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Features

Features	**Description**
In/Out board	Receptionists can respond to visitors and callers without having to search in the office to find out who is available. There's no need to guess when your co-worker on the other side of the floor is free.
Automatic "In" notification	When you turn on your computer, the display board automatically indicates "In".
Automatic "Out" notification	You can choose the option to have the board indicate "Out" when you turn off your computer.
Customized remarks	In addition to the standard set of remarks, users can prepare their own temporary or long-term customized remarks.
Messaging system	You can send and receive messages. Features include copy to clipboard, clipboard paste, reply, and print. Messages cannot be viewed by others.
Message notification	When a message is received, a single chime will notify you that a message is on your working screen (optional). If you do not want to read it at that time, press on the space bar to minimize OfficeView. The title bar will remind you that you have unread messages.
Employee Information screen	Each employee has his own information screen that only the employee or the Administrator can update. It displays handy information for all to read, such as - telephone, cell phone, fax and pager numbers, etc., and a notepad with very large space. There is also a miscellaneous field where you can record whatever information you chose, e.g., standard hours of work, person to contact in your absence or home phone number. A small message flag indicates if the employee has read his mail.
Available in four client sizes	The following user sizes are available: 10, 30, 300, and 1000.
Group feature	The larger sizes of OfficeView (referred to as Group OfficeView) display the names in groups/organizations. The 300 names size handles 12 groups of 30 names and the 1000 names version handles 34 groups of 30 names.
Search capability	Group OfficeView has a feature that allows you to search for any names in the organization. The user can start to type the name of an individual. The program automatically scrolls you through the alphabetical listing to the name, probably before you complete typing the name.
Change others' status	Nobody can change anybody else's status unless the Administrator gives the individual the capability to do so. This privilege is usually given to receptionists and/or bosses.
Changing configurations	Using a password, the Administrator can access and change important information, such as adding or deleting users and groups and allowing select users to change others' status. This can be performed from any workstation using the administrative password.

Available in four client sizes	The following user sizes are available: 10, 30, 300 and 1000.
Supports several platforms	Self-contained native code for Windows 3.x, 95 and NT. Since there are absolutely no DLL's required, it won't interfere with the support files of other applications.
Available in 16- and 32-bits	These two versions can run harmoniously using the same database so that any 32-bit operating systems can take maximum advantage of the 32-bit operating system capabilities.
Easy installation	Includes a Setup program with complete instructions to install it on your LAN or server.
On-line database maintenance	Administrators can update/maintain the database without having to shut down the workstations.
Easy upgrades	You can upgrade from our web site without having to re-enter your database of names and groups.
Very efficient	There is low band width consumption. It can run with as little as two megs of hard disk space, including the space to store messages and database information. Most offices with about 50 users would need about three megs of disk space, including sufficient space to store messages and the database.
On-line help	Comprehensive on-line help is available. There is also the option to turn on yellow hints that will guide you. We think this is a simple program and if you need help, it won't be for long.
Free support	Highly qualified staff give technical support to back up the product. Check out our support web site or e-mail to OfficeView@Ottawa.com We provide helpful and friendly advice.
Free trial version	For the latest version see http://www.capitalnet.com/~phillips/.

Easy Access to Hidden OfficeView Screen

If the application you are working in covers the OfficeView screen, you can quickly flip to it by holding down the Alt key and tapping the Tab key until the OfficeView icon is selected. Release the Alt key to pop up the OfficeView screen. Repeat the same procedure to return to your original application.

Password Access

A password system is available to control access to change some information. Specifically, this refers to using the following commands: **Add Name, Remove Name, My Name, Add New Group, Rename Group, Delete Group**, as well as changing information in other employees' Information windows.

Most users operate in User Mode which prevents them from accidentally adding or removing names, etc.. Administrative mode permits access to use all commands. To operate in Administrative Mode, the Administrator(s) need only click on **File/Admin Mode** and enter the password. To disable Administrative Mode, click on **File/User Mode**. The unregistered OfficeView defaults to Administrative Mode, permitting you to easily explore all the features. The registered copy defaults to User Mode.

To change the password, click on **File/Change Password** and you will be prompted to enter the current password once, and the new password twice. Passwords must consist of letters only. The program will confirm that a new password has been accepted.

