

SleekOffice

User Guide

Version 1.1

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SleekOffice User Guide

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INTRODUCING SLEEKOFFICE

If you find yourself swamped with to-do lists and an almost never-ending amount of stuff that needs to get done, then take heart --- this guide is for you.

You may be someone who desperately needs to get more done in a day, but feels like you're just spinning your wheels.

Maybe you have a workgroup or employees whose productivity you are responsible for, and you need some way to help them get more done that doesn't cost you more of your own time.

We have good news for you: **SleekOffice** is a web-based system designed to help you and your workgroup get more done in a day, and it works.

Those who get the most benefit from **SleekOffice** are people who spend a good portion of their day at or near a computer. These people are called "knowledge workers" and they already account for nearly 50 percent of the workforce.

Most of us develop lists of things we are supposed to do. Some of us use day planners, some use PDAs, and some use sticky-notes and scraps of paper. Some of us use all four.

And then there is the stuff that doesn't get written down, that just gets stored away in your memory banks, taking up mental space. Stuff that you hope you'll remember to do, places you're supposed to go, random ideas, random lists --- you name it.

In addition to all that stuff, you have appointments you are supposed to attend, contacts you have to keep current with, customers or suppliers you have to stay on top of, notes and memos you have to file, internal documents you have to access and files you need to update.

Plus, if you have employees or are part of a workgroup, a lot of your information gets shared back and forth, meaning it gets even harder to manage and keep up-to-date.

After awhile, it can feel like you and those you work with are spending the majority of the day just trying to catch-up on all this stuff, and never really gaining that much of a sense of accomplishment. Sometimes the day ends and you ask yourself "what did I do all day?" and you don't really have a satisfying answer. You may have worked very hard, but have no sense that anything meaningful got done.

The **SleekOffice** system was designed with the express purpose of helping you and those you work with get more done in a day, and to focus your energy on those things which are important to you or your organization.

When we designed **SleekOffice**, we chose to design it as software rather than a paper-based system, since most knowledge workers are around computers a good portion of their day. We also thought it would make sense to have the software accessible through a web-browser, rather than forcing individual users to download and install software, since knowledge workers often have constant internet access.

How to Get More Done

The one thing you can do right now that will help you get more done in a day is to make sure that the things you spend your time doing are consistent with your desired outcomes. "Desired outcomes" is just another way of saying "goals", or "objectives", or "results."

You may be thinking that the previous paragraph is stating the obvious, and it is. But very few of us actually do it.

For example, if you are a salesperson and your desired outcome is to gross \$100,000 in sales this month, you need to make sure the things you do every day are consistent with hitting your target. If you spend your day working with the product-development staff, organizing your paper filing system, having a pow-wow with the IT guys to figure out why your computer keeps crashing, while all the time being interrupted by incoming phone calls from an irate client who needs your help getting the product to work properly --- you may find that your target of \$100,000 doesn't get reached.

Why? Because you were allowing yourself to do things that were unrelated to your desired outcome. Even though you may feel that all those things you were doing were absolutely necessary, the bottom line is that none of them helped you reach your target of \$100,000 in gross sales.

Similarly, if you are an architect, and your desired outcome is to finish the drawings for a house so they can be sent to the city planning department for approval 7 days from now, you need to make sure you invest a considerable amount of time every day in accomplishing this. However, if you spend your day training the new guy, answering your telephone every time it rings, phoning the newspaper to place an advertisement, reading the latest architectural digest that came across your desk, and attending unrelated meetings, you may find that the 7 days come and go and your drawings remain unfinished.

Sounds obvious. But most of us fall into these unproductive patterns every day.

So really there are two changes that most of us have to make: first, we have to decide what our desired outcomes are for; second, we have to make sure those things which we plan to do today are consistent with our desired outcomes.

This process is very simple and effective, but it is surprising that more of us don't do it.

It only takes a few minutes to do, but it really improves your productivity.

What are Your Desired Outcomes?

In order to answer this question, you first have to ask yourself: what things are important to me?

That may not seem like a very complex question, but it carries a lot of weight. By answering it, you'll more easily be able to determine what things are important for you to do, and what things aren't.

For example, is it really important for you to read the architectural digest from cover-to-cover, or could you skim it? Or could you ignore it completely? When was the last time you actually benefited from anything you read in that digest? Is it important, or is it more like an entertaining diversion?

When you use the **SleekOffice** system, you can plan your day, or your week, or your month, and every one of your to-do items and appointments can be linked to a desired outcome which in turn is linked to an area of your life that is important to you. This will help you get more done, focus your time more efficiently, and allow you to finally get control over your day and your life.

You have to decide what your desired outcomes are. If you haven't made those decisions, or don't know what your desired outcomes are, please --- don't worry; you will find it is remarkably simple to do.

What key areas of your professional/work life are really important? (For now, we'll talk about how to use **SleekOffice** as a tool for getting more done in your professional/work/business life. However, you will soon see that **SleekOffice** can be used to get more done in all areas of your life --- both professional and personal).

Here is an example of how you might answer this question: If you are a salesperson, then it is probably important that you generate new prospects. Similarly, it is important that you contact those new prospects and turn them into customers. It is probably also important to ensure that your existing customers are satisfied. It is also important that you intimately understand the products you are selling. These are all crucial components of your position as a salesperson. In **SleekOffice**, we call these your *Focus Areas*.

Your *Focus Areas* are those aspects of your work that are absolutely crucial.

Sometimes, when you are first doing this exercise, it is challenging to come up with your Focus Areas. That's ok --- just take your best guess at them for now --- you can always modify them later. Also, if you are an employee or if you have a team you work with, it is a good idea to talk with your manager or team leader to get a sense of what your *Focus Areas* are. You may find that your boss has a different idea than you do of what your *Focus Areas* are, in which case it's best to sort them out before you go any further.

Here is another example. Suppose you are an office manager for a small company. In identifying your *Focus Areas*, you may find they are: interviewing, hiring, and training office employees; planning, assigning, and directing office work; appraising performance of office staff; rewarding and disciplining office employees; addressing complaints and resolving problems.

Focus Areas are usually different for most people. Everyone's professional life is unique to some extent, and so are their *Focus Areas*. To one person, customer service is a *Focus Area*. To another person, cost management is a *Focus Area*. To another person, sales is a *Focus Area*. To another, team building is a *Focus Area*. To another, leadership is a *Focus Area*. To another, training is a *Focus Area*. And so on.

Next, provide a bit more detail about your *Focus Areas*. Using the above example of the salesperson, think about:

- what it would look like if the process of identifying new prospects was everything you wanted it to be;
- what it would look like if the process of prospect-conversion was really awesome;
- what it would be like to have customers who are truly satisfied;
- and how it would be if your product knowledge was really top-notch?

In other words, identify how each of your *Focus Areas* would look in an ideal world. In **SleekOffice**, we call this your Vision.

You might say:

- “Well, if the process of generating new sales leads was all I wanted it to be, I would always have a steady supply of new leads flowing to me, each of whom is qualified and interested in hearing about the products I am selling.”
- “My idea of successful prospect-conversion is to have a high-percentage of my prospects becoming sales, in a rapid time frame.”
- “When I think of satisfied customers, I want all my customers to tell their friends and colleagues how happy they are to be doing business with me. I want my customers to do repeat business with me, and be a regular source of new referrals.”
- “To me, I want to understand the products I am selling inside and out, so that I can answer any question in the sales process and so I can provide useful feedback to the people in product development.”

If you are an employee, or are part of a workgroup, you should consider speaking to your boss or your team leader about the Vision for each of your *Focus Areas*. Hopefully your Vision for each of your *Focus Areas* should be consistent with the Vision that he or she has for you.

The next step in this process is to ask yourself the question: “In order for me to attain the Visions I have outlined for each of my *Focus Areas*, what needs to happen?” Specifically, let's look at the example of generating new sales leads.

“Well” you might say, “In order to attain my Vision of having a steady flow of leads coming to me that are highly qualified, I'd need to have a great source of sales leads that have been screened to ensure they are actually interested in my products. I'd also have to make sure that the leads don't cost too much. I also don't want too many leads all at once, in fact I can only handle about 20 leads per week.” In **SleekOffice**, we call this your *Outcome*. Think of *Outcomes* as goals, or objectives.

So, for your *Focus Area* called “Generating New Leads” you have now identified your desired Outcome: “20 Great Low-Cost Qualified Leads per Week”. This is what we call your top-level *Outcome* for the *Focus Area* “Generating New Leads”.

The next step is to take this top-level *Outcome* and make it more manageable. It's sometimes easier to accomplish your desired Outcomes if you recognize that they can be sub-divided into smaller components. We do this by creating sub-Outcomes.

So, underneath “20 Great Low-Cost Qualified Leads per Week” you could add three sub-Outcomes, such as “Have a Source of Great Leads” and “Have a Great Lead-Screening Process” and “Get Approval from Boss”.

Now we are at the point where the rubber meets the road. You have defined some of your *Focus Areas*, and underneath those you have defined some top-level *Outcomes*, and underneath that

you have learned that you can define sub-Outcomes. But now you have to actually commit to doing specific activities of some kind that will bring about the desired *Outcomes*.

For example, to accomplish the sub-Outcome called "Get Approval from Boss," you can schedule an activity called "Meeting with Boss re Lead Expenses," tomorrow morning at 10 am.

Similarly, for the top-level *Outcome* "Have a Source of Great Leads" you could create several to-do items like "Search web for cost-per-lead providers" and "Purchase and read a book on successful lead generation" and "Contact direct marketer about lead generation campaign."

In this way, you have managed to connect your daily activities to your *Outcomes* and your *Focus Areas* --- the things that are actually important. Using this simple system will help you get more things done every day, and will also show you how the things you do every day move you closer to the things that really matter.

What Can SleekOffice Help You Do?

- ☒ **accomplish more** work in less time
- ☒ manage your personal and corporate **goals**
- ☒ monitor and measure **productivity**
- ☒ track and manage your **tasks and outcomes**
- ☒ **collaborate** with others
- ☒ **share** information, **yet retain control**
- ☒ manage your **contacts**
- ☒ eliminate redundant tasks, **automate** others
- ☒ manage **schedules**
- ☒ capture and centralize **knowledge assets**
- ☒ **access knowledge** and information, rapidly
- ☒ **synchronize** your data with Palm and Outlook
- ☒ manage personal **projects**

What Features Does SleekOffice Offer?



Outcomes/Focus Areas - manage personal and corporate goals with Outcomes Manager



Reporting - monitor and measure personal and workgroup productivity



Calendar/To-Do List - manage and share schedules and tasks with Activity Manager



Files - upload and share computer files with File Manager



Documents - manage and share web-based documents through Knowledge Management



Weblogs - centralize notes and journal entries with Log Manager, share with others



Notes - organize random notes and memos, share with others



Address Book - centralize and share contacts with Contact Manager



Accounts - centralize and share accounts through Account Manager



Group Email - automate email communications to small groups with Group Email Manager



Search - locate personal information based on keyword



Backup - backup personal data to the PC



Sync - synchronize data with Palm Desktop or Microsoft Outlook



Messaging – communicate with other SleekOffice users; notify teams of changes quickly



Project Management – manage personal projects with ease; integrated time tracker

User Requirements

To use **SleekOffice**, you must have the following hardware and software:

- A computer using either Microsoft Windows 98, Windows ME, or Microsoft Windows NT 4.0 with Service Pack 3 or later, Windows 2000, or Windows XP.
- Microsoft Internet Explorer version 6.0 SP1 or later. Firefox 1.0 or later is also supported.
- A broadband Internet (or local area network) connection.
- Palm Desktop or Microsoft Outlook for data synchronization (optional).

Creating a Shortcut to SleekOffice

Since you will be connecting to the **SleekOffice** application through a service provider (or your organization) one or more times a day, it is advantageous to create a link in *Internet Explorer's* (IE) Links Bar to the system. To add the **SleekOffice** application's web page to IE's Links Bar (when on the page), drag the icon for the system from the Address Bar to the Links Bar. If the links displayed on the Links Bar are not organized, drag each individual link to a new position on the Links Bar. This helps keep the links on the Links Bar organized and readily available.

You can create a shortcut on your desktop to the **SleekOffice** application. To create a shortcut, right-click your desktop and select *New/Shortcut*. The **Create Shortcut** window appears. Type the URL to the **SleekOffice** application and click **Next**. Finally, type a name for your shortcut such as *SleekOffice* and click **Finish**. The shortcut appears on your desktop. Alternatively, create a desktop shortcut by dragging a link from the IE window (if it is NOT maximized) to the desktop or to a folder on the desktop.

Another option is to add a link to IE's **Favorites** list. To add the **SleekOffice** application page to your **Favorites** list, first load the **SleekOffice** application's web page. On the **Favorites** menu, click **Add to Favorites**. Type a name such as *SleekOffice*. Connect to the **SleekOffice** application's web page by accessing it through the **Favorites** menu or by clicking **Favorites** on IE's toolbar and clicking the *SleekOffice* item.

ACCESSING SLEEKOFFICE

To log on to **SleekOffice**, execute your web browser and type the URL for your **SleekOffice** installation in the address bar, or select the *SleekOffice* page from your **Favorites** menu. When you press enter, the **Login** window appears.

The image shows a web browser window with a blue border. At the top center is the SleekOffice logo, which consists of a blue square icon with a white person silhouette and a yellow clock icon, followed by the text "SleekOffice" in a bold, sans-serif font. Below the logo are two text labels: "Login:" and "Password:". Each label is followed by a white rectangular input field. Below these fields is a button with the text "Login" in a bold, sans-serif font. At the bottom left of the window is a small square checkbox, and to its right is the text "Don't ask me to login for two weeks." in a bold, sans-serif font.

Figure 1: The SleekOffice Login Window

Type in your **SleekOffice** login and then press tab to move to the *Password* field. After you type your password, click **Login**. You may also check '*Don't ask me to login for two weeks.*', if you would like to remain logged into **SleekOffice** for two weeks (as long as you don't log out manually).

Upon clicking **Login**, **SleekOffice** will connect to our license server to ensure that you have a license to use **SleekOffice** and then verify your login credentials against your **SleekOffice** server.

Finally, **SleekOffice** will display the **Main** window if your login credentials are correct.

If you don't have a **SleekOffice** login and password, please ask your **SleekOffice** Account Manager to create a **SleekOffice** account for you. Additionally, your **SleekOffice** Account Manager can reset your password.

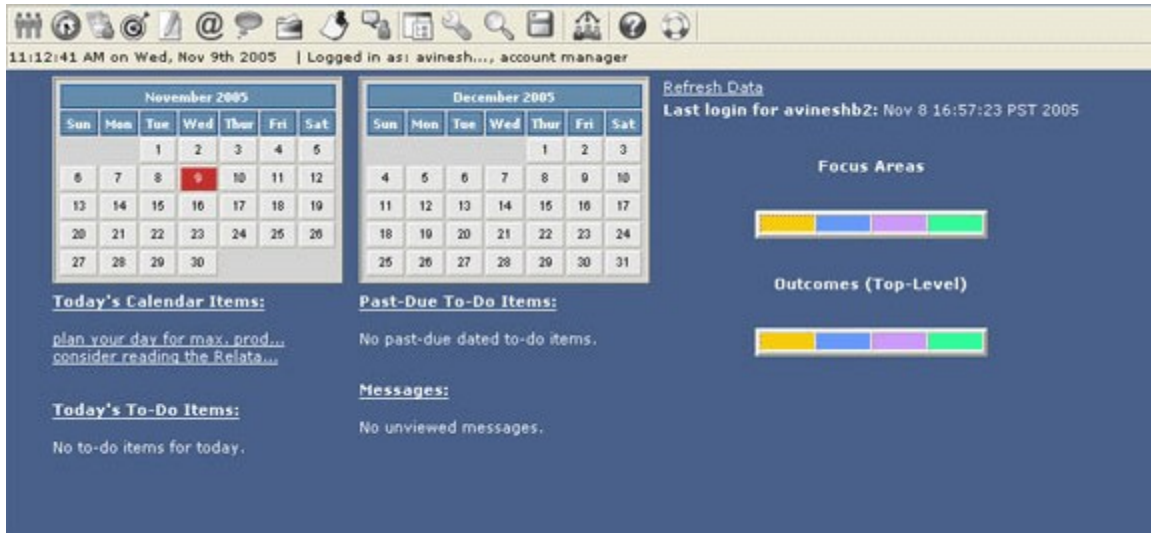


Figure 2: Main Window

- **To log on to SleekOffice:**
 1. Execute your web browser.
 2. Type the URL for **SleekOffice** and press ENTER. The **Login** window appears.
 3. Click the *Login* field and type your **SleekOffice** username.
 4. Click the *Password* field and type your password.
 5. Click **Login**.

Understanding the Main Window

When **SleekOffice** is executed, the **Main** window displays the current date and time and who you are logged on as. **SleekOffice** Account Managers are denoted with 'account manager' after their **SleekOffice** username. Below this information, **SleekOffice** displays today's calendar items, to-do items, past-due to-do items, and unread messages from other **SleekOffice** users. Finally, **SleekOffice** displays the Focus Areas and Outcomes charts. If the above information is not visible, click the "at a glance" icon in the **SleekOffice** toolbar.

Refreshing At a Glance View

Data is updated on the **SleekOffice** server instantly once changes are made. You can force the system to refresh data on the "At a Glance" view by clicking **Refresh Data** on the Main window. After a few seconds, the **Main** window will be updated with new data from the server.

Personal and Shared Views

While using **SleekOffice**, you can determine which view you are currently in. To do so, look at the status bar just below the **SleekOffice** toolbar. You will see a message similar to *Viewing: personal activities* or *Viewing: shared activities*, depending on which module of **SleekOffice** you are in.


Personal view shows you items that are not shared, whereas Shared view shows items that other **SleekOffice** users have shared with you.

9:23:44 AM on Fri, Jan 7th 2005 | Logged in as: davidfo..., customer Viewing: personal activities

USING THE ACTIVITY MANAGER

The **Activity Manager** helps you manage your day-to-day and monthly activities. You can create personal and shared activities, and complete to-do items.

Planning Your Time with the Activity Manager

To use **Activity Manager** to manage your activities, click the **Activity Manager** icon  in the toolbar. The **Activity Manager** window appears.

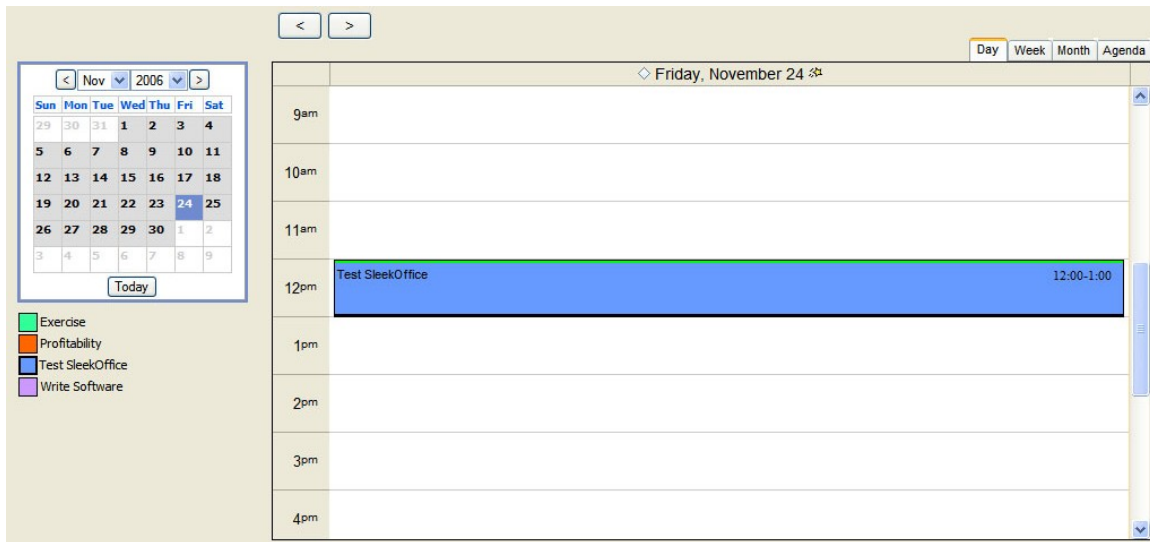


Figure 3: Activity Manager Window

- **To access the Activity Manager:**
 - Click the **Activity Manager** icon in the **Main** window. The **Activity Manager** window appears. The default view is **Day** view.

Date Navigation

To navigate between various dates, the forward and backward buttons can be used. The buttons appear the following views: Day, Week and Month.

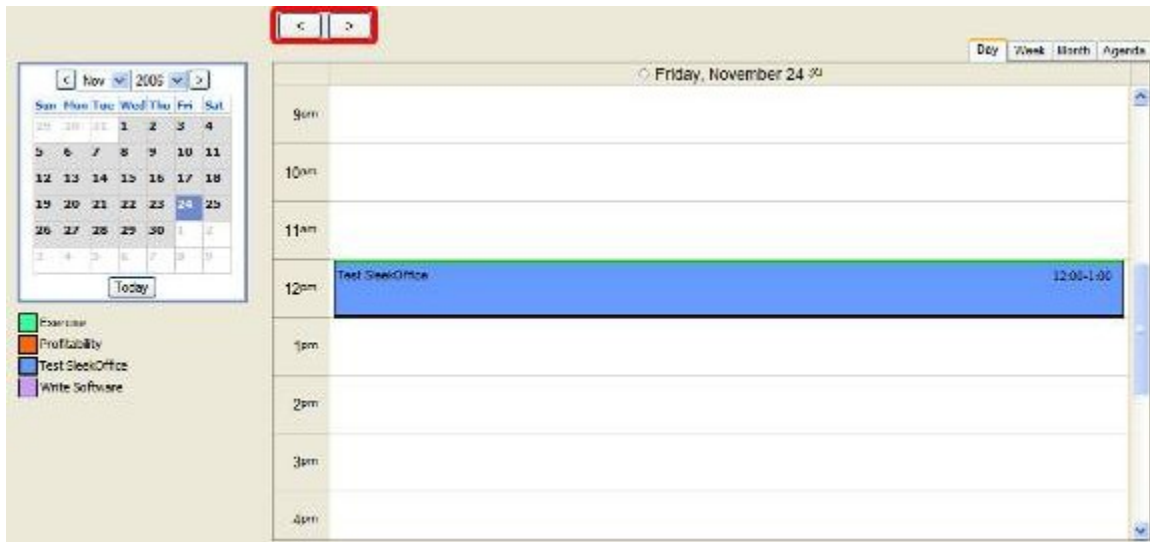


Figure 4: Activity Manager Date Navigation

Date navigation is not available in Agenda view.

Using Activity Views

You can view activities by the day, by the week or by the month in **SleekOffice**. To view activities by the week, click the **Week** tab. The activities appear in the window.



Figure 5: Week view

If you want to view activities by the month, click the **Month** tab. The activities for the selected month appear in the **Activity Manager** window.

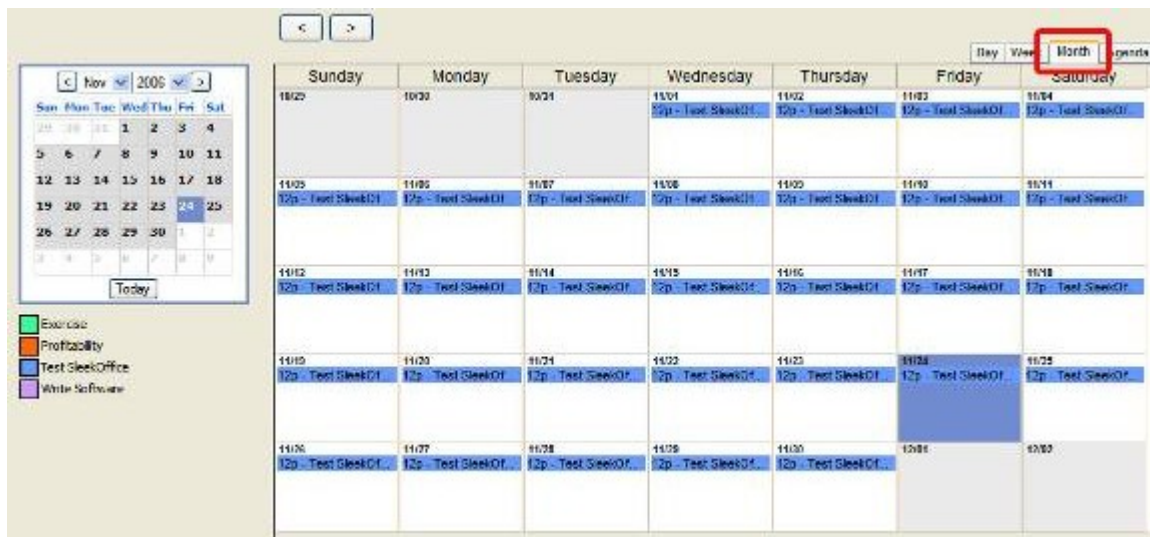


Figure 6: Month view

If you want to view all open activities, click the **Agenda** tab. All open activities (default) will appear in the **Activity Manager** window. Using the drop-down menus, you can view closed activities, activities by team and more. The drop-down menu selections are saved so that they don't need to be re-selected each time.

