a period of 3½ hours.

Scenario 4

Company A of 100 users is linked closely with Company B. They are separate companies. However both companies have many joint meetings and wish to co-ordinate a way of scheduling meetings in which they know all persons will be able to attend. They plan to do this by giving the organiser, who resides at Company A, access to the holidays and diaries of all the relevant people. Both companies have Internet mail access. The diary data must be no more than 1 day out of date.

Solution 4

The replication strategy for these companies is for Company A to implement a replica of Company B's OfficeTalk database using e-mail replication. Company B will be set up to give Company A access to its user diary data and its planner data. Company A will make no data available to Company B. This will enable the organiser to use Meeting Mode to invite people from both his local workgroup and from Company B's workgroup, taking into consideration all user's diary and holiday commitments.

Each day at, say 8:00pm, Company A will issue an e-mail replication request to Company B. Company B will collect mail at 8:30pm and will package up its changes since the last synchronisation and send the information via Internet mail. At 9:00pm Company A will dial up and collect Internet mail. It will receive Company B's changes but will issue no changes of its own since Company B has been restricted from seeing any of its data.

Scenario 5

A company has several employees who work from home. It is required that each remote worker should have access to all OfficeTalk data and all users should be able to mail and notify each other as normal. Each remote worker has Internet mail access.

Solution 5

A possible replication strategy for this company would be to have each remote worker mirror the main Workgroup, or have the main Workgroup mirror each remote worker's Workgroup. The first case is not desirable since it would require each remote worker to know how to set up a mirror database. The second case is also not desirable since the main workgroup would need to have an External Workgroup defined for each remote worker and updates would be sent out regardless, even if the remote worker was on holiday, for example.

A more suitable replication strategy for this company would be for the remote workers to Work Off-line (See Working Off-line). Once off-line, the remote workers could synchronise with the main Workgroup via e-mail.

Data Security Between Remote Workgroups

By default, OfficeTalk does not allow other workgroups to connect to your workgroup in any way. Permission to do this must be explicitly set by a supervisor. For more information, see "Granting Access to Remote Workgroups" below.

OfficeTalk gives you full control over what data you give to remote workgroups. At a higher level, you can decide whether or not to give specific remote workgroups access to your diary, project, planner, contact information etc.

Additionally, you can specify the access rights of a remote workgroup to individual items of data in just the same way that you administer your local security. For example you may wish to give members of the remote workgroup access to the diaries of certain individuals in your workgroup, but not others.

To provide even more control over security, OfficeTalk lets you grant individual access to specific users in a remote workgroup. This could be useful, for example, if you wished to grant to the members of a particular remote workgroup, read only access to the local user's diaries but wished to grant full access to one specific member of the remote workgroup.

Granting Access to Remote Workgroups

A remote workgroup which connects to your workgroup for the first time, in order to initiate some form of replication, is referred to as an *un-registered* Remote Workgroup. It will be granted access to your data depending upon the settings that you specify in the Remote Workgroup Options dialog box. You can display the Remote Workgroup Options dialog box by selecting **Remote Workgroup Options** from the **Options** menu in Supervisor mode.

Remote workgroups that have registered with your workgroup are accessible from Supervisor mode by selecting Remote Workgroups from the left hand list. You may grant separate access rights to each registered remote workgroup from each remote workgroups corresponding property sheet. You may display such a property sheet by double clicking on the appropriate remote workgroup in the right hand list.

Connection Access

The first level of security lets you specify whether or not remote workgroups may connect to you at all. This may be specified in the Security page of the Remote Workgroup Options dialog box.

You may separately specify whether remote workgroups may:

- replicate your workgroup
- mirror your workgroup
- access your workgroup directly

Do this by checking the appropriate check box in the Security page. For each option, you may supply an optional password. If you do this, then each remote workgroup that wishes to connect to you must supply the same password when defining the connection. This provides a further level of security.

Data Level Security

The second level of security lets you specify the data types to which remote workgroups have access. This is called Data Level security. To specify the data level security for un-registered remote workgroups select the Details page of the Remote Workgroup Options dialog box.

You will be presented with a list of data types. If you wish to give no access to any part of your data to any un-registered remote workgroups, then you must ensure that all the check boxes are blank. If, by default, you wish to give un-registered workgroups access to your users' diaries and your planners, for example, then check the Users and Planners items.

If you wish to give access to only one user's diary then select the Users item and press the **Details** button. From the list of users, check the check box next to the relevant user.

You may specify the Data Level security on a per remote workgroup basis. This can be done from within the property sheet of the relevant remote workgroup. Select **Remote Workgroups** from the left hand list in Supervisor mode and then right click on the appropriate remote workgroup in the right hand list and select **Edit** from the context menu. The remote workgroup property sheet is displayed. Select the Give What page and specify the data level access as described above.

Note that the data level access only applies to configurations which involve data replication. As a result, the Give What page does not exist for remote workgroups configured for direct connection.

Security Profile Access

The third level of security lets you specify a remote workgroup's access to individual data within your workgroup. This is done in exactly the same way that data access is specified for local OfficeTalk users. Remote workgroups may be assigned a security profile in just the same way that local users are assigned a security profile.

Unregistered remote workgroups may be assigned a default security profile from within the Access page of the Remote Workgroup Options dialog box.

Registered remote workgroups may be assigned a security profile on an individual basis. You can do this by selecting **Remote Workgroups** from the left hand list in Supervisor mode, clicking the right mouse button on the relevant remote workgroup in the right hand list and selecting **Edit** from the context menu. This will display the Remote Workgroup property sheet. Select the Access page and specify the appropriate security profile.

Once you have specified a security profile for the remote workgroup, all members of the remote workgroup will be granted the same access as defined by the security profile.

OfficeTalk lets you specify the access rights of individual remote users within the remote workgroup to your data. Once a workgroup is registered you may press the **Remote User Access** button in the Access page of the Remote Workgroup dialog box. This will display the Remote User Access Rights dialog box.

Select the remote user(s) from the **Access Of** list and then select the required security profile which is to be assigned to each of the selected users. Press **OK** to save your changes.

Creating a Remote Workgroup

You can create a new reference to a remote workgroup in the following way:

From Supervisor mode, select **Remote Workgroups** from the left hand list. In the right hand list, click the right mouse button to bring up the context sensitive menu and select **New**.

The Remote Workgroup Wizard is displayed. This wizard will guide you through the process of creating the reference to the Remote Workgroup and setting various options associated with the Remote Workgroup.

Firstly, type in the name of the Remote Workgroup. This will typically be the name of the organisation. Press **Next**. The next page lets you choose the workgroup configuration. Choose between **Mirrored**, **Direct** and **Replica**.

For a full description of each workgroup configuration along with its relative advantages and disadvantages see “Different Remote Workgroup Configurations” on page 377.

The next page lets you specify a password which will be used to gain access to the remote workgroup database. If the remote workgroup has not specified an appropriate password in the Remote Workgroup Options dialog box, then you may leave this field blank..

Each configuration requires different information and so different pages are shown depending upon which configuration you choose.

Creating a Mirror Configuration

Having selected **Mirrored** in the Configuration page, pressing **Next** in the Password page will display the Get What page. This page lets you choose what types of data you wish to get from the remote workgroup. You will typically select all data types unless you are specifically uninterested in certain data types. For example, you may want each workgroup to share all data except for contact data which should be kept proprietary to each physical database. In this case you would tick all data types except for Contact Information.

The next page is similar, but lets you choose what types of data the remote mirror workgroup can request from you.

The next page lets you choose the user who will receive synchronisation reports. Synchronisation reports are mailed to the chosen user and detail which records were successfully replicated along with any records which failed to replicate. For more information see “The Synchronisation Report” on page 398.

The remaining pages let you choose and set up the Replication Method and complete the creation of the remote workgroup. See “The Replication Method Page and Beyond” on page 390 for an explanation of the pages remaining in the creation of a mirror workgroup.

Creating a Direct Configuration

Having selected Direct in the Configuration page, pressing **Next** in the Password page will take you straight to the Replication Method page. See “The Replication Method Page and Beyond” on page 390 for an explanation of the pages remaining in the creation of a direct workgroup.

Creating a Replica Configuration

A Replica configuration will create a local copy of the remote workgroup and will keep the local copy synchronised with the remote workgroup database. Having selected Replica in the Configuration page, pressing **Next** in the Password page will take you to a page which asks for a data source representing the local copy of the remote workgroup.

Note OfficeTalk requires that you specify a data source which points to a blank database. You will not be able to continue otherwise

Type in ‘LOCAL_REPLICA’ into the Data Source field and press the **Add…** button. A Create New Data Source wizard is displayed. For more information on how to complete this wizard, see “Setting up a Data Source” on page 398. When you have specified a data source pointing to a new blank database, press **Next**.

The next page lets you choose whether or not users of the remote workgroup may log on to the local replica. If users may log on to this replica then OfficeTalk will need to replicate additional types of data, such as mail and notifications, making the synchronisation process less efficient.

Pressing **Next** will display the Replicate What page. This page lets you choose what types of data you wish to get from the remote workgroup.

The next page is similar, but lets you choose what types of data the remote workgroup may request from you.

The next page lets you choose the user who will receive synchronisation reports. Synchronisation reports are mailed to the relevant user and detail which records were successfully replicated along with any records which failed to replicate. For more information see “The Synchronisation Report” on page 398.

The remaining pages let you choose and set up the Replication Method and complete the creation of the remote workgroup. See “The Replication Method Page and Beyond” below for an explanation of the pages remaining in the creation of a replica workgroup.

The Replication Method Page and Beyond

The Replication Method page lets you choose the Replication Method. Choose between Synchronous, Asynchronous and E-mail replication methods. For a full description of each Replication method along with its relative advantages and disadvantages see “Remote Workgroup Replication Strategies” on page 379.

If you choose the Synchronous or Asynchronous method, then the next page requires you to select or set up a data source which points to the remote workgroup database. You may either select an existing data source from the drop list or you can create a new data source by pressing the **Add** button. For more information on creating a new data source, see "Setting up a Data Source" on page 398.

If you need to use Dial-up Networking in order to connect to the remote workgroup database, then check the **Connect to this data source using dial-up networking** check box and select a dial-up service from the drop down list below. Doing this will ensure that OfficeTalk automatically establishes the dial-up network prior to attempting to connect to the remote workgroup database.

If you choose the E-mail method, then the Data source page is not displayed. Instead, you are prompted to supply a mail service and an e-mail address for sending mail to the remote workgroup.

Regardless of the chosen replication method, the next page is the Gateway Page. This page lets you specify whether or not this machine will act as a gateway.

If you make this machine a *gateway machine* then you can specify when this machine will connect to the remote workgroup and replicate data. Do this by checking the **Gateway Machine** check box and pressing the **Update Times…** button. This will display an Update Times dialog box. For more information on specifying Update Times, see "Scheduled Replication" on page 396.

Attachment data is file-based data that you attach to mail messages or to notes. It can also represent letters that you write to companies and contacts. This data can be very large and you may wish to treat it separately when replicating data between workgroups. The Gateway page lets you specify whether or not you wish to replicate attachment data and if so whether to send and receive attachment data whenever you replicate workgroup data or according to a separate schedule. If you wish to schedule attachment data separately then select the third radio button and press the **Attachment Update Times** button. This will display the Attachment Update Times dialog box. For more information on specifying Update Times, see "Scheduled Replication" on page 396. For further information, see “Options For Transferring Binary Attachments” on page 397.

To create the remote workgroup, press **Finish**. The table below summarises the subsequent actions which will depend upon the remote workgroup configuration and the replication method used. It is assumed that the remote workgroup allows other workgroups to connect to it and that the correct password, if any, has been specified.

Type	Method	Description
Mirror	Synchronous	OfficeTalk will confirm that you wish to set up the mirror workgroup. It will then open the remote workgroup database directly and synchronise the data in the remote workgroup with the data in your workgroup. When this function has completed, both databases will be mirrored with each other.
Mirror	Asynchronous	OfficeTalk will place a single command in the remote workgroup which will be processed the next time that the remote workgroup processes commands. Once the remote workgroup has processed commands, you should click on the remote workgroup using the right mouse button and select **Merge…**. Choose Send and Receive changes from the Merge Remote Workgroup dialog box and press **Finish**. OfficeTalk will process the data presented by the remote workgroup and write another command to the remote workgroup containing all the relevant data in your workgroup. When this function has completed and the remote workgroup has processed commands once more, both databases will be mirrored with each other.
Mirror	E-mail	OfficeTalk will send an e-mail message to the remote workgroup containing your workgroup data. When the remote workgroup database receives the message, it will add the data to its database and will send back an e-mail message containing the remote workgroup data. Once you have received this message and automatically processed it, both databases will be mirrored with each other.
Replica	Synchronous	OfficeTalk will confirm that you wish to set up the replica workgroup. It will then open the remote workgroup database directly and copy the data in the remote workgroup to your local replica database. When this function has completed, you will be able to view data in the remote workgroup and the members of the remote workgroup will become available in the relevant address books.
Replica	Asynchronous	OfficeTalk will place a single command in the remote workgroup which will be processed the next time that the remote workgroup processes commands. Once the remote workgroup has processed commands, you should click on the remote workgroup using the right mouse button and select **Merge…**. Choose Send and Receive changes from the Merge Remote Workgroup dialog box and press **Finish**. OfficeTalk will process the data presented by the remote workgroup and write it to the local replica workgroup. When this function has completed you will be able to view data in the remote workgroup and the members of the remote workgroup will become available in the relevant address books.
Replica	E-mail	OfficeTalk will send an e-mail message to the remote workgroup asking for its data to be prepared and sent back in the form of a message. Once you have received this

		message and automatically processed it, the data held in the remote workgroup will become available in the local replica database. You will be able to view data in the remote workgroup and the members of the remote workgroup will become available in the relevant address books.
Direct	Synchronous	You will be able to view data directly in the remote workgroup and the members of the remote workgroup will become available in the relevant address books.
Direct	Asynchronous	Members of the remote workgroup will become available in the relevant address books.
Direct	E-mail	OfficeTalk will send an e-mail message requesting the list of the remote workgroup's members (users and groups). Once you have received the reply to this message and have automatically processed it, the members of the remote workgroup will become available in the relevant address books.

Viewing Remote Workgroup Information

With the exception of a Mirrored configuration or a Direct / Asynchronous or Direct / Email configuration, whenever you wish to access data held in a remote workgroup, OfficeTalk must first connect to either the remote workgroup database directly, in the case of a direct configuration, or to a local copy of the remote workgroup database, in the case of a replica configuration.

When you have referenced a remote workgroup in Supervisor mode, then, provided that you have sufficient access, OfficeTalk will make the data held in the remote workgroup seamlessly available from all relevant modes.

Viewing Diary Data in a Remote Workgroup

In order to view a diary held in a remote workgroup, go to Diary mode and select the Users drop down list. Select the remote workgroup which will be shown towards the bottom of the list. This will open the remote workgroup and will select the first user's diary in the remote workgroup to which you have access.

If you do not have at least read access to any users' diaries in the remote workgroup, OfficeTalk will warn you with a message and will return you to viewing the local workgroup.

Once you are viewing data in a remote workgroup, then provided that you have sufficient access, you may add, edit and delete data in just the same way that you add, edit and delete data in your local workgroup.

Viewing Group Data in a Remote Workgroup

In order to view the diaries of a group of remote workgroup users, go to Group mode and select the Group list drop down. Select the remote workgroup which will be shown towards the bottom of the list. This will open the remote workgroup and will display the structured list of groups belonging to that remote workgroup. Double clicking a group will display the list of group members and will show the appointments for the listed users.

Viewing Meeting Data in a Remote Workgroup

In order to view the schedule of meetings held in a remote workgroup, go to the Meeting List view in Meeting mode and select the meeting list drop down. Select the remote workgroup which will be shown towards the bottom of the list. This will open the remote workgroup and will display the structured list of meetings. Clicking on a meeting using the left mouse button will display the list of people invited to that meeting in the Members window at the bottom of the Meeting view.

You cannot book a meeting directly into a remote workgroup, however you may book a meeting from the local workgroup consisting of members from a remote workgroup.

Viewing Contact Data in a Remote Workgroup

In order to view companies and contact information held in a remote workgroup, go to Contact mode and from either Company, Contact or Directory view, select the Contact group drop down list. Select the remote workgroup which will be shown towards the bottom of the list. This will open the remote workgroup and will display a list of contact groups held in the remote workgroup. The **All** contact group will be selected by default and any companies or contacts will be displayed in the right hand window.

You can view remote workgroup data in the following views:

Mode	View
Diary	All
Group	All

Meeting	Meeting List View
Project	All
Planner	All
Contact	All except History view

Replicating Data

You can view any remote workgroups that you have defined by going to Supervisor mode and selecting **Remote Workgroups** in the left hand list. The list of remote workgroups will appear in the right hand list. This section describes how to replicate data held in these workgroups either manually or on a scheduled basis.

Manual Replication

Provided that the remote workgroup was originally set up as either a mirror workgroup or a replica workgroup, OfficeTalk will let you manually replicate the data held in the remote workgroup database and the local workgroup database.

To do this, click the Remote Workgroup using the right mouse button. The context sensitive menu will appear. Select **Merge…** from the menu. A Merge Remote Workgroup dialog box is displayed. This dialog box lets you choose between sending local updates to the remote workgroup, receiving updates made by the remote workgroup, or both. Select the third option, **Send And Receive Updates** and press **Finish**.

If the replication method is synchronous, OfficeTalk will send and receive changes, updating both databases there and then. If the replication method is asynchronous or e-mail, OfficeTalk will create a package of data representing the changes made locally. This package of data is called a *command*. OfficeTalk will transfer, or send the command to the remote workgroup along with another command, requesting the remote workgroups changes. According to its own schedule, the remote workgroup will process the commands, updating its own database with the appropriate changes and compiling a command representing its own changes which is ready for collection the next time that you send and receive updates.

Scheduled Replication

OfficeTalk lets you automate the replication process. If the replication method is asynchronous or e-mail, then in addition to scheduling a time to send updates and requests for updates you must also schedule another time to collect updates.

The replication may be automated in one of two ways:

- From within the Gateway page of the Remote Workgroup wizard. For more information, see “The Replication Method Page and Beyond” on page 390.
- From the OfficeTalk Services dialog box. For more information, see “Remote Workgroup Gateway Services” on page 91.

Updating Slave Workgroups

A *Slave* workgroup is a workgroup that has been referenced by another workgroup. The latter workgroup is termed the *master* workgroup. If the master workgroup chose to replicate the data in the slave workgroup asynchronously, then data synchronisation is not immediate. Instead, a command remains in the slave workgroup, waiting to be processed. In order to process the command, the slave workgroup must *process commands*. When the slave workgroup processes commands, it updates itself with any changes sent by the master workgroup including delivery of any mail sent by a user in the master workgroup to a user in the slave workgroup. The slave workgroup also prepares any requests made by the master workgroup for changes to the slave workgroup's data since the last synchronisation.

Processing Commands

Commands may be processed manually or automatically. To process any pending commands manually, go to Supervisor mode and select **OfficeTalk Server…** from the **Options** menu. The OfficeTalk Services dialog box is displayed. Select **Command processor service** from the list of services and press the **Kick…** button. OfficeTalk will process any pending commands.

Usually, you will want to schedule command processing to be performed automatically. You can do this in the following way:

- Check the check box next to the **Command Processor** entry in the OfficeTalk Services dialog box and press the **Settings…** button. The Command Processor Settings dialog box is displayed.
- The Schedules page shows a list of existing command processor schedules. To add a new schedule, press the **New…** button. A Scheduled Event dialog box is displayed.
- The **When** drop down list lets you choose the type of scheduled event. You may choose between specifying processing to occur *Every n minutes* or *Once* on a particular date at a particular time or *Weekly on* one or more days of the week at a certain time. The fields in the Scheduled Event dialog box will change according to your selection. Once you have selected the scheduled event type and have specified the appropriate dates and times, then press **OK**. The scheduled event will be added to the list in the Schedule dialog box.

Options For Transferring Binary Attachments

You can attach binary files to mail messages and to any object capable of displaying a Notes page. Since binary attachments can be potentially very large, OfficeTalk gives you a choice when it comes to replicating them. You may choose between

- Always replicating attachments
- Never replicating attachments

- Sending and receiving attachments according to a separate schedule.