Initially, the security password is set to "abc". When you register you will be given an additional emergency password.

Adding New Users

To add a new name to the display board, click on **Add Name** in the **Options** menu.   Type the new name, and choose **OK** or **Enter**.   The names are automatically displayed alphabetically.

This command is password protected. See Administration.

Also see
Unrestricted Access to all commands

Associating a Name With a Workstation

The program must identify names with workstations in order to make the messaging system fully functional. To do this, select Admin Mode by clicking on **File/Admin Mode**. For each name, at the appropriate workstation, click on the name to be associated with that workstation and select **My Name** from the pop-up menu. The name will appear in the top title bar. This procedure need never be repeated, unless a new user operates at that computer.

Removing Users

To remove a name, click on the name to be removed. From the pop-up menu which appears, click on **Remove Name** and confirm the removal by choosing **Yes**.

Also see
Unrestricted Access to all commands

Signing In

To sign in, click in the remarks field beside your name and choose **IN** from the pop-up list. Your remarks field will indicate **IN** and the background will change to a green colour.

If you want the program to automatically indicate **IN** beside your name when you turn on your computer, then include the program in your Windows Startup group.

After signing in, if you do not wish to be disturbed, click on the remarks field beside your name and select **In But Unavailable** from the pop-up list. This remark will appear beside your name and the background will turn to purple.

Signing Out

To sign out, click on the remarks field adjacent to your name. A pop-up list will appear. Click on the appropriate comment to assign it to the remarks field.

Some of the remarks contain “smart” fields which are identified inside {} or <> brackets. Remarks with the word “time” in uppercase or lowercase inside {} brackets automatically insert the current time in the remark. Prompts appear inside <> brackets. Prompts ask for information, such as a future date or time.

If the remark you want to insert is not available in the list, then you may enter a customized remark. Click on <Custom Remark> and type your remark. <Custom Remark> is a temporary remark. If you want to insert a permanent remark to the master list of remarks, use **Add**. Remarks on the list may also be permanently added and deleted using the procedure outlined in ***Maintaining the List of Remarks.***

Choosing a sign-out remark turns off the highlight in your remarks field.

If you choose **Sign Out on Exit** in the **Options** menu, then whenever you turn off your computer and your remark is indicating **IN,** the remarks field will automatically change to **OUT**. The absence of a tick mark in front of this item indicates that this feature is turned off. Clicking on **Sign Out on Exit** toggles this feature on and off.

Changing User Remarks

To change a remark, use the same procedure described in ***Signing In*** or ***Signing Out.*** More detailed remarks can be inserted in the Additional Information screen.

Also see
Signing In
Signing Out
Maintaining The List of Remarks

Maintaining the List of Remarks

The list of remarks is the list from which users may select a remark. To modify this list, choose **Modify Remarks List** in the **Options** menu. A window containing the list of remarks will appear. This list may be updated using the three buttons that appear (**Add**, **Remove,** and **Close**). To add a remark to the list, click on **Add** and type a remark. To remove a remark from the list, select the remark to be deleted and click on **Remove**. To close the pop-up window, click on **Close**.

Remarks can have a “smart” field which prints the current time. To add a remark with the current time, insert the word “time” in uppercase or lowercase within {} brackets. For instance, type “Left at {current time} “. The current time will be printed in the remark when the users choose it.

A second type of field is the prompt field which requests the user to add information. To add a prompt to a remark, insert the prompt text within <> brackets. For example, include <date> to prompt the user to enter a date. The user can add as many smart fields as they need.

If the master list of remarks becomes modified extensively and you want to reset it to the original set of remarks provided by this program, choose **File** and **Load Standard Remarks.**

Sending Messages

To send a message, click on the name of the person to whom you wish to send a message. From the pop-up menu, select **Send Message.** This action opens a dialogue box. All the standard Windows editing features are available.

If you want to send the same message to another person, press the copy button to place the entire message text into the windows clipboard. There is no need to select text as is often the case when placing text into the clipboard. You can use the paste button to retrieve the clipboard text and place it into the message area.

Similarily, the paste button can be used to transfer text from other applications, saving you from having to retype data that exists in other documents.

If a phone message is to be sent, press on **Phone Msg** and type replies to the prompts for the name and number. Press **Send** to send the message and exit or press **Cancel** to delete the message and exit.