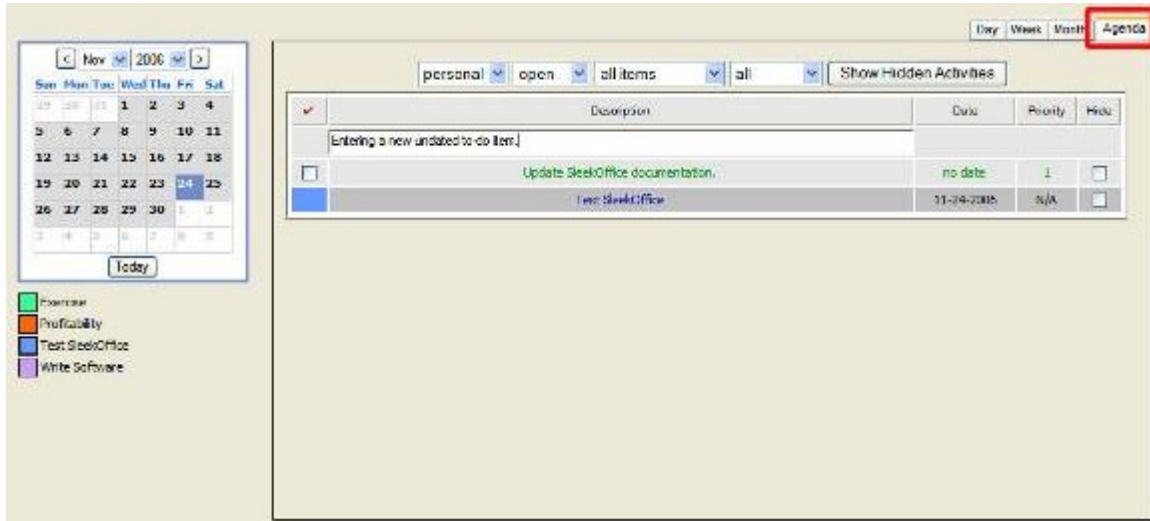


Figure 7: Agenda view

Changing Dates for Activities

You can click a to-do item's date in the activity list (in the Agenda view) to extend the due date. A context menu will appear with a list of choices.



Figure 8: Context menu

If you want to change the to-do item's date, select either the *Today*, *Tomorrow*, *2 Days from Now*, *3 Days from Now*, or *1 Week from Now* option.

➤ **To change the date for an activity:**

1. Click the **Activity Manager** icon. Click the **Agenda** tab.
2. Click an activity item and select the *Today*, *Tomorrow*, *2 Days from Now*, *3 Days from Now*, or *1 Week from Now* option.

Viewing Regular or Hidden Activities

Activities can be hidden from view in **Agenda** view. To hide an activity from view, simply click the hide checkbox. To view hidden activities, click the **Show Hidden Activities** button. The **Activity Manager** window displays the hidden activities, if any.

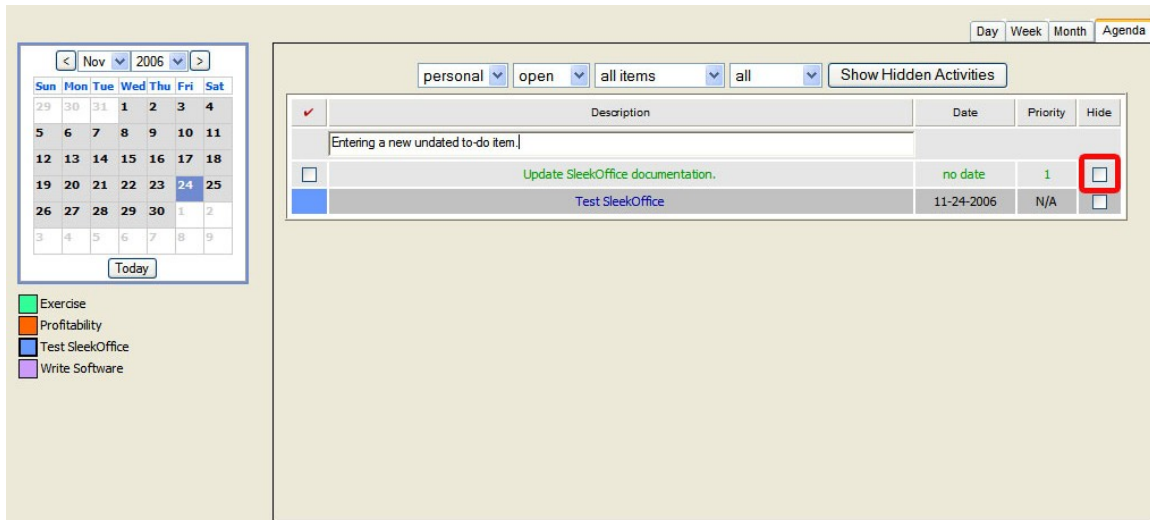



Figure 9: Hiding an Activity

While viewing the hidden activities, you will notice the **Show Hidden Activities** button has been changed to read **Show Regular Activities**. You can click the **Show Regular Activities** button to view regular activities again.



You can hide an activity by selecting the *Hide* check box next to the selected activity.

- **To hide an activity:**
 1. Click the **Activity Manager** icon. Click the **Agenda** tab.
 2. Select the **Hide** check box to the immediate right of the activity.
- **To view hidden activities:**
 1. Click the **Activity Manager** icon. Click the **Agenda** tab.
 2. Click **Show Hidden Activities**.
- **To view regular activities:**
 1. Click the **Activity Manager** icon. Click the **Agenda** tab.
 2. Click **Show Regular Activities**.

Viewing Your Activities: Personal or Shared

To view your personal activities, click the **Show My Entries** icon . The **Activity Manager** window appears with only your personal activities listed. This is the default view.

You can also view shared activities in **SleekOffice**. To see all activities that other **SleekOffice** users have shared with you, click the **Show Shared Entries** icon .

- **To view your personal activities:**
 1. Click the **Activity Manager** icon. The **Activity Manager** window appears.
 2. Click the **Show My Entries** icon .
- **To view activities that have been shared with you:**
 1. Click the **Activity Manager** icon. The **Activity Manager** window appears.
 2. Click the **Show Shared Entries** icon .

Viewing Activities by All, Personal, or Team

In the **Agenda** tab, you can view the activities in the **Activity Manager** window by *All*, *Personal*, or team name (providing you have created a team using the **Settings Manager**). To do so, click the DOWN ARROW in the *Personal* field and select one. Only those matching activities will appear in the window.

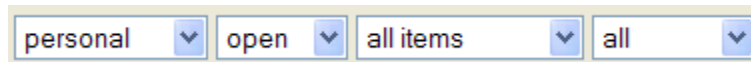


Figure 10: Selecting Activities to View

- **To view all activities, personal activities, or activities you have shared with any teams you have defined:**
 1. Click the **Activity Manager** icon. Click the **Agenda** tab.
 2. Click the DOWN ARROW in the *Personal* field and select *All*, *Personal*, or *Team*.

Viewing Activities by Status

You can see a list of activities according to their status. An activity may be open or closed. To see activities based on their status, click the DOWN ARROW in the *Open* field and select *Open*, *Closed*, or *All*.

- **To view open or closed activities:**
 1. Click the **Activity Manager** icon. Click the **Agenda** tab.
 2. Click the DOWN ARROW in the *Open* field and select *Open*, *Closed*, or *All*.

Viewing Activities by All Items, To-Do Items, and Calendar Items

Activity Manager allows you to see all activities by default. You can, however, see only those items that are to-do's or calendar items. To do so, click the DOWN ARROW in the *All Items* field and select *All Items*, *To-Do Items*, or *Calendar Items*.

- **To view all items, to-do items, or calendar items:**
 1. Click the **Activity Manager** icon. Click the **Agenda** tab.
 2. Click the DOWN ARROW in the *All Items* field and select *All Items*, *To-Do Items*, or *Calendar*.

Viewing Activities for Today or This Week

By default, **Activity Manager** displays all activities in the **Agenda** view. You can view items by the day or for the entire week. To do so, click the DOWN ARROW in the *All* field and select *All*, *This Week*, or *Today*.

- **To view all items for today or for one week:**
 1. Click the **Activity Manager** icon. Click the **Agenda** tab.
 2. Click the DOWN ARROW in the *All* field and select *All*, *This Week*, or *Today*.

Marking an Activity as Completed

When you have completed an activity, you should select the check box ☐ to the left of the item you have completed.

<input checked="" type="checkbox"/>	Description	Date	Pri	Hide
<input type="checkbox"/>	add birthdays and other import...	no date	1	<input type="checkbox"/>
<input checked="" type="checkbox"/>	enter my outcomes and focus ar...	no date	1	<input type="checkbox"/>
<input type="checkbox"/>	remember to backup your data u...	02-05-05	1	<input type="checkbox"/>
<input checked="" type="checkbox"/>	store random or specific notes...	02-05-05	1	<input type="checkbox"/>
<input checked="" type="checkbox"/>	you can share items with other...	02-05-05	1	<input type="checkbox"/>

<input checked="" type="checkbox"/>	Description	Date	Pri	Hide
<input type="checkbox"/>	add birthdays and other import...	no date	1	<input type="checkbox"/>
<input checked="" type="checkbox"/>	enter my outcomes and focus ar...	no date	1	<input type="checkbox"/>
<input type="checkbox"/>	remember to backup your data u...	02-05-05	1	<input type="checkbox"/>
<input checked="" type="checkbox"/>	store random or specific notes...	02-05-05	1	<input type="checkbox"/>
<input checked="" type="checkbox"/>	you can share items with other...	02-05-05	1	<input type="checkbox"/>

When a to-do item is marked *Complete*, it is now a “closed” activity. Similarly, when a calendar item is completed one day in the past, it automatically becomes “closed”. Therefore, to view your completed to-do’s or past calendar items, select *Closed* from the dropdown menu in the **Agenda** view.

The **Activity Manager** module synchronizes data with the *Palm Date Book* and *Microsoft Outlook Calendar* applications using *Resync*. To-do items are synchronized with the *Palm Todo List* and *Microsoft Outlook Tasks* application.

➤ **To mark a to-do as completed:**

1. Click the **Activity Manager** icon. Click the **Agenda** tab.
2. Select the *Check-Mark* check box next to the to-do you want to specify as completed. Only to-do items can be checked as complete.

Adding Activities

To add an activity, simply use your mouse to select a time slot for the activity. For example, for an activity starting at 11 AM, hold down the left mouse button start at the top of the 11 AM time slot and drag it down to bottom of the time slot (right before 12 AM).

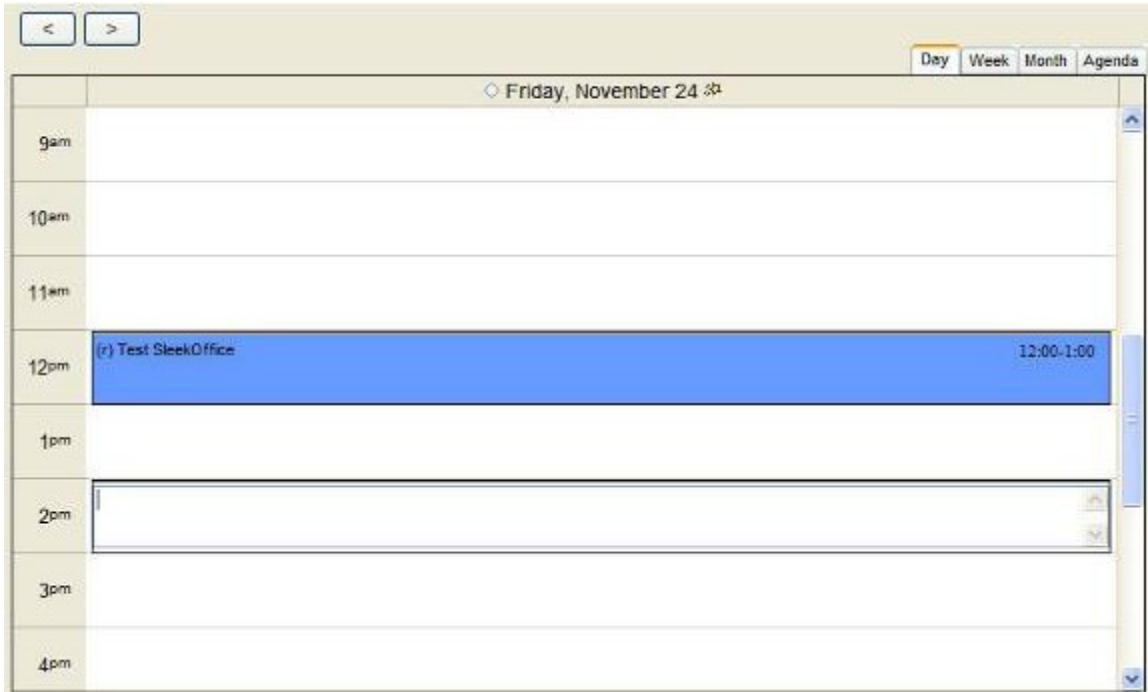


Figure 11: New Activity Entry

In the field, type a description for the activity. Click outside of the field to save it.

You may create new activities in **Day** or **Week** view. Additionally, you can create undated to-do items by using the quick to-do entry form in the **Agenda** view.

To add an untimed calendar item. Click the diamond shape to the left of the current date. Likewise, to add a dated to-do item, click the shooting star image to the right of the current date.

Editing Activities

To edit an activity, simply double-click on it. You will be presented with the Edit Activity window.

The screenshot shows the 'Edit Activity' window. At the top, there are navigation buttons '<' and '>'. Below them are tabs for 'Day', 'Week', 'Month', and 'Agenda'. The main window has two tabs: 'General' and 'Repeat'. The 'General' tab is selected, displaying the following fields:


- Description:** A text box containing 'Test SleekOffice'.
- Date:** A date picker showing '2006-11-24'.
- Outcome:** A dropdown menu with 'Test SleekOffice' selected.
- Share With:** A dropdown menu with '(optional)' selected.
- Type:** Radio buttons for 'Calendar Item' (selected), 'Untimed Calendar Item', and 'To Do'.
- Start time:** Time picker showing '12:00 pm'.
- End time:** Time picker showing '1:00 pm'.
- Palm Alarm:** A dropdown showing '1', a unit dropdown showing 'Minutes', and a checkbox labeled 'Set'.

On the right side, there is a 'Note:' field with a timer icon. At the bottom right, there are two buttons: 'Notify Team' and 'Delete Activity'. At the bottom left, a small text note reads: 'Last modified by: avinash on 2006-11-24'.

Figure 12: Edit Activity window

Made any required changes to the activity and then click outside of the field. The changes will be saved automatically.


In the *Type* field, select the type of activity. You can specify an activity as a calendar item, an untimed calendar item, or as a to-do item. For *Calendar* items, you can specify the start and end time. You can also specify whether the alarm will sound on a Palm device if you click **Palm Alarm Set**. If this is a *To-Do* item, you can set its *Priority* level from 1 through 5 (1 is the highest priority).

In the *Note* field, type any notes you would like for this activity. While typing the note, you can quickly insert the current date and time by clicking the **Timer** icon .

To have this activity repeated, click the **Repeat** tab. The **Repeat** window appears. Only calendar items can be set to repeat.

To specify how often this activity should be repeated, click the *None*, *Day*, *Week*, *Month*, or *Year* fields respectively. The activity will then be repeated according to your selection.

MANAGING YOUR CONTACTS

You can add, edit, delete, and share contacts using the **Contact Manager**. To do so, click the **Contact Manager** icon  on the **Main** window. The **Contact Manager** window appears.

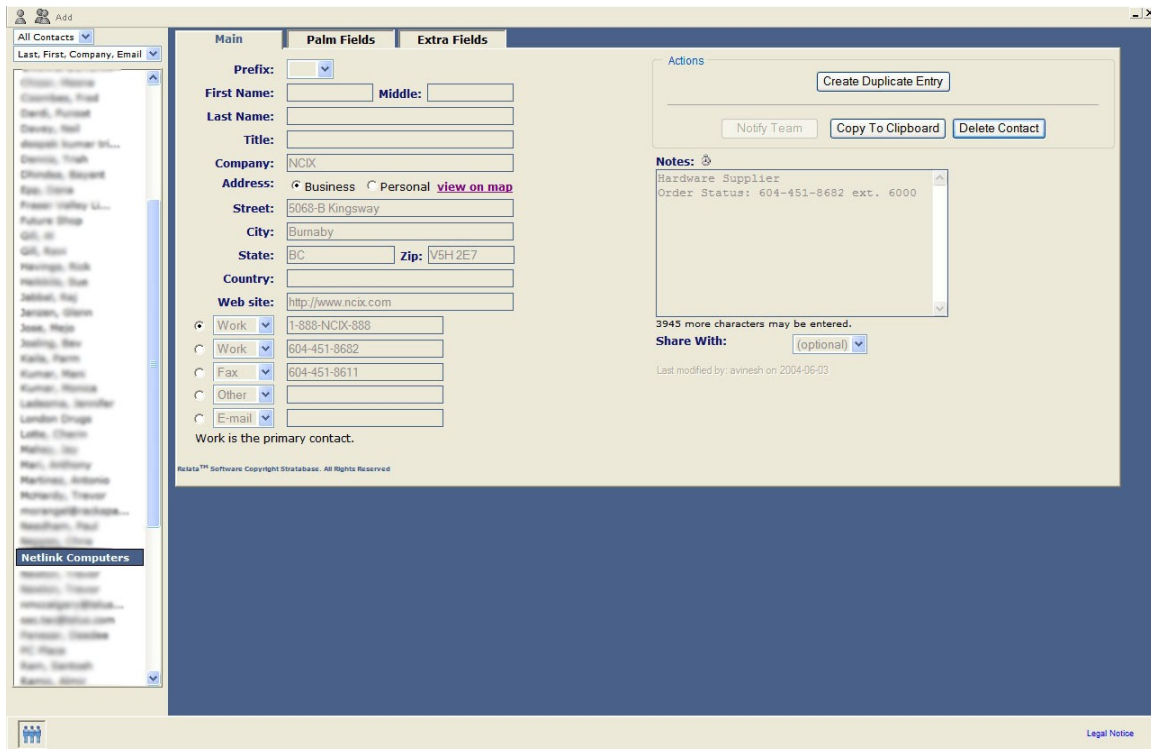


Figure 13: Contact Manager Window

- **To manage your contacts:**
 - Click the **Contact Manager** icon. The **Contact Manager** window appears.

Selecting Contact Groups

The **Contact Manager** allows you to view all your contacts or a group's contacts. To select the type of contacts you want to view, click the DOWN ARROW in the *All Contacts* field. The **Contact Manager** will display that group of contacts.

- **To view a subset of contacts:**
 1. Click the **Contact Manager** icon. The **Contact Manager** window appears.
 2. Click the DOWN ARROW in the *All Contacts* field and select a group.

Changing How Contact Names Appear

By default, the **Contact Manager** displays the contact list by *Last Name, First Name, Company Name*, and *Email address*. If you click the DOWN ARROW in the *Last, First, Company, Email* field, you can display the names by *Company Name, Last Name, First Name, Email* or by *Email, Last Name, First Name, Company Name* order.

- **To select the information shown for each contact:**
 1. Click the **Contact Manager** icon. The **Contact Manager** window appears.
 2. Click the DOWN ARROW in the *Last, First, Company, Email* field and select the option you want.

Viewing a Contact's Information

When the **Contact Manager** window appears, the first contact's information appears. You can view information about a different contact by clicking a name.

- **To view a contact's information:**
 1. Click the **Contact Manager** icon. The **Contact Manager** window appears.
 2. Click the contact's name. The information about that contact appears in the window.

Adding Contacts

To add a contact, click **Add**. The **Add Contact** window appears.

Figure 14: Add Contact Window

Type the name, address, and telephone information for the contact. (Note: You only need type the first name or last name or email or company information – these are all required fields). If you want to add comments about the contact, type the comments in the *Notes* field. The **timer** icon will allow you to quickly insert the current date and time into the *Notes* field. You can also optionally share the contact with a team of users or a group.

The **Palm Fields** tab lets you add Palm-specific information about this contact, if you are synchronizing your **SleekOffice** data with your Palm device.

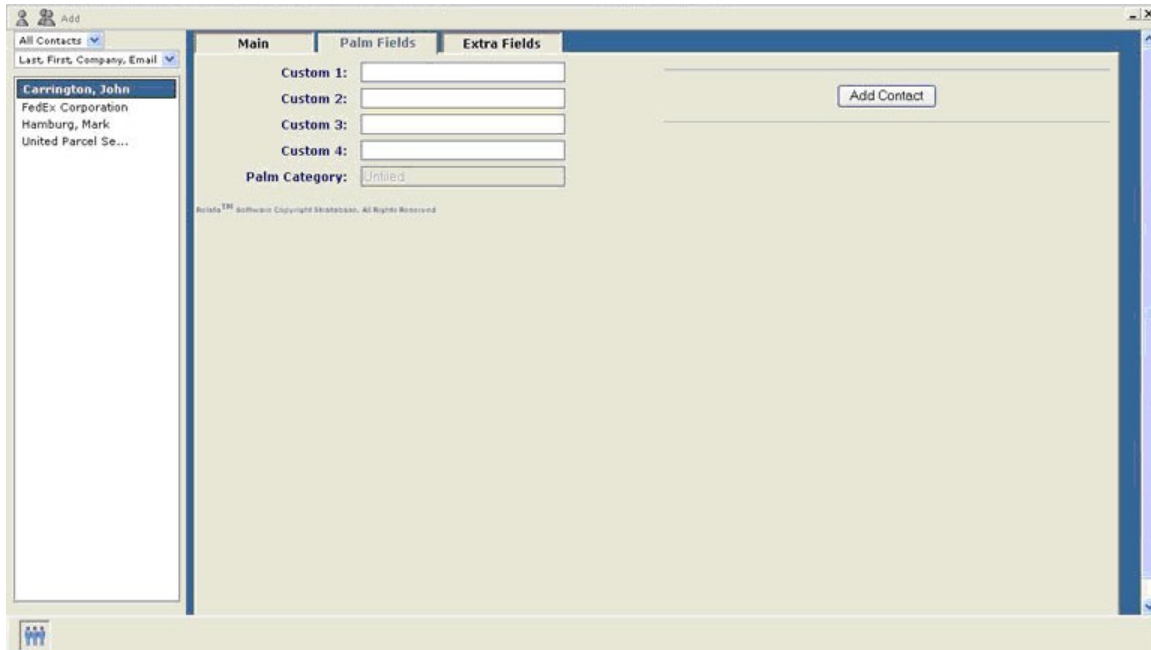


Figure 15: Add Contact Palm Fields Window

You can click the **Extra Fields** tab to type data in any extra fields you have previously defined in the **Settings Manager**. When you have finished entering the information for this new contact, click **Add Contact**. The contact's name appears in the listing of contacts on the left.

➤ **To add a contact:**

1. Click the **Contact Manager** icon. The **Contact Manager** window appears.
2. Click **Add**. The **Add Contact** window appears.
3. Click the DOWN ARROW in the *Prefix* field and select the contact's prefix (optional).
4. Click the *First Name* field and type the contact's first name (optional).
5. Click the *Middle* field and type the contact's middle name, if any (optional).
6. Click the *Last Name* field and type the contact's surname (optional).
7. Click the *Title* field and type the contact's title, if any (optional).
8. Click the *Company* field and type the contact's company name (optional).
9. In the *Address* field, select the type for this contact – business or personal (optional).
10. Click the *Street* field and type the street address (optional).
11. Click the *City* field and type the name of the city (optional).
12. Click the *State* field and type the province or state name (optional).
13. Click the *Zip* field and type the zip or postal code (optional).
14. Click the *Country* field and select the country (optional).
15. Click the *Web-site* field and type the full URL for the contact's website (optional).
16. Click the DOWN ARROW in the *Work*, *Home*, *Fax*, *Other*, or *E-mail* fields and select the type. Next, click the adjacent field and type the corresponding telephone number or email address (optional).
17. Click the *Notes* field and type any comments about this contact (optional).
18. In the *Groups* field, if any, select the appropriate groups to assign this contact to (optional).
19. In the *Share With* drop-down, select a team of users, if any, with whom you will share this activity (optional).
20. Click the **Palm Fields** tab. Click the *Custom* field and type a name for the custom field. You can specify up to four custom fields (optional). (This is only for **SleekOffice** users who are synchronizing their data with their Palm device.)
21. Click the **Extra Fields** tab. Enter the information for the extra fields, if any (optional).
22. Click **Add Contact**.

Copying a Contact's Information to the Windows Clipboard

You can transfer a contact's information to another application in Windows. To copy a contact's information, click **Copy to Clipboard**. In the other Windows (eg. Notepad) application, select the *Paste* menu item to copy the contact's information from the *Clipboard* to the other application.