The first option will ensure that attachment information is completely up to date with other replicated data. However, large attachments created at one site may take a long time to be replicated at another site, especially if the replication method is e-mail, and as a result, the potentially more important *core* data may be delayed accordingly.

The second option has the disadvantage that file attachments will never be available to members of the replicating site. However, the speed of data replication will be proportionally faster.

The third option can be useful if your company needs to quickly replicate its core data every day and doesn’t need immediate access to binary attachment data. This way large binary data can be transferred less frequently, all in one go, for example at the weekend.

These options may be specified in one of two ways:

- From within the Gateway page of the Remote Workgroup wizard or the Remote Workgroup property sheet.
- From the OfficeTalk Services dialog box. For more information, see “Remote Workgroup Gateway Services” on page 91.

To specify these options from the Remote Workgroup property sheet, do the following:

- Select **Remote Workgroups** from the left hand list in Supervisor mode and click the right mouse button on the relevant remote workgroup in the right hand list and select **Edit** from the context menu. This will display the Remote Workgroup property sheet.
- Select the Gateway page and choose the appropriate radio button, representing your choice for how attachments are handled. If you select **Schedule when to send/receive attachment data**, the **Attachment Update Times** button will become enabled, letting you enter a schedule of when attachments will be replicated.

The Synchronisation Report

When data is synchronised between two workgroups, OfficeTalk can optionally generate a synchronisation report in the form of a mail message that is sent to a designated user on completion of a data *merge.* The report gives an indication of the number of records synchronised. A typical syncronisation report is shown in the picture below:

Setting up a Data Source

As part of creating a reference to a remote workgroup, you are required to specify the location of the remote workgroup database in the form of a data source. A data source describes to OfficeTalk the location and format of the remote workgroup database.

The Data Source page lets you specify the data source representing a database either by selecting an existing data source, which describes the database, or by creating a new data source.

You may create a new data source in the following way:

- Specify a unique name for the data source into the **Data Source** field and press the **Add…** button located underneath the field. A Create New Data Source wizard is displayed.
- Select the **System Data Source** radio button and press **Next**. The next page shows a list of database drivers. If the remote workgroup database is an Access driver, then select the line that reads ‘Microsoft Access Driver (*.mdb)’ and press **Next**. The last page will summarise the wizard’s intended actions when you press **Finish**.
- Press **Finish**. The ODBC Microsoft Access Setup dialog box is displayed. Press the **Select…** button. A Select Database dialog box is displayed.
- Locate and select the remote workgroup database. Note that if the remote workgroup database is available over dial-up networking then you must be dialled up to the remote location prior to selecting the remote workgroup database. Press **OK** on the Select Database dialog box to save your changes. Finally, press **OK** on the ODBC Microsoft Access Setup dialog box. The data source is now set up.

Customising OfficeTalk

Overview

This section describes the different ways in which you can customise both the look and certain features of OfficeTalk. For information on how to customise the database in order to store additional custom information, see "Administering Custom Data" on page 56.

Customising the Display

Most aspects of the display, such as fonts and colours, may be customised to your own preference and your settings may be stored in a *display profile*. OfficeTalk is supplied with several display profiles which provide a variety of display configurations. You may either use one of these shipped profiles or you may design your own. A display profile stores more than just font and colour information. It also stores which columns are displayed in each list, how each list is sorted, which window buttons and which menu items are available as well as several mode specific options.

Selecting an Existing Profile

You may select an existing display profile by choosing **Select Profile** from the **Edit** menu from within any mode. Alternatively, press **Ctrl+P**. The Select Profile dialog box is shown. Select the desired profile from the drop down list and press **OK**. The display will change to the settings stored in the selected profile.

Creating a New Profile

To create a new display profile, select **Edit Profiles…** from the **Edit** menu. The Profiles dialog box is displayed.

If you want to base your new profile on an existing profile, then select the relevant profile from the list and press the **Copy…** button. If you wish to create a completely new profile, based on the default settings, then press the **New…** button. In both cases the Profile property sheet will be displayed showing the Details page. Enter a name for the new profile.

Editing an Existing Profile

To edit the fonts and colours of the currently selected display profile, select **Edit Profile** from the **Edit** menu from within any mode. The Profile property sheet will be displayed showing the Format page. Any changes that you make to the list column settings, the window menu settings or the window button settings will change the currently selected profile. To save these changes permanently, select **Save Profile** from the **Edit** menu. In order to save changes to a profile, you must either own the profile or you must be a supervisor.

To edit the fonts and colours of a different display profile, select **Edit Profiles** from the **Edit** menu from within any mode. The Profiles dialog box is displayed. Select the profile that you wish to edit and press the **Edit** button. The Profile property sheet is displayed showing the Format page.

The Profile Property Sheet

When you create a new profile, the Profile property sheet is displayed showing the Details page. This page lets you enter a name for the display profile. This may be, for example, ‘My Display Settings’.

If you edit an existing display profile, the Profile property sheet is displayed showing the Format page. This page lets you customise all the fonts and colours of the OfficeTalk display.

The Attribute list contains a list of all the font and colour attributes which make up the OfficeTalk display. Each attribute is represented by three columns

- The Window column, representing the specific window associated with the display attribute, for example, the Contact Groups window or the Diary Monthly window.
- The Name column, representing the display attribute type, for example, the Column header, the Window Text or the Window Title.
- The Mode column, representing the mode containing the display attribute, for example, Diary mode or Contact mode.

Initially, the display attributes are grouped according to which mode they affect. However, you may sort or group this list by any of the three columns. You can sort by a specific column by clicking on the column using the left mouse button. You can group by a specific column by clicking on the column whilst holding down the **Shift** key.

If you select an attribute from the list, the attribute's properties will be displayed down the right hand side of the Format page. Depending upon the attribute selected, one or more of the following properties will be displayed:

Property	Description
Font	The font face used to draw the attribute text
Style	The font style, e.g. Regular, Bold, Italic or Bold Italic
Size	The font size used to draw the attribute text
Text colour	The colour used to draw the attribute text
Background	The background colour of the attribute
Justification	The justification of the attribute text
Indentation	3D indent or outdent. Applies to window titles only
Graduation	Colour graduation. Applies to window titles only.

You may change any of the properties associated with the selected attribute. If you select more than one attribute then any properties that are the same for each selected attribute will be displayed. Any properties that differ over the selected attributes will be blanked. Changing one of the property controls will affect that property for all the selected attributes. For example, you may sort the list by the Name column, select all Window Text attributes and choose a font size of 9pt. This will ensure that all fonts shown in any of the window lists will be 9pt.

If you wish to reset one or more attributes back to their default setting then select the relevant attributes from the list and press the **Reset to default settings** button.

Mode Specific Options

Diary Page

The Diary page lets you choose options specific to Diary mode. The settings are as follows:

Show window Title (Daily)	Check this check box if you wish to show the dark grey title banner immediately above the Daily view.

Day Header Format	This represents the date format shown at the top of each day cell in weekly, monthly and custom views.
Show appointment start time	Check this check box if you wish to show the start time of each appointment shown in the view. This option applies to weekly, monthly and custom views.
Show appointment end time	Check this check box if you wish to show the end time of each appointment shown in the view. This option applies to weekly, monthly and custom views.
Show appointment duration	Check this check box if you wish to show the duration of each appointment shown in the view. This option applies to weekly, monthly and custom views.
Show daily bookings before long term bookings	Check this check box if you wish to show daily appointments before shown through planner bookings and events.
Rows	Choose how many rows you wish to show in the Custom Appointments view.
Columns	Choose how many columns you wish to show in the Custom Appointments view.
Days across	Choose this radio button if you wish to show consecutive days from left to right in the Custom Appointments view.
Days down	Choose this radio button if you wish to show consecutive days from top to bottom in the Custom Appointments view.
Do not show weekends	Choose this radio button if you do not wish to show weekends in the Custom Appointments view.
Show weekends in two cells	Choose this radio button if you wish to show Saturday and Sunday in separate cells in the Custom Appointments view.
Show weekends in one cell	Choose this radio button if you wish to show Saturday and Sunday in a single cell in the Custom Appointments view.

Group Page

The Group page lets you choose options specific to Group mode. The settings are as follows:

Show Day Headers	Check this check box if you wish to show the date at the top of each day cell.
Day Header Format	Select, from the drop down list, the format of the date to be shown in the day cell header.
Show appointment start time	Check this check box if you wish to show the start time of each appointment shown in the Table View.
Show appointment end time	Check this check box if you wish to show the end time of each appointment shown in the Table View.
Show appointment duration	Check this check box if you wish to show the duration of each appointment shown in the Table View.
Show daily bookings before long term bookings	Check this check box if you wish to show daily appointments before shown through planner bookings and events in the Table view.

Meeting Page

The Meeting page lets you choose options specific to Meeting mode. The settings are as follows:

Show window title	Check this check box if you wish to display the dark grey title banner immediately above the meeting window.

Contact Page

The Contact page lets you choose options specific to Contact mode. The settings are as follows:

Rows	Specify the number of rows shown in the view. This applies to either the Company or Contact view.
Columns	Specify the number of columns shown in the view. This applies to either the Company or Contact view.
Line below company name	Check this check box if you wish to show a thin black horizontal line below the company name.
Line below contact name	Check this check box if you wish to show a thin black horizontal line below the contact name.
Default Text Font	Press this button to display a Font dialog box which will let you choose the default font for the company or contact record text.
Default Field Font	Press this button to display a Font dialog box which will let you choose the default font for the company or contact field label text.
Not shown	This list contains all those company or contact fields which are not shown in the Company or Contact view. You may show any of these fields by selecting them from this list and pressing the **>>** button.
Shown	This list contains all those company or contact fields which are shown in the Company or Contact view. The order in which these fields appear in the list determines the order in which they are displayed in the Company or Contact view. You may remove any of these fields by selecting them from this list and pressing the **<<** button.

Mail Page

The Mail page lets you choose options specific to Mail mode. The settings are as follows:

Show CC Window	Check this check box if you wish to show the CC recipient window directly underneath the To recipient window.
Show BCC Window	Check this check box if you wish to show the BCC recipient window directly underneath the CC recipient window.
Show Recipient Address Book Window	Check this check box if you wish to show the Recipient Address Book at the top left hand side of Mail mode.
Show Selected Recipients Window	Check this check box if you wish to show the list of selected recipients at the bottom left hand side of Mail mode.

Customising the Toolbars

OfficeTalk lets you customise the main toolbar and the shortcut bar. This means that you can choose both the content and the order of the buttons in these toolbars. If you wish to hide functionality that you plan not to use then this can be done simply by removing the appropriate button from the relevant toolbar. If you wish to make other programs accessible from within any mode in OfficeTalk then such programs may be added, in the form of a button, to the main toolbar or the shortcut bar.

For information on how to customise the Shortcut bar, see "The Shortcut Bar" on page 361.

Customising the Main Toolbar

To customise the main toolbar, do the following:

- Click anywhere in the main toolbar using the right mouse button and select **Customise…** from the context menu. The Customise Toolbar dialog box is displayed.

- The right hand list will contain a list of the buttons already shown in the toolbar. You can change the order in which these buttons are shown by selecting a button whose order you wish to change and pressing either the **Raise** or **Lower** buttons accordingly.
- The left hand list contains a list of buttons which are not currently shown in the toolbar. You may show any of these buttons in the main toolbar by selecting the appropriate button(s) and pressing the **Add** button.
- You may hide buttons that are currently shown in the main toolbar by selecting the relevant button(s) from the right hand list and pressing the **Remove** button.

By default, only mode buttons are shown in the main toolbar. OfficeTalk lets you add buttons which represent files or executable programs. You can do this by dragging the file or program, that you wish to add, from the Windows Explorer and dropping it onto the main toolbar. The file or program is then shown in the main toolbar as a button and is added to OfficeTalk as a *Tool*. The program or file may be started by clicking on the button.

You may edit the properties of the tool or delete the tool by accessing **Customise** from the **Tools** menu from within any mode. For more information on tools, see Customising the Tools Menu, below.

Customising the Tools Menu

A *Tool* is a program or file that you can access from within OfficeTalk. One example of a tool is the Calculator program supplied with Windows. Another example is a Visual Basic program which accesses data held within OfficeTalk.

Once a tool has been added, it may be accessed from the main toolbar, the shortcut bar and the menu.

Adding a Tool

You can add a tool in the following way:

- Select **Customise** from the **Tools** menu from within any mode. The Tools dialog box is displayed.

- Press the **New…** button. The Tool property sheet is displayed, showing the Details page.

- Enter a name for the tool, for example, 'Calculator'. Specify the full path of the relevant program or file, for example, 'C:\WINDOWS\CALC.EXE'. You may use the **Browse…** button to locate the required file. If you are specifying a program which requires arguments then enter those arguments in the **Arguments** field.
- In the Visibility page, choose whether or not you wish to show the tool in the menu by checking the **View in menu** check box. If you wish to show the tool in the menu in each mode, then select 'All Modes' from the **Mode** drop down list. If you wish to show the tool only in a specific mode, then select that mode from the **Mode** drop down list.

- If you wish to view the tool in the main toolbar then check the **View in toolbar** check box.
- The Access page lets you choose whether this tool is a public tool, available to all users or whether it is a private tool, accessible only by you. Select either the **Public** or **Personal** radio button accordingly.

Editing and Deleting Tools

You may edit or delete a tool in the following way:

- Select **Customise** from the **Tools** menu from within any mode. The Tools dialog box is displayed.

- If you wish to edit the tool, then select the relevant tool from the list and press the **Edit** button. The Tool property sheet is displayed showing the details of the selected tool.
- If you wish to delete a tool, then select the relevant tool from the list and press the **Delete** button. OfficeTalk will ask you to confirm that you wish to delete the tool, prior to deleting it.

Customising Window Buttons and Menus

Each mode contains one or more *windows*. An example of a window is the Task List window or the Daily Appointments window. The default display profile shows a graduated navy blue banner above each window. OfficeTalk provides certain functions which relate specifically to a window. For example, consider the Task List. The function to mark a task as *completed* is specific to the Task List. For this reason, OfficeTalk makes such functionality available in the form of a window button or a window menu.

The window menu may be displayed by clicking on the left most part of the banner above each window as shown in the picture below.

If a window is configured to display window buttons then these will be shown at the right most part of the banner.

You can change which window buttons and menus are accessible from a particular window by clicking the right mouse button anywhere inside the window and selecting **Window Buttons** from the context menu. The Choose Buttons/Menu Items dialog box is displayed. The Buttons page and the Menu Items page are identical in appearance. The Buttons page lets you choose which window buttons to show in the window banner. The Menu Items page lets you choose which menu items to show in the window's drop down menu. In both pages, you may use the **Add** and **Remove** buttons to determine which buttons or menu items are accessible. You may also use the **Raise** and **Lower** buttons to determine the order in which the buttons and menu items appear.

Customising List Columns

Most modes contain one or more *window lists*. A window list is a window which specifically shows data in the form of a list of items. An example of a window list is the Task list in Diary mode or the list of employees in the Company View within Contact mode.

Every list shows several columns. For example, the list of employees shows, by default, the *First Names* column, the *Last Names* column, the *Position, Department* and *Phone* columns.

OfficeTalk lets you customise which columns are shown in any of the window lists. You can do this by clicking the right mouse button down anywhere in the window list and selecting **Columns…** from the context menu. The Choose Columns dialog box is displayed. This dialog box shows the available columns in the left hand list and shows which columns are currently shown in the right hand list. Use the **Add** and **Remove** buttons to determine which columns are shown. You may also use the **Raise** and **Lower** buttons to determine the order in which the shown columns appear in the list.

Another way of changing the order of the columns shown in the window list is simply by clicking on the relevant column header in the window list and dragging the column header to the required position. Another way of hiding a column currently shown in the window list is simply by dragging the appropriate column header and dropping it outside the window list.

OfficeTalk Application Programming Interface

Overview

This chapter describes the OfficeTalk application programming interface (API). The OfficeTalk API has an OLE Automation interface which means that it is straight forward to manipulate OfficeTalk data from within OLE automation controllers, such as Visual Basic, VBScript, JavaScript, WordBasic and Visual C++. It is intended that Visual Basic is the ideal platform from which to program add-ons and extensions for OfficeTalk. For this reason, all the examples in this reference manual are Visual Basic examples.

The OfficeTalk API gives you access to much of the data contained within OfficeTalk. Provided you have sufficient access, you may use the API to read, write, edit and delete certain OfficeTalk data. Access to OfficeTalk data is achieved through a single *object* called the Session object.

The OfficeTalk API is structured as follows:

In order to use the OfficeTalk API you must first create a Session object.

```
Set session =
CreateObject("OfficeTalk.Session")
```

To gain access to the data held in OfficeTalk, you must then log on as a specific user. To do this you call a function called Logon through the Session object:

```
Set user = session.Logon("myLoginName",
"myPassword")
```

Objects and Object Lists

OfficeTalk data may be traversed using an object list and then edited using an object. For example, if you wished to traverse your list of tasks, you would access the Task List object, calling methods to iterate through the list. Once you have found a task in the list that you wish to edit, then you would access it via the Task object. With the exception of the Session object, all the objects that you will access will shared common functionality. Furthermore all object lists that you access will also share common functionality.

Object List Common Functionality

This section describes the methods and properties that are common to all object lists:

Common Object List Methods

Add	Adds a new item
Count	Returns the number of items in the list.
SetFilter	Sets the list filter
SetFilterAnd	Logically ANDs the filter with this expression
SetFilterOr	Logically ORs the filter with this expression
ClearFilter	Clears the list filter
FindItemByID	Finds an item with an ID which matches the passed in ID
GetFirst	Gets the first item in the list
GetNext	Gets the next item in the list
GetLast	Gets the last item in the list
GetPrev	Gets the previous item in the list

Add()

Description:	Adds a new item to the list
Syntax:	list.Add()
Parameters:	
list	Required, the list object
Remarks:	Adds a new item to the list
Returns:	Nothing
Example:	

```
Dim session As Object
Dim users As Object
Dim user As Object
Set session =
CreateObject("OfficeTalk.Session")
Set user = users.Add
user.Value("Name") = "Bloggs"
user.Value("First Names") ="Fred"
user.Value("Login Name") = "fredb"
user.Update()
```

Count()

Description: Returns the number of items in this list

Syntax: list.Count()

Parameters:

list Required, the list object

Remarks: If there is no filter applied to this list then the returned count will represent the total number of items in the list to which you have at least visible access.

Returns: An integer representing the number of items in the list.

Example:

```
Dim session As Object
Dim tasks As Object
Dim task As Object
Dim user As Object
Dim iTasks As Integer
Set session =
CreateObject("OfficeTalk.Session")
Set user = session.Logon(login name, password)
Set tasks = user.tasks
iTasks = tasks.Count
```

SetFilter(sField As String, sOp As String, value As Variant)

Description: Sets the list filter. This function takes a string as the first parameter which is the name of the column by which you wish to filter. The second parameter is a string field which represents the operator, e.g. "==", ">=" "!=" etc. The third parameter represents a value which may be represented by a variant. This can represent a numeric, string or date value.

Syntax: list.SetFilter(sField, sOp, value)

Parameters:

list Required, the list object

sField The OfficeTalk column name describing the column by which you wish to filter.

sOp The operator expressed as a string.

sValue The value used to filter the list according to the operator.

Remarks: The caller can set up the filter and then iterate through the resulting filtered list using the familiar GetFirst() and GetNext() methods. The field name is identical to the columns available for display in the associated display list in OfficeTalk. The sOp operator may be one of the following string values:

"==", ">", "<", ">=", <=", "!=", "==*" (*equals case insensitive*), "!=*" (*does not equal - case insensitive*), "begins_with", "begins_with_no_case", "ends_with", "ends_with_no_case", "contains", "contains_no_case", "does_not_begin_with", "does_not_begin_with_no_case", "does_not_end_with", "does_not_end_with_no_case", "does_not_contain", "does_not_contain_no_case"

Returns: Nothing

Example:

```
Dim session As Object

Dim users As Object

Dim user As Object

Set session =
CreateObject("OfficeTalk.Session")

Call session.Logon(login name, password)

Set users = session.GetUsers

Call users.SetFilter("Last Logon", "<",
#12/7/97#)

Set user = users.GetFirst
```

SetFilterAnd(sField As String, sOp As String, value As Variant**)**

Description: Sets the list filter, logically ANDing the specified filter with the current filter. This function takes a string as the first parameter which is the name of the column by which you wish to filter. The second parameter is a string field which represents the operator, e.g. "==", ">=" "!=" etc. The third parameter represents a value which may be represented by a variant. This can represent a numeric, string or date value.