Also see
Reading Messages

Reading Messages

A blue flashing background on your name indicates a new message has been received. To read your message: (1) do **CTR R;** or (2) click on your name and, from the pop-up menu, select **Read Message.** This opens a dialogue box which displays a message as well as the date and time it was sent and the author. The header on the screen indicates the number of total and new messages the user has received.

Options available on the screen are: **Copy to Clipboard**, **Print**, **Reply, Erase**, **Erase All**, **Next**, and **Close. Copy to Clipboard** copies the text of your message to the Windows clipboard, thus making it available to be pasted into your favourite word processor. Messages which have not been read are coloured green for the first viewing. They will be coloured black for any subsequent viewings. Upon exiting the window, the background on your name will no longer flash.

Messages are confidential. You cannot read another user's messages from your own workstation.

Note: When the program is installed, the name of the user must be identified with his/her workstation so that the user can receive messages at that workstation. To do this, click on the name to be associated with that workstation and select **My Name** from the pop-up menu. The name will appear in the top title bar. This procedure need never be repeated, unless a new user operates at that computer. The **My Name** command is password protected. See Password Access.

Also see
Notification of Message Received

Notification of Message Received

If a new message is received when OfficeView is hidden by another program window or is in an icon state, it will pop-up in its normal size in front of all other windows. The background of your name will flash and the Title Bar will blink "MESSAGE". If you do not want to read the message at that time, then press the space bar to minimize OfficeView. If you choose to minimize OfficeView without reading your message, the text on the icon will blink "MESSAGE" to remind you that a new message was received. When you want to read it, click on **Options/Read Message** (or short-cut **Ctl R**).

See also
Reading Messages

Updating the Employee Information Window

You can change the information in your Employee Information window, provided your name appears in the top title bar. (If your name does not appear in the title bar, then refer to **Administration** (paragraph on associating names with workstations)).

To update the information in the window, click on your name and **Information** and make the changes. Althought this screen can be viewed by all users, only the employee or the Administrator can update it.

The standard Windows editing features are available in this very large Notepad.

A messages flag will indicate if the user has unread mail.

There is a miscellaneous field to record your choice of information, e.g., home phone number, person to contact in your absence, hours of work, station/building.

Hiding the Yellow Pop-Up Help Hints

To prevent the yellow pop-up help hints from appearing, choose **Yellow Hints** under **Options.** The absence of a tick mark in front of this item indicates that the hints are turned off. Clicking on **Yellow Hints** toggles this feature on and off.

Hiding the Name Warning

The question, "This is not your name. Do you want to proceed?" appears when a user chooses a name other than his/her name. To turn off this warning, choose **Name Warning** under **Options**. The absence of a tick mark in front of this item indicates that the question is turned off. Clicking on **Name Warning** toggles this feature on and off.

Enlarging or Reducing the OfficeView Screen

The OfficeView screen may be enlarged or reduced in steps of 60%. The screen can be blown up so that it is visible from a distance. To resize the screen, click on **Options/Shrink Screen** or **Options/Expand Screen**. You may find it more convenient to use **F4** to shrink or **F5** to expand.

Using Group OfficeView

(Included in program for 300 or 1000 names)

Searching for a Name
Type in the first few letters of the name. As you type, the cursor will automatically scroll to the name in a pop-up screen containing an alphabetical list of names. This list contains all names in the organization (not limited to the employee's group).
Displaying a Group
To display an organizational group, select **Group** and the name of the group to display.

The following commands are password protected. Refer to **Password Access**.

1) Adding a Group
To add the name of an organization/group, choose **File/Add New Group**. A window will appear indicating "Enter New Group Name". Type in the name and click **OK**.

2) Adding User Names to a Group
The group must be chosen before adding new users. You must be viewing the group; that is, the name of the group should appear in the top title bar. The commands for adding users to groups operates the same as outlined in **Adding New Names.**

3) Renaming a Group
To rename an organizational group’s title, select the name of the group to be modified by clicking on **Group** and the name of the group. This name will appear in the top bar of the screen. Choose **File/ Rename Group.** A window will appear indicating "Enter New Name". Type in the name and click on **OK**.