- **To copy a contact's information to the Windows Clipboard:**
 1. Click the **Contact Manager** icon. The **Contact Manager** window appears.
 2. Click the contact's name. The contact's information appears in the window.
 3. Click **Copy to Clipboard**.

Duplicating a Contact Entry

You can create a duplicate of a contact entry, should you need to create multiple contact entries with repetitive information. To duplicate a contact, click **Create Duplicate Entry**. Make changes to the contact details and then click **Add Contact**.


- **To duplicate a contact entry:**
 1. Click the **Contact Manager** icon. The **Contact Manager** window appears.
 2. Click the contact's name. The contact's information appears in the window.
 3. Click **Create Duplicate Entry**. The add contact template appears.
 4. Make changes and then click **Save** to save the new entry.

Deleting a Contact's Information

You can remove a contact from the **Contact Manager**. To delete a contact, click the contact's name. The **Contact Manager** window appears showing the selected contact's information. Click **Delete Contact**. You are asked to confirm the delete request. Click **OK** to permanently delete the contact. (The **Contact Manager** is synchronized with the Palm Address application.)

- **To delete a contact's information:**
 1. Click the **Contact Manager** icon. The **Contact Manager** window appears.
 2. Click the contact's name you want to delete.
 3. Click **Delete Contact**.
 4. Click **OK**.

MANAGING YOUR ACCOUNTS

You can add, edit, delete, and share accounts using the **Account Manager**. You can also add contacts to a specific account. To manage your accounts, click the **Account Manager** icon . The **Account Manager** window appears.

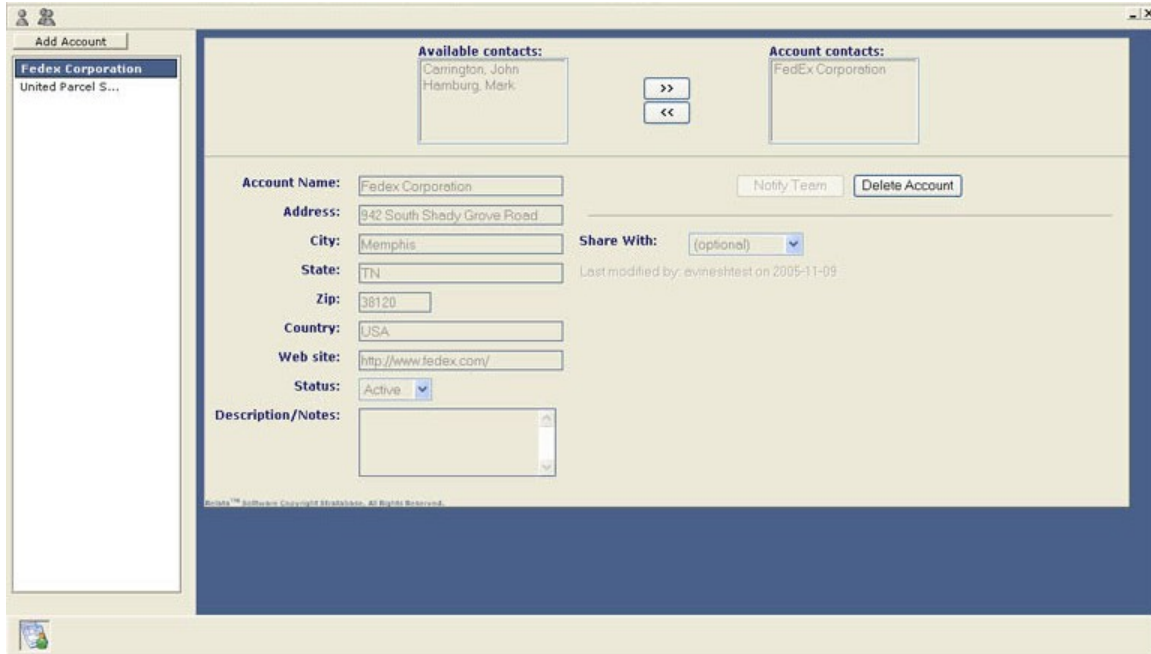


Figure 16: Account Manager Window

The **Account Manager** window displays the information for the first account by default. The **Account Manager** window lists the available contacts and account contacts for this account, as well as other account information.

- **To manage your accounts:**
 - Click the **Account Manager** icon. The **Account Manager** window appears.

Viewing an Account's Information

When the **Account Manager** window appears, the first account's information appears. You can view information about a different account by clicking an account.

- **To view information about an account:**
 1. Click the **Account Manager** icon. The **Account Manager** window appears.
 2. Click the account's name. The account's information appears in the window.

Adding an Account

To add an account, click **Add Account**. The **Add Account** window appears.

Figure 17: Add Account Window

The *Available Contacts* field displays a list of contacts you can link to this account. Select the name from the *Available Contacts* field and then click the **>>** button. The selected contact's name appears in the *Account Contacts* box. To add more contacts to this account, repeat this process. If you want to remove a contact from this account, select the contacts name in the *Account Contacts* field and click the **<<** button.

Note: It is mandatory that you link at last one contact to an account, otherwise **Account Manager** won't let you create the account.

Type the information for this account in the appropriate fields. If this account is to be shared, select the team in the *Share With* field. When you have finished entering the information for this account, click **Add Account**. The new account appears in the list of accounts on the left.

➤ **To add an account:**

1. Click the **Account Manager** icon. The **Account Manager** window appears.
2. Click **Add Account**. The **Add Account** window appears.
3. Click a name in the *Available Contacts* field and click **>>** to add this contact to this account.
4. Click the *Account Name* field and type a name for this account.
5. Click the *Address* field and type the street address (optional).
6. Click the *City* field and type the name of the city (optional).
7. Click the *State* field and type the name of the province or state (optional).
8. Click the *Zip* field and type the zip or postal code (optional).
9. Click the *Country* field and select the country (optional).
10. Click the *Web-Site* field and type the URL to this contact's website (optional).
11. Click the DOWN ARROW in the *Status* field and select the status for this account (optional).


12. Click the *Description/Notes* field and type any comments about this account (optional).
13. In the *Share With* drop-down, select a team of users, if any, with whom you will share this activity.
14. In the *Share With* field, select the team to share the account with, if any.
15. Click **Add Account**.

Deleting an Account

To delete an account, click the account's name. Next, click **Delete Account**. You are asked to confirm the delete request. Click **OK** to permanently delete the account.

- **To delete an account:**
 1. Click the **Account Manager** icon. The **Account Manager** window appears.
 2. Click the name of the account you want to delete. The account's information appears in the window.
 3. Click **Delete Account**.
 4. Click **OK**.

WORKING WITH THE OUTCOMES MANAGER

The **Outcomes Manager** lets you manage your outcomes, or goals. To manage your outcomes, click the **Outcomes** icon  on the **Main** window. The **Outcomes Manager** window appears.

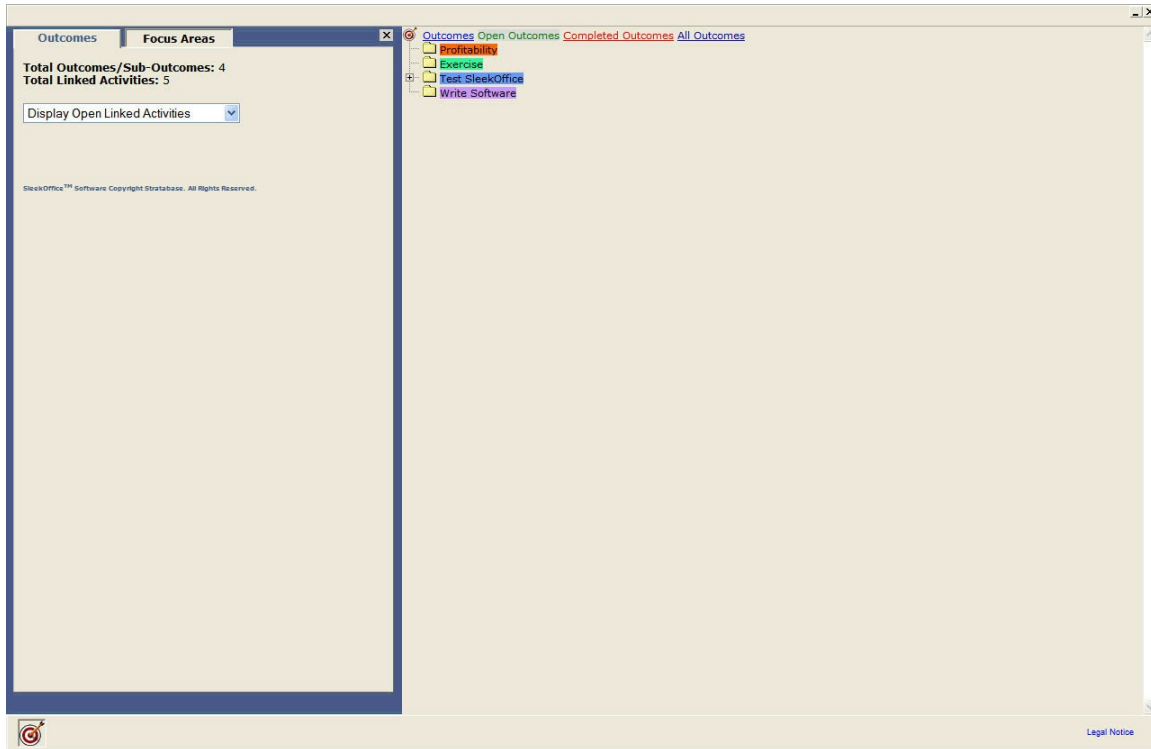


Figure 18: Outcomes Manager Window

- To manage your outcomes:
 - Click the **Outcomes** icon. The **Outcomes Manager** window appears.

Working with Your Outcomes

When you click the **Outcomes** tab on the **Outcomes Manager** window, your outcomes, or goals, appear. You can click the DOWN ARROW in the *Outcomes* pane to see (in the right frame) all open linked activities, completed linked activities, or all linked activities. The *Outcomes* pane also displays the total number of outcomes and sub-outcomes you have, and also the total number of linked activities.

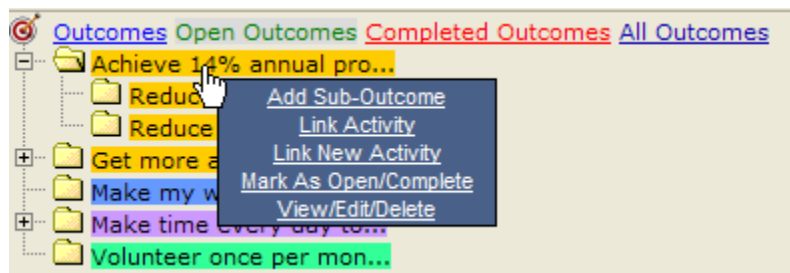


Figure 19: List of Outcomes

➤ **To view outcomes and sub-outcomes:**

1. Click the **Outcomes** icon. The **Outcomes Manager** window appears.
2. Click the DOWN ARROW in the *Outcomes* pane and select the type of outcomes to view.

Adding Outcomes

To add an outcome, click the **Outcomes** link.

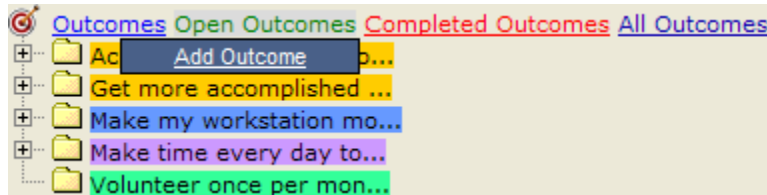


Figure 20: Add Outcome Pop-Up Window

When you click the *Add Outcome* link, the **Add Outcome** window appears.

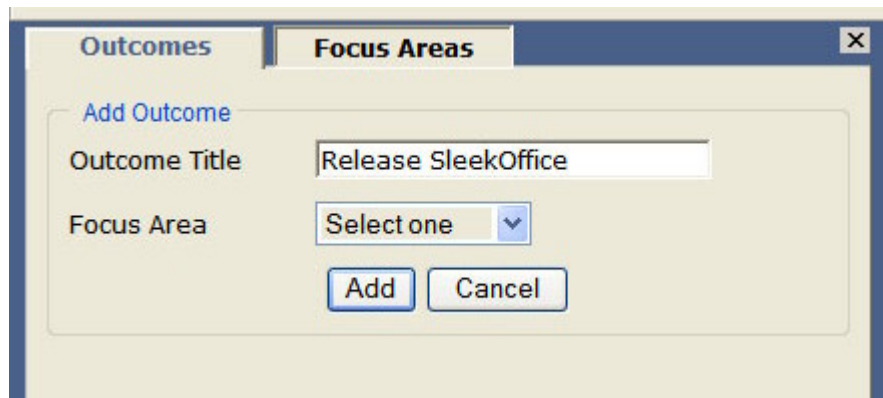


Figure 21: Add Outcome Window

Type a title for the new outcome and optionally select a focus area from the dropdown list. When you have finished entering the information, click **Add**. The outcome appears in the right window.

➤ **To add an outcome:**

1. Click the **Outcomes** icon. The **Outcomes Manager** window appears.
2. Click the **Outcome** link. The **Add Outcome** window appears.
3. Click the *Outcome Title* field and type a name for this outcome.
4. Click the DOWN ARROW in the *Focus Area* field and optionally select a focus area for this outcome.
5. Click **Add**.

Adding Sub-Outcomes

You can add a sub-outcome to an outcome. To do so, click the outcome you want to add the sub-outcome to. The **Add Sub-Outcome Pop-Up** window appears.

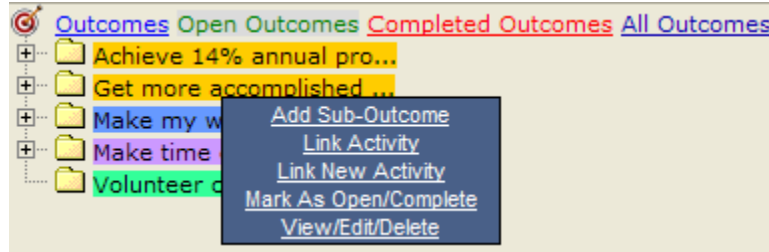


Figure 22: Add Sub-Outcome Pop-Up Window

Click the *Add Sub-Outcome* link. The **Add Sub-Outcome** window appears.

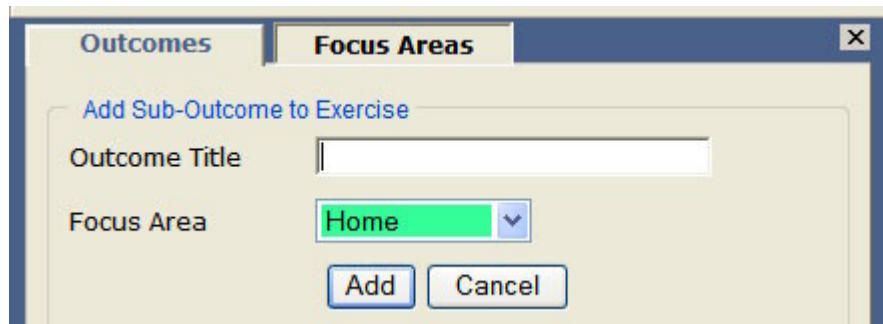


Figure 23: Add Sub-Outcome Window

Click the *Outcome Title* field and type a title for this sub-outcome. Next, click the DOWN ARROW in the *Focus Area* field and select a focus area. Finally, click **Add** to create the sub-outcome.

➤ **To add a sub-outcome to an outcome:**

1. Click the **Outcomes** icon. The **Outcomes Manager** window appears.
2. Click the outcome you want to add the sub-outcome to and select *Add Sub-Outcome*. The **Add Sub-Outcome** window appears.
3. Click the *Outcome Title* window and type a name for the sub-outcome.
4. Click the DOWN ARROW in the *Focus Area* field and select a focus area.
5. Click **Add**.

Linking Activities

You can link an activity to an outcome or sub-outcome. To do so, click the outcome or sub-outcome you want to link an activity to. The **Add Sub-Outcome Pop-Up** window appears.

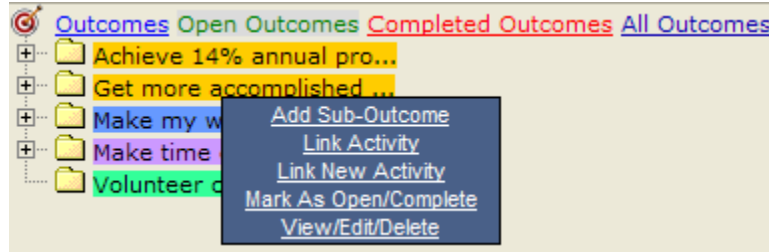


Figure 24: Add Sub-Outcome Pop-Up Window

Click the *Link New Activity* link. The **Link Activity** window appears.



Figure 25: Link Activity Window

Using the scroll bar, identify the activity you want to link to this outcome or sub-outcome by clicking the target activity. The activity is now linked to the outcome or sub-outcome.

- **To link an activity to an outcome or sub-outcome:**
 1. Click the **Outcomes** icon. The **Outcomes Manager** window appears.
 2. Click the outcome you want to link an activity to and select *Link Activity*. The **Link Activity** window appears.
 3. Click the activity you want to link to the selected outcome.

Linking New Activities

You can link an outcome or sub-outcome to a new activity. To do so, click the target outcome or sub-outcome and select *Link New Activity*.

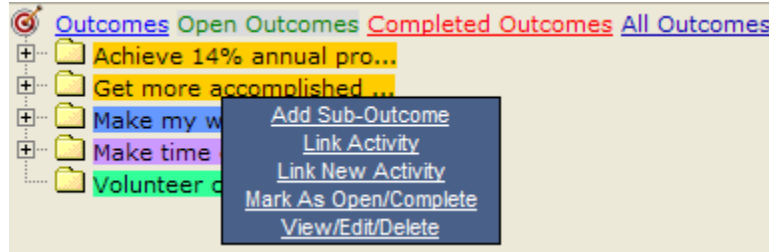


Figure 26: Link New Activity Pop-Up Menu

The **Link New Activity** window appears.

Figure 27: Link New Activity Window

Click the *Description* field and type a description for this activity. Next, select a date for the activity and type of activity to create. When you have finished entering the information for this activity, click **Add Activity**. **Outcome Manager** updates the list of **Outcomes** and activities.

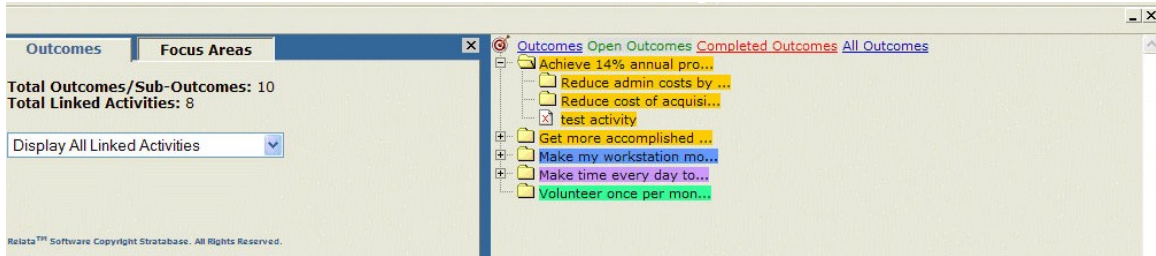


Figure 28: Outcomes Window

- **To link an outcome or sub-outcome to a new activity:**
1. Click the **Outcomes** icon. The **Outcomes Manager** window appears.
 2. Click the target outcome or sub-outcome and select *Link New Activity*. The *Link New Activity* window appears.
 3. Click the *Description* field and type a description for this activity.
 4. Select a date for the activity.
 5. In the *Type* field, select the type for this activity. Finish entering the information for this activity.
 6. Click **Add Activity**.

Marking Outcomes as Open or Complete

You can specify an outcome as being open or complete. To do so, click the outcome to see the **Add Sub-Outcome** context menu.

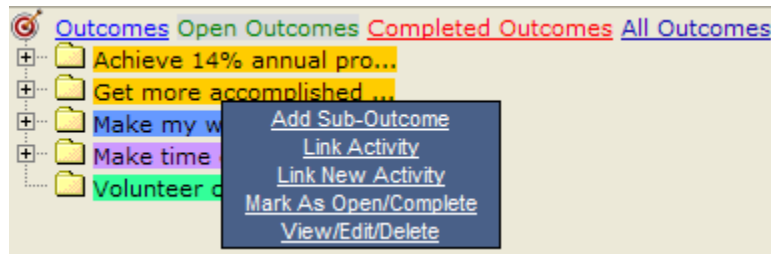


Figure 29: Add Sub-Outcome Pop-Up Window

Click the *Mark As Open/Complete* link.

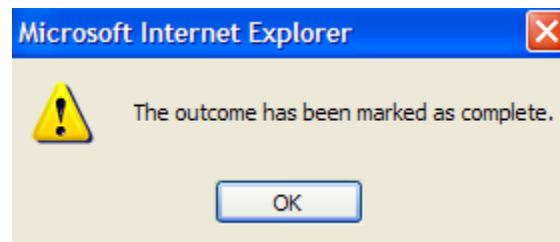


Figure 30: Outcome Marked As Complete

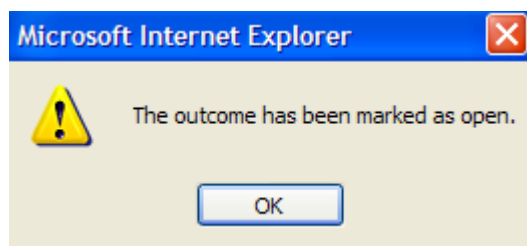


Figure 31: Outcome Marked As Open

The outcome is marked as open or complete when you click **OK**.

- **To mark an outcome as open or complete:**
 1. Click the **Outcomes** icon. The **Outcomes Manager** window appears.
 2. Click the outcome you want to mark as open or complete and select *Mark As Open/Complete*.
 3. Click **OK**.

Viewing, Editing, and Deleting Outcomes

You can view, edit, and delete outcomes in the **Outcomes Manager**. To do so, click the outcome and select *View/Edit/Delete*. The **View/Edit/Delete Outcomes** window appears.

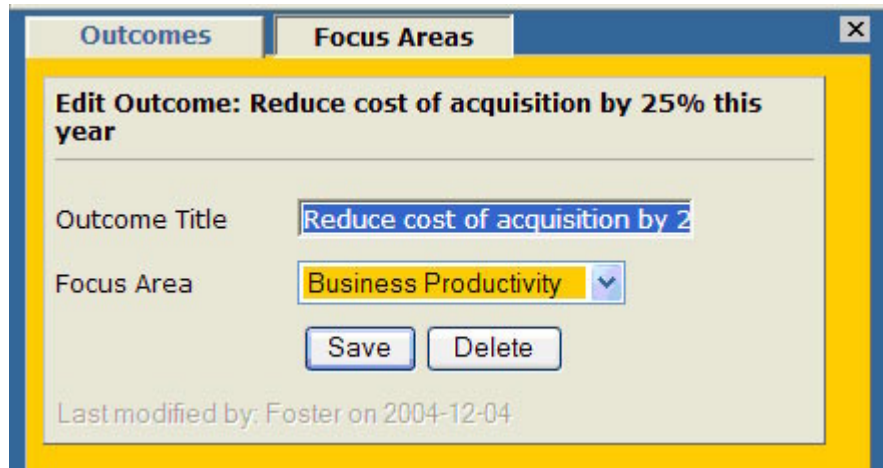


Figure 32: View/Edit/Delete Outcomes Window

To edit the outcome, click the *Outcome Title* field and type a new title for the outcome or click the DOWN ARROW and select a different focus area for this outcome. Click **Save** to save your changes.

To delete the outcome, click **Delete**. The **Delete Outcome Confirmation** window appears.

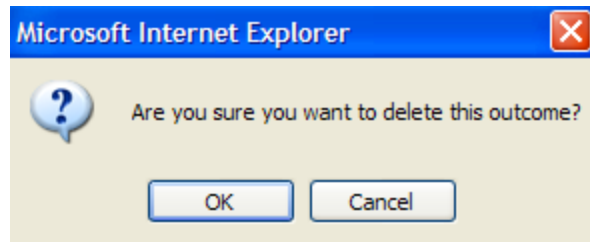


Figure 33: Delete Outcome Confirmation Window

Click **OK** to permanently delete this outcome or click **Cancel** to return to the **View/Edit/Delete Outcomes** window.

- **To view an outcome:**
 1. Click the **Outcomes** icon. The **Outcomes Manager** window appears.
 2. Click the outcome and select *View/Edit/Delete*. The outcome's information appears in the window.
- **To edit an outcome:**
 1. Click the **Outcomes** icon. The **Outcomes Manager** window appears.
 2. Click the outcome and select *View/Edit/Delete*. The **View/Edit/Delete Outcomes** window appears.
 3. Click the *Outcome Title* field and type a new title for this outcome or click the DOWN ARROW and select a different focus area.
 4. Click **Save**.
- **To delete an outcome:**
 1. Click the **Outcomes** icon. The **Outcomes Manager** window appears.