Syntax: list.SetFilterAnd(sField, sOp, value)

Parameters:

list Required, the list object

sField The OfficeTalk column name describing the column by which you wish to filter.

sOp The operator expressed as a string.

sValue The value used to filter the list according to the operator.

Remarks: The caller can set up the filter and then iterate through the resulting filtered list using the familiar GetFirst() and GetNext() methods. The field name is identical to the columns available for display in the associated display list in OfficeTalk. The sOp operator may be one of the following string values:

"==", ">", "<", ">=", <=", "!=", "==*" (*equals case insensitive*), "!=*" (*does not equal - case insensitive*), "begins_with", "begins_with_no_case", "ends_with", "ends_with_no_case", "contains", "contains_no_case", "does_not_begin_with", "does_not_begin_with_no_case", "does_not_end_with", "does_not_end_with_no_case", "does_not_contain", "does_not_contain_no_case"

Returns: Nothing

Example:

```
Dim session As Object

Dim users As Object

Dim user As Object

Set session = CreateObject("OfficeTalk.Session")

Call session.Logon(login name, password)

Set users = session.GetUsers

Call users.SetFilter("Last Logon", "<", #12/7/98#)

Call users.SetFilterAnd("Last Logon", ">", #30/7/98#)

Set user = users.GetFirst
```

SetFilterOr(sField As String, sOp As String, value As Variant**)**

Description: Sets the list filter, logically ORing the specified filter with the current filter. This function takes a string as the first parameter which is the name of the column by which you wish to filter. The second parameter is a string field which represents the operator, e.g. "==", ">=" "!=" etc. The third parameter represents a value which may be represented by a variant. This can represent a numeric, string or date value.

Syntax: list.SetFilterOr(sField, sOp, value)

Parameters:

list Required, the list object

sField The OfficeTalk column name describing the column by which you wish to filter.

sOp The operator expressed as a string.

sValue The value used to filter the list according to the operator.

Remarks: The caller can set up the filter and then iterate through the resulting filtered list using the familiar GetFirst() and GetNext() methods. The field name is identical to the columns available for display in the associated display list in OfficeTalk. The sOp operator may be one of the following string values:

"==", ">", "<", ">=", <=", "!=", "==*" (*equals case insensitive*), "!=*" (*does not equal - case insensitive*), "begins_with", "begins_with_no_case", "ends_with", "ends_with_no_case", "contains", "contains_no_case", "does_not_begin_with", "does_not_begin_with_no_case", "does_not_end_with", "does_not_end_with_no_case", "does_not_contain", "does_not_contain_no_case"

Returns: Nothing

Example:

```
Dim session As Object

Dim users As Object

Dim user As Object

Set session = CreateObject("OfficeTalk.Session")

Call session.Logon(login name, password)
```

```
Set contacts = session.GetContacts
Call users.SetFilter("Name", "==", "Smith")
Call users.SetFilterOr("Name", "==", "Jones")
Set user = users.GetFirst
```

ClearFilter()

Description: Clears the list filter.

Syntax: list.ClearFilter()

Parameters:

list Required, the list object

Remarks: Clears the filter that was set as a result of a SetFilter method.

Returns: Nothing

Example:

```
Dim session As Object
Dim users As Object
Dim user As Object
Set session =
CreateObject("OfficeTalk.Session")
Call session.Logon(login name, password)
Set users = session.GetUsers
Call users.SetFilter("Last Logon", "<",
#12/7/97#)
iFilteredUsers = users.Count
users.ClearFilter
iUnfilteredUsers = users.Count
```

FindItemByID()

Description: Returns the item in the list whose unique ID matches the passed in ID.

Syntax: list.FindItemByID(id)

Parameters:

list Required, the list object

id The unique identifier of the object required.

Remarks: Returns the item in the list whose unique ID matches the passed in ID. You can query the ID of any object by calling object.Value("ID").

Returns: An object which matches the passed in ID. If there is no match then Nothing is returned.

Example:

```
Dim session As Object
Dim user As Object
Set session =
CreateObject("OfficeTalk.Session")
Call session.Logon(login name, password)
Set users = session.GetUsers
```

```
Set user = users.FindItemByID(103345311)
```

GetFirst()

Description: Gets the first item in the list

Syntax: object.GetFirst()

Parameters:

list Required, the list object

Remarks: Returns the first item in the list. If there are no items in the list or you do not have at least visible access to any of the items in the list then Nothing is returned.

Returns: An object of the appropriate type.

Example:

```
Dim session As Object
Dim user As Object
Dim users As Object
Set session =
CreateObject("OfficeTalk.Session")
Call session.Logon(login name, password)
Set users = session.GetUsers
Set user = users.GetFirst
```

GetNext()

Description: Gets the next item in the list

Syntax: object.GetNext()

Parameters:

list Required, the list object

Remarks: Returns the next item in the list. If there are no items in the list or you do not have at least visible access to any of the items in the list then Nothing is returned. Note this call must have been preceded by a call to GetFirst() or calls to GetLast()/GetPrev()

Returns: An object of the appropriate type.

Example:

```
Dim session As Object
Dim user As Object
Dim appts As Object
Dim appt As Object
Set session =
CreateObject("OfficeTalk.Session")
Set user = session.Logon(login name, password)
Set appts = user.Appointments
Set appt = appts.GetFirst
While Not appt Is Nothing
   MsgBox appt.Name
```

```
    Set appt = appts.GetNext
Wend
```

GetLast()

Description: Gets the last item in the list

Syntax: object.GetLast()

Parameters:

list Required, the list object

Remarks: Returns the last item in the list. If there are no items in the list or you do not have at least visible access to any of the items in the list then Nothing is returned.

Returns: An object of the appropriate type.

Example:

```
Dim session As Object
Dim contact As Object
Dim contacts As Object
Set session =
CreateObject("OfficeTalk.Session")
Set user = session.Logon(login name, password)
Set contacts = session.GetContacts
Set contact = contacts.GetLast
```

GetPrev()

Description: Gets the previous item in the list

Syntax: object.GetPrev()

Parameters:

list Required, the list object

Remarks: Returns the previous item in the list. If there are no items in the list or you do not have at least visible access to any of the items in the list then Nothing is returned. Note this call must have been preceded by a call to GetLast() or calls to GetFirst()/GetNext().

Returns: An object of the appropriate type.

Example:

```
Dim session As Object
Dim user As Object
Dim task As Object
Dim tasks As Object
Set session =
CreateObject("OfficeTalk.Session")
Call session.Logon(login name, password)
Set user = session.FindUserByLoginName("fred")
Set tasks = user.Tasks
Set task = tasks.GetLast
MsgBox task.Description
```

```
Do While Not task Is Nothing
 MsgBox task.Description
   Set task = tasks.GetPrev
Loop
```

Object Common Functionality

This section describes the methods and properties that are common to all objects:

Common Object Methods

Edit	Lets the caller edit the properties of the Appointment object via a dialog box
Update	Saves changes to this object
Delete	Deletes the object
Value	Gets the value of the passed in field/column name
Value=	Sets the value of the passed in field/column name

Common Object Properties

Name	Represents the object's description
LastEditedDate	The date on which the object was last changed
CreationDate	The date when the object was created

Edit()

Description: Lets the caller edit the properties of the item via the standard dialog box.

Syntax: object.Edit()

Parameters:

object Required, the item

Remarks: Pops up a dialog box, letting the caller manually change the properties of the object. The dialog box will not appear if the caller does not have at least Edit access to the item. The dialog box will also not appear if **session.SetAllowUI(False)** has been previously called.

Returns: True if the changes were committed, False otherwise.

Example:

```
Dim session As Object
Dim user As Object
Dim appts As Object
Dim appt As Object
Set session =
CreateObject("OfficeTalk.Session")
Set user = session.Logon(login name, password)
Set user = session.FindUserByLoginName("fred")
Set appts = user.Appointments
```

```
Set appt = appts.Add
If appt.Edit Then
 appt.Update
End If
```

Update()

Description: Saves changes to this object

Syntax: object.Update()

Parameters:

object Required, the item

Remarks: If any changes have been made to the object, this method saves those changes. Update() is automatically called for you when the object goes out of scope. It is useful, however, if you require that the state of the object be saved before the object goes out of scope, for example, if you create a new object, you must call Update on the object prior to querying the item's properties.

Returns: Nothing

Example:

```
Set appts = user.Appointments
Set appt = appts.Add
appt.Name = "Write report"
appt.Update
MsgBox appt.Name
```

Delete()

Description: Deletes the object.

Syntax: object.Delete()

Parameters:

object Required, the item

Remarks: Deletes the item provided that you have full delete access to the item.

Returns: True if the item was successfully deleted, False otherwise.

Example:

```
Dim session As Object
Dim user As Object
Dim appts As Object
Dim appt As Object
Set session =
CreateObject("OfficeTalk.Session")
Call session.Logon(login name, password)
Set user = session.FindUserByLoginName("fred")
Set appts = user.Appointments
Set appt = appts.GetFirst
If appt.delete Then
```

```
 MsgBox "Delete OK"
Else
 MsgBox "Did not delete"
End If
```

Value(sField As String**)**

Description: Gets the value of the field/column whose name matches the passed in sField string.

Syntax: object.Value(sField)

Parameters:

object Required, the item

sField The field/column name

Remarks: The Value() method can be used to retrieve the value of any field/column of an item. If the field/column value is accessible as a property of the item then it is more efficient to directly access the property value as opposed to calling this method. E.g. appt.Name is more efficient than appt.Value("Name"). Value() should be used when a property call is not available for the required field. The Value() method can also retrieve the value of custom fields.

Returns: A variant containing the data held in the items matching field/column.

Example:

Example:

```
Set appts = user.Appointments
Set appt = appts.Add
appt.Name = "Write report"
appt.Update
MsgBox appt.Value("Name")
```

Value(sField As String**) =** ***expr***

Description: Sets the value of the field/column whose name matches the passed in sField string.

Syntax: object.Value(sField) = *expr*

Parameters:

object Required, the item

sField The field/column name

Remarks: The Value() method can be used to set the value of any field/column of the item. If the field/column value is accessible as a property of the item then it is more efficient to directly access the property value as opposed to calling this method. E.g. appt.Name = "Meeting" is more efficient than appt.Value("Name") = "Meeting". Value() should be used when a property call is not available for the required field. The Value() method can also set the value of custom fields.

Returns: Nothing

Example:

```
Set appts = user.Appointments
```

```
Set appt = appts.Add
appt.Value("Name") = "Meeting"
appt.Update
```

Name (property)

Description: Returns a string representing the name or description of the item. For example, the description of a task or the subject of a mail message or the name of a meeting.

Type: String

Example:

```
Set appts = user.Appointments
Set appt = appts.Add
appt.Name = "Meeting"
appt.Update
MsgBox appt.Name
```

CreationDate (property)

Description: Returns the date and time on which the item was first created. This is a read-only property.

Type: Date

Example:

```
Set appts = user.Appointments
Set appt = appts.GetFirst
MsgBox CStr(appt.CreationDate)
```

LastEditedDate (property)

Description: Returns the date and time on which the item was last edited. This is a read-only property.

Type: Date

Example:

```
Set appts = user.Appointments
Set appt = appts.GetFirst
MsgBox CStr(appt.LastEditedDate)
```

Application Object

The Application object provides methods for showing a particular item of data in a running instance of OfficeTalk and for determining the currently viewed item.

The following methods are available from the Application object:

Application Methods

ViewItem	Changes to the required mode and displays the item of data according to the passed in ID.
GetViewedItem	Returns the data type and ID of the item currently being viewed in OfficeTalk.
GetLoginName	Gets the login name of the currently logged on user

The application object may be accessed in one of two ways, depending upon whether the you wish to run up a new instance of OfficeTalk or latch on to a running instance. To run up a new instance of OfficeTalk, create the Application object in the following way:

```
Set app =
CreateObject("OfficeTalk.Application")
```

To latch on to a running instance of OfficeTalk, create the Application object in the following way:

```
Set app = GetObject(,"OfficeTalk.Application")
```

ViewItem()

Description: Views an item of data given the item's data type and passed in ID.

Syntax: object.ViewItem *data type, ID*

Parameters:

object Required, the Application object

ID The ID of the item. This can usually be obtained by calling the Value method on the item, e.g. *item.Value("ID")*

data type A string representing the OfficeTalk data type. This may be one of the following values:

"Company", "Contact", "Conversation", "Document", "Task Folder", "Meeting Folder", "Project Folder", "Planner Folder", "Mail Folder", "Task", "Project Task", "Appointment", "Resource Booking", "Meeting", "Meeting Member", "Planner", "Project", "Received Mail", "Sent Mail", "Group", "User", "Resource".

Returns: Nothing

Example:

```
Dim appl As Object

Set appl =
CreateObject("OfficeTalk.Application")

appl.ViewItem "Contact", "15534534"
```

GetViewedItem()

Description: Returns the data type and ID of the currently viewed item.

Syntax: object.GetViewedItem *data type, ID*

Parameters:

object Required, the Application object

_ID_ A *long* integer which will be assigned the ID of the item.

data type A string which will be assigned with a string representing the OfficeTalk data type. This may be one of the following values:

"Company", "Contact", "Conversation", "Document", "Task Folder", "Meeting Folder", "Project Folder", "Planner Folder", "Mail Folder", "Task", "Project Task", "Appointment", "Resource Booking", "Meeting", "Meeting Member", "Planner", "Project", "Received Mail", "Sent Mail", "Group", "User", "Resource".

Returns: True if the function successfully assigned the data type and ID of the currently viewed item, False otherwise.

Example:

```
Dim appl As Object

Set Appl = GetObject(,
"Officetalk.application")

Dim sDataType As String

Dim lID As Long

Call Appl.GetViewedItem(sDataType, lID)

MsgBox sDataType

MsgBox lID
```

GetLoginName()

Description: Gets the login name of the currently logged on user

Syntax: object.GetLoginName()

Parameters:

object Required, the Application object

Returns: The login name of the currently logged in user

Example:

```
Dim ot As Object

Dim sLoginName As String

Set ot =
CreateObject("OfficeTalk.Application")

sLoginName = ot.GetLoginName
```

Session Object

The Session object provides a set of interfaces which allow the programmer to access OfficeTalk data with the same access as the programmer would normally have if logged into OfficeTalk with the specified login name and password. Logging on to the Session object requires the same login name and password that you would use to log in as a particular user in OfficeTalk. Logging on is achieved using the **Logon** method.

The following methods are available from the session object:

Session Methods

Logon	Logs the user onto OfficeTalk using the passed in name and password.
Logout	Logs the user off the session.
LatchLogon	Logs the user onto OfficeTalk using the same credentials as the user currenly logged on to the running instance of OfficeTalk.
FindUserByLastName	Returns a User object based on the passed in surname
FindUserByLoginName	Returns a User object based on the passed in login name
FindLoginNameByIndex	Returns a login name for the passed in index into the user list.
GetUsers	Returns an object which may be used for iterating users.
GetContacts	Returns an object which may be used for iterating contacts.
GetCompanies	Returns an object which may be used for iterating companies.
GetConversations	Returns an object which may be used for iterating conversations.
GetPlanners	Returns an object which may be used for iterating planners.
GetProjects	Returns an object which may be used for iterating projects.
GetGroups	Returns an object which may be used for iterating groups.
GetContactGroups	Returns an object which may be used for iterating contact groups.
GetMeetings	Returns an object which may be used for iterating meetings.
GetResources	Returns an object which may be used for iterating resources.
GetProjectFolders	Returns an object which may be used for iterating project folders.
GetPlannerFolders	Returns an object which may be used for iterating planner folders.
GetMeetingFolders	Returns an object which may be used for iterating meeting folders.
NewMeeting	Creates and returns a new meeting object.
NewMessage	Creates and returns a new message object.
InitCheckRecipients	Prepares the session to check the validity of a recipient.
GetCheckedRecipient	Returns the name and address of a validated recipient.
GetCheckedRecipientName	Returns the name and address of a validated recipient.
GetCheckedRecipientAddress	Returns the name and address of a validated recipient.
CheckForNewMail	Checks for new mail for the logged on user.
GetTempFilename	Helper function which returns a temporary filename.
SetAllowUI	Specifies whether or not to turn off user interface
AddContextMenuItem	Adds a custom context menu item to any of the OfficeTalk data type context menus, allowing seamless integration with other

	products.
RemoveContextMenuItems	Removes all custom context menu items from a specific data type context menu or removes a specific custom context menu or removes all custom context menus.

Session Properties

CurrentUser	Returns a User object representing the current user.
Trace	Setting this property to True will cause the API to pop up debug message boxes when errors are encountered.

Logon()

Description: Logs the user onto OfficeTalk using the passed in name and password.

Syntax: object.Logon([loginName, [loginPassword]])

Parameters:

object Required, the Session object

loginName The user's login name. To prompt the user to enter a login name, omit *loginName* and ensure the user interface is activated (the default) via a call to SetAllowUI().

loginPassword The user's login password. To prompt the user to enter a login password, omit *loginPassword* and ensure the user interface is activated (the default) via a call to SetAllowUI().

Returns: Returns a User object.

Example:

```
Dim session As Object

Dim user As Object

Set session =
CreateObject("OfficeTalk.Session")

Set user = session.Logon("fred", "password")
```

Logout()

Description: Logs the user off the session

Syntax: object.Logout()

Parameters:

object Required, the Session object

Returns: Nothing

Example:

```
Dim session As Object

Dim user As Object

Set session =
CreateObject("OfficeTalk.Session")

session.Logout
```

LatchLogon()

Description: Logs the user onto OfficeTalk using the same credentials as the user currenly logged on to the running instance of OfficeTalk.

Syntax: object.LatchLogon(applicationObject)

Parameters:

object Required, the Session object

applicationObject The application object returned by a call to CreateObject("OfficeTalk.Application").

Returns: A User object

Remarks: This function is used to log on to a session using the same login name and password as used to log into the current running instance of OfficeTalk.

This function is provided for developers who use OfficeTalk's ability to call a method in an automation object when a particular custom context menu has been selected. When such an event occurs, the only way to log onto a session using the same credentials as the user currently logged on to OfficeTalk, is by logging on to the session using the LatchLogon method.

Example:

```
Dim session As Object

Dim user As Object

Set ot =
CreateObject("OfficeTalk.Application")

Set session =
CreateObject("OfficeTalk.Session")

Set user = session.LatchLogon(ot)
```

FindUserByLastName()

Description: Returns a User object based on the passed in surname.

Syntax: object.FindUserByLastName(name)

Parameters:

object Required, the Session object

name The user's last name

Remarks: This function searches the list of users looking for a match by surname. If a single match is found, a User object is returned, representing the matched user. If more than one matching user is found or no matching user is found **Nothing** is returned. The match is case in-sensitive.

Returns: Returns a User object.

Example:

```
Dim session As Object

Dim user As Object

Set session =
CreateObject("OfficeTalk.Session")

Set user = session.FindUserByLastName("Bates")
```

FindUserByLoginName()

Description: Returns a User object based on the passed in login name

Syntax: object.FindUserByLoginName(name)

Parameters:

object Required, the Session object

name The user's login name

Remarks: This function searches the list of users looking for a match by login name. A login name is always guaranteed to be unique and so this function will never match more than one user. If a user is found, the associated User object is returned, otherwise **Nothing** is returned.

Returns: Returns a User object.

Example:

```
Dim session As Object

Dim user As Object

Set session =
CreateObject("OfficeTalk.Session")

Set user = session.FindUserByLoginName("stb")
```

FindLoginNameByIndex()

Description: Returns a login name for the user represented by the passed in iIndex. This function is useful for finding out which users are available in the workgroup without needing to be logged on. This permits the application designer to let the user choose from a list of possible login names prior to logging on.