4) Deleting a Group
To delete a group and erase all the names in that group, select the name of the group to be modified by clicking on **Group** and the name of the group. This name should appear on the top bar of the screen. Then choose **File/ Delete Group.** A window will appear asking to confirm that the group should be deleted. Click on **Yes**.

Also see
Password Access
Administration
Admin Mode
User Mode

Searching for a Name

(Included in program for 300 or 1000 names)

This feature provides a fast method to locate a name. Type in the first few letters of the name. As the name is typed, an alphabetical list of names will pop-up on the screen and the cursor will be automatically scrolled to the name with matching letters. Type **Enter** to switch to the group containing the name that is highlighted. This feature will search all names in the organization.

File Menu

The file menu includes the following commands:

a) Load Standard Remarks
This command allows you to overwrite the existing remarks with a set of standard default remarks. You may use this feature when the list of remarks has been modified and you wish to return to a standard set of remarks.

b) Set DB Path
This command is primarily intended to allow OfficeView that is residing on a local hard drive to access a server database. This configuration reduces the LAN traffic and makes the program run faster.

Choose this command to set the directory path of the main database used by a program operating at a single workstation. Programs running at other workstations are not affected. It is possible to have some workstations running from the local hard drive and some from the shared directory.

You should use the setup program to initially place the necessary files in the new directory before attempting to use this command. The **Set DB Path** command will do validity checks to ensure that the new path possesses the necessary access rights and contains the proper files. Any failure to meet the validity checks will result in a message indicating the problem, such as “Database files missing. New path rejected.” or “File creation failure. New path rejected.”

Another circumstance when the Administrator may wish to use this command is when making a major change to the database. This can be done in a new directory without affecting the users. Once the new database is ready, the users can be switched over to it.

It is possible for each database to have a different admin password. To avoid confusion, the best policy is to ensure that you use the same admin password on all your databases.

c) Admin Mode
This enables the user to change the configuration, i.e., add names, delete names, etc.. Initially, the Admin Mode password is set to 'abc'.

d) Change Password
This enables the user to change the password to access Admin Mode. You will be asked to enter the current password once and your new password twice. Initially, the security password is set to 'abc'.

e) User Mode
This disables commands that allow users to change the configurations, i.e., add names, delete name, etc..

f) Add Name
Click on **Add Name** and type the name to be added. Press **Enter** or **OK** to enter the name or press **Cancel** to cancel the command. This command is password protected. See Password Access.

g) Add New Group (300 and 1000 names only)
This command is password protected. Refer to **Admin Mode** above. Choose this command to add a group. A window will appear with the prompt "Enter New Group Name". Type in the name and click on **OK.**

h) Rename Group (300 and 1000 names only)
This command is password protected. Refer to **Admin Mode** above. To rename the title of a group, select the name of the group to be modified by clicking on **Group** and choosing the name of the group. This group name should appear on the top bar of the screen. Then choose **File/ Rename Group.** A

window will appear indicating "Enter New Name". Type in the name and click on **OK**.

i) Delete Group (300 and 1000 names only)

This command is password protected. Refer to **Admin Mode** above. To delete a group and erase all the names in that group, select the name of the group to be deleted by clicking on **Group** and selecting the name of the group. This name should appear on the top bar of the screen. Then choose **File/ Delete Group.** A window will appear asking to confirm that the group should be deleted. Click on **Yes**.

j) Exit

Quits OfficeView

See also
Using Group OfficeView

Group Menu

To view a group, choose **Group** in the menu bar. A list of organizational/group names will appear. Choose the desired group. The screen will display the names in that group and the title bar will indicate the group name.

Options Menu

This menu contains the following commands:

a) Read Message
Select to read your messages. Note: In order for users to be able to read their messages, the program must identify a name(s) with workstations. To do this, click on the name to be associated with that workstation and select **My Name** from the pop-up menu. The name will appear in the top title bar. This procedure need never be repeated, unless a new user operates at that computer. The **My Name** command is password protected. See Password Access.

b) Modify Remarks List
Click on **Modify Remarks List** to display the list of remarks. To add a new remark to the list, click on **Add** and type a remark into the field displayed in the dialog box that pops up. To remove a remark from the list, highlight the remark to be deleted and click on **Remove**. After making the modifications, click on **Close** to save the changes and exit the window.

c) Shrink Window
Click on this to reduce the window to your preferred size.