2. Click the activity and select *View/Edit/Delete*. The **View/Edit/Delete Outcomes** window appears.
3. Click **Delete**. The **Delete Outcome Confirmation** window appears.
4. Click **OK**.

Working with Your Focus Areas

To work with your **Focus Areas**, click the **Focus Areas** tab on the **Outcomes Manager** window. The **Focus Areas** window appears.

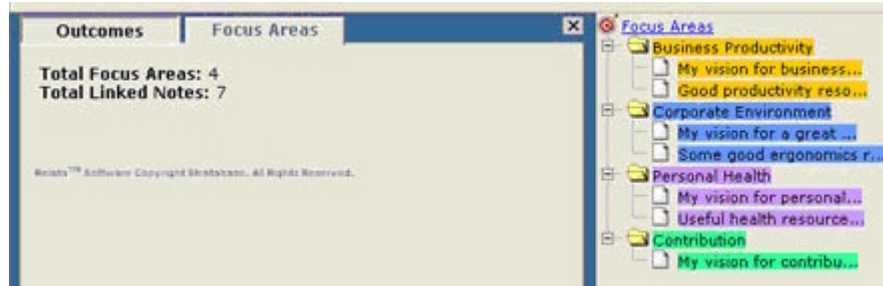


Figure 34: Focus Areas Window

When you click the **Focus Areas** tab, the **Focus Areas** window appears, showing you the number of focus areas you have and the number of linked notes. The focus areas are color-coded.

- **To view your Focus Areas:**
 1. Click the **Outcomes** icon. The **Outcomes Manager** window appears.
 2. Click the **Focus Areas** tab. The **Focus Areas** window appears.

Viewing Linked Notes

You can view a note which has been linked to a Focus Area. To do so, click the item to see the **Focus Areas** context menu.

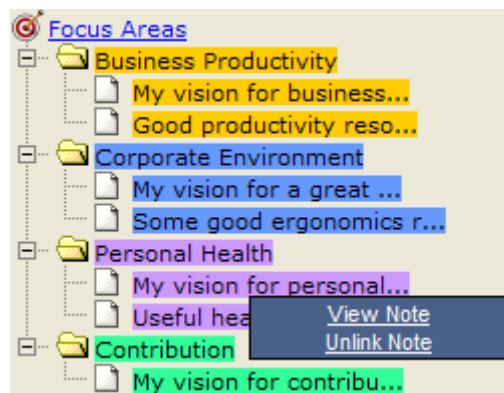


Figure 35: Focus Areas Context Menu

Click the *View Note* link. The note content appears in the left window.

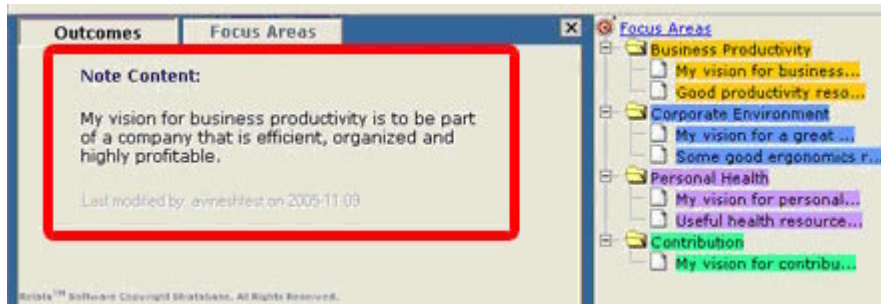


Figure 36: View Note Window

- **To view a note that is linked to a Focus Area:**
 1. Click the **Outcomes** icon. The **Outcomes Manager** window appears.
 2. Click the **Focus Areas** tab. The **Focus Areas** window appears.
 3. Click the item and select **View Note**. The note content appears in the left window.

Unlinking a Note

You can unlink a note from a Focus Area. To unlink the note, click the note and select *Unlink Note*. The **Unlink Note Confirmation** window appears.

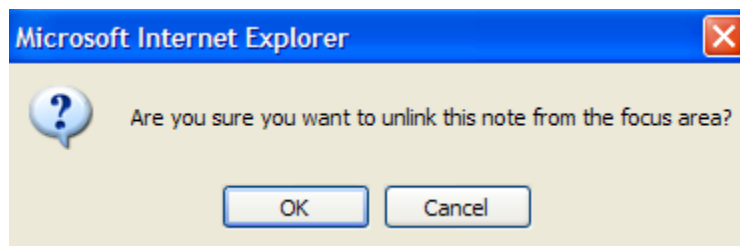



Figure 37: Unlink Note Confirmation Window

Click **OK** to unlink the note.

- **To unlink a note from a Focus Area:**
 1. Click the **Outcomes** icon. The **Outcomes Manager** window appears.
 2. Click the **Focus Areas** tab. The **Focus Areas** window appears.
 3. Click the note and select **Unlink Note**. The **Unlink Note Confirmation** window appears.
 4. Click **OK**.

WORKING WITH LOGS

The **Log Manager** lets you record special notes, or logs, about topics. You can create, edit, delete, and share log entries and export your log entries to *Microsoft Word*.

To use the **Log Manager**, click the **Log Manager** icon . The **Log Manager** window appears.

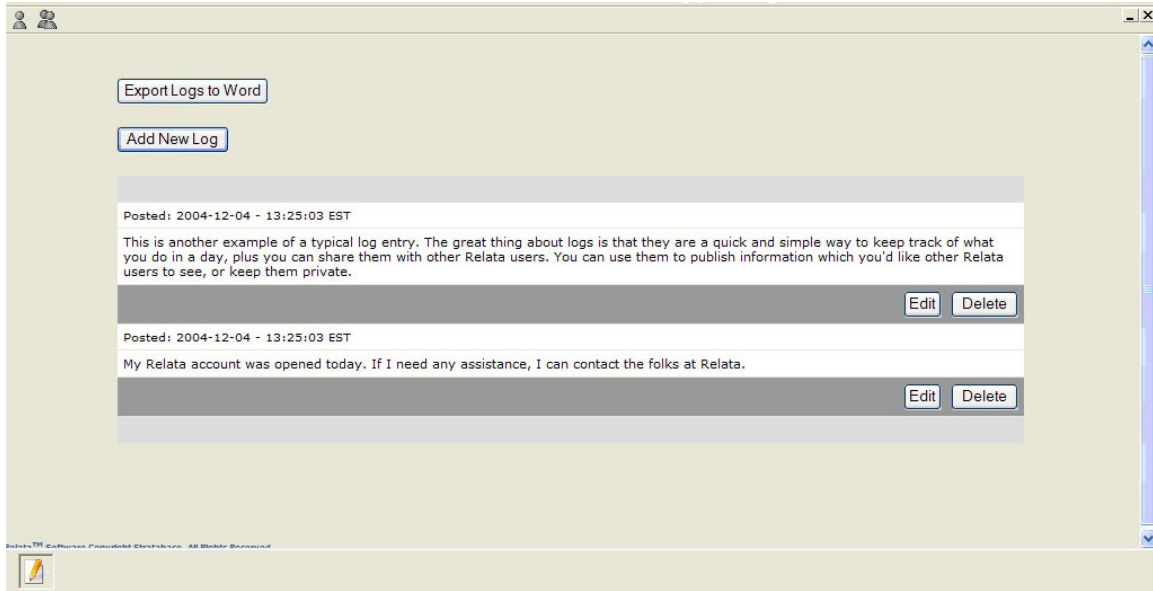


Figure 38: Log Manager Window

The **Log Manager** displays your most recent logs.

- **To manage your logs:**
 - Click the **Log Manager** icon. The **Log Manager** window appears.

Creating Logs

To create a log, click **Add New Log**. The **Add Log** window appears.



Figure 39: Add Log Window

You can type the text for this log in the window. The **Log Editor** has a formatting toolbar – it lets you use bold, italics, and so on to format your log.

If you want to share this log with one of your **SleekOffice** teams, select the *Share With* drop-down. When you are ready to create the log, click **Post Log**.

➤ **To create a log:**

1. Click the **Log Manager** icon. The **Log Manager** window appears.
2. Click **Add New Log**. The **Add Log** window appears.
3. Type the text for the log.
4. In the *Share With* field, select the team this log will be shared with (optional).
5. Click **Post Log**.

Editing Logs

You can change the content of a log. To edit a log, click **Edit**. The **Edit Log** window appears.

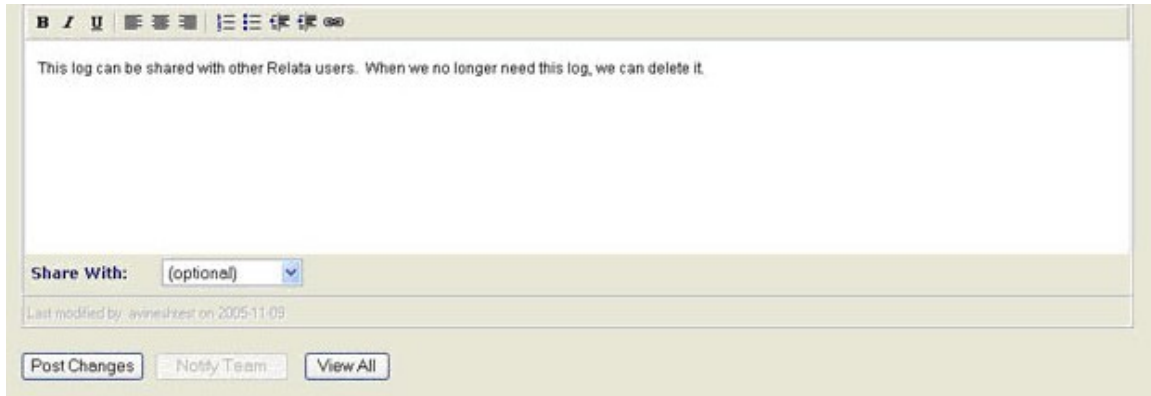


Figure 40: Edit Log Window

After you have edited your log, click **Post Changes**. The new information for this log is saved.

- **To edit a log:**
 1. Click the **Log Manager** icon. The **Log Manager** window appears.
 2. Click **Edit**. The **Edit Log** window appears.
 3. Edit the log entry.
 4. Click **Post Changes**.

Deleting Logs

To remove a log, click **Delete**. The **Delete Confirmation** window appears.

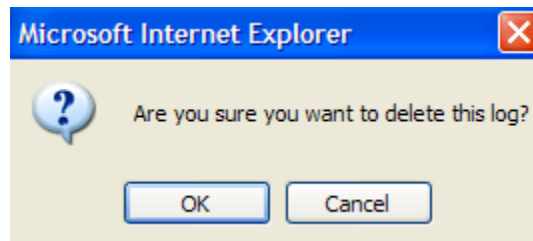


Figure 41: Delete Confirmation Window

Click **OK** to permanently delete this log or click **Cancel** to return to the **Log Manager**.

- **To delete a log:**
 1. Click the **Log Manager** icon. The **Log Manager** window appears.
 2. Click **Delete**. The **Delete Confirmation** window appears.
 3. Click **OK**.

Exporting Logs to Microsoft Word

You can export your logs from **SleekOffice** to *Microsoft Word*. To do so, click **Export Logs to Word**. The **File Download** window appears.

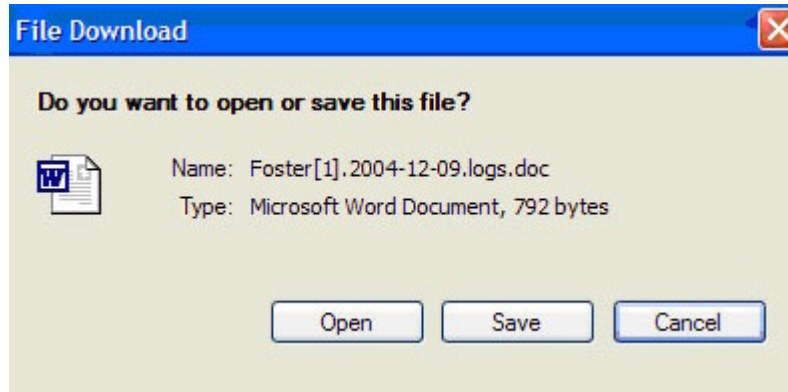



Figure 42: File Download Window

Click **Save**. The **Save As** window appears. You can change the name of the file, if desired, or just click **Save** to export the file to *Microsoft Word*. You can then open this file using *Microsoft Word*.

- **To export logs to Microsoft Word:**
 1. Click the **Log Manager** icon. The **Log Manager** window appears.
 2. Click **Export Logs to Word**. The **File Download** window appears.
 3. Click **Save**. The **Save As** window appears.
 4. Click **Save**.

USING THE GROUP EMAIL MANAGER

You can manage your group emails. To do so, click the **Group Email Manager** icon  on the **SleekOffice** toolbar. The **Group Email Manager** window appears.

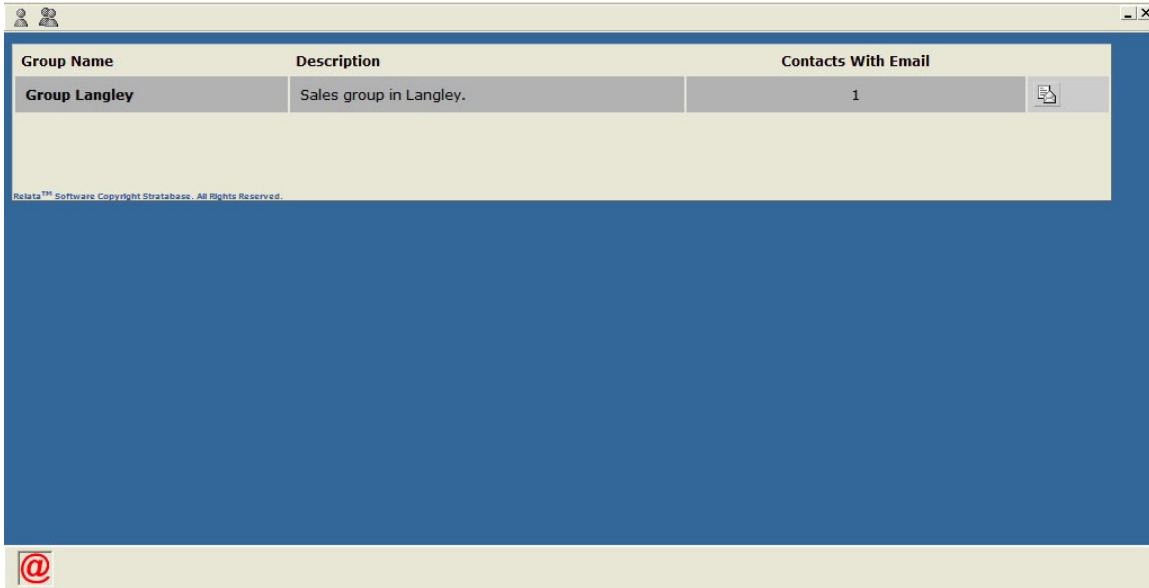


Figure 43: Group Email Manager Window

For each group, the window displays the group's name, description, and the number of contacts in that group that have an email address specified.

- **To manage group emails:**
 - Click the **Group Email Manager** icon. The **Group Email Manager** window appears.

Sending an Email to a Contact

You can send an email to a contact within a group. To send an email, click the **Email** icon. A new window appears in your default mail application (*Microsoft Outlook, Outlook Express, Eudora, and so on*). You can write the email information and click **Send** to send the email.

- **To send an email to a contact:**
 1. Click the **Group Email Manager** icon. The **Group Email Manager** window appears.
 2. Click the **Email** icon.
 3. Type the information for the email.
 4. Click **Send**.

WORKING WITH KNOWLEDGE MANAGEMENT


Knowledge Management lets you create and manage documents. To create and manage your documents, click the **Knowledge Management** icon  on the **Main** window. The **Knowledge Management** window appears.



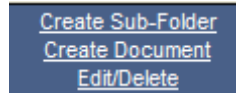
Figure 44: Knowledge Management Window

The **Knowledge Management** window displays a list of your documents, arranged in folders and sub-folders, as well as the total number of folders and documents you have in **Knowledge Management**.

- **To manage your documents:**
 - Click the **Knowledge Management** icon. The **Knowledge Management** window appears.

Creating Folders

You can create a folder or sub-folder in **Knowledge Management**. To do so, click the folder you want to create a sub-folder in and select *Create Folder*.



The **Create Folder** window appears.

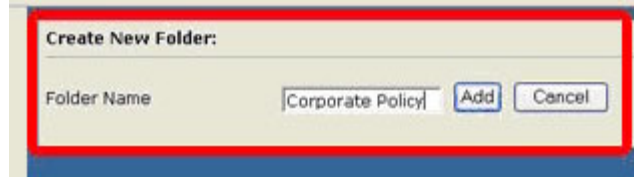


Figure 45: Create Folder Window

Click the *Folder Name* field and type a name for this folder. When you have finished entering the name, click **Add**. The folder is created.

➤ **To create a folder:**

1. Click the **Knowledge Management** icon. The **Knowledge Management** window appears.
2. Click the target folder and select *Create Folder*. The **Create Folder** window appears.
3. Click the *Folder Name* field and type a name for the folder.
4. Click **Add**.

Renaming and Deleting Folders

You can rename or delete a folder in **Knowledge Management**. To do so, click the folder you want to work with and select *Edit/Delete*. The **Rename Folder** window appears.



Figure 46: Rename Folder Window

If you want to rename this folder, type a new name for the folder and click **Save**.

If you want to delete a folder, the folder must not contain any documents. You must delete all sub-folders and documents stored in this folder before you can delete it. To delete a folder, click **Delete**. The **Delete Folder Confirmation** window appears.

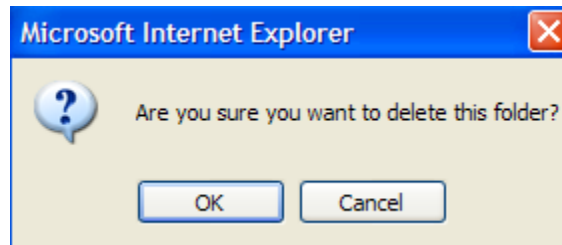


Figure 47: Delete Folder Confirmation Window

Click **OK** to permanently remove the folder from **Knowledge Management**.

➤ **To rename or delete a folder:**

1. Click the **Knowledge Management** icon. The **Knowledge Management** window appears.
2. Click the target folder and select *Edit/Delete*. The **Rename Folder** window appears.
3. To rename the folder, click the *Folder Name* field, type a new name for the folder, and click **Save**.
4. To delete the folder, click **Delete**.

Creating Documents

You can create a document in **Knowledge Management**. To create a document, click the item for which you want to create a document and select *Create Document*. The **Create Document** window appears.

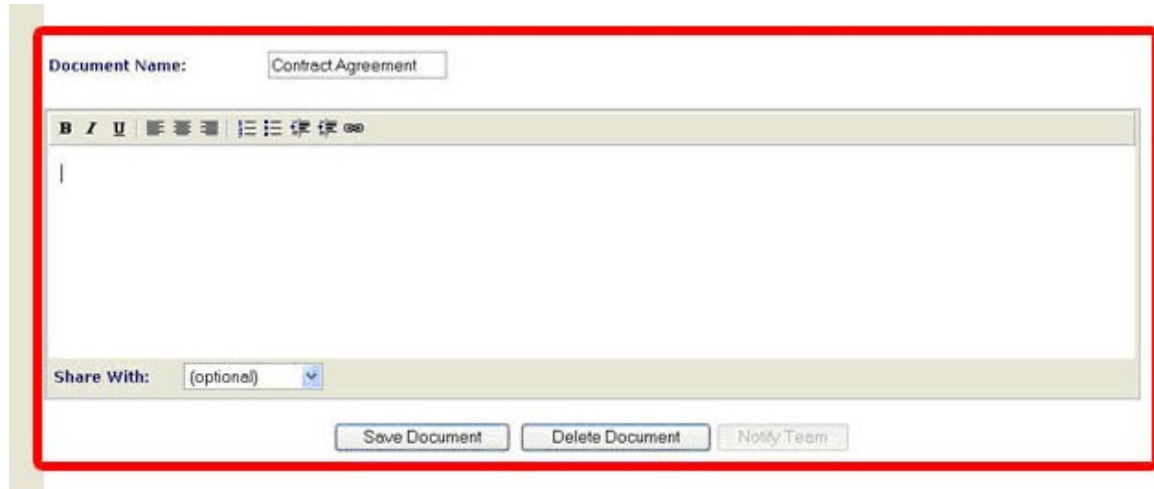


Figure 48: Create Document Window

Click the *Document Name* field and type a name for this document. Next, click the editor's window and type the text for this document. If you want to share the document, select a team from the *Share With* drop-down menu. Click **Save Document** to save the document.

- **To create a document:**
 1. Click the **Knowledge Management** icon. The **Knowledge Management** window appears.
 2. Click the target item and select *Create Document*. The **Create Document** window appears.
 3. Click the *Document Name* field and type a name for this document.
 4. Click the editor field and type the text for this document.
 5. In the *Share With* field, select a team with whom to share this document (optional).
 6. Click **Save Document**.

Editing and Deleting Documents

You can edit or delete a document. To do so, click the document and select *Edit Document*. The **Edit Document** window appears.

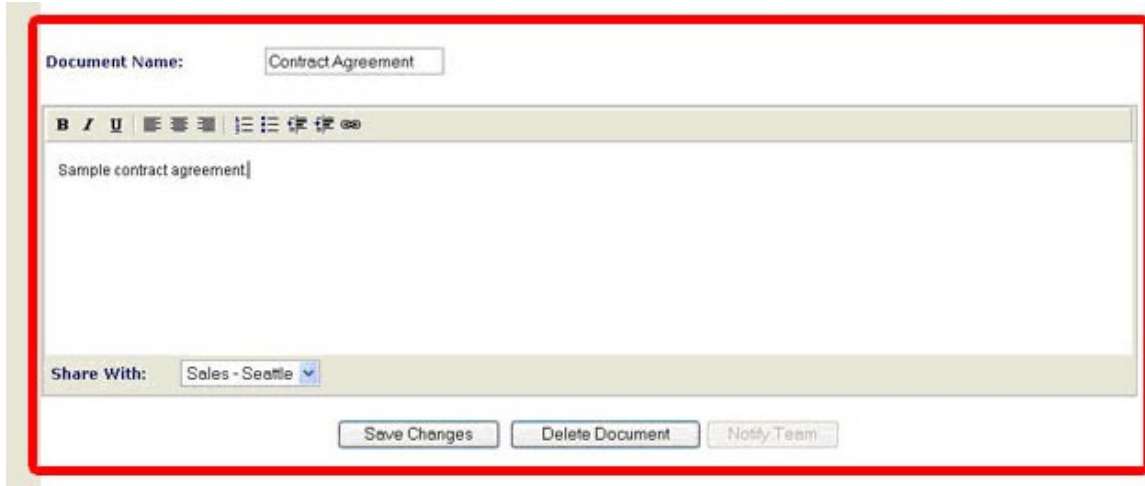


Figure 49: Edit Document Window

Make the changes to the document and click **Save Changes**. The document's changes are saved.

Alternatively, if you want to delete a document, click **Delete Document**. The **Delete Document Confirmation** window appears.

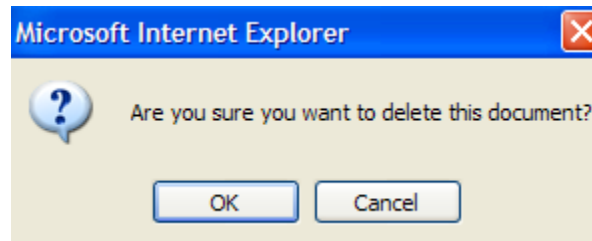


Figure 50: Delete Document Confirmation Window

Click **OK** to permanently delete the document.

➤ **To edit or delete a document:**

1. Click the **Knowledge Management** icon. The **Knowledge Management** window appears.
2. Click the document and select *Edit Document*. The **Edit Document** window appears.
3. If you want to edit this document, make the changes and click **Save Changes**.
4. If you want to delete this document, click **Delete Document**. The **Delete Document Confirmation** window appears. Click **OK**.

Viewing a Document's Change Log

You can view the *Change Log* for a document. It provides statistical information on when a document was created and modified. Click a document and select *View ChangeLog*. The **View ChangeLog** window appears.




Figure 51: View ChangeLog Window

The **ChangeLog** window displays the date and time a change was made, the type or status of the change, and who made the change.

- **To view a document's Change Log:**
 1. Click the **Knowledge Management** icon. The **Knowledge Management** window appears.
 2. Click the document and select *View ChangeLog*. The **View ChangeLog** window appears.

WORKING WITH THE FILE MANAGER

The **File Manager** lets you organize your documents. Using **File Manager**, you can create sub-folders to organize related documents and you can upload and delete files, as well as sub-folders as required.