Syntax: object.FindLoginNameByIndex(iIndex, sLoginName)

Parameters:

object Required, the Session object

iIndex A zero based index into the list of users.

sLoginName A string to which the appropriate login name will be assigned.

Remarks: This method lets you iterate through the list of available login names without needing to be logged on to the session. You can find out the number of users in the workgroup by calling *session.GetUsers.Count*. Call this method repeatedly, passing in a value of iIndex incrementing from 0 to the total number of users. The sLoginName parameter will be assigned with the appropriate user login name.

Returns: A String representing the login name of the appropriate user.

Example:

```
Dim session As Object

Dim user As Object

Dim sLoginName As String

Set session =
CreateObject("OfficeTalk.Session")

Call session.FindLoginNameByIndex(0,
sLoginName)
```

GetContacts()

Description: Returns a list of Contacts to which the current user has access. The list may be used for subsequent iteration.

Syntax: object.GetContacts

Parameters:

object Required, the Session object

Remarks: This function returns a new Contacts object to the caller. The list may be subsequently iterated using GetFirst(), GetNext(), GetLast(), GetPrev().

Returns: Returns a Contacts object.

Example:

```
Dim session As Object

Dim contacts As Object

Set session =
CreateObject("OfficeTalk.Session")

Set user = session.Logon(login name, password)

Set contacts = session.GetContacts
```

GetCompanies()

Description: Returns a list of Companies to which the current user has access. The list may be used for subsequent iteration.

Syntax: object.GetCompanies

Parameters:

object Required, the Session object

Remarks: This function returns a new Companies object to the caller. The list may be subsequently iterated using GetFirst(), GetNext(), GetLast(), GetPrev().

Returns: Returns a Companies object.

Example:

```
Dim session As Object

Dim companies As Object

Set session =
CreateObject("OfficeTalk.Session")

Set user = session.Logon(login name, password)

Set companies = session.GetCompanies
```

GetPlanners()

Description: Returns a list of Planners to which the current user has access. The list may be used for subsequent iteration.

Syntax: object.GetPlanners

Parameters:

object Required, the Session object

Remarks: This function returns a new Planners object to the caller. The list may be subsequently iterated using GetFirst(), GetNext(), GetLast(), GetPrev().

Returns: Returns a Planners object.

Example:

```
Dim session As Object

Dim planners As Object

Set session =
CreateObject("OfficeTalk.Session")
```

```
Set user = session.Logon(login name, password)
Set planners = session.GetPlanners
```

GetProjects()

Description: Returns a list of Projects to which the current user has access. The list may be used for subsequent iteration.

Syntax: object.GetProjects

Parameters::

object Required, the Session object

Remarks: This function returns a new Projects object to the caller. The list may be subsequently iterated using GetFirst(), GetNext(), GetLast(), GetPrev().

Returns: Returns a Projects object.

Example:

```
Dim session As Object
Dim projects As Object
Set session =
CreateObject("OfficeTalk.Session")
Set user = session.Logon(login name, password)
Set projects = session.GetProjects
```

GetGroups()

Description: Returns a list of Groups to which the current user has access. The list may be used for subsequent iteration.

Syntax: object.GetGroups

Parameters:

object Required, the Session object

Remarks: This function returns a new Groups object to the caller. The list may be subsequently iterated using GetFirst(), GetNext(), GetLast(), GetPrev().

Returns: Returns a Groups object.

Example:

```
Dim session As Object
Dim groups As Object
Set session =
CreateObject("OfficeTalk.Session")
Set user = session.Logon(login name, password)
Set groups = session.GetGroups
```

GetContactGroups()

Description: Returns a list of contact groups to which the current user has access. The list may be used for subsequent iteration.

Syntax: object.GetContactGroups

Parameters:

object Required, the Session object

Remarks: This function returns a new ContactGroups object to the caller. The list may be subsequently iterated using GetFirst(), GetNext(), GetLast(), GetPrev().

Returns: Returns a ContactGroups object.

Example:

```
Dim session As Object

Dim groups As Object

Set session =
CreateObject("OfficeTalk.Session")

Set user = session.Logon(login name, password)

Set contgrps = session.GetContactGroups
```

GetMeetings()

Description: Returns a list of Meetings to which the current user has access. The list may be used for subsequent iteration.

Syntax: object.GetMeetings

Parameters:

object Required, the Session object

Remarks: This function returns a new Meetings object to the caller. The list may be subsequently iterated using GetFirst(), GetNext(), GetLast(), GetPrev().

Returns: Returns a Meetings object.

Example:

```
Dim session As Object

Dim meetings As Object

Set session =
CreateObject("OfficeTalk.Session")

Set user = session.Logon(login name, password)

Set meetings = session.GetMeetings
```

GetResources()

Description: Returns a list of Resources to which the current user has access. The list may be used for subsequent iteration.

Syntax: object.GetResources

Parameters:

object Required, the Session object

Remarks: This function returns a new Resources object to the caller. The list may be subsequently iterated using GetFirst(), GetNext(), GetLast(), GetPrev().

Returns: Returns a Resources object

Example:

```
Dim session As Object

Dim resources As Object

Set session =
CreateObject("OfficeTalk.Session")

Set user = session.Logon(login name, password)

Set resources = session.GetResources
```

GetProjectFolders()

Description: Returns a list of ProjectFolder objects to which the current user has access. The list may be used for subsequent iteration.

Syntax: object.GetProjectFolders

Parameters:

object Required, the Session object

Remarks: This function returns a new ProjectFolders object to the caller. The list may be subsequently iterated using GetFirst(), GetNext(), GetLast(), GetPrev().

Returns: Returns a ProjectFolders object.

Example:

```
Dim session As Object

Dim projFolders As Object

Set session =
CreateObject("OfficeTalk.Session")

Set user = session.Logon(login name, password)

Set projFolders = session.GetProjectFolders
```

GetPlannerFolders()

Description: Returns a list of PlannerFolder objects to which the current user has access. The list may be used for subsequent iteration.

Syntax: object.GetPlannerFolders

Parameters:

object Required, the Session object

Remarks: This function returns a new PlannerFolders object to the caller. The list may be subsequently iterated using GetFirst(), GetNext(), GetLast(), GetPrev().

Returns: Returns a PlannerFolders object.

Example:

```
Dim session As Object

Dim planFolders As Object

Set session =
CreateObject("OfficeTalk.Session")

Set user = session.Logon(login name, password)

Set planFolders = session.GetPlannerFolders
```

GetMeetingFolders()

Description: Returns a list of MeetingFolders to which the current user has access. The list may be used for subsequent iteration.

Syntax: object.GetMeetingFolders

Parameters:

object Required, the Session object

Remarks: This function returns a new MeetingFolders object to the caller. The list may be subsequently iterated using GetFirst(), GetNext(), GetLast(), GetPrev().

Returns: Returns a MeetingFolders object.

Example:

```
Dim session As Object

Dim meetFolders As Object

Set session =
CreateObject("OfficeTalk.Session")

Set user = session.Logon(login name, password)

Set meetFolders = session.GetMeetingFolders
```

NewMeeting()

Description: Creates and returns a new meeting object provided that the current user has sufficient access to create meetings.

Syntax: object.NewMeeting

Parameters:

object Required, the Session object

Remarks: This function returns a new Meeting object to the caller.

Returns: Returns a Meeting object.

Example:

```
Dim session As Object

Set session =
CreateObject("OfficeTalk.Session")

Set user = session.Logon(login name, password)

Set meeting = session.NewMeeting
```

NewMessage()

Description: Creates and returns a new mail message object.

Syntax: object.NewMessage

Parameters:

object Required, the Session object

Remarks: This function returns a new Message object to the caller. A subject, body and list of recipients may subsequently be specified and the message may then be sent.

Returns: Returns a Message object.

Example:

```
Dim session As Object

Set session =
CreateObject("OfficeTalk.Session")

Set user = session.Logon(login name, password)

Set message = session.NewMessage
```

InitCheckRecipients()

Description: Prepares the session to validate a passed in recipient

Syntax: object.InitCheckRecipients(name)

Parameters:

object Required, the Session object

name A search string which should match part or all of the required recipient.

Remarks: This function returns the number of recipients that matched the passed in search name. It is intended that this function is used in conjunction with GetCheckedRecipient().

Returns: The number of recipients that matched the passed in search name.

Example:

```
Dim session As Object

Set session =
CreateObject("OfficeTalk.Session")

Set user = session.Logon(login name, password)

iCount = session.InitCheckRecipients("smith")
```

GetCheckedRecipient()

Description: Retrieves a specific validated recipient after a call to InitCheckRecipients(). This function would typically be called prior to sending mail in order to establish the validity of a recipient.

Syntax: Object.GetCheckedRecipient(iIndex, sName, sAddress)

Parameters:

object Required, the Session object

iIndex An index specifying which, of several recipients should be returned to the caller.

sName A string which will be set to the requested matched recipient's name.

sAddress A string which will be set to the requested matched recipient's e-mail address.

Remarks: Prior to calling this function you must call InitCheckRecipients() in order to perform the search for matching recipients. InitCheckRecipients() returns a count of the number of matching recipients. You can retrieve the appropriate recipient by passing in the appropriate value for *iIndex*. This function sets up a name and an address string that you must pass into the function.

Note that this function may not be called from VBScript since the language cannot pass strings by reference.

Returns: Returns **True** if a recipient's details were successfully retrieved. Otherwise **False** is returned.

Example:

```
Dim session As Object

Dim sName As String

Dim sAddress As String

Set session =
CreateObject("OfficeTalk.Session")

Set user = session.Logon(login name, password)

iCount = session.InitCheckRecipients("smith")

GetCheckedRecipient(0, sName, sAddress)
```

GetCheckedRecipientName()

Description: Returns the name of a specific validated recipient after a call to InitCheckRecipients(). This function would typically be called prior to sending mail in order to establish the validity of a recipient.

Syntax: Object.GetCheckedRecipientName(iIndex)

Parameters:

object Required, the Session object

iIndex An index specifying which, of several recipients should be returned to the caller.

Remarks: This function returns the retrieved recipient's name. This function, in conjunction with GetCheckedRecipientAddress() is intended as a replacement for GetCheckedRecipient() for languages such as VBScript which are not capable of passing strings by reference.

Returns: The number of recipients that matched the passed in search name.

Example:

```
Dim session As Object

Set session =
CreateObject("OfficeTalk.Session")

Set user = session.Logon(login name, password)

iCount = session.InitCheckRecipients("smith")

sName = GetCheckedRecipientName(0)
```

GetCheckedRecipientAddress()

Description: Returns the name of a specific validated recipient after a call to InitCheckRecipients(). This function would typically be called prior to sending mail in order to establish the validity of a recipient.

Syntax: Object.GetCheckedRecipientAddress(iIndex)

Parameters:

object Required, the Session object

iIndex An index specifying which address, of several recipients should be returned to the caller.

Remarks: This function returns the retrieved recipient's address. This function, in conjunction with GetCheckedRecipientName() is intended as a replacement for GetCheckedRecipient() for languages such as VBScript which are not capable of passing strings by reference.

Returns: The number of recipients that matched the passed in search name.

Example:

```
Dim session As Object

Set session =
CreateObject("OfficeTalk.Session")

Set user = session.Logon(login name, password)

iCount = session.InitCheckRecipients("smith")

sName = GetCheckedRecipientAddress(0)
```

CheckForNewMail()

Description: Checks for new incoming mail for the current user.

Syntax: object.CheckForNewMail

Parameters:

object Required, the Session object

Remarks: This function checks for new mail using all mail services currently established for the current user.

Returns: Nothing

Example:

```
Dim session As Object

Set session =
CreateObject("OfficeTalk.Session")

Set user = session.Logon(login name, password)

Set message = session.CheckForNewMail
```

GetTempFilename()

Description: Returns a temporary filename which the user may use for any purpose

Syntax: object.GetTempFilename

Parameters::

object Required, the Session object

Remarks: This function returns a filename of the form tmpxxxxx.tmp. The filename is guaranteed to be unique.

Returns: Nothing

Example:

```
Dim session As Object

Set session =
CreateObject("OfficeTalk.Session")

Set user = session.Logon(login name, password)

sFilename = session.GetTempFilename
```

SetAllowUI()

Description: Specifies whether the API should pop up any user interface dialog boxes or message boxes.

Syntax: object.SetAllowUI(bAllowUI)

Parameters:

object Required, the Session object

bAllowUI FALSE if UI should be turned off for this session

Remarks: Sometimes it is important that no user interface is used when using the API. One example of this is if you are using the API from within Microsoft Active Server Pages. In this example, the server machine runs the API and sends only HTML to each client program. Any UI which pops up simply halts the server machine. In this circumstance it is mandatory that UI not be used within an OfficeTalk session.

Returns: Nothing

Example: Nothing

```
Dim session As Object

Set session =
CreateObject("OfficeTalk.Session")
```

```
session.SetAllowUI(False)
```

AddContextMenuItem()

Description: Adds a custom context menu to any OfficeTalk data type.

Syntax: object.AddContextMenuItem(sDataType, sMenuText, sAppOrProgID [, sMethod] [,bThreaded])

Parameters:

object Required, the Session object

sDataType The name of the data type, e.g. 'Contacts', 'Companies', 'UserTasks'.

sMenuText The text of the context menu item

sAppOrProgID The fully qualified path of the application to be run when the menu item is selected or the ProgID of the object whose method will be called. If the sMethod parameter of this function is not supplied then this parameter contains the fully qualified path of an application to be launched when the menu item is selected. If the sMethod parameter of this function is supplied then this parameter contains the progID of the object whose method will be invoked. An example of a progID is '**Word.Document**' or '**OfficeTalk.Application**'

sMethod The method to invoke in the object created or referenced by sAppOrProgID. The meaning of the sAppOrProgID parameter changes depending upon whether or not this optional parameter is supplied.

bThreaded By default, if you are specifying a ProgID rather than an application, when you select this command from a context menu item, control will not be returned back to OfficeTalk until the invoked method has completed. You can force OfficeTalk to return control immediately by passing in this optional parameter as True.

Remarks: By calling this function, you can install a custom menu item into a specific context menu. The menu item will be installed into the context menu of the data type specified by **sDataType**. The text of the menu item will be set to **sText**. Clicking on an item of the relevant data type using the right mouse button will show a context menu containing the menu item. Selecting the menu item from the context menu will do one of two things. If **sMethod** is not supplied, then selecting the menu item will start the application pointed to by **sAppOrProgID**. The following parameters will be passed to this application in the order listed.

- **sDataType** (String inside quote characters). This is the datatype of the associated OfficeTalk object (see below for a list of valid data types).
- **sItemID** (String). This is the ID of the associated OfficeTalk object.
- **sWorkgroupName** (String inside quote characters). This is the name of the OfficeTalk workgroup.
- **sCurrentUserID** (String). This is the ID of the current OfficeTalk user.

The following is a list of valid data type strings which may be passed as the first parameter to this function:

UserTasks	Conversations	Projects	Meetings
UserAppointments	Documents	ProjectTasks	MeetingMembers
Contacts	ReceivedMail	Planners	Groups

Companies	SentMail	PlannerKeys	Users
Resources	Folders	ContactGroups	PlannerFolders
ProjectFolders	MeetingFolders		

If **sMethod** is supplied, then the **sAppOrProgID** parameter should contain a string representing the progID of the object whose method will be invoked when the menu item is selected. Selecting the menu item in this case will create a new object of the type **sAppOrProgID**, or will latch on to an existing object of this type and will call the method **sMethod**. No parameters are passed to this method. It is simply an event. Typically, you would write a program, using Visual Basic or any other development environment, which would create an **OfficeTalk.Session** object and an **OfficeTalk.Application** object. The program would expose a method for this menu item which OfficeTalk will call when the menu item is selected. When the method is called, your program should use the method **GetViewedItem** in the **OfficeTalk.Application** object to get the currently viewed item. Your program should then use the **OfficeTalk.Session** object in conjunction with the item's returned data type and ID (given by **GetViewedItem**) in order to perform any additional processing of that data item. Note that the method does not need to be passed any parameters, such as those passed as command line parameters when starting an application, since all information is either available from the Session object or through the Application object.

Returns: Nothing

Example:

```
Dim session As Object

Set session =
CreateObject("OfficeTalk.Session")

Call session.AddContextMenuItem("Contacts",
"Invoice Customer", "g:\apps\invoice.exe")
```

or

```
Dim session As Object

Set session =
CreateObject("OfficeTalk.Session")

Call session.AddContextMenuItem("Contacts",
"Invoice Customer", "myprog.application",
"InvCustPressed")
```

Further Information:

In the case where **sMethod** is not supplied, parameters are passed to the application specified by **sAppOrProgID**. If the application is a Visual Basic application and you wish to get the parameters passed to the application by OfficeTalk, then you will need to parse the command line in order to retrieve the parameters. You can do this using a function similar to that shown below:

```
////////////////////////////////////////////
// Parses the command line and returns the
// arguments in an array.
//
Function GetCommandLine(Optional MaxArgs)
   Dim C, CmdLine, CmdLnLen, InArg, I,NumArgs
   If IsMissing(MaxArgs) Then MaxArgs = 10
   ReDim ArgArray(MaxArgs)
   NumArgs = 0: InArg = False
   CmdLine = Command()
```

```
  CmdLnLen = Len(CmdLine)
  For I = 1 To CmdLnLen
    C = Mid(CmdLine, I, 1)
    If (C <> " " And C <> vbTab) Then
        If Not InArg Then
            If NumArgs = MaxArgs Then Exit For
            NumArgs = NumArgs + 1
            InArg = True
        End If
        ArgArray(NumArgs) = ArgArray(NumArgs)& C
    Else
        InArg = False
    End If
  Next I
  ReDim Preserve ArgArray(NumArgs)
  GetCommandLine = ArgArray()
End Function
```

This function returns an array of arguments. You would use the function in the following way:

```
cml = GetCommandLine(6) 'We expect 6 arguments
sDataType = StripQuotes(cml(1))
sItemID = StripQuotes(cml(2))
sWorkgroupName = StripQuotes(cml(3))
sCurrentUserID = StripQuotes(cml(4))
sLoginName = StripQuotes(cml(5))
sPassword = StripQuotes(cml(6))
```

Remember that some of the arguments will be inside quotes and so you may need to check for these and remove them accordingly. A function to do this is shown below:

```
Private Function StripQuotes(sString As String)
iFirst = InStr(1, sString, """", vbTextCompare)
If (iFirst > 0) Then
    iLast = InStr(iFirst + 1, sString, """")
    If (iLast > 0) Then
        sResult = Mid(sString, iFirst + 1)
        sResult = Left(sResult, Len(sResult) - 1)
        sString = sResult
    End If
End If
StripQuotes = sString
End Function
```

RemoveContextMenuItems()

Description: Removes custom context menu items for the passed in data type or for the passed in item name.

Syntax: object.RemoveContextMenuItems(sDataType, sText)

Parameters:

object Required, the Session object

sDataType A string representing the data type to which the custom context menu item belongs. If this parameter is empty, all custom context menu items will be removed from OfficeTalk. For a list of the data type strings, see AddContextMenuitem().

sText An optional string which matches the name of the custom context menu item that you wish to remove. If this parameter is not empty, OfficeTalk will delete a custom context menu item whose data type matches the passed in data type AND whose text matches this paramter.

Remarks: None

Returns: Nothing

Example:

```
Dim session As Object

Set session =
CreateObject("OfficeTalk.Session")

session.RemoveContextMenuItems("Contacts",
"Invoice Customer")
```

CurrentUser (property)

Description: Returns a User object representing the current user. If no user is logged on to the session, this property returns **Nothing**.

Type: User object

Trace (property)

Description: Setting this property to True will cause the API to pop up debug message boxes when errors are encountered. This can be useful when methods don't return what you think they are supposed to. The message which pops up will aid your understanding of the problem involved.