d) Expand Window
Click on this to expand the window to your preferred size.

e) Yellow Hints
Click on this command to toggle the feature on and off. When a tick mark appears on this menu item, then the yellow pop-up hints are activated.

f) Name Warning
Click on this command to toggle the feature on and off. When a tick mark appears with this menu item, then the pop-up question window is activated.

g) Sign Out on Exit
Click on this command to toggle the feature on and off. When a tick mark appears with this menu item, the program will automatically change your status from **IN** to **OUT** whenever you turn off your computer.

h) Change Others'
Click on this command to toggle the feature on and off. When a tick mark appears with this menu item, the program will allow you to change remarks for any name. Otherwise, you can only change your own remark. This command is password protected.

i) New Message Sound
Click on this command to toggle on and off the sound notification that a new message has arrived. When a tick mark appears with this menu item, then the sound is "on".

Help Menu

a) Contents
Click on **Contents** to launch the on-line help system.

b) Topic Search
Click on **Topic Search** to search for on-line help for a subject.

c) About
Select this item to display a window containing buttons for registration and ordering information. It also contains program information (e.g., registration and serial numbers).

ADMINISTRATION

Password Security

OfficeView has a security system (password) to control access to use the following commands: **Add Name, Remove Name, My Name, *C*hange Password, Add New Group, Rename Group** and **Delete Group** and to control access to make changes to the Employee Information screens for all employees. To allow access to make these changes, the Administrator(s) need only click on **File/Admin Mode** and enter a password. To return to the normal mode of operation, click on **File/User Mode**.

Note: The unregistered versions of OfficeView start up in Admin mode so that all commands are easily available for evaluation.

To change the admin password (initially="abc"), click on **File/Change Password** and enter the current password once, and the new password twice. The program will confirm that a new password has been accepted. Passwords must consist of letters only.

Adding Groups, Names, and information in the Employee Information screen:

When you add groups, names and update the Employee Information screen while other users are operating OfficeView, it may take a few minutes before the new information appears.

To add new groups (300/1000 name version only), switch to Admin mode by clicking on **File/Admin Mode.** Enter the password (initially="abc"). Type **Ctrl+G** and the name of the group. The new name will appear in the **Group** menu.

To populate the board with user names, switch to Admin mode by clicking on **File/Admin Mode.** Enter the password (initially="abc"). Type **Ctrl+N** and the name.

You can enter information into the Employee Information screen by clicking on the name and selecting **Information**. Employees may prefer to enter this information for themselves after you identify their name at their own workstation.

Identifying Names with Workstations

The program must identify names with workstations so that users can read their messages and make changes to the Employee Information screen at their workstations. To do this, after a new name is added, change to Admin Mode by selecting **File/Admin Mode** at the workstation. Next, click on the name to be associated with that workstation and select **My Name** from the pop-up menu. The name will appear in the top title bar, indicating that the association of that user with that workstation was successful. Also, if you wish to prohibit the user at that workstation from making changes to another user's remarks, click on **Options/Change Others'.** The tick mark in front of **Change Others'** will turn off, indicating the user at that workstation cannot change others' remarks. OfficeView will remember your settings.

Also see:
User Mode
Admin Mode
Change Password
Adding New Users
Associating a Name With a Workstation
Removing Users
Using Group OfficeView

INSTALLATION AND REMOVAL

Disk Space Requirements

The common network directory should have four megs of free disk space. This allows for over three megabytes of spare room to hold messages. For the client workstations, you will need two kilobytes of disk space if you are running on a dedicated Server. Otherwise, 500 kilobytes of disk space will be required on the workstations to store local copies of the program files.

Installing OfficeView

If you receive OfficeView in a compressed format, i.e., from the Internet or a CD library, you will receive all the OfficeView files as a single file. If the file name ends in ".exe", it is a self-extracting program that will decompress the files and run the Setup program automatically. If the file name ends in ".zip.", you will require a program to decompress the files, e.g., WinZip. Both ".exe" and ".zip" filenames are available from our website: http://www.capitalnet.com/~phillips/

If you are installing the program on more than one workstation, then <u>one</u> copy of the program and database files must be installed on the shared directory. This directory can be located on a Server or shared on a peer-to-peer LAN, such as Microsoft Networks or Lantastic. Installing on a Server is preferable, if possible. All users should be given read, write and create privileges in the shared directory.