To manage your files, click the **File Manager** icon . The **File Manager** window appears.

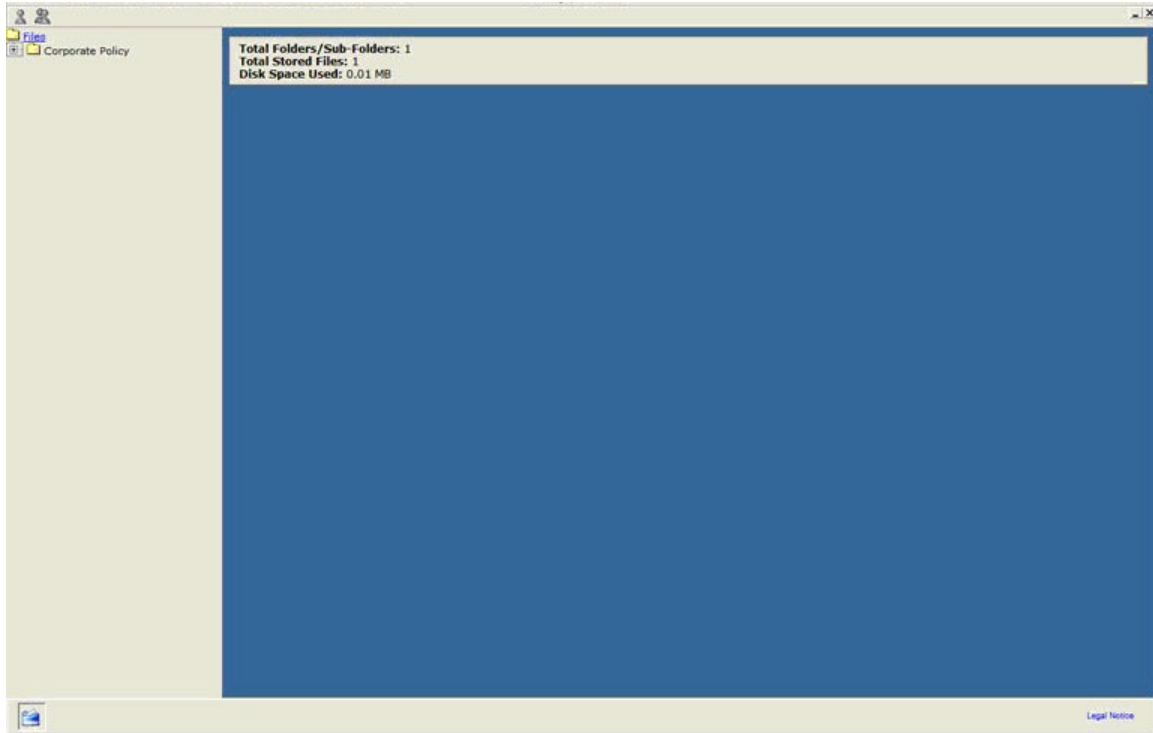


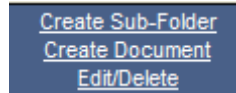
Figure 52: File Manager Window

The folders and documents you have stored in the **File Manager** are shown on the left side of the **File Manager** window. The right side of the **File Manager** window shows you the number of folders and sub-folders you have created, the number of files or documents you have stored in the **File Manager**, and the amount of disk space used by those files.

- **To manage your files:**
 - Click the **File Manager** icon. The **File Manager** window appears.

Creating Folders and Sub-Folders

You can create a folder or sub-folder by clicking the *Files* item. Next, select the *Create Folder* item.



The **Create Folder** window appears.



Figure 53: Create Folder Window

Click the *Folder Name* field and type a name for this new folder and then click **Add**. The folder appears in the folder list.

If you want to create a sub-folder, click the parent folder's name and then select *Create Sub-Folder*. The **Create Sub-Folder** window appears.



Figure 54: Create Sub-Folder Window

The *Folder Name* field is automatically populated with the parent folder's name. Click this field and type a name for the sub-folder you want to create. Click **Add** to create the sub-folder.

➤ **To create a folder:**

1. Click the **File Manager** icon. The **File Manager** window appears.
2. Click the *Files* item and select *Create Folder*. The **Create Folder** window appears.
3. Click the *Folder Name* field and type a name for the folder.
4. Click **Add**.

➤ **To create a sub-folder:**

1. Click the **File Manager** icon. The **File Manager** window appears.
2. Click the parent folder's name and select *Create Sub-Folder*. The **Create Sub-folder** window appears.
3. Click the *Folder Name* field and type a name for the sub-folder.
4. Click **Add**.

Renaming Folders and Sub-Folders

To rename a folder, click the folder's name and select *Edit/Delete Folder*. The **Rename Folder** window appears.



Figure 55: Rename Folder Window

The folder's name appears in the *Folder Name* field. Type a new name for the folder and click **Save**.

- **To rename a folder:**
 1. Click the **File Manager** icon. The **File Manager** window appears.
 2. Click the folder you want to rename and select *Edit/Delete Folder*. The **Rename Folder** window appears.
 3. Click the *Folder Name* field, and type a new name for the folder.
 4. Click **Save**.

Deleting Folders and Sub-Folders

To delete a folder, click the folder's name and then select *Edit/Delete folder*. The **Rename Folder** window appears.



Figure 56: Rename Folder Window

The folder's name appears in the *Folder Name* field. To delete this folder, click **Delete**.

- **To delete a folder or sub-folder:**
 1. Click the **File Manager** icon. The **File Manager** window appears.
 2. Click the folder you want to delete and select *Edit/Delete Folder*. The **Rename Folder** window appears.
 3. Click **Delete**.

Uploading Files

To upload a file, click the folder you want to add the file to and select *Upload File*. The **Upload File** window appears.

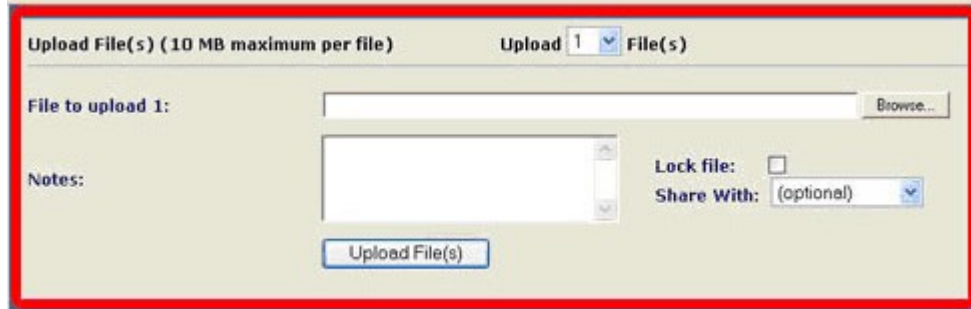


Figure 57: Upload Files Window

Click **Browse** to locate the file on your local computer's hard disk. Next, click the *Notes* field and type any comments about this file. You can upload up to ten files at a time.

If you want to lock the file, select the *Lock File* check box. When you lock a file, that file cannot be modified by other **SleekOffice** users until it is unlocked.

If you want other **SleekOffice** users to be able to access this file, select an appropriate team from the *Share With* drop-down.

Click **Upload File**. The **File Upload in Progress** window appears. Click **OK** to begin uploading the file.

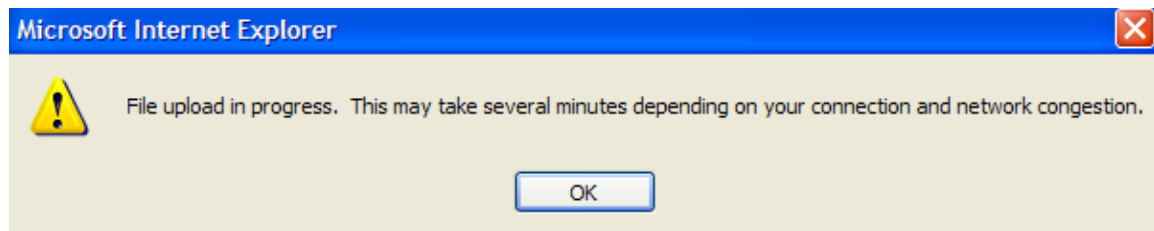


Figure 58: File Upload in Progress Window

When the file has been successfully uploaded, click **OK**.



Figure 59: File Uploaded Successfully Window

You'll see the uploaded file in the folder list.

➤ **To upload a file:**

1. Click the **File Manager** icon. The **File Manager** window appears.
2. Click the target folder and select *Upload File*. The **Upload File** window appears.
3. Click **Browse** to find the file you want to upload.
4. Click the *Notes* field and type any comments about the file.
5. Select the *Lock File* check box if the file is to be locked.
6. In the *Share With* drop-down, select a team to share the file with (optional).
7. Click **Upload File**. The **File Upload in Progress** window appears.
8. Click **OK**.
9. Click **OK**.

Downloading Files

You can download a file from **SleekOffice** to your local computer. To do so, click the filename and select *Download*. The **Download File** window appears.

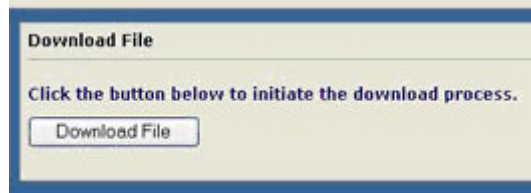


Figure 60: Download File Window

Click **Download File**. The **File Download** window appears.

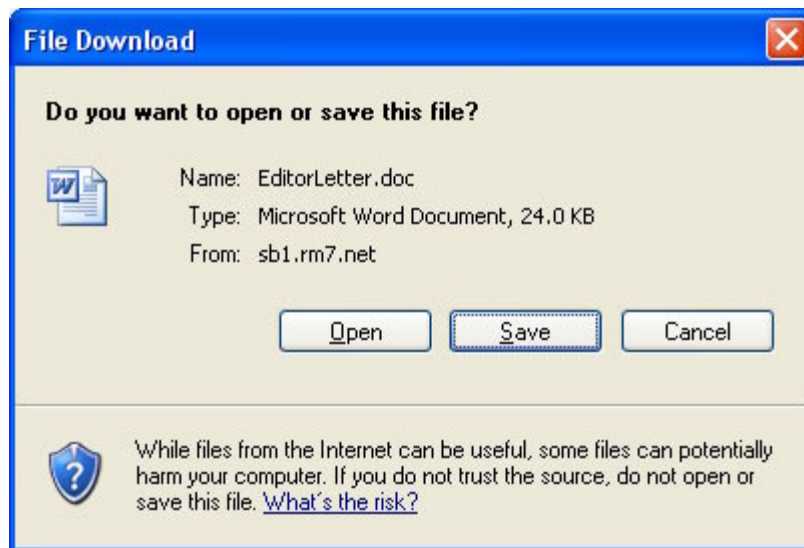


Figure 61: File Download Window

Click **Save** to begin downloading the file. The **Save As** window appears. Click **Save** to download the file.

➤ **To download a file:**

1. Click the **File Manager** icon. The **File Manager** window appears.
2. Click the file you want to download and select *Download*. The **Download File** window appears.
3. Click **Download File**. The **File Download** window appears.
4. Click **Save**. The **Save As** window appears.
5. Click **Save**.

Checking In Files and Checking Out Files

If you have stored a file in the **File Manager** and want to edit it, you must first check the file out. You can then modify the file. When you have finished modifying the file, you will need to check the file back into the **File Manager**. Otherwise, other **SleekOffice** users will not be able to work with the updated file.

To check a file out, click the file's name and then select *Check-Out*. The **Check Out File** window appears.



Figure 62: Check Out File Window

Since another **SleekOffice** user may have modified this file, you will need to download a copy of the file to your local computer. After you download the file, you must then check the file out. When you check the file out, other **SleekOffice** users cannot check the file out until it is checked back in.

To check out the file, click **Download File**. The **File Download** window appears.

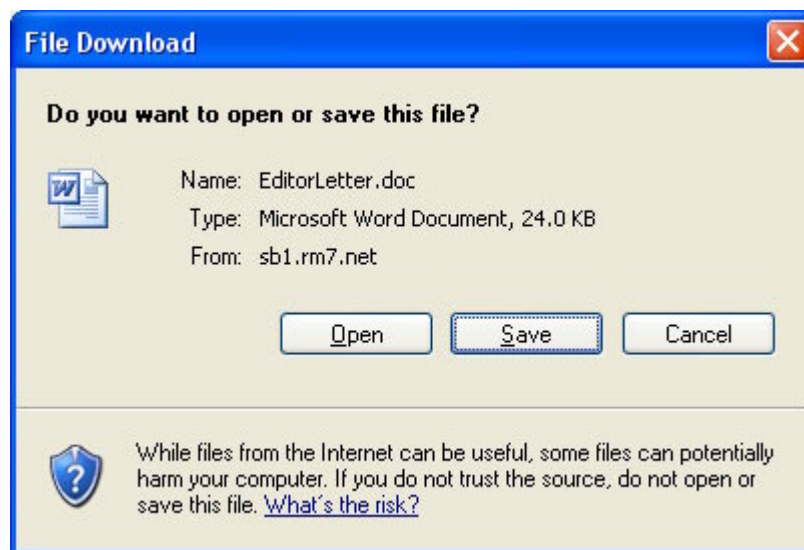


Figure 63: File Download Window

Click **Save** to begin downloading the file. The **Save As** window appears. Click **Save** to download the file.

Next, you'll need to check the file out. To check the file out, click **Check-Out File**. Next, a window appears telling you the file is checked out.

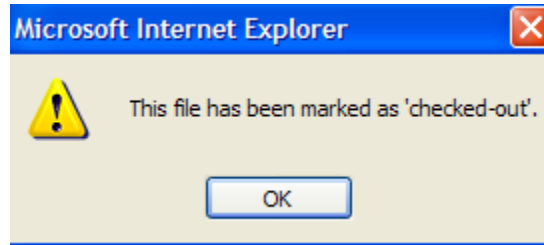


Figure 64: File Checked Out Window

After you have finished working with the file, you will need to check it in so other users can access it. To check in the file, click the file's name and select *Check-in/Update*. The **Check-In/Update File** window appears.

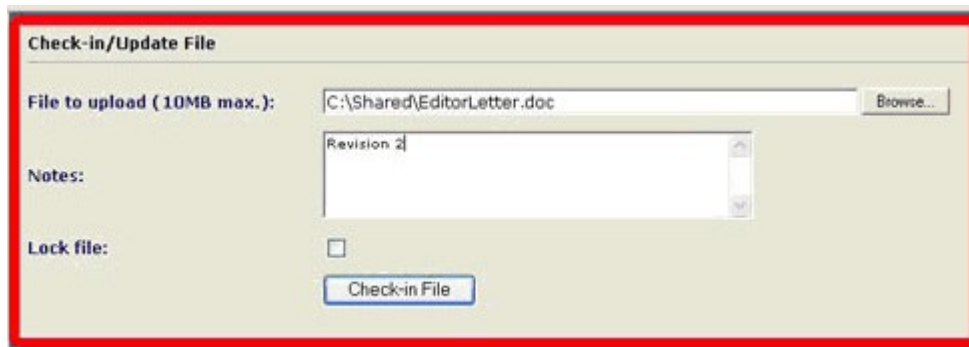


Figure 65: Check-In/Update File Window

Locate the file on your local computer by clicking **Browse**. Next, edit any comments about the file and select the *Lock File* check box, if needed. Finally, click **Check-In File**. The **File Upload in Progress** window appears.

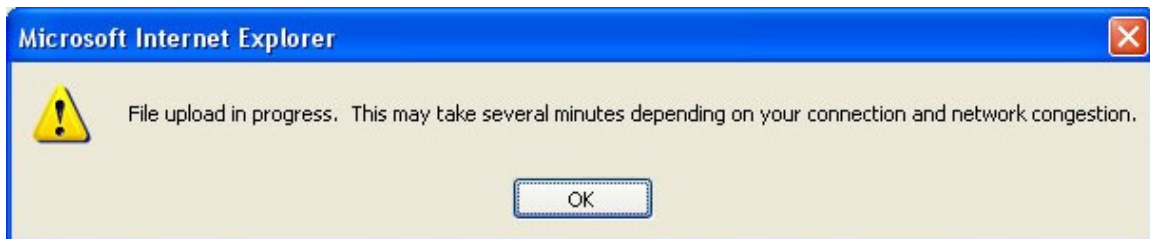


Figure 66: File Upload in Progress Window

Click **OK** to begin checking the file in. When the file has been successfully checked in, click **OK**.

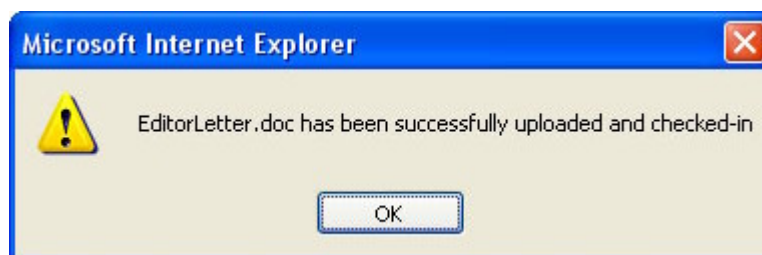


Figure 67: File Successfully Checked In Window

- **To check a file out:**
 1. Click the **File Manager** icon. The **File Manager** window appears.
 2. Click the file you want to check out and select *Check-Out*. The **Check-Out File** window appears.
 3. Click **Download File**. The **File Download** window appears.
 4. Click **Save**. The **Save As** window appears.
 5. Click **Save**.
 6. Click **Check-Out File**.
 7. Click **OK**.
- **To check a file in:**
 1. Click the **File Manager** icon. The **File Manager** window appears.
 2. Click the file you want to check in and select *Check-In Update*. The **Check-In/Update File** window appears.
 3. Click **Browse** to find the file.
 4. Click the *Notes* field and type any comments about the file.
 5. Select the *Lock File* check box if the file is to be locked.
 6. In the *Share With* field, select the groups that will share this file.
 7. Click **Check-In File**. The **File Upload in Progress** window appears.
 8. Click **OK**.
 9. Click **OK**.

Editing a File's Attributes

You can change the attributes about a file. To change a file's attributes, click the file and select *Edit Attributes*. The **Edit Attributes** window appears.



Figure 68: Edit Attributes Window

Edit the *Notes*, *Lock File*, and *Share With* fields as required. When you click **Update File**, the file's new attributes are saved.

- **To edit a file's attributes:**
 1. Click the **File Manager** icon. The **File Manager** window appears.
 2. Click the file you want to modify and select *Edit Attributes*. The **Edit Attributes** window appears.
 3. Click the *Notes* field and edit the comments, if required.
 4. Select or deselect the *Lock File* check box, if desired.
 5. Select a team to share the file with, if desired.
 6. Click **Update File**.

Renaming Files

If a user has locked the file, you will first have to remove the lock from the file before you can rename it. To rename a file, click the file's name and select *Rename*. The **Rename File** window appears.



Figure 69: Rename File Window

The file's original name appears in the *Filename* field. Type a new name for the file and click **Rename File**.

- **To rename a file:**
 1. Click the **File Manager** icon. The **File Manager** window appears.
 2. Click the file you want to rename and select *Rename*. The **Rename File** window appears.
 3. In the *Filename* field, type the new name for this file.
 4. Click **Rename File**.
 5. Click **OK**.

Deleting Files

If you want to remove a file, click the filename and then select *Delete*. The **Delete File** window appears.



Figure 70: Delete File Window

If you want to permanently delete this file, click **Delete File**. The file is deleted on the server.

- **To delete a file:**
 1. Click the **File Manager** icon. The **File Manager** window appears.
 2. Click the file you want to delete and select *Delete File*. The **Delete File** window appears.
 3. Click **Delete File**.

Viewing the Change Log for a File

Each time you modify a file, the **File Manager** records that change. To view the *Change Log* for a file, click the file and then select *View ChangeLog*. The **ChangeLog** window appears.



The screenshot shows a window titled "Viewing Changelog for EditorLetter.doc". It contains a table with three columns: "Timestamp", "Status", and "Modified By". There are two rows of data, both showing a "check-in" status by the user "avineshtest" on the date "2005-11-09".

Timestamp	Status	Modified By
2005-11-09 - 14:37:13	check-in	avineshtest
2005-11-09 - 14:44:33	check-in	avineshtest

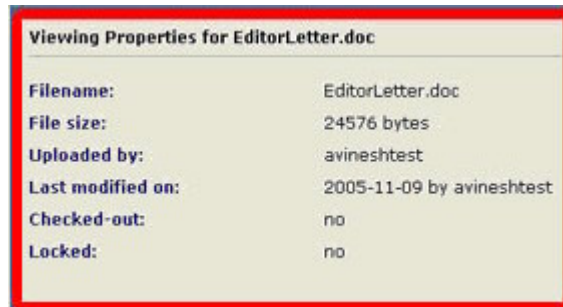
Figure 71: ChangeLog Window

The **ChangeLog** window displays the timestamp, status, and modified by information about the selected file. Each time the file is edited, renamed, or deleted that change is recorded in the *Change Log*.

- **To view a file's Change Log:**
 1. Click the **File Manager** icon. The **File Manager** window appears.
 2. Click the file you want to view a *Change Log* for and select *View ChangeLog*. The **ChangeLog** window appears.

Viewing a File's Properties

You can view information about a file stored in the **File Manager**. To do so, click the file you want to view information about and then click **View Properties**. The **View Properties** window appears.



The screenshot shows a window titled "Viewing Properties for EditorLetter.doc". It displays various file properties in a key-value format.


Filename:	EditorLetter.doc
File size:	24576 bytes
Uploaded by:	avineshtest
Last modified on:	2005-11-09 by avineshtest
Checked-out:	no
Locked:	no

Figure 72: View Properties Window

For each file, the **View Properties** window displays the filename and size, the name of the user who uploaded the file, when the file was last modified and by whom, whether the file is currently checked out by a user, and, finally, whether the file is locked.

- **To view a file's properties:**
 1. Click the **File Manager** icon. The **File Manager** window appears.
 2. Click the file you want to view properties for and click **View Properties**. The **View Properties** window appears.

WORKING WITH PROJECTS

The **Project Management** module allows you to manage personal projects and track time spent on tasks. To create, edit, delete, or share a project or a task, click the **Project Management** icon . The **Project Management** window appears.

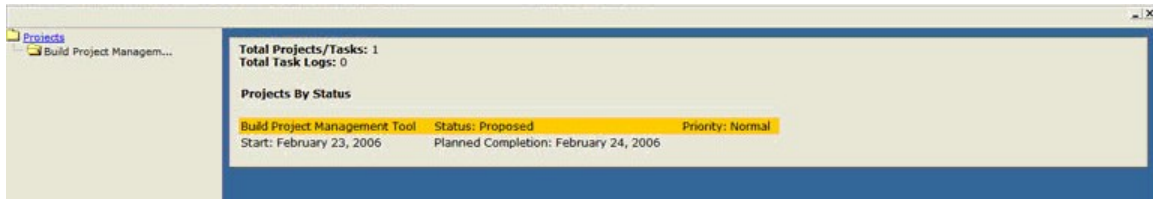


Figure 73: Project Management Window

The **Project Management** window displays a list of projects and tasks in a tree-like structure, and also projects by status in the right-hand pane. Overdue projects are marked with the due date in red.

- **To manage your projects:**
 - Click the **Project Management** icon. The **Project Management** window appears.

Creating a New Project

To create a new project, click on the **Project** hyperlink. From the context menu, click **New Project**.

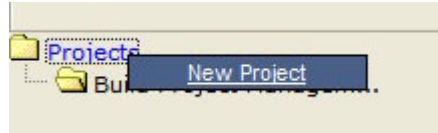


Figure 74: New Project Context Menu

A project must have the following as the minimum: project name, start date and the planned completion date. Once the project has been entered, it can be edited to assign contacts and resources. Tasks can also be scheduled in the Activity Manager.

A screenshot of the 'Create New Project' form in the SleekOffice application. The form is titled 'Create New Project:' and contains several input fields and dropdown menus. The 'Project Name' field is filled with 'Tune Linux Server'. The 'Start Date' field is filled with '2006-02-24'. The 'Planned Completion Date' field is empty. The 'Actual Completion Date' field is empty. The 'Total Budget' field is empty. The 'Priority' dropdown menu is set to 'Normal'. The 'Status' dropdown menu is set to 'Proposed'. The 'Notes' field is empty. A calendar widget is open over the 'Planned Completion Date' field, showing the month of February 2006. The calendar has a grid with days of the week (S M T W T F S) and dates (29 30 31 1 2 3 4, 5 6 7 8 9 10 11, 12 13 14 15 16 17 18, 19 20 21 22 23 24 25, 26 27 28 1 2 3 4, 5 6 7 8 9 10 11). The date '24' is highlighted. Below the calendar is a 'Today' button. At the bottom of the form are 'Add' and 'Cancel' buttons.