Type: Boolean

Default: False

Example:

```
Dim session As Object

Dim user As Object

Dim appts As Object

Set session =
CreateObject("OfficeTalk.Session")

session.Trace = True

Set user = session.Logon("fred",
"wrongPassword")

……..message box will appear describing the
problem
```

Users List Object

The Users object relates to a list of OfficeTalk users. This object is a collection of User objects. The Users list object provides access to the common list object functionality.

Users Methods

Add	Adds a new user
Count	Returns the number of users in the workgroup/list.
SetFilter	Sets the list filter
SetFilterAnd	Logically ANDs the filter with this expression
SetFilterOr	Logically ORs the filter with this expression
ClearFilter	Clears the list filter
FindItemByID	Finds a user with an ID which matches the passed in ID
GetFirst	Gets the first user in the list
GetNext	Gets the next user in the list
GetLast	Gets the last user in the list
GetPrev	Gets the previous user in the list

User Object

The User object relates to an OfficeTalk user. The User object provides access to the common object functionality. The User object also gives you access to other user related objects such as Tasks and Appointments and mail folders.

User Methods

GetTaskAccess	Returns the access of the current user to this User's tasks
GetTaskAccessToUser	Returns the access of this User to the tasks belonging to the passed in User.
GetTaskAccessOfUser	Returns the access of the passed in User to the tasks belonging to this User.
GetAppointmentAccess	Returns the access of the current user to this User's appointment.
GetAppointmentAccessToUser	Returns the access of this User to the appointments belonging to the passed in User.
GetAppointmentAccessOfUser	Returns the access of the passed in User to the appointments belonging to this User.
MailFolders	Returns the list of mail folders personal to this user
GetMailFolderFromID	Returns a mail folder according to a passed in ID
GetTaskFolders	Returns the list of task folders personal to this user
InBox	Returns this user's incoming mail folder
SentMail	Returns this user's sent mail folder
Update	Saves changes to this object
Edit	Edits the object using a graphical user

	interface
Delete	Deletes the object
Value	Gets the value of the passed in field/column name
Value=	Sets the value of the passed in field/column name

User Properties

Name	The user's surname
CreationDate	The date when this object was first created
LastEditedDate	The date when this object was last edited
Appointments	Represents the appointments for the associated user
Tasks	Represents this user's tasks

Available Fields

ID	Long	The user's ID
First Names	String	The user's first name(s)
Last Edited	Date	The date and time when this object was first created
Last Logon Date	Date	The date when this user last logged on.
Last Logon	Date	The date and time when this user last logged on.
Last Name	String	The users last name
Usual Location	String	The user's usual location
Logged On	Boolean	True if this user is currently logged on
Supervisor	Boolean	True if this user is a supervisor
Name	String	The user's full name
Login Name	String	The user's login name

GetTaskAccess()

Description: Returns the access of the current user to this User's tasks.

Syntax: object.GetTaskAccess()

Parameters:

object Required, the User object

Remarks: This function returns a number which represents the currently logged in user's access to the tasks belonging to the OfficeTalk user represented by this object. The access is represented by an integer value as follows:

Value	Access Level
0	No Access
1	Visible Access
2	Read Only Access
3	Read/Create Access

4	Read/Create/Edit Access
5	Read/Create/Edit/Delete Access

Returns: Returns the appropriate Integer

Example:

```
Dim session As Object
Dim user As Object
Dim iAccess As Integer
Set session =
CreateObject("OfficeTalk.Session")
Call session.Logon(login name, password)
Set user = session.FindUserByLoginName("fred")
iAccess = user.GetTaskAccess()
```

GetTaskAccessToUser()

Description: Returns the access of this User to the tasks belonging to the passed in User

Syntax: object.GetTaskAccessToUser(user)

Parameters:

object Required, the User object

user Required, the User object

Remarks: This function returns a number which represents this User's access to the tasks belonging to the OfficeTalk user represented by the passed in User object. The access is represented by an integer value as follows:

Value	Access Level
0	No Access
1	Visible Access
2	Read Only Access
3	Read/Create Access
4	Read/Create/Edit Access
5	Read/Create/Edit/Delete Access

Returns: Returns an integer representing the access of the current user to the tasks of the passed in user.

Example:

```
Dim session As Object
Dim user1 As Object
Dim user2 As Object
Dim iAccess As Integer
Set session =
CreateObject("OfficeTalk.Session")
Call session.Logon(login name, password)
Set user1 =
session.FindUserByLoginName("fred")
```

```
Set user2 =
session.FindUserByLoginName("john")

iAccess = user1.GetTaskAccessToUser(user2)
```

GetTaskAccessOfUser()

Description: Returns the access of the passed in User to the tasks belonging to this User.

Syntax: object.GetTaskAccessOfUser(user)

Parameters:

object Required, the User object

user Required, the User object

Remarks: This function returns a number which represents the passed in User's access to the tasks belonging to the OfficeTalk user represented by this User object. The access is represented by an integer value as follows:

Value	Access Level
0	No Access
1	Visible Access
2	Read Only Access
3	Read/Create Access
4	Read/Create/Edit Access
5	Read/Create/Edit/Delete Access

Returns: Returns an integer representing the access of the passed in user to the tasks of the current user.

Example:

```
Dim session As Object

Dim user1 As Object

Dim user2 As Object

Dim iAccess As Integer

Set session =
CreateObject("OfficeTalk.Session")

Call session.Logon(login name, password)

Set user1 =
session.FindUserByLoginName("fred")

Set user2 =
session.FindUserByLoginName("john")

iAccess = user1.GetTaskAccessOfUser(user2)
```

GetAppointmentAccess()

Description: Returns the access of the current user to this user's appointments.

Syntax: object.GetAppointmentAccess()

Parameters:

object Required, the User object

Remarks: This function returns a number which represents the currently logged in user's access to the appointments belonging to the OfficeTalk user represented by this object. The access is represented by an integer value as follows:

Value	Access Level
0	No Access
1	Visible Access
2	Read Only Access
3	Read/Create Access
4	Read/Create/Edit Access
5	Read/Create/Edit/Delete Access

Returns: Returns an integer representing the associated access.

Example:

```
Dim session As Object
Dim user As Object
Dim iAccess As Integer
Set session = CreateObject("OfficeTalk.Session")
Call session.Logon(login name, password)
Set user = session.FindUserByLoginName("fred")
iAccess = user.GetAppointmentAccess()
```

GetAppointmentAccessToUser()

Description: Returns the access of this user to the appointments belonging to the passed in user

Syntax: object.GetAppointmentAccessToUser(user)

Parameters:

object Required, the User object

user Required, the User object

Remarks: This function returns a number which represents this User's access to the appointments belonging to the OfficeTalk user represented by the passed in User object. The access is represented by an integer value as follows:

Value	Access Level
0	No Access
1	Visible Access
2	Read Only Access
3	Read/Create Access
4	Read/Create/Edit Access
5	Read/Create/Edit/Delete Access

Returns: Returns an integer representing the associated access.

Example:

```
Dim session As Object
Dim user1 As Object
Dim user2 As Object
Dim iAccess As Integer
```

```
Set session =
CreateObject("OfficeTalk.Session")

Call session.Logon(login name, password)

Set user1 = FindUserByLoginName("fred")

Set user2 = FindUserByLoginName("john")

iAccess =
user1.GetAppointmentAccessToUser(user2)
```

GetAppointmentAccessOfUser()

Description: Returns the access of the passed in User to the appointments belonging to this User.

Syntax: object.GetAppointmentAccessOfUser(user)

Parameters:

object Required, the User object

user Required, the User object

Remarks: This function returns a number which represents the passed in User's access to the appointments belonging to the OfficeTalk user represented by this User object. The access is represented by an integer value as follows:

Value	Access Level
0	No Access
1	Visible Access
2	Read Only Access
3	Read/Create Access
4	Read/Create/Edit Access
5	Read/Create/Edit/Delete Access

Returns: Returns an integer representing the associated access.

Example:

```
Dim session As Object

Dim user1 As Object

Dim user2 As Object

Dim iAccess As Integer

Set session =
CreateObject("OfficeTalk.Session")

Call session.Logon(login name, password)

Set user1 = FindUserByLoginName("fred")

Set user2 = FindUserByLoginName("john")

user1.GetAppointmentAccessOfUser(user2)
```

MailFolders()

Description: Returns the user's list of top level mail folders

Syntax: object.MailFolders()

Parameters:

object Required, the User object

Remarks: The list of mail folders is returned to the caller provided that either the caller is a supervisor or the user object, on which this method is called, is the logged in user. Otherwise, Nothing is returned. It is not possible for the caller to get the list of mail folders belonging to another user if the caller is not a supervisor. Once successfully retrieved, the caller may iterate through the list to access each mail folder belonging to the user object. If you need specific access to the Incoming Mail folder or the Sent Mail folder, you may use the InBox or SentMail methods, respectively. To access messages inside each folder, call **GetReceivedMessages()** or **GetSentMessages()**.

Returns: A MailFolderList

Example:

```
Dim session As Object
Dim user As Object
Dim folders As Object
Set session =
CreateObject("OfficeTalk.Session")
Call session.Logon(login name, password)
Set folders = user.MailFolders
Set folder = folders.GetFirst
```

Appointments (property)

Description: Represents the appointments for the associated user

Type: Appointments Object

Example:

```
Dim session As Object
Dim user As Object
Dim appts As Object
Set session =
CreateObject("OfficeTalk.Session")
Set user = session.Logon(login name, password)
Set appts = user.appointments
```

Tasks (property)

Description: Represents the tasks for the associated user

Type: Tasks Object

Example:

```
Dim session As Object
Dim user As Object
Dim tasks As Object
Set session =
CreateObject("OfficeTalk.Session")
Set user = session.Logon(login name, password)
Set tasks = user.tasks
```

Appointments List Object

The Appointments List object is a list which lets you access Appointments for a particular user. The Appointments List object may be obtained by accessing the Appointments property of the User object. The Appointments list object provides access to the common list object functionality.

Appointment List Methods

Add	Adds a new appointment to the associated user's diary
GetFirst	Gets the first appointment belonging to the associated user
GetNext	Gets the next appointment belonging to the associated user
GetLast	Gets the last appointment belonging to the associated user
GetPrev	Gets the previous appointment belonging to the associated user
SetFilter	Sets the list filter
ClearFilter	Clears the list filter

Appointment Object

The Appointment object represents an OfficeTalk Appointment. This object provides access to the common object functionality but has properties which let you get and set certain appointment attributes, such as the appointment name, start time, duration etc.

Appointment Methods

Edit	Lets the caller edit the properties of the Appointment object via a dialog box
Update	Saves changes to this object
Delete	Deletes the item
Value	Gets the value of the passed in field/column name
Value=	Sets the value of the passed in field/column name
SetNotes	Sets the notes of the appointment
GetNotes	Gets the notes of the appointment

Appointment Properties

Name	Represents the appointments description
LastEditedDate	The date on which the appointment was last changed
CreationDate	The date when the appointment was created
Start	Represents the appointments start time
Duration	Represents the appointments duration
Remind	True if an alarm has been set to remind the appointments owner of its imminent start
RemindTime	Represents the number of minutes prior to the start of this appointment that the owner is given a remind alarm
Private	True if this appointment is private

Available Fields

ID	Long	The appointment's ID
Name	String	The appointment description
Last Edited	Date	The date and time when the appointment was last edited
Start Time	Date	The date and time of the start of the appointment
Start Date	Date	The date of the start of the appointment
End Time	Date	The date and time of the end of the appointment
End Date	Date	The date of the end of the appointment
Duration	String	The duration of the appointment. If the appointment is 2 hours and 35 minutes in duration, the value of this field will be "2h35m"
Private	Boolean	True if this appointment is private.
Remind	Boolean	True if a reminder has been associated with this appointment
Remind Time	String	The length of time prior to the start of the appointment that the user will be reminded. The format of this string is e.g. "2h15m"

SetNotes()

Description: Sets the notes of the appointment

Syntax: object.SetNotes(sText)

Parameters:

object Required, the Appointment object

sText A string representing the appointment notes

Remarks: Sets the notes of the appointment. Handles plain text. Rich text is not supported.

Returns: Nothing

Example:

```
Dim session As Object
Dim user As Object
Set session =
CreateObject("OfficeTalk.Session")
Call session.Logon(login name, password)
set appt = user.Appointments.getfirst
appt.SetNotes "Some notes"
```

GetNotes()

Description: Gets the notes of the appointment

Syntax: object.GetNotes

Parameters:

object Required, the Appointment object

Remarks: This function returns the appointment's notes as a plain text string.

Returns: The appointment notes

Example:

```
Dim session As Object
Dim user As Object
Set session =
CreateObject("OfficeTalk.Session")
Call session.Logon(login name, password)
set appt = user.Appointments.getfirst
MsgBox appt.GetNotes
```

Start (property)

Description: Represents the appointments start time.

Type: DATE

Default: Current time

Example:

```
Dim session As Object
Dim user As Object
Dim appts As Object
Dim appt As Object
Set session =
CreateObject("OfficeTalk.Session")
Set user = session.Logon(login name, password)
Set appts = user.appointments
Set appt = appts.Add
appt.Start = #12/8/96 17:00#
```

Duration (property)

Description: Represents the appointments duration **in minutes**. You may both set and get this property. The duration is specified in minutes.

Type: long

Default: 30

Example:

```
Dim session As Object
Dim user As Object
Dim appts As Object
Dim appt As Object
Set session =
CreateObject("OfficeTalk.Session")
Set user = session.Logon(login name, password)
Set appts = user.appointments
Set appt = appts.Add
appt.Duration = 30
```

Remind (property)

Description: True if an alarm has been set to remind the appointments owner of its imminent start. This property automatically gets set to True when the RemindTime is set. You can set this property to True in order to request a reminder for the associated appointment.

Type: Boolean

Default: False

Example:

```
Dim session As Object
Dim user As Object
Dim appts As Object
Dim appt As Object
Set session =
CreateObject("OfficeTalk.Session")
Set user = session.Logon(login name, password)
Set appts = user.appointments
Set appt = appts.Add
appt.Remind = True
```

RemindTime (property)

Description: Represents the number of minutes prior to the start of this appointment that the owner is given a remind alarm. Setting this property also sets the Remind property to True.

Type: long

Default: 5

Example:

```
Dim session As Object
Dim user As Object
Dim appts As Object
Dim appt As Object
Set session =
CreateObject("OfficeTalk.Session")
Set user = session.Logon(login name, password)
Set appts = user.appointments
Set appt = appts.Add
appt.Name = "Morning Meeting"
appt.Start = #14/12/97 10:00#
appt.RemindTime = 30
```

Private (property)

Description: True if this appointment is private. You may mark an appointment as private by setting this property. You may both set and get this property.

Type: Boolean

Default: False

Example:

```
Dim session As Object
Dim user As Object
Dim appts As Object
Dim appt As Object
Set session =
CreateObject("OfficeTalk.Session")
Set user = session.Logon(login name, password)
Set appts = user.appointments
Set appt = appts.Add
appt.Name = "Test"
appt.Private = True
If appt.Private Then
 MsgBox "This is a private appointment"
End If
```

Tasks List Object

The Tasks List object is a list which lets you access Tasks for a particular user. The Tasks List object may be obtained by accessing the Tasks property of the User object. The Tasks list object provides access to the common list object functionality.

Task List Methods

Add	Adds a new Task to the associated user's diary
Count	Returns the number of tasks in the list.
SetFilter	Sets the list filter
SetFilterAnd	Logically ANDs the filter with this expression
SetFilterOr	Logically ORs the filter with this expression
ClearFilter	Clears the list filter
FindItemByID	Finds a task with an ID which matches the passed in ID
GetFirst	Gets the first task belonging to the associated user
GetNext	Gets the next task belonging to the associated user.
GetLast	Gets the last task belonging to the associated user
GetPrev	Gets the previous task belonging to the associated user

Task Object

The Task object represents an OfficeTalk Task. This object provides access to the common object functionality but has properties which let you get and set certain task attributes, such as the task name, priority, completion status etc.

Task Methods

Edit	Lets the caller edit the properties of the Task via

	a dialog box
Update	Saves changes to this task
Delete	Deletes the task
Value	Gets the value of the passed in field/column name
Value=	Sets the value of the passed in field/column name
SetNotes	Sets the notes associated with the task
GetNotes	Gets the notes associated with the task

Task Properties

Name	Represents the tasks description
LastEditedDate	The date on which the task was last changed
CreationDate	The date when the task was created
Private	True if this task is private.
Priority	The task priority
Completed	True if this task has been completed
Overdue	True if this task is overdue

Available Fields

ID	Long	The task's ID
Complete	Boolean	True if this task has been completed (read only)
Name	String	The description of the task
Has Note	Boolean	True if this task has associated notes
Priority	Numeric	The priority of this task. Numeric value ranging from 0 to 4.
Has Deadline	Boolean	True if this task has a deadline
Deadline	Date	The deadline date and time for this task
Deadline Date	Date	The deadline date for this task
Deadline Time	Date	The deadline time for this user
% Complete	Numeric	The percentage completeness of this task. Numeric range from 0 to 100
Assigned	Boolean	True if this task has been assigned
Assigned To	String	The name of the person to whom this task has been assigned
Assigning User	String	The name of the user who assigned this task.
Completed Date	Date	The date when the task was completed
Last Edited	Date	The date when the task was last edited
Overdue	Boolean	True if this task is overdue
Private	Boolean	True if this task is private
Scheduled	Boolean	True if this task is scheduled onto your diary

If the task is a project task and it was accessed via a call to **project.GetTasks.GetFirst** for example, then the task will have additional available fields which are listed below:

Project Task Available Fields

Planned Duration	String	The duration of the project task. If the appointment is 2 hours and 35 minutes in duration, the value of this field will be "2h35m"
Planned Start	Date	The planned start date and time of the project task
Planned Start Date	Date	The planned start date of the project task

SetNotes()

Description: Sets the notes of the task

Syntax: object.SetNotes(sText)

Parameters:

object Required, the Task object

sText A string representing the task notes

Remarks: Sets the notes of the task. Handles plain text. Rich text is not supported.

Returns: Nothing

Example:

```
Dim session As Object
Dim user As Object
Set session =
CreateObject("OfficeTalk.Session")
Call session.Logon(login name, password)
set task = user.tasks.getfirst
task.SetNotes "Some notes"
```

GetNotes()

Description: Gets the notes associated with the task

Syntax: object.GetNotes

Parameters:

object Required, the Task object

Remarks: This function returns the task's notes as a plain text string.

Returns: The task notes

Example:

```
Dim session As Object
Dim user As Object
Set session =
CreateObject("OfficeTalk.Session")
Call session.Logon(login name, password)
set task = user.tasks.getfirst
MsgBox task.GetNotes
```

Private (property)

Description: True if this task is private. You may mark a task as private by setting this property. You may both set and get this property.

Type: Boolean

Default: False

Example:

```
Dim session As Object
Dim user As Object
Dim tasks As Object
Dim task As Object
Set session =
CreateObject("OfficeTalk.Session")
Set user = Call session.Logon(login name,
password)
Set tasks = user.tasks
Set task = tasks.Add
task.Private = True
If task.Private Then
 MsgBox "This is a private task"
End If
```

Priority (property)

Description: The task priority. This can take on whatever value you like. However, OfficeTalk can only display values in the range 0-4.

Type: long

Default: 1 (0- high, 1- Medium, 2-Low, 3-user defined, 4-user defined)

Example:

```
Dim session As Object
Dim user As Object
Dim tasks As Object
Dim task As Object
Set session =
CreateObject("OfficeTalk.Session")
Set user = Call session.Logon(login name,
password)
Set tasks = user.tasks
Set task = tasks.Add
task.Priority = 0
MsgBox "Priority is " & Str(task.Priority)
```

Completed (property)

Description: True if this task has been completed. You may mark a task as completed by setting this property. You may both set and get this property.

Type: Boolean

Default: False

Example:

```
Dim session As Object
Dim user As Object
Dim tasks As Object
Dim task As Object
Set session =
CreateObject("OfficeTalk.Session")
Set user = Call session.Logon(login name,
password)
Set tasks = user.tasks
Set task = tasks.Add
task.Completed = True
If task.Completed Then
 MsgBox "This task has been completed"
End If
```

Overdue (property)

Description: True if this task is overdue. You may mark a task as overdue by setting this property. You may both set and get this property.