Installing the Files on the Server:

First, install the OfficeView files on the common network directory. From any workstation, click on the **File** menu of your Windows Program Manager, and select **Run** (Windows 95 uses **Start/Run**). Type the name of the compressed OfficeView file or the appropriate Setup program (setup.exe for 16-bit or setup32.exe for 32-bit) and click **OK**. For the self-extracting program, click the **Setup** button. Select **Network Install**, then **Server**, and follow the screen instructions. The OfficeView Setup program installs within seconds.

Next, run OfficeView and add all the groups and their associated employee names before setting up any other workstations.

Running OfficeView from the Server:
(not recommended for peer networks)

Running OfficeView from your server allows all workstations to run from a single copy of the main program.

At each workstation, assign (map) a drive letter to the common network directory and be sure to enable the option to automatically reconnect when Windows starts up. From the common network directory, run the Setup program to set up the workstations. Select **Network Install**, then **Workstation**. When prompted for the directory location, enter the workstation path to the common network directory.

Running OfficeView from a Local Hard Drive
(for peer networks or congested LANs):

At each workstation, assign (map) a drive letter to the common network directory and be sure to enable the option to automatically reconnect when Windows starts up. From the common network directory, run the Setup program to set up the client workstations. Select **Single Install**. When prompted for the "Copy to" directory, accept the default of C:\OView. At this point, the workstation is working in isolation. To enable communication with other users, OfficeView needs the location of the common OfficeView database. To do this, run OfficeView using the newly created Program Manager group (Windows 96/NT

4.0 use **Start**/**Programs**/**OfficeView** menu) and click **File**/**Set DB Path**. Enter the workstation path to the common network directory. At this stage, any names in the central database will display. As an additional test, send a message to another user and confirm that it arrives.

Running OfficeView Standalone:

To run OfficeView on a single workstation, click on the **File** menu of your Windows Program Manager, and select **Run** (Windows 95 uses **Start/Run**). Type the name of the compressed OfficeView file or the appropriate Setup program (setup.exe for 16-bit or setup32.exe for 32-bit) and click **OK**. For the self-extracting program, click the **Setup** button. Select **Single Install** and accept the suggested "copy to" directory. This procedure creates a Program group or Windows 96/NT 4.0 **Start**/**Programs**/**OfficeView** menu that can be used to run OfficeView.

Note:

> Both the 16- and 32-bit versions of OfficeView are designed to run concurrently using the same database. Therefore, in a mixed operating system environment, 32-bit workstations aren't required to use 16-bit software.
>
> If you are upgrading OfficeView from the 10/30 names size to the 300/1000 names size or from 16-bits to 32-bits, you must re-run the Setup program at each client workstation.

Finally, follow the procedures in Administration to add names/groups.

Un-installing OfficeView:

The following steps outline how to completely remove the main copy of OfficeView (do all steps) and the LAN Workstations copies (do first two steps only):

- Delete the OfficeView group and OfficeView icon from the Program Manager.
- Delete ovlocal.ini from the main windows directory (usually c:\windows).
- Delete all files in the OfficeView directory (default directory c:\OView).
- Delete the OfficeView directory.

Questions:

If you have any questions, send them to phillips@capitalnet.com or officeview@ottawa.com. In addition, the OfficeView web site at "www.capitalnet.com/~phillips" has a support page to assist you.

FEEDBACK AND UPGRADES

We welcome any suggestions you have for improvements or upgrades or other information you may wish to communicate about this product. Your comments will be considered in preparing any future upgrades. You may contact the author via e-mail at phillips@capitalnet.com or officeview@ottawa.com.

We are providing a five-name version of OfficeView for 10 or 30 users and a three-user in three groups version for the 300 or 1000 user programs free of charge. To increase the number of users, you must register your copy of OfficeView by purchasing the package, as outlined on the Order Form.

For the latest version, check our Internet Home Page at http://www.capitalnet.com/~phillips/.

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CREDIT CARD INFORMATION

Credit card start:___________________________

Expiration month:___________________________

Expiration year:____________________________

Complete any of the following which is different from the above:

Name on the card:____

CREDIT CARD BILLING ADDRESS

Company name: ____

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Zip/Postal Code:____

Country:____

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