Figure 75: Entering Project Details

Projects can have one of several priorities: *Low*, *Normal* or *Urgent*. A project's status can be set to the following: *Proposed*, *In Planning*, *In Progress*, *On Hold* or *Complete*.

Editing a Project

To edit the details of an existing project, click on the project's name and select **Edit/Delete** from the context menu.

Edit Project: Tune Linux Server

Project Name: Tune Linux Server

Start Date: 2006-02-24

Planned Completion Date: 2006-02-24

Actual Completion Date: 0000-00-00

Total Budget: N/A

Priority: Normal

Status: On Hold

Notes:

Resource Type: Contacts

Assigned Contacts: No Assigned Contacts.

Available Contacts:

- ☐ Al, Gill
- ☐ Arney, Nathanael
- ☐ ATIC Computers
- ☐ Bachman, Jeff
- ☐ Bal, Harwinder
- ☐ Bangar, Avinesh

Save Delete

Figure 76: Editing an Existing Project

Assigning Contacts to a Project or Task

Multiple contacts can be assigned to a project or task. Ensure that one or more contacts have been entered using the Contact Manager. Click the checkbox beside a contact under *Available Contacts* to assign the contact to the project (or task). The list of assigned contacts will automatically update with the change.

Edit Project: Tune Linux Server

Project Name: Tune Linux Server

Start Date: 2006-02-24

Planned Completion Date: 2006-02-24

Actual Completion Date: 0000-00-00

Total Budget: N/A

Priority: Normal

Status: On Hold

Notes:

Resource Type: Contacts

Assigned Contacts: No Assigned Contacts.

Available Contacts:

- ☐ Al, Gill
- ☐ Arney, Nathanael
- ☐ ATIC Computers
- ☐ Bachman, Jeff
- ☐ Bal, Harwinder
- ☐ Bangar, Avinesh

Save Delete

Figure 77: Assigning Contacts to a Project or Task

Contacts can be unassigned in the same manner, by clicking the checkbox beside each contact. The contact will be added to the list of available contacts automatically.

Assigning Resources to a Project or Task

Multiple resources can be assigned to a project or task. Ensure that *Equipment* is selected in the **Resource Type** drop-down menu.

Under **New Resource**, specify the name of the resource and also the number of hours it is required. Click **Add** to assign the resource to the project or task.

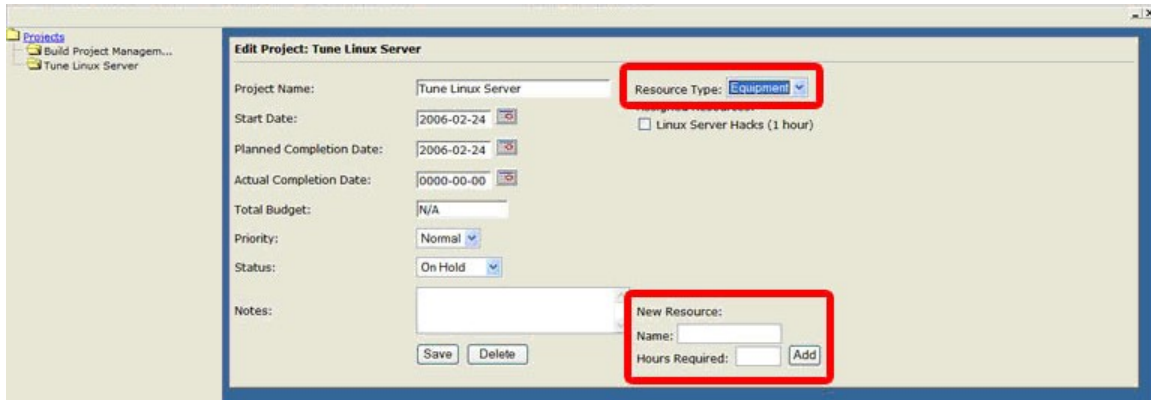


Figure 78: Assigning Resources to a Project or Task

Resources can be deleted in the same manner, by clicking the checkbox beside each resource.

Adding or Viewing a Task Log

A task log can be added to a project or a task. Task logs help determine how many hours were spent on an aspect of a project and also the contact involved. Click on a project or task and select **Add / View Task Log** from the context menu in the left pane.

To enter a new task log, select the date using the pop-up calendar, enter the number of hours, a short summary of the work that was done and optionally select the assigned contact that performed the work. Finally, click **Add**.

Date	Hours	Summary	Contact
2006-02-24	1	Apache occupies 25% less memory. MySQL is 10% faster.	Myself

Delete Date Hours Summary Contact

No Task Logs Entered.

Figure 79: Entering a Task Log

Once task logs have been entered, they can be deleted by clicking the checkbox under the **Delete** column.

WORKING WITH NOTES


The **Notes Manager** allows you to store notes about whatever you want. A note may be a memo, list, or practically anything else. To create, edit, delete, or share a note, click the **Notes** icon . The **Notes Manager** window appears.



Figure 80: Notes Manager Window

The **Notes** window displays a list of notes and the dates they were created or last modified. The notes are color-coded according to the Focus Area you have associated them with. Notes are also synchronized with the *Palm Memo Pad*.

- **To manage your notes:**
 - Click the **Notes** icon. The **Notes Manager** window appears.

Viewing Notes

You can view a specific note in the **Notes Manager**. To do so, click the text of the note you want to read. The **Note Content** window appears.

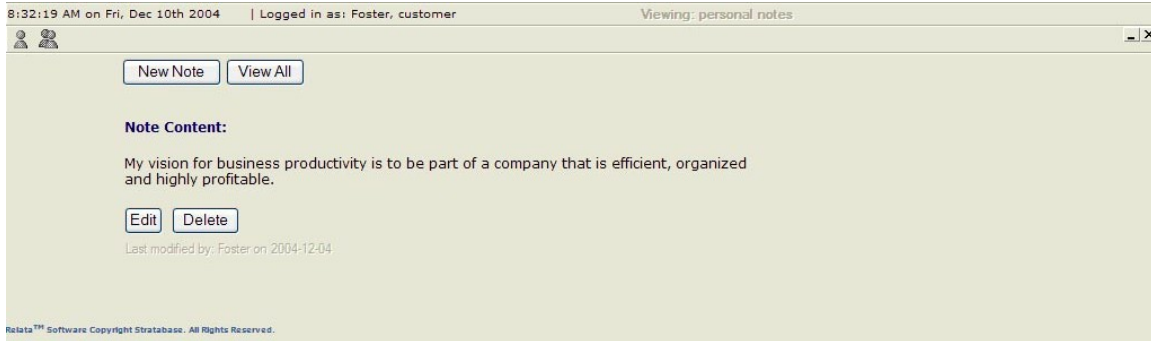


Figure 81: Note Content Window

The **Note Content** window displays the note in its entirety. You can add a note, edit this note, or delete this note or share this note with your team(s).

- **To manage your notes:**
 1. Click the **Notes** icon. The **Notes Manager** window appears.
 2. Click the note you want to review. The **Note Content** window appears.

Adding Notes

You can add a note to the **Note Manager**. To do so, click **New Note**. The **Add Note** window appears.

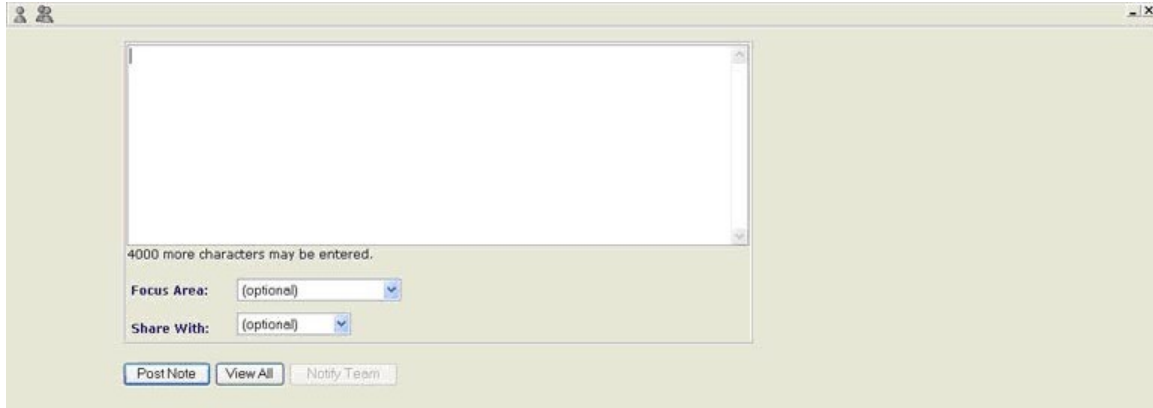


Figure 82: Add Note Window

Each note may be up to 4,000 characters in length. Type the note content in the field. Next, select the Focus Area you want to assign this note to (optional). The Focus Area means the note pertains to that specific topic, such as *Business Productivity*. In the *Share With* field, select a team with whom you want to share this note (optional). When you have finished entering the information for this note, click **Post Note**. The new note is listed in the **Notes Manager** window.

➤ **To add a note:**

1. Click the **Notes** icon. The **Notes Manager** window appears.
2. Click **New Note**. The **Add Note** window appears.
3. Type the text for this note.
4. Click the DOWN ARROW in the *Focus Area* field and select the Focus Area for this note (optional).
5. In the *Share With* drop-down, select the team with whom you want to share this note (optional).
6. Click **Post Note**.

Editing Notes

You can edit a note in the **Notes Manager**. To edit a note, click **Edit** next to the note you want to change. The **Edit Note** window appears.



Figure 83: Edit Note Window

Make the changes to the note as required. When you have finished editing the note, click **Post Changes**.

- **To edit a note:**
 1. Click the **Notes** icon. The **Notes Manager** window appears.
 2. Click **Edit** adjacent to the note you want to modify. The **Edit Note** window appears.
 3. Change the information for the note.
 4. Click **Post Changes**.

Deleting Notes

You can delete a note you no longer need. To delete a note, click **Delete** next to the note you want to remove. You are asked to confirm the delete request.

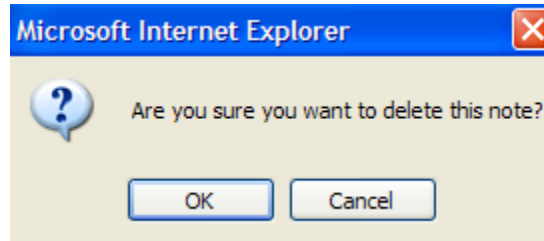



Figure 84: Confirm Delete Request

Click **OK** to delete the specified note or **Cancel** to return to the **Note Manager** window.

- **To delete a note:**
 1. Click the **Notes** icon. The **Notes Manager** window appears.
 2. Click **Delete** adjacent to the note you want to delete. The **Confirm Delete Request** window appears.
 3. Click **OK**.

GENERATING STATISTICS AND REPORTS

You can view statistics and generate reports using **Stats and Reports**. To do so, click the **Stats and Reports** icon  on the **Main** window. The **Statistics** window appears.

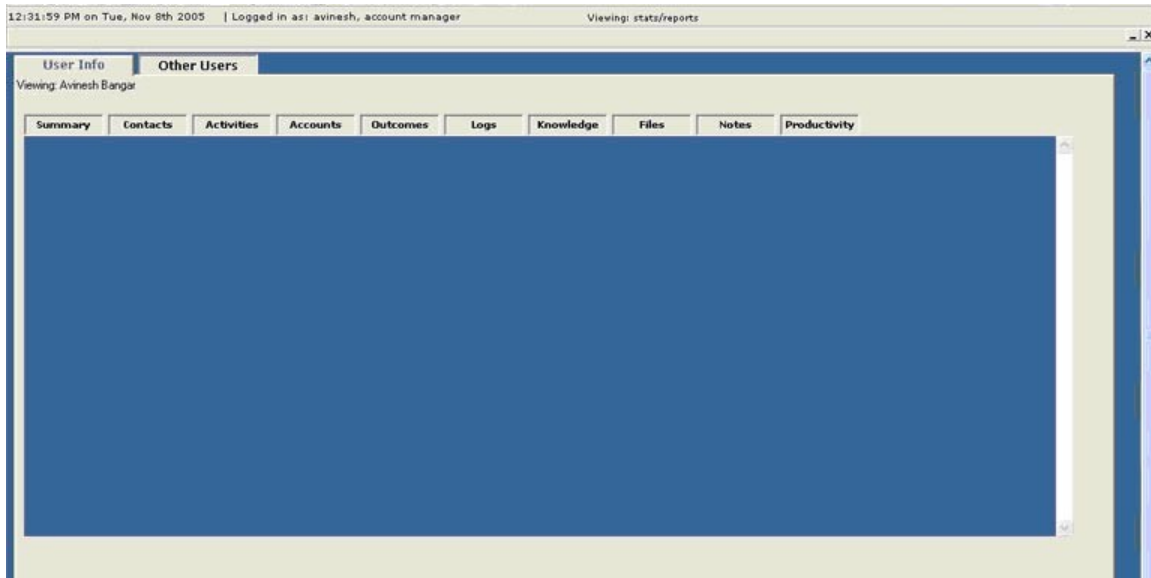


Figure 85: Statistics Window

Using the **Statistics** window, you can view statistics about yourself or other users (if you are the Account Manager for your **SleekOffice** account). To view your personal statistics, ensure the **User Info** tab is selected.

To view statistics about another user, click the **Other Users** tab. The **Other Users** window appears.

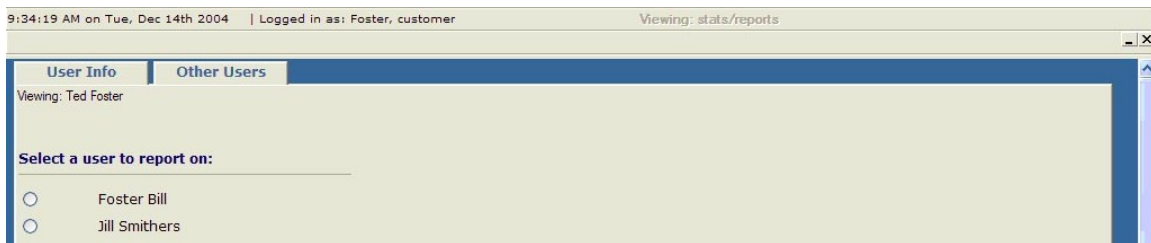


Figure 86: Other Users Window

The **Other Users** window lists all users associated with your **SleekOffice** account, if you are the Account Manager. Click the user you would like to view statistics for.

- **To generate statistics and reports:**
 1. Click the **Stats and Reports** icon. The **Statistics** window appears.
 2. To view your personal statistics, click the **User Info** tab.
 3. To view statistics about another user, click the **Other Users** tab. The **Other Users** window appears. Select the user's name.

Viewing a Statistics Summary

You can view a summary of various statistics. To do so, click the **Summary** tab. The **Summary** window appears.

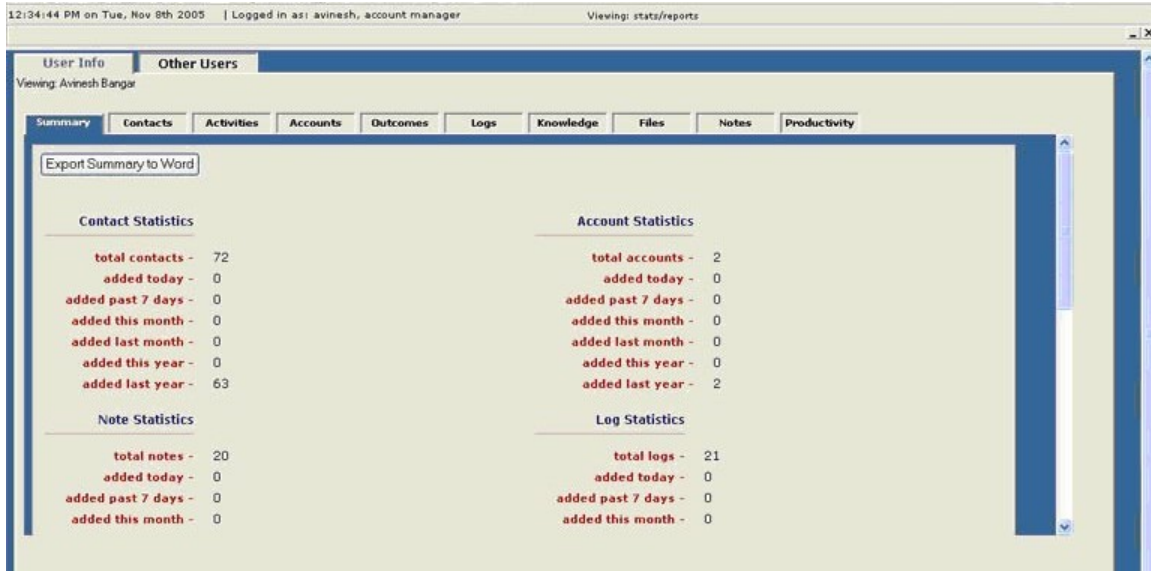


Figure 87: Summary Window

The **Summary** window displays statistics about your contacts, activities, accounts, outcomes, logs, documents, files and notes.

- **To view a summary of user information:**
 1. Click the **Stats and Reports** icon. The **Statistics** window appears.
 2. Click the **Summary** tab. The **Summary** window appears.

Viewing Contacts

You can view the contacts associated with your user account. To view your contacts, click the **Contacts** tab on the **Statistics** window. The **Contacts** window appears.



Figure 88: Contacts Window

You can click a contact's name to see his information and the accounts related to that user, if any.

- **To view contacts:**
 1. Click the **Stats and Reports** icon. The **Statistics** window appears.
 2. Click the **Contacts** tab. The **Contacts** window appears.
 3. Click the contact's name.

Viewing Activities

You can see a list of all your activities. To view your activities, click the **Activities** tab on the **Statistics** window. The **Activities** window appears.



Figure 89: Activities Window

For each activity, the **Activities** window displays the activity's description, type, and date.

You can click the DOWN ARROW in the *Display* field to view all activities, open activities, or closed activities.

➤ **To view activities:**

1. Click the **Stats and Reports** icon. The **Statistics** window appears.
2. Click the **Activities** tab. The **Activities** window appears.
3. Click the DOWN ARROW in the *Display* field to view all activities, open activities, or closed activities.

Viewing Accounts

You can view accounts. To do so, click the **Accounts** tab on the **Statistics** window. The **Accounts** window appears.

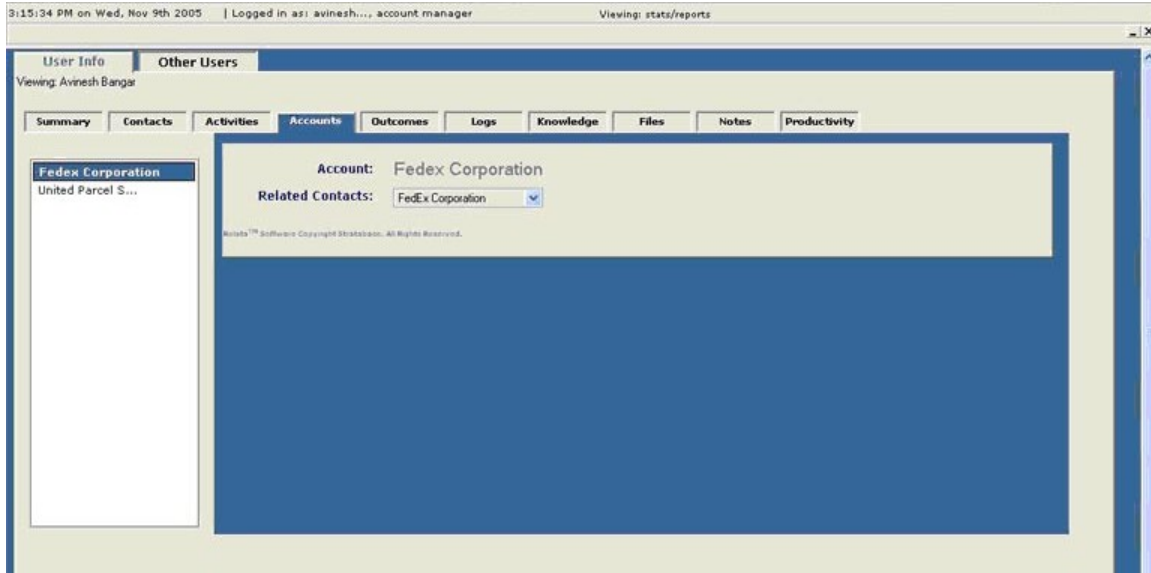


Figure 90: Accounts Window

For each account, the **Accounts** window displays the account's name and related contacts. You can click the DOWN ARROW in the *Related Contacts* field to see which contacts are associated with the account.

- **To view accounts:**
1. Click the **Stats and Reports** icon. The **Statistics** window appears.
 2. Click the **Accounts** tab. The **Accounts** window appears.
 3. Click the DOWN ARROW in the *Related Contacts* field to see the contacts associated with the account.

Viewing Outcomes

You can see the outcomes you have created. To see the outcomes, click the **Outcomes** tab on the **Statistics** window. The **Outcomes** window appears.

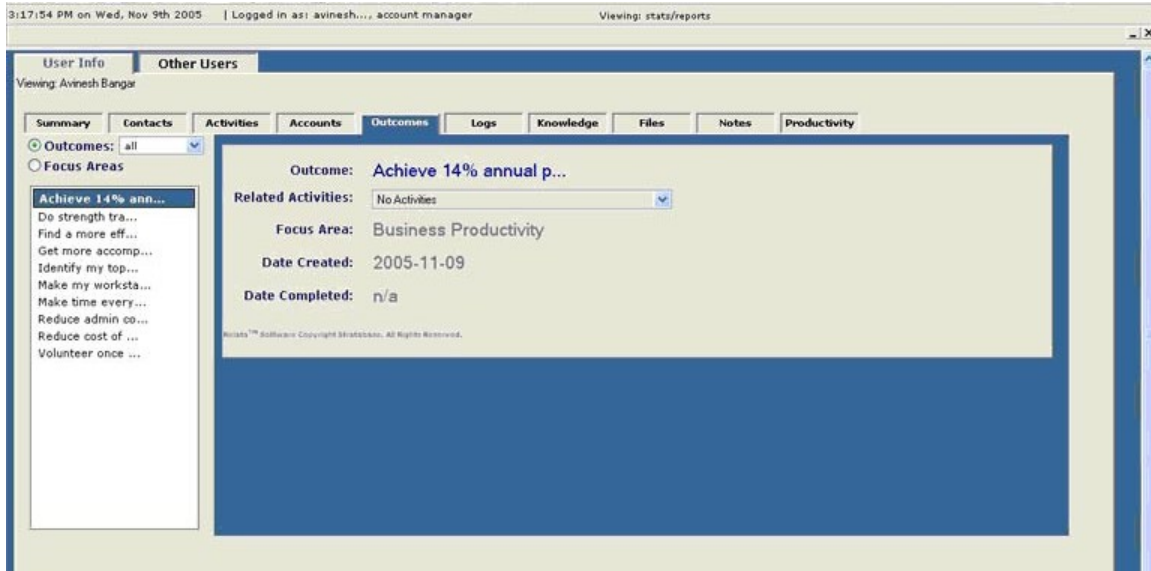


Figure 91: Outcomes Window

The **Outcomes** window displays the outcome's title, related activities, the date the outcome was created, and the date the outcome was completed, if applicable.

➤ **To view outcomes:**

1. Click the **Stats and Reports** icon. The **Statistics** window appears.
2. Click the **Outcomes** tab. The **Outcomes** window appears.

Viewing Focus Areas

You can see the focus areas you have created. To see the focus areas, click the **Outcomes** tab on the **Statistics** window. The **Outcomes** window appears. Click the circle besides **Focus Areas**.



Figure 92: Focus Areas Window

The **Outcomes** window displays the focus area, related outcome, and the date the focus area was created.

➤ **To view focus areas:**

1. Click the **Stats and Reports** icon. The **Statistics** window appears.
2. Click the **Outcomes** tab. The **Outcomes** window appears.
3. Click the circle besides **Focus Areas**.

Viewing Logs

You can see the logs you have created. To see the logs, click the **Logs** tab on the **Statistics** window. The **Logs** window appears.



Figure 93: Logs Window

The **Logs** window displays the log, the date the log was created, and the date it was last modified.

➤ **To view logs:**

1. Click the **Stats and Reports** icon. The **Statistics** window appears.
2. Click the **Logs** tab. The **Logs** window appears.

Viewing Documents

You can see the documents you have created. To see the documents, click the **Knowledge** tab on the **Statistics** window. The **Knowledge** window appears.



Figure 94: Knowledge (Documents) Window

The **Knowledge** window displays the document title and the date the document was created.

➤ **To view documents:**

1. Click the **Stats and Reports** icon. The **Statistics** window appears.
2. Click the **Knowledge** tab. The **Knowledge** window appears.

Viewing Files

You can see the files you have uploaded. To see the files, click the **Files** tab on the **Statistics** window. The **Files** window appears.