Type: Boolean

Default: False

Example:

```
Dim session As Object
Dim user As Object
Dim tasks As Object
Dim task As Object
Set session =
CreateObject("OfficeTalk.Session")
Set user = Call session.Logon(login name,
password)
Set tasks = user.tasks
Set task = tasks.Add
task.Overdue = True
If task.Overdue Then
 MsgBox "This task is overdue"
End If
```

Meetings List Object

The Meetings List object is a list which lets you access OfficeTalk meetings. The Meetings List object may be obtained by a call to **session.GetMeetings**. The Meetings list object provides access to the common list object functionality.

Meetings List Methods

Add	Adds a new meeting
Count	Returns the number of meetings in the list.
SetFilter	Sets the list filter
SetFilterAnd	Logically ANDs the filter with this expression
SetFilterOr	Logically ORs the filter with this expression
ClearFilter	Clears the list filter
FindItemByID	Finds a meeting with an ID which matches the passed in ID
GetFirst	Gets the first meeting in the list
GetNext	Gets the next meeting in the list.
GetLast	Gets the last meeting in the list
GetPrev	Gets the previous meeting in the list

Meeting Object

The Meeting object represents an OfficeTalk Meeting. This object provides access to the common object functionality.

Meeting Methods

Edit	Lets the caller edit the properties of the Meeting via a dialog box
Update	Saves changes to this meeting
Delete	Deletes the meeting
Value	Gets the value of the passed in field/column name
Value=	Sets the value of the passed in field/column name
GetMembers	Returns a MeetingMembers list
AddRecipient	Adds an invited member to the meeting
SetAgenda	Sets the meeting agenda
Book	Books the meeting

Meeting Properties

Name	Represents the meeting's description
LastEditedDate	The date on which the meeting was last changed
CreationDate	The date when the meeting was created

Available Fields

ID	Long	The meeting's ID
Name	String	The subject of this meeting
Subject	String	The subject of this meeting
Owner	String	The owner of this meeting
Last Edited	Date	The date on which the meeting was last changed (Read only)
Start	Date	The date and time at which this meeting is planned to start
Start Time	Date	The time at which this meeting is planned to start
Start Date	Date	The date at which this meeting is planned to start
Duration	String	The duration of the meeting. If the meeting is 2 hours and 35 minutes in duration, the value of this field will be "2h35m"
Place	String	The place where the meeting is to be held
Venue	String	The place where the meeting is to be held
Has Agenda	Boolean	True if this meeting has an associated agenda
Has Minutes	Boolean	True if this meeting has associated minutes
Agenda	String	The text of the agenda of the meeting
Minutes	String	The text of the meeting minutes
Guest List	String	The list of guests that have been invited to the meeting (Read only)

GetMembers()

Description: Returns a list of MeetingMembers for this meeting. The list may be used for subsequent iteration.

Syntax: object.GetMembers

Parameters:

object Required, the Meeting object

Remarks: This function returns a MeetingMembers list which may be iterated to find the invited members of the meeting.

Returns: A MeetingMembers list object.

Example:

```
Dim session As Object
Dim meetings As Object
Set session =
CreateObject("OfficeTalk.Session")
Set user = session.Logon(login name, password)
Set meetings = session.GetMeetings
Set meeting = meetings.GetFirst
Set members = meeting.GetMembers
```

AddRecipient(sRecipient As String**)**

Description: Adds a recipient member to the meeting. When the meeting is booked this recipient will receive a meeting invitation mail message.

Syntax: object.AddRecipient(sRecipient)

Parameters:

object Required, the Meeting object

sRecipient The name or address of the recipient.

Remarks: The sRecipient parameter may be part or all of the recipient's name or address. If OfficeTalk cannot resolve the sRecipient parameter to a single unique recipient, it will pop up a Check Names dialog box, requiring you to choose the appropriate recipient. If you do not wish to have any user interface then you should call **session.SetAllowUI(False)**. If UI is disallowed then AddRecipients will return FALSE if a unique recipient was not resolved. To ensure that sRecipient will represent a unique recipient prior to calling AddRecipient then use the methods **session.InitCheckRecipients** and **session.GetCheckedRecipient(n)**.

Returns: Returns True if a unique recipient was resolved and added as a meeting member, False otherwise.

Example:

```
Dim session As Object

Dim meetings As Object

Set session =
CreateObject("OfficeTalk.Session")

Set user = session.Logon(login name, password)

Set meeting = session.NewMeeting

bAdded = meeting.AddRecipient ("fred")

If (bAdded) Then

   meeting.Name = "Test"

   meeting.Book

End If
```

SetAgenda(sAgenda As String**)**

Description: Sets the meeting agenda text.

Syntax: object.SetAgenda(sText)

Parameters:

object Required, the Meeting object

sText The text of the agenda

Remarks: This method sets the agenda of the meeting.

Returns: Nothing

Example:

```
Dim session As Object

Dim meetings As Object

Set session =
CreateObject("OfficeTalk.Session")
```

```
Set user = session.Logon(login name, password)
Set meeting = session.NewMeeting
bAdded = meeting.AddRecipient ("fred")
If (bAdded) Then
meeting.Name = "Test"
meeting.SetAgenda "1. Review minutes of
previous meeting" & Chr(10) & Chr(13) & "2.
Any other business"
meeting.Book
End If
```

Book()

Description: Books the meeting

Syntax: object.Book

Parameters:

object Required, the Meeting object

Remarks: This method books the meeting. Prior to calling this function, you should set the subject of the meeting by setting the name property, you should add invited members by calling the AddRecipient method and you may optionally specify an agenda using the SetAgenda method. Other properties of the meeting should be set using the Value method. See the example for more details.

Returns: True if the meeting was successfully booked, False otherwise.

Example:

```
Dim session As Object
Dim meetings As Object
Set session =
CreateObject("OfficeTalk.Session")
Set user = session.Logon(login name, password)
Set meeting = session.NewMeeting
bAdded = meeting.AddRecipient ("fred")
If (bAdded) Then
meeting.Name = "Test"
meeting.Value("Duration") = "2h"
meeting.Value("Start Time") = #12/3/98 13:00#
meeting.Value("Place") = "Board Room"
meeting.SetAgenda "1. Review minutes of
previous meeting" & Chr(10) & Chr(13) & "2.
Any other business"
meeting.Book
End If
```

MeetingMembers List Object

The MeetingMembers List object is a list which lets you access members of an OfficeTalk meeting. The MeetingMembers List object may be obtained by a call to **meeting.GetMembers**. The MeetingMembers list object provides access to the common list object functionality.

MeetingMembers List Methods

Add	Adds a new member to the MeetingMembers list. Note that the way to add a member to a meeting is via a call to AddRecipient
Count	Returns the number of members in the list.
SetFilter	Sets the list filter
SetFilterAnd	Logically ANDs the filter with this expression
SetFilterOr	Logically ORs the filter with this expression
ClearFilter	Clears the list filter
FindItemByID	Finds a meeting member with an ID which matches the passed in ID
GetFirst	Gets the first member in the list
GetNext	Gets the next member in the list.
GetLast	Gets the last member in the list
GetPrev	Gets the previous member in the list

MeetingMember Object

The Meeting Member object represents an OfficeTalk Meeting member. This object provides access to the common object functionality.

MeetingMember Methods

Edit	Lets the caller edit the properties of the Task via a dialog box
Update	Saves changes to this task
Delete	Deletes the task
Value	Gets the value of the passed in field/column name
Value=	Sets the value of the passed in field/column name
SetAttending	Marks this member as attending

MeetingMember Properties

Name	Represents the tasks description
LastEditedDate	The date on which the task was last changed
CreationDate	The date when the task was created

Available Fields

ID	Long	The meeting member’s ID
Name	String	The name of this meeting member

Required	Boolean	True if this meeting member is required to attend the associated meeting
Last Edited	Date	The date on which the meeting member was last changed (Read only)

SetAttending(bAttending, sReason As String**)**

Description: Marks the member as attending or not.

Syntax: object.SetAttending(bAttending, sReason)

Parameters:

object Required, the Meeting Member object

bAttending True if the member plans to attend the meeting, False otherwise.

sReason The reason for not attending

Remarks: This method marks the member as planning to attend the meeting or not depending upon the value of bAttending. If bAttending is False then you may optionally supply a reason.

Returns: Nothing

Example:

```
Dim session As Object
Dim meetings As Object
Set session =
CreateObject("OfficeTalk.Session")
Set user = session.Logon(login name, password)
Set meetings = session.GetMeetings
Set meeting = meetings.GetFirst
Set members = meeting.GetMembers
Set member = members.GetFirst
Call member.SetAttending(False, "I will be
away")
```

Resource List Object

The Resource List object is a list which lets you access OfficeTalk resources. The Resource List object may be obtained by a call to **session.GetResource**. The Resource list object provides access to the common list object functionality.

Resource List Methods

Add	Adds a new resource
Count	Returns the number of resources in the list.
SetFilter	Sets the list filter
SetFilterAnd	Logically ANDs the filter with this expression
SetFilterOr	Logically ORs the filter with this expression
ClearFilter	Clears the list filter
FindItemByID	Finds a resource with an ID which matches the passed in ID
GetFirst	Gets the first resource in the list
GetNext	Gets the next resource in the list.

GetLast	Gets the last resource in the list
GetPrev	Gets the previous resource in the list

Resource Object

The Resource object represents an OfficeTalk Resource. This object provides access to the common object functionality.

Resource Methods

Edit	Lets the caller edit the properties of the Resource via a dialog box
Update	Saves changes to this resource
Delete	Deletes the resource
Value	Gets the value of the passed in field/column name
Value=	Sets the value of the passed in field/column name

Resource Properties

Name	Represents the resource's description
LastEditedDate	The date on which the resource was last changed
CreationDate	The date when the resource was created

Available Fields

ID	Long	The resource’s ID
Name	String	The name of this resource
Fixed	Boolean	True if this resource is a *fixed* resource
Last Edited	Date	The date on which the resource was last changed (Read only)
Owner	String	The name of the owner of this meeting
Usual Location	String	The usual location of this resource

Company List Object

The Company List object is a list which lets you access OfficeTalk companies. The Company List object may be obtained by a call to **session.GetCompanies**. The Company list object provides access to the common list object functionality.

Company List Methods

Add	Adds a new company
Count	Returns the number of companies in the list.
SetFilter	Sets the list filter
SetFilterAnd	Logically ANDs the filter with this expression
SetFilterOr	Logically ORs the filter with this expression
ClearFilter	Clears the list filter
FindItemByID	Finds a company with an ID which matches the passed in ID

GetFirst	Gets the first company in the list
GetNext	Gets the next company in the list.
GetLast	Gets the last company in the list
GetPrev	Gets the previous company in the list

Company Object

The Company object represents an OfficeTalk Company. This object provides access to the common object functionality.

Company Methods

Edit	Lets the caller edit the properties of the Company via a dialog box
Update	Saves changes to this company
Delete	Deletes the company
Value	Gets the value of the passed in field/column name
Value=	Sets the value of the passed in field/column name
GetEmployees	Returns a list of employees
AddEmployee	Adds an employee to the company
SetNotes	Sets the notes associated with the company
GetNotes	Gets the notes associated with the company

Company Properties

Name	Represents the company's description
LastEditedDate	The date on which the company was last changed (Read only)
CreationDate	The date when the company was created (Read only)
Address1	The first address field
Address2	The second address field
Address3	The third address field
City	The city address field
County	The county address field
Postcode	The postcode address field
Country	The country address field
Phone1	The primary phone number
Phone2	The secondary phone number
Fax	The fax number
Email	The Email address of the company

Available Fields

ID	Long	The company's ID
Last Edited	Date	The date when this company was last changed (Read only)
Name	String	The name of this company
Address1	String	The first address line of this company
Address2	String	The second address line of this company
Address3	String	The third address line of this company
City	String	The town or city where this company is

		located
County	String	The county or state where this company is located
Postcode	String	The company's postcode or zip code
Country	String	The country where the company is located
Phone1	String	The company's primary phone number
Phone2	String	The company's secondary phone number
Fax	String	The company's fax number
Comment	String	The comment associated with the company
Web Address	String	The company's world wide web address
Email	String	The company's e-mail address

GetEmployees()

Description: Returns the list of employees.

Syntax: object.GetEmployees()

Parameters:

object Required, the Company object

Remarks: This method returns a Contact list object which contains all the employees of this company.

Returns: A Contact list object

Example:

```
Dim session As Object

Set session =
CreateObject("OfficeTalk.Session")

Set user = session.Logon(login name, password)

Set comp = session.GetCompanies.GetFirst

Set employees = comp.GetEmployees

Set empl = employees.GetFirst
```

AddEmployee()

Description: Adds an employee to this company.

Syntax: object.AddEmployee()

Parameters:

object Required, the Company object

Remarks: This method makes the passed in contact an employee of this company.

Returns: Nothing

Example:

```
Dim session As Object

Set session =
CreateObject("OfficeTalk.Session")

Set user = session.Logon(login name, password)

Set comp = session.GetCompanies.GetFirst

Set cont = session.GetContacts.GetFirst
```

```
comp.AddEmployee cont
```

SetNotes()

Description: Sets the notes of the company

Syntax: object.SetNotes(sText)

Parameters:

object Required, the Company object

sText A string representing the company notes

Remarks: Sets the notes of the company. Handles plain text. Rich text is not supported.

Returns: Nothing

Example:

```
Dim session As Object

Dim user As Object

Set session =
CreateObject("OfficeTalk.Session")

Call session.Logon(login name, password)

set comp = session.GetCompanies.getfirst

comp.SetNotes "Some notes"
```

GetNotes()

Description: Gets the notes associated with the company

Syntax: object.GetNotes

Parameters:

object Required, the Company object

Remarks: This function returns the company's notes as a plain text string.

Returns: The company notes

Example:

```
Dim session As Object

Dim user As Object

Set session =
CreateObject("OfficeTalk.Session")

Call session.Logon(login name, password)

set comp = session.GetCompanies.getfirst

MsgBox comp.GetNotes
```

Contact List Object

The Contact List object is a list which lets you access OfficeTalk contacts. The Contact List object may be obtained by a call to **session.GetContacts**. The Contact list object provides access to the common list object functionality.

Contact List Methods

Add	Adds a new contact
Count	Returns the number of contact in the list.
SetFilter	Sets the list filter
SetFilterAnd	Logically ANDs the filter with this expression
SetFilterOr	Logically ORs the filter with this expression
ClearFilter	Clears the list filter
FindItemByID	Finds a contact with an ID which matches the passed in ID
GetFirst	Gets the first contact in the list
GetNext	Gets the next contact in the list.
GetLast	Gets the last contact in the list
GetPrev	Gets the previous contact in the list

Contact Object

The Contact object represents an OfficeTalk Contact. This object provides access to the common object functionality.

Contact Methods

Edit	Lets the caller edit the properties of the Contact via a dialog box
Update	Saves changes to this contact
Delete	Deletes the meeting
Value	Gets the value of the passed in field/column name
Value=	Sets the value of the passed in field/column name
SetNotes	Sets the notes associated with the contact
GetNotes	Gets the notes associated with the contact

Contact Properties

Name	Represents the contact's description
LastEditedDate	The date on which the contact was last changed
CreationDate	The date when the contact was created
LastName	The contact surname
FirstNames	The contact first name
HomeAddress1	The first address line of the contacts home address.
HomeAddress2	The second address line of the contacts home address.
HomeAddress3	The third address line of the contacts home address.
HomeCity	The city address line of the contacts home address.
HomeCounty	The county address line of the contacts home address.
HomePostcode	The postcode address line of the contacts home address.
HomeCountry	The country address line of the contacts home address.
Phone1	The primary phone number of the contact's home address
Phone2	The secondary phone number of the contact's home address
Fax	The fax number of the contacts home address

Email	The Email address of the contact at home

Available Fields

ID	Long	The contact's ID
Last Edited	Date	The date when this contact was last changed (Read Only)
Name	String	The name of this contact
Company	Number	The ID of the employing company (if there is one). Setting this field to the ID of a company will not properly make the associated company an employee of the company. Instead, use the method **AddEmployee()** for the Company object.
FirstNames	String	The first name(s) of this contact
Address1	String	The first address line of this contact's home address
Address2	String	The second address line of this contact's home address
Address3	String	The third address line of this contact's home address
City	String	The contact's home town or city
County	String	The contact's home county or state
Postcode	String	The contact's home postcode or zip code
Country	String	The country where the contact's home address is located
Phone1	String	The contact's primary home phone number
Phone2	String	The contact's secondary home phone number
Fax	String	The contact's home fax number
Comment	String	The comment associated with the contact
Web Address	String	The contact's world wide web address
Email	String	The contact's home e-mail address
Company Last Edited	Date	The date when this contact's company was last changed (Read Only)
Company Name	String	The name of this contact's company
Company Address 1	String	The first address line of this contact's company
Company Address 2	String	The second address line of this contact's company
Company Address 3	String	The third address line of this contact's company
Company Town/City	String	The town or city in which the contact's company is located
Company County	String	The county or state in which the contact's company is located
Company Postcode	String	The contact's company's postcode or zip code
Company Country	String	The country where the contact's company is located
Company Phone 1	String	The primary phone number of the contact's company
Company Phone 2	String	The secondary phone number of the contact's company

Company Fax	String	The contact's company's fax number
Company Comment	String	The comment associated with the contact's company
Company Web Address	String	The contact's company's world wide web address
Company Email	String	The contact's company's e-mail address

SetNotes()

Description: Sets the notes of the contact

Syntax: object.SetNotes(sText)

Parameters:

object Required, the Contact object

sText A string representing the contact notes

Remarks: Sets the notes of the contact. Handles plain text. Rich text is not supported.

Returns: Nothing

Example:

```
Dim session As Object
Dim user As Object
Set session =
CreateObject("OfficeTalk.Session")
Call session.Logon(login name, password)
set cont = session.GetContacts.getfirst
cont.SetNotes "Some notes"
```

GetNotes()

Description: Gets the notes associated with the contact

Syntax: object.GetNotes

Parameters:

object Required, the Contact object

Remarks: This function returns the contact's notes as a plain text string.

Returns: The contact notes

Example:

```
Dim session As Object
Dim user As Object
Set session =
CreateObject("OfficeTalk.Session")
Call session.Logon(login name, password)
set cont = session.GetContacts.getfirst
MsgBox cont.GetNotes
```

Conversation List Object

The Conversation List object is a list which lets you access OfficeTalk meetings. The Conversation List object may be obtained by a call to

session.GetConversations. The Conversation list object provides access to the common list object functionality.

Conversations List Methods

Add	Adds a new conversation
Count	Returns the number of conversations in the list.
SetFilter	Sets the list filter
SetFilterAnd	Logically ANDs the filter with this expression
SetFilterOr	Logically ORs the filter with this expression
ClearFilter	Clears the list filter
FindItemByID	Finds a conversation with an ID which matches the passed in ID
GetFirst	Gets the first conversation in the list
GetNext	Gets the next conversation in the list
GetLast	Gets the last conversation in the list
GetPrev	Gets the previous conversation in the list

Conversation Object

The Conversation object represents an OfficeTalk Conversation. This object provides access to the common object functionality.

Conversation Methods

Edit	Lets the caller edit the properties of the Conversation via a dialog box
Update	Saves changes to this conversation
Delete	Deletes the conversation
Value	Gets the value of the passed in field/column name
Value=	Sets the value of the passed in field/column name
SetCompany	Sets the company associated with this conversation.
GetCompany	Gets the company associated with this conversation.
SetContact	Sets the contact associated with this conversation.
GetContact	Gets the contact associated with this conversation.
SetUser	Sets the user associated with this conversation.
GetUser	Gets the user associated with this conversation.
GetBody	Gets the body of the conversation
SetBody	Sets the body of the conversation
SetBodyHTML	Sets the body of the conversation using an HTML formatted string

Conversation Properties

Name	Represents the conversation's subject
LastEditedDate	The date on which the conversation was last changed
CreationDate	The date when the conversation was created

Available Fields

ID	Long	The conversation's ID
Last Edited	Date	The date when this conversation was last changed (Read only)
Date Time	Date	The date and time when this conversation was made
Date	Date	The date when this conversation was made
Time	Date	The time when this conversation was made
Subject	String	The subject of this conversation
Contact	String	The contact with whom this conversation is associated. Blank if none.
Company	String	The company with which this conversation is associated

SetCompany(company As Object**)**

Description: Associates the conversation with the passed in company.