Figure 95: Files Window

The **Files** window displays the filename, the date the file was uploaded, and the date the file was last modified.

➤ **To view files:**

1. Click the **Stats and Reports** icon. The **Statistics** window appears.
2. Click the **Files** tab. The **Files** window appears.

Viewing Notes

You can see the notes you have created. To see the notes, click the **Notes** tab on the **Statistics** window. The **Notes** window appears.



Figure 96: Notes Window

The **Notes** window displays a preview of the note, the date it was created, and the date it was modified.

➤ **To view notes:**

1. Click the **Stats and Reports** icon. The **Statistics** window appears.
2. Click the **Notes** tab. The **Notes** window appears.

Viewing Projects

You can see the projects you have created. To see the projects, click the **Projects** tab on the **Statistics** window. The **Projects** window appears.

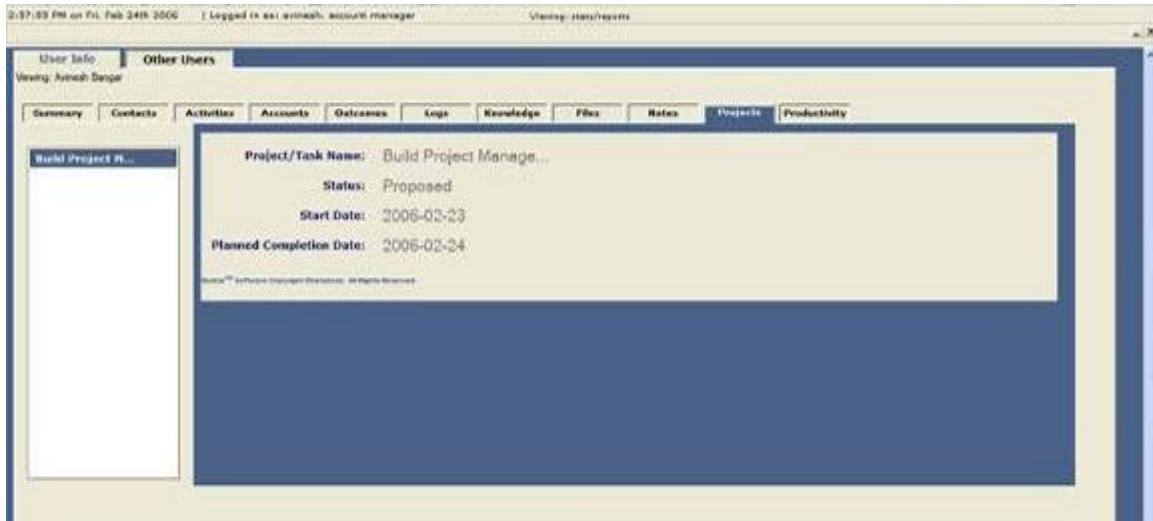


Figure 97: Projects Window

The **Projects** window displays the project or task name, the status, the date it was supposed to start and the date it was supposed to be completed.

- **To view projects:**
 1. Click the **Stats and Reports** icon. The **Statistics** window appears.
 2. Click the **Projects** tab. The **Projects** window appears.

Viewing Productivity

You can view your productivity statistics. To do so, click the **Productivity** tab on the **Statistics** window. The **Productivity** window appears.

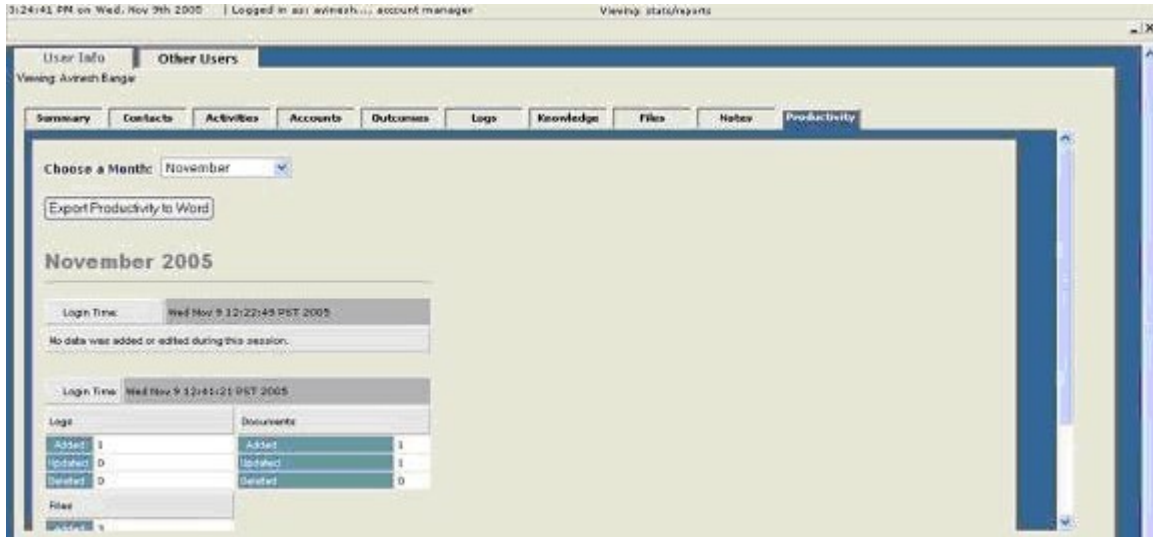


Figure 98: Productivity Window

To view your productivity statistics, click the DOWN ARROW in the *Choose a Month* field and select a target month. The productivity statistics for a month can also be exported to a Word document by clicking **Export Productivity to Word**.

The **Productivity** window lists the times you logged in to **SleekOffice** and the activities you performed.

- **To view productivity statistics:**
 1. Click the **Stats and Reports** icon. The **Statistics** window appears.
 2. Click the **Productivity** tab. The **Productivity** window appears.
 3. To view statistics for a specific month, click the DOWN ARROW and select the month.

CONFIGURING SLEEKOFFICE WITH THE SETTINGS MANAGER

You can define groups, add extra fields, create teams, update login settings, edit account information, and set team blocking parameters using the **Settings Manager**. To do so, click the

Settings Manager icon . The **Settings Manager** window appears.



The screenshot shows the Settings Manager window with the following details:

- Top bar: 11:04:06 AM on Fri, Dec 2nd 2005 | Logged in as: avinesh, account manager | Viewing: personal settings
- Tabs: Groups, Extra Fields, Teams, Login Settings, Account Info (selected), Blocking
- Relata Username: avinesh
- Account Manager: Avinesh Bangar
- Buttons: Account History, User List
- User List Table:

#	Login	First Name	Last Name	Email	Password Change	Assign As Account Manager	Delete User
1	avinesh	Avinesh	Bangar	avinesh@statabase.com	<input type="text"/> Save	Assign	Delete
2	bozo	Avinesh	Bangar	avineshb@gmail.com	<input type="text"/> Save	Assign	Delete
- Bottom: Number of users to add:

Figure 99: Settings Manager Window

The **Settings Manager** window displays your account information as the default view. The window displays your username, the name of your account manager (either yourself or the **SleekOffice** Account Manager), and the number of users supported by your **SleekOffice** license. To add support for more users, your **SleekOffice** Account Manager can upgrade your **SleekOffice** license by going to the **SleekOffice** web site.

- **To configure your SleekOffice settings:**
 - Click the **Settings Manager** icon. The **Settings Manager** window appears.

Assigning Users to Groups

You can assign your contacts to groups so you can send out group emails to those contacts. To assign contacts to a group, click the **Groups** tab on the **Settings Manager** window. You assign your contacts to groups so you can send group email to them. The **Groups** window appears.

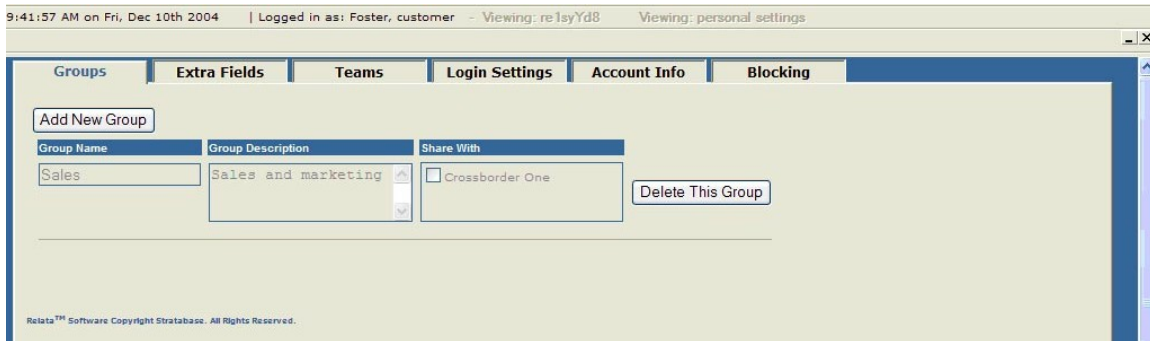


Figure 100: Groups Window

The **Groups** window displays the list of groups you have defined in **SleekOffice**. You can add, edit, or delete groups as needed.

- **To configure your groups:**
 1. Click the **Settings Manager** icon. The **Settings Manager** window appears.
 2. Click the **Groups** tab. The **Groups** window appears.

Adding a Group

To add a group to **SleekOffice**, click **Add New Group**. The **Groups** window is refreshed and displays fields for the new group.

Figure 101: Add Group Window

Type a name for this new group in the *Add Group Name* field. Next, type a description for the group. In the *Share With* field, select the team(s) this group will be shared with. Finally, click **Add This Group** to create the group.

- **To add a group:**
 1. Click the **Settings Manager** icon. The **Settings Manager** window appears.
 2. Click the **Groups** tab. The **Groups** window appears.
 3. Click **Add New Group**. The **Add Group** window appears.
 4. Type a name for the group in the *Add Group Name* field.
 5. In the *Add Group Description* field, type a description for this group.
 6. In the *Share With* field, select the team(s) this group will be shared with.
 7. Click **Add This Group**.

Deleting a Group

You can remove a group from **SleekOffice**. To remove a group, click **Delete** next to the group you want to delete. The **Delete Confirmation** window appears.

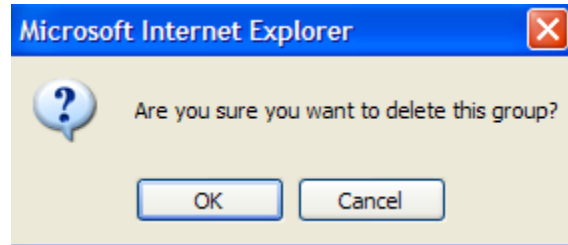


Figure 102: Delete Group Confirmation Window

Click **OK** to permanently delete this group, or **Cancel** to return to the Group window.

- **To delete a group:**
 1. Click the **Settings Manager** icon. The **Settings Manager** window appears.
 2. Click the **Groups** tab. The **Groups** window appears.
 3. Click Delete adjacent to the group you want to delete. The **Delete Group Confirmation** window appears.
 4. Click **OK**.

Working with Extra Fields

You can define extra fields for your various contacts. To do so, click the **Extra Fields** tab in the **Settings Manager** window. The **Extra Fields** window appears.

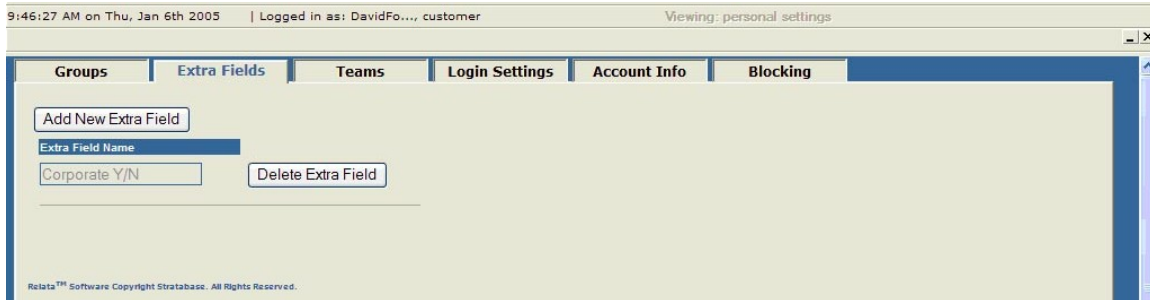


Figure 103: Extra Fields Window

Adding Extra Fields

To add an extra field, click **Add New Extra Field**. The **Add Extra Field** window appears.

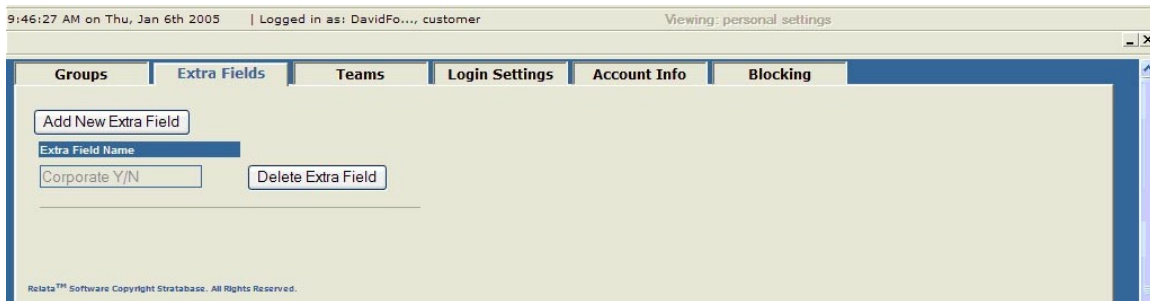


Figure 104: Add Extra Field Window

You can name the field anything you want. Click the *Add Extra Field Name* field and type a name for the field. When you have finished typing the name, click **Add Extra Field**.

➤ **To add extra fields:**

1. Click the **Settings Manager** icon. The **Settings Manager** window appears.
2. Click the **Extra Fields** tab. The **Extra Fields** window appears.
3. Click **Add New Extra Field**. The **Add Extra Field** window appears.
4. In the *Add Extra Field Name* field, type a name for the field.
5. Click **Add Extra Field**.

Deleting Extra Fields

If you previously created an extra field and no longer need that field, click **Delete Extra Field** next to the field you want to remove. The **Delete Extra Field Confirmation** window appears.

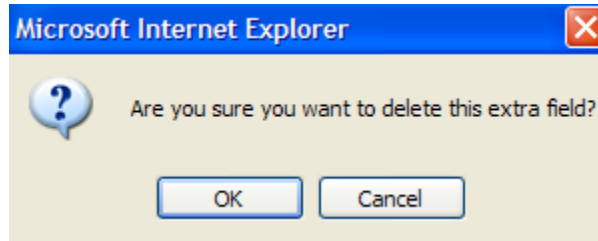


Figure 105: Delete Extra Field Confirmation Window

Click **OK** to delete the field. The extra field is immediately removed.

- **To delete extra fields:**
 1. Click the **Settings Manager** icon. The **Settings Manager** window appears.
 2. Click the **Extra Fields** tab. The **Extra Fields** window appears.
 3. Click **Delete Extra Field** adjacent to the field you want to delete. The **Delete Extra Field** window appears.
 4. Click **OK**.

Working with Teams of Users

You can organize **SleekOffice** users into teams. A team may have one or more users. To create a team, click the **Teams** icon. The **Teams** window appears.

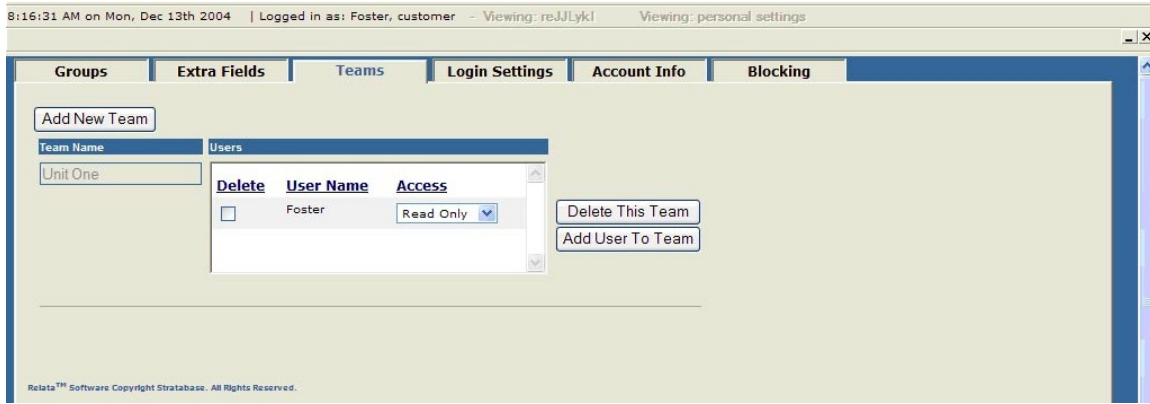


Figure 106: Teams Window

The **Teams** window lists each team you have created and the users assigned to that team.

- **To manage your teams:**
 1. Click the **Settings Manager** icon. The **Settings Manager** window appears.
 2. Click the **Teams** tab. The **Teams** window appears.

Adding a Team

To create a team, click **Add New Team**. The **Add New Team** window appears.

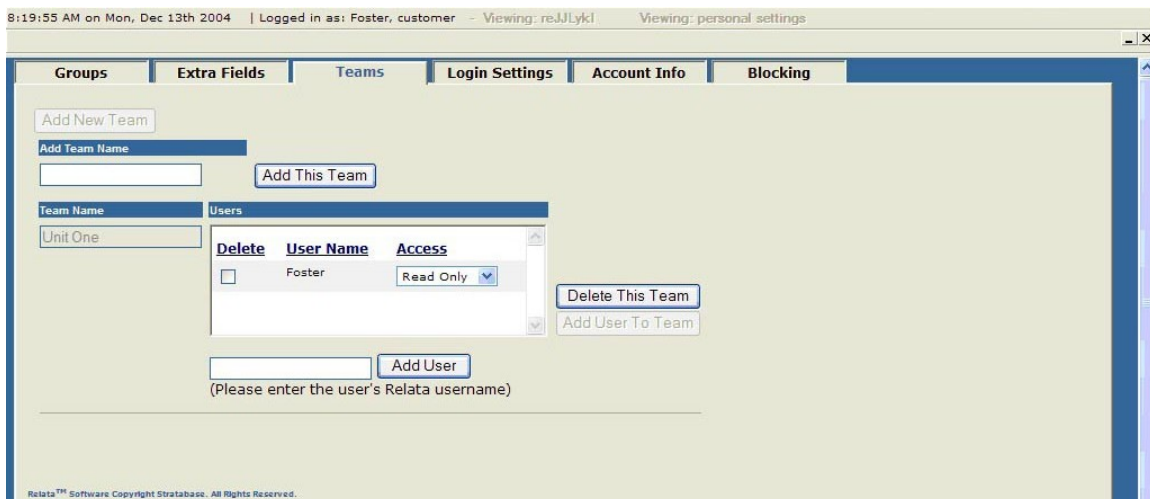


Figure 107: Add New Team Window

Type a name for the new team and click **Add This Team**. The team's name appears in the window.

- **To create a team:**
 1. Click the **Settings Manager** icon. The **Settings Manager** window appears.
 2. Click the **Teams** tab. The **Teams** window appears.
 3. Click **Add New Team**. The **Add New Team** window appears.
 4. In the *Add Team Name* field, type a name for this team.
 5. Click **Add This Team**.

Deleting Teams

If you don't need a team you have previously defined, you can remove it. To delete a team, click **Delete This Team**. The **Delete Team Confirmation** window appears.

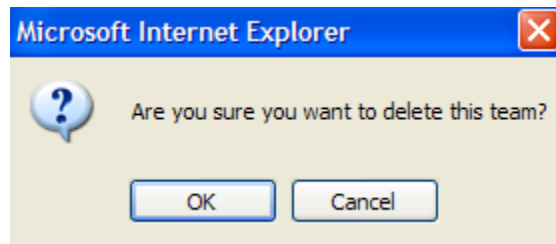


Figure 108: Delete Team Confirmation Window

Click **OK** to delete this team. The team information is immediately deleted.

- **To delete a team:**
 1. Click the **Settings Manager** icon. The **Settings Manager** window appears.
 2. Click the **Teams** tab. The **Teams** window appears.
 3. Click **Delete This Team**. The **Delete Team Confirmation** window appears.
 4. Click **OK**.

Adding Users to a Team

You can add any **SleekOffice** user to a team. As long as the person has a **SleekOffice** username, you can add them to your team, even if they aren't associated with your **SleekOffice** account. To add a user, click **Add User To Team**. The **Add User to Team** window appears.

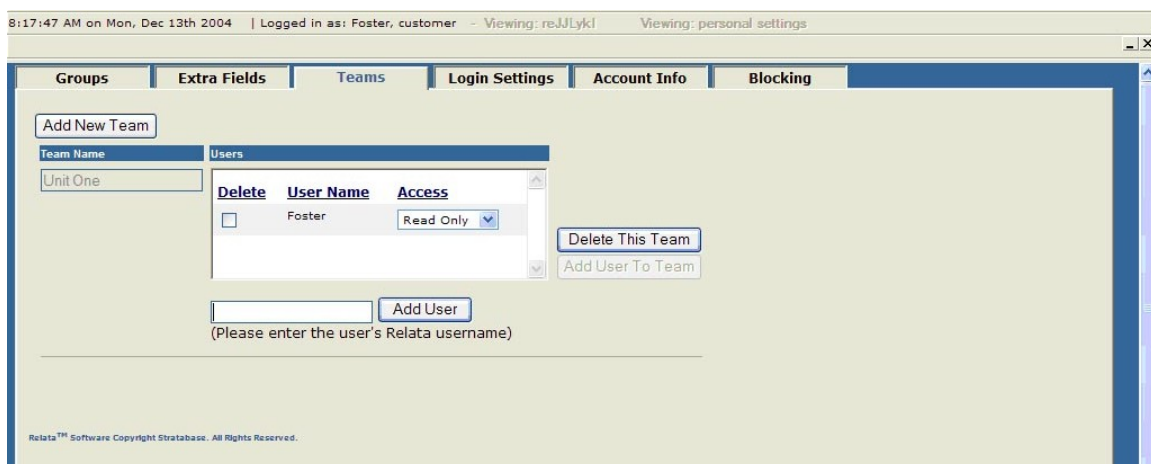


Figure 109: Add User to Team Window

Type the user's name in the field and click **Add User**. The team is now updated to include this user.

- **To add a user to a team:**
 1. Click the **Settings Manager** icon. The **Settings Manager** window appears.
 2. Click the **Teams** tab. The **Teams** window appears.
 3. Click **Add User To Team**. The **Add User to Team** window appears.
 4. In the *Add User* field, type the name of the user you want to add.
 5. Click **Add User**.

Deleting Users from a Team

If you want to remove a user from a team, select the *Delete* check box next to the user's name. The **Delete User from Team Confirmation** window appears.

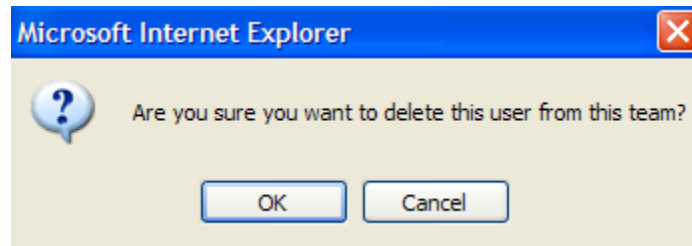


Figure 110: Delete User from Team Confirmation Window

Click **OK** to permanently remove this user from this team. The user's information is not deleted – they are just removed from this team.

- **To delete a user from a team:**
 1. Click the **Stats and Reports** icon. The **Statistics** window appears.
 2. Click the **Teams** tab. The **Teams** window appears.
 3. Select the *Delete* check box next to the user's name that you want to delete. The **Delete User from Team Confirmation** window appears.
 4. Click **OK**.

Modifying a User's Read/Write Access

Each user you add to a team can have read and write or read only access to shared access in **SleekOffice**. Click the DOWN ARROW in the *Access* field and select *Read/Write* or *Read Only* to assign that level to the user.

- **To modify a user's read/write access:**
 1. Click the **Settings Manager** icon. The **Settings Manager** window appears.
 2. Click the **Teams** tab. The **Teams** window appears.
 3. Click the DOWN ARROW in the *Access* field and select *Read/Write* or *Read Only*.

Changing Login Settings

To change your login settings, click the **Login Settings** tab on the **Settings Manager** window. The **Login Settings** window appears.