Syntax: object.SetCompany(company)

Parameters:

object Required, the Conversation object

company The company to associate with the conversation.

Remarks: This method associates this conversation with the passed in company. This means that the conversation will appear as a history item against the passed in company.

Returns: Nothing

Example:

```
Dim session As Object

Set session =
CreateObject("OfficeTalk.Session")

Set user = session.Logon(login name, password)

Set conv = session.GetConversations.GetFirst

Set comp = session.GetCompanies.GetFirst

Call conv.SetCompany(comp)
```

GetCompany()

Description: Returns the company that is associated with the conversation.

Syntax: object.GetCompany()

Parameters:

object Required, the Conversation object

Remarks: This method returns the company that is associated with the conversation.

Returns: A Company object

Example:

```
Dim session As Object

Set session =
CreateObject("OfficeTalk.Session")

Set user = session.Logon(login name, password)
```

```
Set conv = session.GetConversations.GetFirst
Set comp = conv.GetCompany
```

SetContact(contact As Object**)**

Description: Associates the conversation with the passed in contact.

Syntax: object.SetContact(contact)

Parameters:

object Required, the Conversation object

company The contact to associate with the conversation.

Remarks: This method associates this conversation with the passed in contact. This means that the conversation will appear as a history item against the passed in contact.

Returns: Nothing

Example:

```
Dim session As Object
Set session =
CreateObject("OfficeTalk.Session")
Set user = session.Logon(login name, password)
Set conv = session.GetConversations.GetFirst
Set cont = session.GetCompanies.GetFirst
Call conv.SetContact(cont)
```

GetContact()

Description: Returns the contact that is associated with the conversation.

Syntax: object.GetContact()

Parameters:

object Required, the Conversation object

Remarks: This method returns the contact that is associated with the conversation.

Returns: A Contact object

Example:

```
Dim session As Object
Set session =
CreateObject("OfficeTalk.Session")
Set user = session.Logon(login name, password)
Set conv = session.GetConversations.GetFirst
Set cont = conv.GetContact
```

SetUser(user As Object**)**

Description: Associates the conversation with the passed in user.

Syntax: object.SetUser(user)

Parameters:

object Required, the Conversation object

user The user to associate with the conversation.

Remarks: This method associates this conversation with the passed in user. This means that the conversation will appear as a history item belonging to the user.

Returns: Nothing

Example:

```
Dim session As Object

Set session =
CreateObject("OfficeTalk.Session")

Call session.Logon(login name, password)

Set conv = session.GetConversations.GetFirst

Set user = session.FindUserByLoginName("fred")

Call conv.SetUser(user)
```

GetUser()

Description: Returns the user that is associated with the conversation.

Syntax: object.GetUser()

Parameters:

object Required, the Conversation object

Remarks: This method returns the user that is associated with the conversation.

Returns: A User object

Example:

```
Dim session As Object

Set session =
CreateObject("OfficeTalk.Session")

Call session.Logon(login name, password)

Set conv = session.GetConversations.GetFirst

Set user = conv.GetUser
```

SetBody(sBody As String)

Description: Sets the body of the conversation

Syntax: object.SetBody(sBody)

Parameters:

object Required, the Conversation object

sBody The string representing the conversation body.

Remarks: This method sets the textual body of the conversation.

Returns: Nothing

Example:

```
Dim session As Object

Set session =
CreateObject("OfficeTalk.Session")

Call session.Logon(login name, password)

Set comps = session.GetCompanies

Set convs = session.GetConversations
```

```
Set user = session.FindUserByLoginName("stb")
Call comps.SetFilter("Name", ">=", "sareen")
Set comp = comps.GetFirst
Set conts = comp.GetEmployees
Set cont = conts.GetFirst
Set conv = convs.Add
conv.Value("Name") = "Smoking..."
conv.Value("Date") = Now
conv.SetCompany (comp)
conv.SetUser (user)
conv.SetContact (cont)
conv.SetBody "This is the conversation text"
conv.Update
```

GetBody()

Description: Returns the text of the conversation body

Syntax: object.GetBody()

Parameters:

object Required, the Conversation object

Remarks: This method returns the text of the body of the conversation.

Returns: A string representing the body of the conversation

Example:

```
Dim session As Object
Set session =
CreateObject("OfficeTalk.Session")
Set user = session.Logon(login name, password)
Set conv = session.GetConversations.GetFirst
MsgBox conv.GetBody
```

GetBodyHTML()

Description: Returns the HTML formatted text of the conversation body.

Syntax: object.GetBodyHTML()

Parameters:

object Required, the Conversation object

Remarks: This method returns the HTML formatted text of the body of the conversation.

Returns: A string containing the HTML representation of the conversation body.

Example:

```
Dim session As Object
Set session =
CreateObject("OfficeTalk.Session")
Set user = session.Logon(login name, password)
```

```
Set conv = session.GetConversations.GetFirst
MsgBox conv.GetBodyHTML
```

Group List Object

The Group List object is a list which lets you access OfficeTalk groups. The Group List object may be obtained by a call to **session.GetGroups**. The Group list object provides access to the common list object functionality.

Group List Methods

Add	Adds a new group
Count	Returns the number of groups in the list.
SetFilter	Sets the list filter
SetFilterAnd	Logically ANDs the filter with this expression
SetFilterOr	Logically ORs the filter with this expression
ClearFilter	Clears the list filter
FindItemByID	Finds a group with an ID which matches the passed in ID
GetFirst	Gets the first group in the list.
GetNext	Gets the next group in the list.
GetLast	Gets the last group in the list.
GetPrev	Gets the previous group in the list.

Group Object

The Group object represents an OfficeTalk Group. This object provides access to the common object functionality.

Group Methods

Edit	Lets the caller edit the properties of the group via a dialog box
Update	Saves changes to this group
Delete	Deletes the group
Value	Gets the value of the passed in field/column name
Value=	Sets the value of the passed in field/column name
GetUsers	Gets the list of users belonging to this group
GetResources	Gets the list of resources belonging to this group
GetSubGroups	Gets the sub groups of this group

Group Properties

Name	The name of the group
LastEditedDate	The date on which the group was last changed
CreationDate	The date when the group was created

Available Fields

ID	Long	The group's ID
Last Edited	Date	The date when this group was last changed
Name	Date	The name of this group
Owner	Date	The owner of this group. This is the name of a local user
Owner ID	Date	The owner of this group. This is the ID of a local user

GetUsers()

Description: Returns the list of users belonging to this group.

Syntax: object.GetUsers()

Parameters:

object Required, the Group object

Remarks: This method returns the list of users belonging to the group.

Returns: A User list object

Example:

```
Dim session As Object
Set session =
CreateObject("OfficeTalk.Session")
Call session.Logon(login name, password)
Set group = session.GetGroups.GetFirst
Set users = group.GetUsers
Set user = users.GetFirst
```

GetResources()

Description: Returns the list of resources belonging to this group.

Syntax: object.GetResources()

Parameters:

object Required, the Group object

Remarks: This method returns the list of resources belonging to the group.

Returns: A Resource list object

Example:

```
Dim session As Object
Set session =
CreateObject("OfficeTalk.Session")
Call session.Logon(login name, password)
Set group = session.GetGroups.GetFirst
Set resources = group.GetResources
Set resource = resources.GetFirst
```

GetSubGroups()

Description: Returns the list of sub groups belonging to this group.

Syntax:	object.GetSubGroups()
Parameters:	
object	Required, the Group object
Remarks:	This method returns the list of sub groups belonging to the group.
Returns:	A Group list object

Example:

```
Dim session As Object
Set session =
CreateObject("OfficeTalk.Session")
Call session.Logon(login name, password)
Set group = session.GetGroups.GetFirst
Set subgroups = group.GetSubGroups
Set subgroup = subgroups.GetFirst
```

Contact Group List Object

The ContactGroup List object is a list which lets you access OfficeTalk contact groups. The ContactGroup List object may be obtained by a call to **session.GetContactGroups**. The ContactGroup list object provides access to the common list object functionality.

ContactGroup List Methods

Add	Adds a new contact group
Count	Returns the number of contact groups in the list.
SetFilter	Sets the list filter
SetFilterAnd	Logically ANDs the filter with this expression
SetFilterOr	Logically ORs the filter with this expression
ClearFilter	Clears the list filter
FindItemByID	Finds a contact group with an ID which matches the passed in ID
GetFirst	Gets the first contact group in the list.
GetNext	Gets the next contact group in the list.
GetLast	Gets the last contact group in the list.
GetPrev	Gets the previous contact group in the list.

Contact Group Object

The Contact Group object represents an OfficeTalk contact group. This object provides access to the common object functionality.

Contact Group Methods

Edit	Lets the caller edit the properties of the contact group via a dialog box.
Update	Saves changes to this contact group.
Delete	Deletes the contact group.
Value	Gets the value of the passed in field/column name.
Value=	Sets the value of the passed in field/column name.

GetCompanies	Gets the list of companies belonging to this contact group.
GetContacts	Gets the list of contacts belonging to this contact group.
GetSubContactGroups	Gets the list of contact groups which are sub items of this contact group.
AddMember	Adds the passed in company or contact to the contact group.
RemoveMember	Removes the passed in company or contact from the contact group.

Contact Group Properties

Name	The name of the contact group.
LastEditedDate	The date on which the contact group was last changed.
CreationDate	The date when the contact group was created.

Available Fields

ID	Long	The contact group's ID.
Last Edited	Date	The date when this contact group was last changed.
Name	Date	The name of this contact group.
Owner	Date	The owner of this contact group. This is the name of a local user.
Owner ID	Date	The owner of this contact group. This is the ID of a local user.

GetCompanies()

Description: Returns the list of companies belonging to this group.

Syntax: object.GetCompanies()

Parameters:

object Required, the Contact Group object

Remarks: This method returns the list of companies belonging to the contact group.

Returns: A Company list object

Example:

```
Dim session As Object
Set session =
CreateObject("OfficeTalk.Session")
Call session.Logon(login name, password)
Set cntgrp = session.GetContactGroups.GetFirst
Set comps = cntgrp.GetCompanies
Set comp = comps.GetFirst
```

GetContacts()

Description: Returns the list of contacts belonging to this contact group.

Syntax: object.GetContacts()

Parameters:

object Required, the Contact Group object

Remarks: This method returns the list of contacts belonging to the contact group.

Returns: A Contact list object

Example:

```
Dim session As Object

Set session =
CreateObject("OfficeTalk.Session")

Call session.Logon(login name, password)

Set cntgrp = session.GetContactGroups.GetFirst

Set conts = cntgrp.GetContacts

Set cont = conts.GetFirst
```

GetSubContactGroups()

Description: Returns the list of sub contact groups belonging to this contact group.

Syntax: object.GetSubContactGroups()

Parameters:

object Required, the Contact Group object

Remarks: This method returns the list of sub contact groups belonging to the contact group.

Returns: A Contact Group list object

Example:

```
Dim session As Object

Set session =
CreateObject("OfficeTalk.Session")

Call session.Logon(login name, password)

Set cntgrp = session.GetContactGroups.GetFirst

Set subgroups = cntgrp.GetSubGroups

Set subgroup = subgroups.GetFirst
```

AddMember()

Description: Adds the passed in company or contact to this contact group.

Syntax: object.AddMember()

Parameters:

object Required, the Contact Group object

Remarks: This method adds a company or contact to the contact group.

Returns: Nothing

Example:

```
Dim session As Object

Set session =
CreateObject("OfficeTalk.Session")
```

```
Call session.Logon(login name, password)
Set comp = session.GetCompanies.GetFirst
Set cont = session.GetContacts.GetFirst
Set cntgrp = session.GetContactGroups.GetFirst
Call cntgrp.AddMember(comp)
Call cntgrp.AddMember(cont)
```

RemoveMember()

Description:	Removes the passed in company or contact from this contact group.
Syntax:	object.RemoveMember(item)
Parameters:	
object	Required, the Contact Group object
item	Required, a Company or a Contact object
Remarks:	This method removes a company or contact from the contact group.
Returns:	True if successful, False otherwise.
Example:	

```
Dim session As Object
Set session =
CreateObject("OfficeTalk.Session")
Call session.Logon(login name, password)
Set cntgrp = session.GetContactGroups.GetFirst
Set comp = cntgrp.GetCompanies.GetFirst
Call cntgrp.RemoveMember(comp)
```

Planner List Object

The Planner List object is a list which lets you access OfficeTalk planners. The Planner List object may be obtained by a call to **session.GetPlanners**. The Planner list object provides access to the common list object functionality.

Planner List Methods

Add	Adds a new planner
Count	Returns the number of planners in the list.
SetFilter	Sets the list filter
SetFilterAnd	Logically ANDs the filter with this expression
SetFilterOr	Logically ORs the filter with this expression
ClearFilter	Clears the list filter
FindItemByID	Finds a planner with an ID which matches the passed in ID
GetFirst	Gets the first planner in the list.
GetNext	Gets the first planner in the list.
GetLast	Gets the last planner in the list
GetPrev	Gets the previous planner in the list

Planner Object

The Planner object represents an OfficeTalk planner. This object provides access to the common object functionality.

Planner Methods

Edit	Lets the caller edit the properties of the planner via a dialog box
Update	Saves changes to this planner
Delete	Deletes the planner
Value	Gets the value of the passed in field/column name.
Value=	Sets the value of the passed in field/column name
AddBooking	Adds a booking to the planner
GetKeys	Gets the list of keys belonging to the planner
GetBookings	Gets the list of bookings belonging to the planner

Planner Properties

Name	Represents the meeting's description
LastEditedDate	The date on which the meeting was last changed
CreationDate	The date when the meeting was created

Available Fields

ID	Long	The planner's ID
Last Edited	Date	The date when this planner was last changed.
Name	Date	The name of this planner.
Owner	Long	The owner of this planner. This is the name of a local user.
Owner ID	Long	The owner of this planner. This is the ID of a local user.

AddBooking()

Description: Adds a booking to the planner using the passed in key and the passed in start time and number of days.

Syntax: object.AddBooking(plannerKey As Object, tStart As Date, iDays As Number)

Parameters:

object	Required, the Planner object
plannerKey	The planner key to be associated with the newly created planner booking
tStart	The start date of the new planner booking
iDays	The duration (in days) of the new planner booking

Remarks: This method adds a planner booking to the planner. The booking is made using the passed in key. It is created starting on the passed in start date and the duration of the booking is set to the passed in number of days. This method is provided as an alternative to adding a booking in the following way:

Set bookings = planner.GetBookings

Set key = planner.GetKeys.GetFirst

Set booking = bookings.Add

booking.SetKey(key)

booking.Value("Start Date") = #12/12/98#

booking.Value("Duration") = 10

Returns: The new planner booking object

Example:

```
Dim session As Object

Set session =
CreateObject("OfficeTalk.Session")

Call session.Logon(login name, password)

Set planner = session.GetPlanners.GetFirst

Set key = planner.GetKeys.GetFirst

Set book = planner.AddBooking(key, #12/12/98#,
5)
```

GetKeys()

Description: Gets the list of keys belonging to the planner

Syntax: object.GetKeys()

Parameters:

object Required, the Planner object

Remarks: This method returns the list of planner keys belonging to this planner.

Returns: A PlannerKey list object

Example:

```
Dim session As Object

Set session =
CreateObject("OfficeTalk.Session")

Call session.Logon(login name, password)

Set planner = session.GetPlanners.GetFirst

Set keys = planner.GetKeys

Set key = keys.GetFirst

MsgBox key.Name
```

GetBookings()

Description: Gets the list of bookings belonging to the planner

Syntax: object.GetBookings()

Parameters:

object Required, the Planner object

Remarks: This method returns the list of planner bookings.

Returns: PlannerBooking list

Example:

```
Dim session As Object
Set session =
CreateObject("OfficeTalk.Session")
Call session.Logon(login name, password)
Set planner = session.GetPlanners.GetFirst
Set bookings = planner.GetBookings
Set booking = bookings.GetFirst
MsgBox booking.Name
```

Planner Key List Object

The Planner key List object is a list which lets you access OfficeTalk planner keys. The Planner key List object may be obtained by a call to **planner.GetKeys**. The Planner Key list object provides access to the common list object functionality.

Planner Key List Methods

Add	Adds a new planner key
Count	Returns the number of planner keys in the list.
SetFilter	Sets the list filter
SetFilterAnd	Logically ANDs the filter with this expression
SetFilterOr	Logically ORs the filter with this expression
ClearFilter	Clears the list filter
FindItemByID	Finds a planner key with an ID which matches the passed in ID
GetFirst	Gets the first planner key in the list
GetNext	Gets the next planner key in the list.
GetLast	Gets the last planner key in the list
GetPrev	Gets the previous planner key in the list

Planner Key Object

The Planner Key object represents an OfficeTalk Planner Key. This object provides access to the common object functionality.

Planner Key Methods

Edit	Lets the caller edit the properties of the planner key via a dialog box
Update	Saves changes to this planner key
Delete	Deletes the planner key
Value	Gets the value of the passed in field/column name
Value=	Sets the value of the passed in field/column name

Planner Key Properties

Name	Represents the key's description
LastEditedDate	The date on which the key was last changed
CreationDate	The date when the key was created

Available Fields

ID	Long	The planner key's ID
Last Edited	Date	The date when this planner was last changed
Name	Date	The name of this planner

Planner Booking List Object

The Planner Booking List object is a list which lets you access OfficeTalk planner bookings. The Planner Booking List object may be obtained by a call to **planner.GetBookings**. The Planner Bookings list object provides access to the common list object functionality.

Planner Bookings List Methods

Add	Adds a new planner booking
Count	Returns the number of planner bookings in the list.
SetFilter	Sets the list filter
SetFilterAnd	Logically ANDs the filter with this expression
SetFilterOr	Logically ORs the filter with this expression
ClearFilter	Clears the list filter
FindItemByID	Finds a planner booking with an ID which matches the passed in ID
GetFirst	Gets the first planner booking belonging to the associated planner
GetNext	Gets the next planner booking belonging to the associated planner.
GetLast	Gets the last planner booking belonging to the associated planner
GetPrev	Gets the previous planner booking belonging to the associated planner

Planner Booking Object

The planner booking object represents an OfficeTalk planner booking. This object provides access to the common object functionality.

Planner Booking Methods

Edit	Lets the caller edit the properties of the planner booking via a dialog box
Update	Saves changes to this planner booking
Delete	Deletes the planner booking
Value	Gets the value of the passed in field/column name
Value=	Sets the value of the passed in field/column name
SetKey	Sets the key associated with the planner booking
GetKey	Gets the key associated with the planner bookings

Planner Booking Properties

Name	Represents the planner booking's description
LastEditedDate	The date on which the planner booking was last changed
CreationDate	The date when the planner booking was created

Available Fields

ID	Long	The planner booking’s ID
Last Edited	Date	The date when this planner booking was last changed
Name	Date	The name of this planner booking
Owner	Long	The owner of this planner. This is the ID of a local user.
Start Date	Date	The date on which this booking starts
Duration	Numeric	The duration of this booking in days
Level	Numeric	The planner bookings level. Each planner is capable of displaying 24 levels for each month. By default, only 2 levels are shown for each month.

Project List Object

The Project List object is a list which lets you access OfficeTalk projects. The Project List object may be obtained by a call to **session.GetProjects**. The Project list object provides access to the common list object functionality.

Project List Methods

Add	Adds a new project
Count	Returns the number of projects in the list.
SetFilter	Sets the list filter
SetFilterAnd	Logically ANDs the filter with this expression
SetFilterOr	Logically ORs the filter with this expression
ClearFilter	Clears the list filter
FindItemByID	Finds a project with an ID which matches the passed in ID
GetFirst	Gets the first project in the list
GetNext	Gets the next project in the list.
GetLast	Gets the last project in the list
GetPrev	Gets the previous project in the list

Project Object

The Project object represents an OfficeTalk Project. This object provides access to the common object functionality.

Project Methods

Edit	Lets the caller edit the properties of the project via a dialog box
Update	Saves changes to this project
Delete	Deletes the project
Value	Gets the value of the passed in field/column name
Value=	Sets the value of the passed in field/column name
GetTasks	Gets the list of project tasks belonging to this project

Project Properties

Name	Represents the project's description
LastEditedDate	The date on which the project was last changed
CreationDate	The date when the project was created

Available Fields

ID	Long	The project's ID
Last Edited	Date	The date when this project was last changed
Name	String	The name of this project
Owner	String	The name of the project's owner

GetTasks()

Description: Gets the list of tasks belonging to the project

Syntax: object.GetTasks()

Parameters:

object Required, the Project object

Remarks: This method returns the list of tasks belonging to the project.

Returns: Task List object

Example:

```
Dim session As Object
Set session =
CreateObject("OfficeTalk.Session")
Call session.Logon(login name, password)
Set project = session.GetProjects.GetFirst
Set tasks = project.GetTasks
Set task = tasks.GetFirst
MsgBox task.Name
```

Message List Object

The Message List object is a list which lets you access OfficeTalk mail messages. The Message List object may be obtained by a call to **mailfolder.GetReceivedMessages** or

mailFolder.GetSentMessages. The Messages list object provides access to the common list object functionality.

Note: The Add method does exist for the Message List object, however this method should not be used for sending messages. The way to create new mail messages is via a call to the **Session.NewMessage**.

Message List Methods

Add	Adds a new mail message to the associated folder. Note that this method is supplied for the purposes of adding mail directly to a specific folder of the current user. It should not be used for sending mail. Use **Session.NewMessage** instead.
Count	Returns the number of messages in the list.
SetFilter	Sets the list filter
SetFilterAnd	Logically ANDs the filter with this expression
SetFilterOr	Logically ORs the filter with this expression
ClearFilter	Clears the list filter
FindItemByID	Finds a message with an ID which matches the passed in ID
GetFirst	Gets the first message in the message list
GetNext	Gets the next message in the message list.
GetLast	Gets the last message in the message list
GetPrev	Gets the previous message in the message list

Message Object

The Message object represents an OfficeTalk Meeting. This object may be obtained either via a call to **session.**NewMessage or by iterating message objects from a message list. This object provides access to the common object functionality.

Message Methods

Update	Saves changes to this message
Delete	Deletes the message
Value	Gets the value of the passed in field/column name
Value=	Sets the value of the passed in field/column name
AddRecipient	Adds a single recipient to the message
AddAttachment	Adds a file attachment to the message
MoveToFolder	Moves the message to another folder
AddABRecipients	Displays a Choose Recipients dialog box allowing you to add one or more recipients to the message. Each recipient is marked as To:
AddABRecipientsCC	Displays a Choose Recipients dialog box allowing you to add one or more recipients to the message. Each recipient is marked as Cc:
GetToRecipientsStr	Returns a string which is a comma separated list of the message's TO recipients.
GetCCRecipientsStr	Returns a string which is a comma

	separated list of the message's CC recipients.
GetBCCRecipientsStr	Returns a string which is a comma separated list of the message's BCC recipients.
Send	Sends the mail message
SendAsNotification	Sends the message as a simple notification
SendAsWYWONotification	Sends the message as a While You Were Out notification
SendAsYNNotification	Sends the message as a Yes/No Notification
SendAsResponseNotification	Sends the message as a Response Notification
SenderAddress	Returns a string which is the address of the sender of the message.
GetBody	Gets the text of the body of the message.
GetBodyHTML	Gets the body of the message in HTML format.
SetBody	Sets the text of the message body.

Message Properties

Name	Represents the message's subject
Subject	Represents the message's subject
SentTime	Represents the time when the message was sent.
ReceivedTime	Represents the time when the message was received. This is not valid for sent messages.
LastEditedDate	The date on which the message was last changed
CreationDate	The date when the message was created
Urgent	A read/write property which represents the *urgent* status of the message.

Available Fields

Last Edited	Date	The date when this message was last changed
Name	String	The subject of this message
Subject	String	The subject of this message
Is Urgent	Boolean	True if this message is urgent
Has Attachment	Boolean	True if this message has one or more attachments
Sender	String	The sender of this message
Received date	Date	The date when this message was received. Applies only to received messages.
Received Time	Date	The date and time when this message was received. Applies only to received messages.
Receiver	String	The name of the receiver of this message
Sent date	Date	The date when this message was sent. Applies only to sent messages.

Sent Time	Date	The date and time when this message was sent. Applies only to sent messages.

AddRecipient()

Description: Adds one or more recipients to the message

Syntax: object.AddRecipient(sRecipient)

Parameters:

object Required, the Message object

sRecipient The address or name of the recipient.

Remarks: This method adds one or more recipients to the message prior to sending. If one or more of the passed in recipient names or addresses does not uniquely identify a person held within the OfficeTalk address book then a Check Names dialog box is shown requiring you to select the appropriate recipient from a list of matches. You may specify more than one recipient by separating each recipient with a semi-colon character, ';', e.g. "John;Paul;Susan"

Returns: Returns True if all recipients were uniquely identified and were added to the message, False otherwise.

Example:

```
Dim session As Object
Set session =
CreateObject("OfficeTalk.Session")
Call session.Logon(login name, password)
Set message = session.NewMessage
if (message.AddRecipient("John")) Then
 MsgBox "Successfully added recipient"
End If
```

AddAttachment()

Description: Adds a file attachment to the message

Syntax: object.AddAttachment(sFile)

Parameters:

object Required, the Message object

sFile The full path name of the file to be attached.

Remarks: This method adds the file attachment to the message prior to sending.

Returns: Returns True if the file was successfully added to the message, False otherwise.

Example:

```
Dim session As Object
Set session =
CreateObject("OfficeTalk.Session")
Call session.Logon(login name, password)
Set message = session.NewMessage
if (message.AddAttachment( "c:\windows\
256color.bmp")) Then
 MsgBox "Successfully added recipient"
End If
```

MoveToFolder()

Description: Moves the message to a folder which is identified by the passed in folder name.

Syntax: object.MoveToFolder(sFolder)

Parameters:

object Required, the Message object

sFolder The name of the folder to which the message will be moved.

Remarks: This method moves the message from its current folder to the folder identified by the passed in folder name.

Returns: Returns True if the message was successfully moved, otherwise, if the message was not successfully moved or the folder was not found then False is returned.

Example:

```
Dim session As Object

Set session =
CreateObject("OfficeTalk.Session")

Call session.Logon(login name, password)

Set message = session.NewMessage

if (message.MoveToFolder( "Old")) Then

 MsgBox "Successfully moved message"

End If
```

AddABRecipients()

Description: Displays a Choose Recipient dialog box which lets you select which recipients you wish to add to the message as TO recipients.

Syntax: object.AddABRecipients

Parameters:

object Required, the Message object

Remarks: This method displays a Choose Recipient dialog box. From this dialog box, you have access to all local users, remote users, the Contact address book, the VIM address book and the MAPI address book. You may select any one or more recipients and press the **Add** button. This will display the selected recipients in the Selected Recipients list. When you press **OK** on the Choose Recipient dialog box, the function will return True, having added the recipients to the message as TO recipients. If you press **Cancel** the function will return False.

Returns: Returns True if OK was pressed on the Choose Recipient dialog box, False otherwise.

Example:

```
Dim session As Object

Set session =
CreateObject("OfficeTalk.Session")

Call session.Logon(login name, password)

Set message = session.NewMessage

message.AddABRecipients
```

AddABRecipientsCC()

Description: Displays a Choose Recipient dialog box which lets you select which recipients you wish to add to the message as CC recipients.

Syntax: object.AddABRecipientsCC

Parameters:

object Required, the Message object

Remarks: This method displays a Choose Recipient dialog box. From this dialog box, you have access to all local users, remote users, the Contact address book, the VIM address book and the MAPI address book. You may select any one or more recipients and press the **Add** button. This will display the selected recipients in the Selected Recipients list. When you press **OK** on the Choose Recipient dialog box, the function will return True, having added the recipients to the message as CC recipients. If you press **Cancel** the function will return False.

Returns: Returns True if OK was pressed on the Choose Recipient dialog box, False otherwise.

Example:

```
Dim session As Object

Set session =
CreateObject("OfficeTalk.Session")

Call session.Logon(login name, password)

Set message = session.NewMessage

message.AddABRecipientsCC
```

GetToRecipientsStr()

Description: Returns a comma separated list of names which represent the people who are TO recipients of this message.

Syntax: object.GetToRecipientsStr

Parameters:

object Required, the Message object

Remarks: This method returns a string which is a comma separated list of names which represent the people who are marked as TO recipients of this message. The output of this method may not be used as the input of the AddRecipient function.

Returns: Returns a string representing the TO recipients of this message.

Example:

```
Dim session As Object

Set session =
CreateObject("OfficeTalk.Session")

Call session.Logon(login name, password)

Set message = session.NewMessage

message.AddABRecipients

sRecipients = message.GetToRecipientsStr
```

GetCCRecipientsStr()

Description: Returns a comma separated list of names which represent the people who are CC recipients of this message.

Syntax: object.GetCCRecipientsStr

Parameters:

object Required, the Message object

Remarks: This method returns a string which is a comma separated list of names which represent the people who are marked as CC recipients of this message. The output of this method may not be used as the input of the AddRecipient function.

Returns: Returns a string representing the CC recipients of this message.

Example:

```
Dim session As Object

Set session =
CreateObject("OfficeTalk.Session")

Call session.Logon(login name, password)

Set message = session.NewMessage

message.AddABRecipientsCC

sRecipients = message.GetCCRecipientsStr
```

GetBCCRecipientsStr()

Description: Returns a comma separated list of names which represent the people who are BCC recipients of this message.

Syntax: object.GetBCCRecipientsStr

Parameters:

object Required, the Message object

Remarks: This method returns a string which is a comma separated list of names which represent the people who are marked as BCC recipients of this message. The output of this method may not be used as the input of the AddRecipient function.

Returns: Returns a string representing the BCC recipients of this message.

Example:

```
Dim session As Object

Set session =
CreateObject("OfficeTalk.Session")

Set user = session.Logon(login name, password)

Set message =
user.InBox.GetReceivedMessages.GetFirst

sRecipients = message.GetBCCRecipientsStr
```

Send()

Description: Sends the mail message

Syntax: object.Send

Parameters:

object Required, the Message object

Remarks: This method sends the message.

Returns: Returns True if the message was successfully sent.

Example:

```
Dim session As Object

Set session =
CreateObject("OfficeTalk.Session")

Set user = session.Logon(login name, password)

Set message = session.NewMessage

message.AddABRecipients

message.Subject = "A Test message"

message.SetBody "This is the body of the
message"

message.Send
```

SendAsNotification()

Description: Sends the mail message in the form of a notification.

Syntax: object.SendAsNotification

Parameters:

object Required, the Message object

Remarks: In order to send a notification, create a message and set its properties in the normal way, but instead of calling Send to send the message call this method.

Returns: Returns True if the notification was successfully sent.

Example:

```
Dim session As Object

Set session =
CreateObject("OfficeTalk.Session")

Set user = session.Logon(login name, password)

Set message = session.NewMessage

message.AddABRecipients

message.Subject = "A Test notification"

message.SetBody "This is the message that will
appear in the notification"

message.SendAsNotification
```

SenderAddress()

Description: Returns a string which represents the sender of the message.

Syntax: object.SenderAddress

Parameters:

object Required, the Message object

Remarks: This method returns a string which represents the sender of this message. If the message has not yet been sent then an empty string is returned. This method is intended to be called on messages that you have received.

Returns: Returns the name of the sender of this message.

Example:

```
Dim session As Object
```

```
Set session =
CreateObject("OfficeTalk.Session")

Set user = session.Logon(login name, password)

Set message =
user.InBox.GetReceivedMessages.GetFirst

sSender = message.SenderAddress
```

GetBody()

Description: Returns the text of the body of the message.

Syntax: object.GetBody

Parameters:

object Required, the Message object

Remarks: This method returns a string which represents the body of this message.

Returns: Returns a string representing the body of the message.

Example:

```
Dim session As Object

Set session =
CreateObject("OfficeTalk.Session")

Set user = session.Logon(login name, password)

Set message =
user.InBox.GetReceivedMessages.GetFirst

sBody = message.GetBody
```

GetBodyHTML()

Description: Returns the text of the body of the message in HTML format.

Syntax: object.GetBodyHTML

Parameters:

object Required, the Message object

Remarks: This method returns a string which represents the body of this message in HTML format.

Returns: Returns a string representing the body of the message in HTML format.

Example:

```
Dim session As Object

Set session =
CreateObject("OfficeTalk.Session")

Set user = session.Logon(login name, password)

Set message =
user.InBox.GetReceivedMessages.GetFirst

sBody = message.GetBodyHTML
```

SetBody()

Description: Sets the text of the body of the message.

Syntax: object.SetBody

Parameters:

object Required, the Message object

Remarks: This method sets the body of this message.

Returns: Nothing.

Example:

```
Dim session As Object
Set session =
CreateObject("OfficeTalk.Session")
Set user = session.Logon(login name, password)
Set message = session.NewMessage
message.SetBody "This is the message body"
```

Folder List Object

The folder List object is a list which lets you access OfficeTalk folders, such as project folders, planner folders, task folders, meeting folders and mail folders. The folder List object may be obtained in a variety of ways depending upon the specific object. At the top level, the folder list object may be obtained by one of the following calls:

session.GetProjectFolders

session.GetPlannerFolders

session.GetMeetingFolders

user.MailFolders

folder.GetSubFolders

The folder list object provides access to the common list object functionality.

Folder List Methods

Add	Adds a new folder
Count	Returns the number of folders in the list.
SetFilter	Sets the list filter
SetFilterAnd	Logically ANDs the filter with this expression
SetFilterOr	Logically ORs the filter with this expression
ClearFilter	Clears the list filter
FindItemByID	Finds a folder with an ID which matches the passed in ID
GetFirst	Gets the first folder in the list.
GetNext	Gets the next folder in the list.
GetLast	Gets the last folder in the list
GetPrev	Gets the previous folder in the list

Folder Object

The Folder object represents an OfficeTalk folder, such as a project folder, a planner folder, a task folder, a meeting folder and a mail folder. A Mail folder has two additional methods which are marked as such in the list below. This object provides access to the common object functionality.

Folder Methods

Edit	Lets the caller edit the properties of the folder via a dialog box
Update	Saves changes to this folder
Delete	Deletes the folder
Value	Gets the value of the passed in field/column name
Value=	Sets the value of the passed in field/column name
GetSubFolders	Returns a Folder List object which represents the list of sub folders under this folder.
GetItems	Returns a List object which represents the list of items contained in this folder. **Applies to all folders except mail folders. For mail folders, use GetReceivedMessages or GetSentMessages
GetParentFolderID	Returns the ID of the folder's parent folder. **Does not apply to mail folder
GetReceivedMessages	Returns the list of received messages contained in this mail folder. **Apples only to Mail folders.
GetSentMessages	Returns the list of sent messages contained in this mail folder. **Apples only to Mail folders.

Folder Properties

Name	Represents the meeting's description
LastEditedDate	The date on which the folder was last changed
CreationDate	The date when the folder was created

Available Fields

ID	Long	The folder’s ID
Last Edited	Date	The date when this folder was last changed
Name	String	The name of this folder
Owner	String	The name of this folder's owner

GetSubFolders()

Description: Gets the list of sub folders contained in this folder.

Syntax: object.GetSubFolders

Parameters:

object Required, the Message object

Remarks: This method returns a Folder List object which represents the list of sub folders belonging to this folder.

Returns: A Folder list object.

Example:

```
Dim session As Object
```

```
Set session =
CreateObject("OfficeTalk.Session")

Set user = session.Logon(login name, password)

Set folder = user.InBox

Set subfolders = folder.GetSubFolders
```

GetItems()

Description: Gets the list of items contained in this folder.

Syntax: object.GetItems

Parameters:

object Required, the Message object

Remarks: This method returns a List object which represents the list of items belonging to this folder. For example, if this object is a Meeting folder object then this method will return a list of meetings.

Returns: An item object.

Example:

```
Dim session As Object

Set session =
CreateObject("OfficeTalk.Session")

Set user = session.Logon(login name, password)

Set folder =
session.GetMeetingFolders.GetFirst

Set meetings = folder.GetItems
```

GetParentFolderID()

Description: Returns the ID of the folder which contains this folder as one of its sub folders.

Syntax: object.GetParentFolderID

Parameters:

object Required, the Message object

Remarks: This method returns the ID of this folder's parent folder.

Returns: A numeric value representing the ID of the parent folder.

Example:

```
Dim session As Object

Set session =
CreateObject("OfficeTalk.Session")

Set user = session.Logon(login name, password)

Set folder =
session.GetMeetingFolders.GetFirst

ID = folder.Value("ID")

set subfolder = folder.GetSubFolders.GetFirst

parentID = subfolder.GetParentFolderID

' **Note: parentID will be the same as ID
```

GetReceivedMessages()

Description: Gets the list of received messages belonging to this mail folder.

Syntax: object.GetReceivedMessages

Parameters:

object Required, the Message object

Remarks: This method returns a Message list object which represents the list of received mail messages contained in this mail folder. Note this method only applies to Mail folder objects.

Returns: A Message list object.

Example:

```
Dim session As Object

Set session =
CreateObject("OfficeTalk.Session")

Set user = session.Logon(login name, password)

Set folder = user.InBox

Set messages = folder.GetReceivedMessages
```

GetSentMessages()

Description: Gets the list of sent messages belonging to this mail folder.

Syntax: object.GetSentMessages

Parameters:

object Required, the Message object

Remarks: This method returns a Message list object which represents the list of sent mail messages contained in this mail folder. Note this method only applies to Mail folder objects.

Returns: A Message list object.

Example:

```
Dim session As Object

Set session =
CreateObject("OfficeTalk.Session")

Set user = session.Logon(login name, password)

Set folder = user.InBox

Set messages = folder.GetSentMessages
```

Glossary of Terms

Cell

In the context of diary views and group table views, a cell is the box which represents a day. For example, the Weekly Appointments window consists of seven cells, representing Monday through Sunday.

Category

A label used to classify certain OfficeTalk data.

Rich text

Formatted text usually containing different fonts and colours.

User link

A user defined link which links any two items of OfficeTalk data. OfficeTalk provides a way for users to easily view linked items.

Slave workgroup

A workgroup that has been replicated or mirrored by another workgroup.

Command

A stored activity which OfficeTalk will perform when the Command Processor is run.

OfficeTalk server

A machine dedicated to performing server based OfficeTalk functions such as checking mail for the entire workgroup or automatically synchronising remote workgroups.

Category set

This is a named set of categories which may be associated with one or more OfficeTalk data types.

Default mail service

A user's default mail service is the mail service that other OfficeTalk users use in order to send mail to that user.

Gateway machine

A machine which has the task of sending and receiving Internet mail for the whole workgroup.

List windows

This is a window showing a columnar list of items. Such items may be sorted grouped and filtered by any of the available columns. An example of a list window is the Task list.

General access

General access to a user defines access to the data, such as projects, planners, contact groups etc, owned by that user. It does not define the access to the user's tasks and appointments.

Fixed resource

A resource that has a fixed location. An example of this is a meeting room.

Keycode

A code provided by your OfficeTalk supplier which enables the product after the trial period.

Directory Services

A service which maintains a list of network users. This service is provided with newer operating systems.

Group

A grouping of users and resources.

Project

A set of related tasks which may be planned and assigned.

Planner booking

A single activity within a planner which spans one or more days.

Planner

A plan of related activities which span one or more days.

Resource

Something which may be reserved or booked, such as a meeting room, an overhead projector or a company pool car. OfficeTalk keeps a diary for every resource.

Background activities

Activities or events which may be viewed in conjunction with the appointments in your diary.

Security profile

A set of access rights defining access to each item of data in OfficeTalk. A security profile may be attributed to a user, thereby completely defining that user's access to data held within OfficeTalk.

API

Application Programming Interface. A set of programming functions that may be called by certain applications such as Visual Basic®.

Automation controller

An application which can be programmed to use functionality made available by other applications.

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