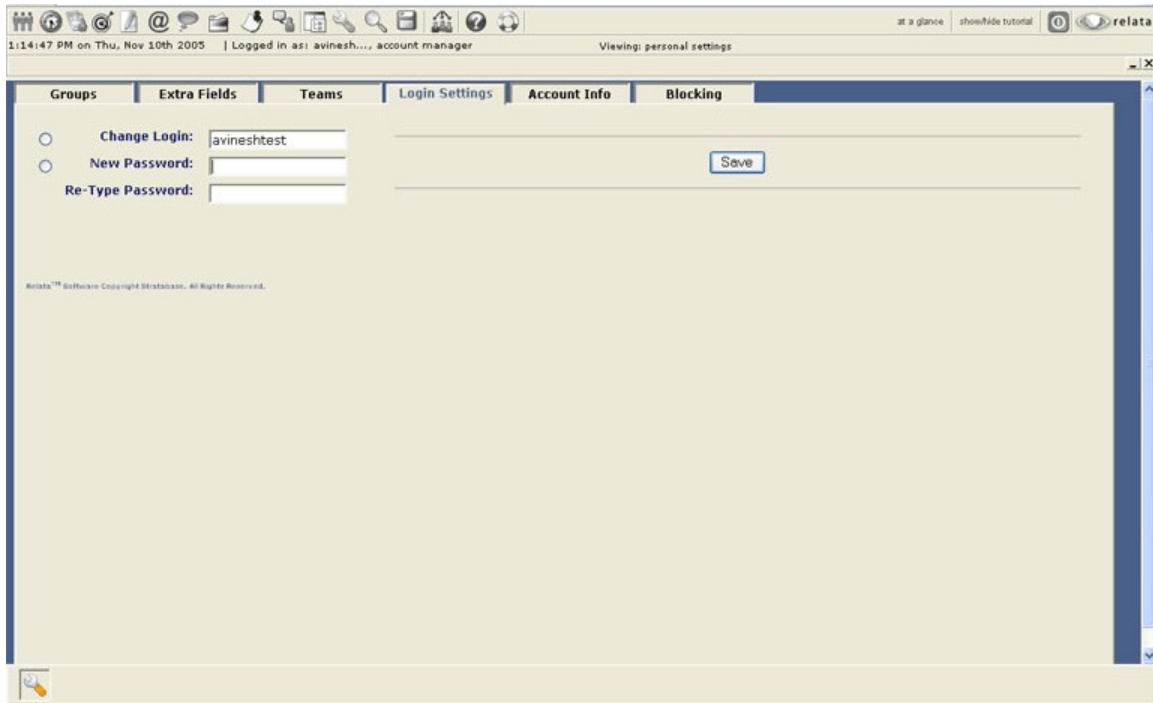
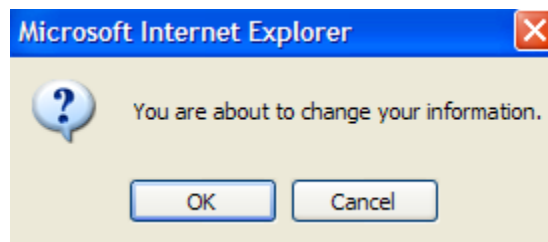


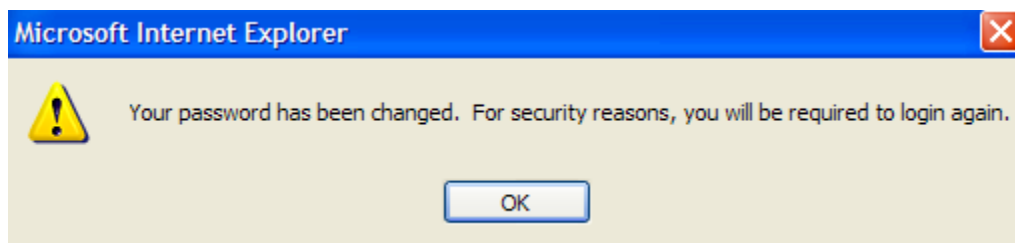
Figure 111: Login Settings Window

To change your username, click the *Change Login* field and type your new **SleekOffice** username. When you click **Save**, you'll be asked to confirm the new name.



Click **OK**. You will then need to log out of **SleekOffice** and log back in with your new username.

To assign a new password, click the *New Password* field and type the new password. Confirm the password by typing it a second time in the *Re-Type Password* field. Click **Save**.



When you click **OK**, your password is updated. Again, you will need to log out of **SleekOffice** and log back in with your new password.

➤ **To change your username:**

1. Click the **Settings Manager** icon. The **Settings Manager** window appears.
2. Click the **Login Settings** tab. The **Login Settings** window appears.
3. Click the *Login* field and type your new username.
4. Click **Save**.
5. Click **OK**.

➤ **To change your login settings:**

1. Click the **Settings Manager** icon. The **Settings Manager** window appears.
2. Click the **Login Settings** tab. The **Login Settings** window appears.
3. Click the *New Password* field and type a new password.
4. Type the password a second time in the *Re-Type Password* field.
5. Click **Save**.
6. Click **OK**.

Adding a New User

To add a new **SleekOffice** user to your account, click on the Number of users to add drop-down menu and select the number of users to add. You will then be able to specify the new user's first name, last name and e-mail address. You can optionally create sample data for the new user. Click **Save** to create the new user. The new user will receive their **SleekOffice** login instructions (including a temporary password) via e-mail.

Figure 112: Create New User Window

If you exceed the maximum number of users supported by your license, then you will be presented with an error dialog. You may purchase an upgrade to your existing **SleekOffice** license by contacting **SleekOffice Support**.

Changing a User's Password

If you are the Account Manager for your **SleekOffice** account, you can change a user's password. To do so, click the *Password Change* field for that user and type the new password you want to assign to this user. Click **Save**. The **Password Change Confirmation** window appears.

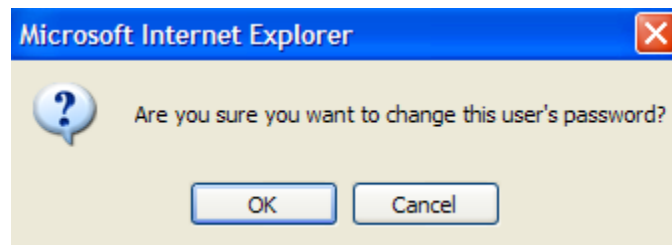


Figure 113: Password Change Confirmation Window

Click **OK** to save the new password or click **Cancel** to leave the original password as is.

- **To change a user's password:**
 1. Click the **Settings Manager** icon. The **Settings Manager** window appears.
 2. Click the **Account Info** tab. The **Account Information** window appears.
 3. In the *Password Change* field, type the new password for this user.
 4. Click **Save**. The **Password Change Confirmation** window appears.
 5. Click **OK**.

Designating a User as a SleekOffice Account Manager

A user in your account can be designated as the **SleekOffice** Account Manager. Account Managers can add and delete users from your account, and access information relating to all users in your account.

To designate a user as the **SleekOffice** Account Manager, click **Assign As Account Manager/Assign** next to the user's name. The **Assign Account Manager Warning** window appears.



Figure 114: Assign Account Manager Warning Window

Click **Continue** to make this user your Account Manager or click **Cancel** to return to the **Account Information** window.

- **To designate a user as a SleekOffice Account Manager:**
 1. Click the **Settings Manager** icon. The **Settings Manager** window appears.
 2. Click the **Account Info** tab. The **Account Information** window appears.
 3. Click **Assign As Account Manager/Assign** next to the user's name. The **Assign Account Manager Warning** window appears.
 4. Click **Continue**.

Deleting Users from Your Account

If you are the Account Manager for your **SleekOffice** account, you can delete a user from your **SleekOffice** account. To do so, click **Delete** next to the user's name in the **Account Information** window. The **Delete User Account Confirmation** window appears.

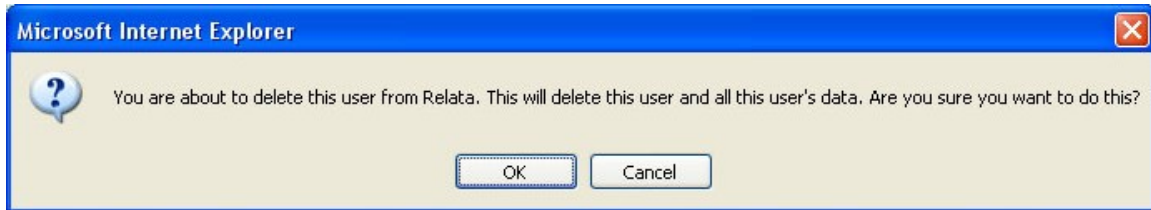


Figure 115: Delete User Account Confirmation Window

Click **OK** to permanently delete this account. All data associated with this user will be deleted from the server.

- **To delete a user from your account:**
 1. Click the **Settings Manager** icon. The **Settings Manager** window appears.
 2. Click the **Account Info** tab. The **Account Information** window appears.
 3. Click **Delete** adjacent to the user's name you want to delete. The **Delete User Account Confirmation** window appears.
 4. Click **OK**.

Viewing Your Account History

You can view a history of your account in **SleekOffice**. To do so, click **Account History**. The **Account History** window appears.

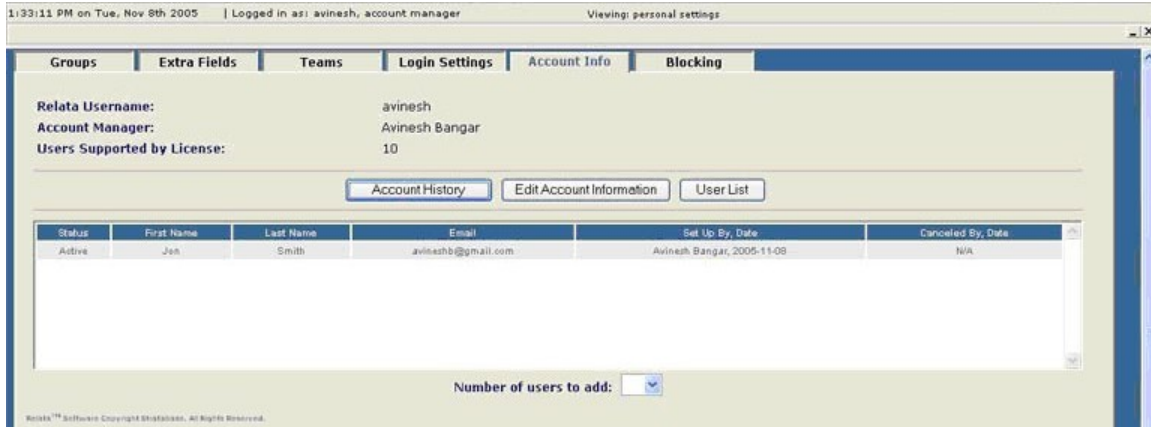


Figure 116: Account History Window

The **Account History** window lists all active and inactive users. For each user, the **Account History** window displays the user's first and last name, the user's email address, the name of the person who created this user's account, and the date the account was created.

- **To view your account settings history:**
 1. Click the **Settings Manager** icon. The **Settings Manager** window appears.
 2. Click the **Account Info** tab. The **Account Information** window appears.
 3. Click **Account History**. The **Account History** window appears.

Blocking Users

In **SleekOffice**, teams can share information. You can prevent a team from sharing its information with you. To do so, click the **Blocking** tab on the **Settings Manager** window. The **Blocking** window appears.

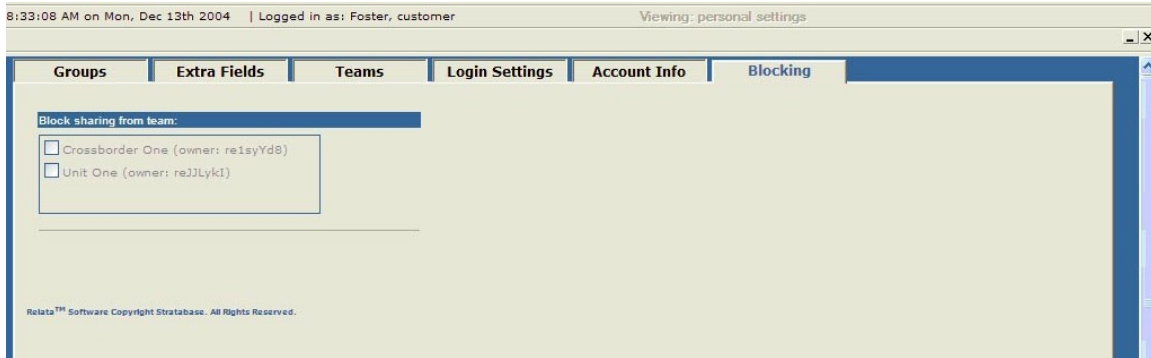


Figure 117: Blocking Window

If you want to block a team from sharing its information with you, click the check box next to the team's name.

- **To block teams from sharing information with you:**
 1. Click the **Settings Manager** icon. The **Settings Manager** window appears.
 2. Click the **Account Info** tab. The **Account Information** window appears.
 3. Click the **Blocking** tab. The **Blocking** window appears.
 4. Select the check box next to the team's name you want to block.

SEARCHING SLEEKOFFICE FOR INFORMATION

You can search for specific information in **SleekOffice**.



Figure 118: Search Field in Toolbar

When searching for information in **SleekOffice**, you type the word or phrase you want to find in the *Search* field. The search terms are case-insensitive. You can separate multiple keywords by using a space -- for example, you can search for *productivity* or just *business productivity* for a more concise search. Quotes in keywords are not supported. Then click the category you want to search within – for example, *Contacts*.

All **SleekOffice** modules are automatically searched.

The **Search Results** window displays the matching entries with the keyword(s) highlighted.

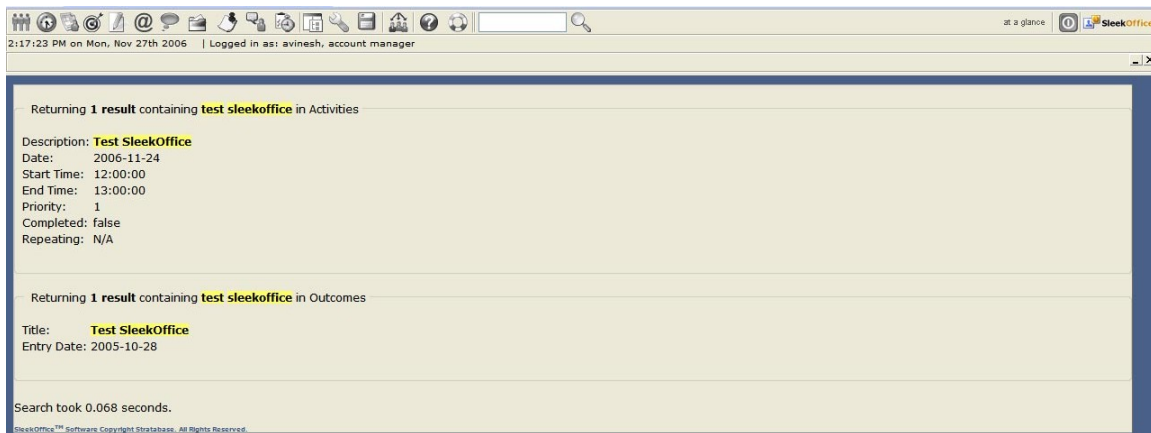



Figure 119: Search Results Window

- **To search SleekOffice for information:**
 1. Enter some text in the *Search* field in the toolbar.
 2. In the *Search* field, type the text you want to search for.
 3. Click the magnifying glass.

BACKING UP YOUR SLEEKOFFICE INFORMATION

You should periodically backup your **SleekOffice** information. To backup your information, click the **Backup** icon  on the **Main** window. The **Backup** window appears.

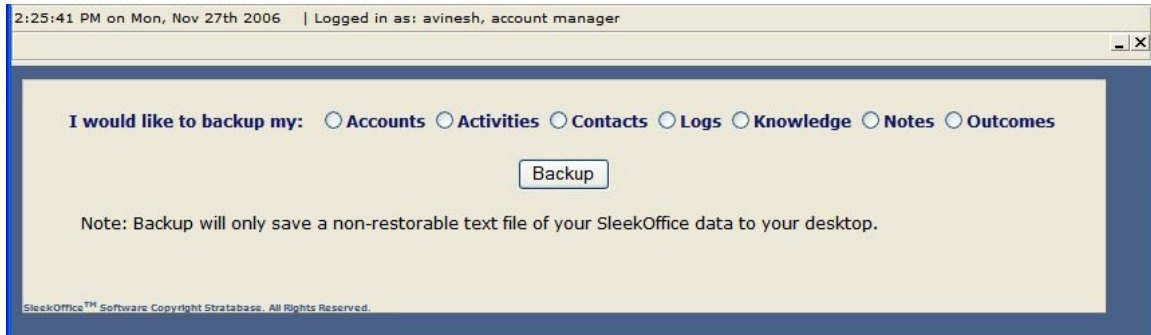


Figure 120: Backup Window

SleekOffice lets you backup your accounts, activities, contacts, logs, knowledge data, notes, and outcomes. You can only backup one of these items at a time. Click the item you want to backup and click **Backup**. The **File Download** window appears.

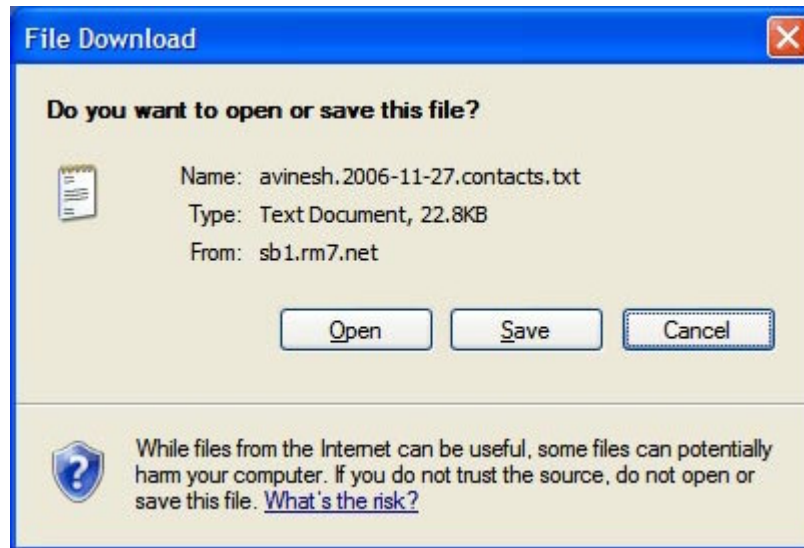


Figure 121: File Download Window

Since you are performing a backup, you'll want to click **Save** to create the backup file. The **Save As** window appears.

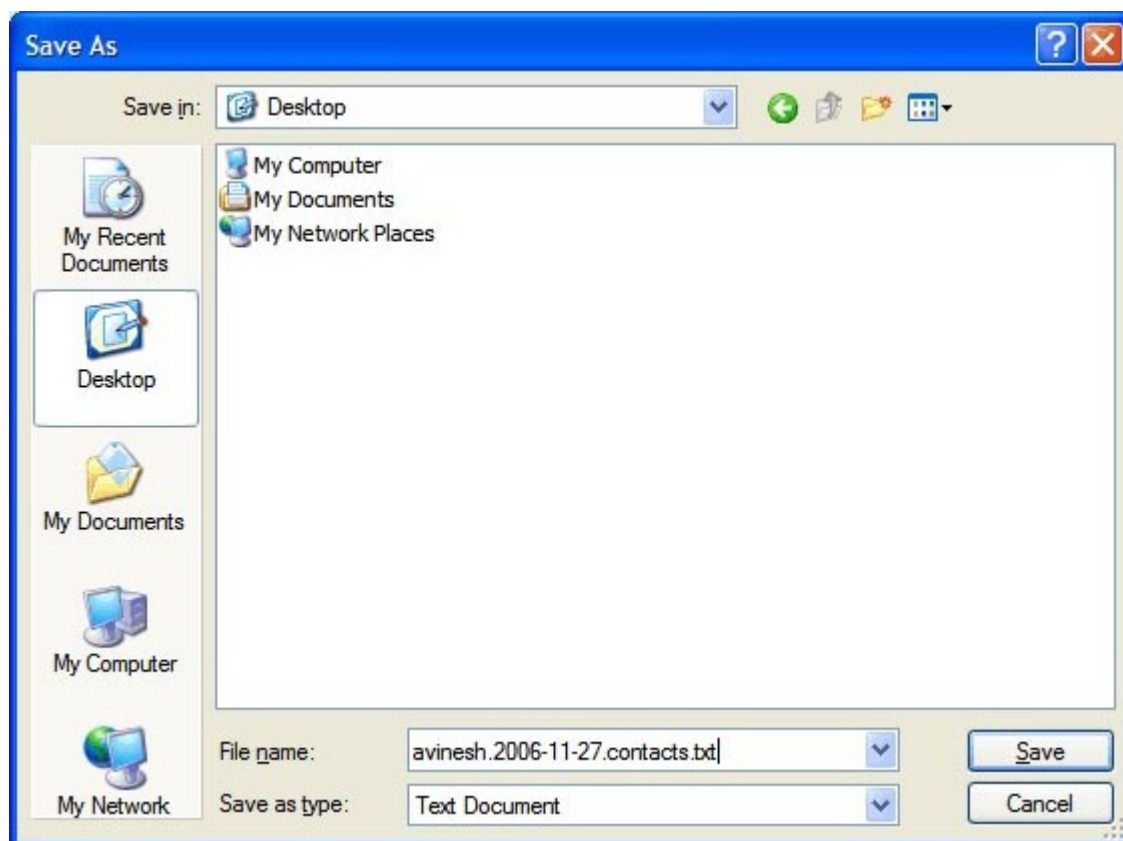



Figure 122: Save As Window

Select the folder you want to save the file to and click **Save**. When the file has been saved to your local computer, the **Download Complete** window appears.

The file you have just created can be opened using a text editor (Notepad, WordPad, Microsoft Word, and so on).

- **To backup your SleekOffice information:**
 1. Click the **Backup** icon. The **Backup** window appears.
 2. Select the item you want to backup and click **Backup**. The **File Download** window appears.
 3. Click **Save**. The **Save As** window appears.
 4. Click **Save**.

MANAGING SLEEKOFFICE USERS

You can add, edit, and delete users if you are a **SleekOffice** Account Manager. To manage the users associated with your **SleekOffice** account, click the **User Manager** icon . The **User Manager** window appears.

The **User Manager** can be minimized and you can access various **SleekOffice** modules to view a user's data (eg. productivity statistics).

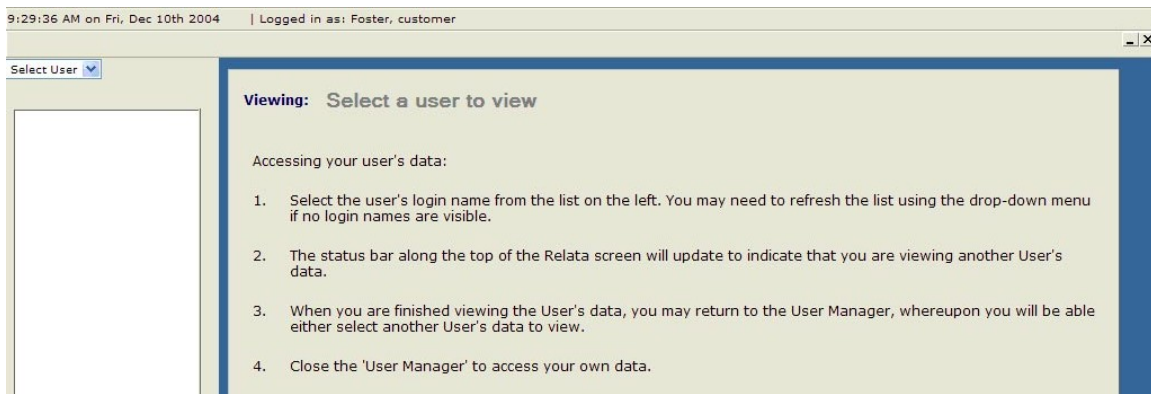


Figure 123: User Manager Window

- **To manage the users associated with your SleekOffice account:**
 - Click the **User Manager** icon. The **User Manager** window appears.
 - The **User Manager** can be minimized and you can access various **SleekOffice** modules to view a user's data (eg. productivity statistics).

SYNCHRONIZING DATA

You can synchronize your **SleekOffice** information, such as contacts, with your Palm device or Windows PocketPC device. To synchronize your data, click the **Data Synchronization** icon



on the **Main** window. The **Resync Information** window appears.

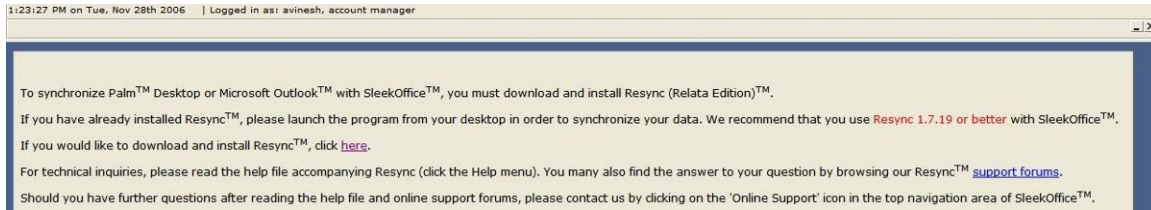


Figure 124: Resync Information Window

As explained in this window, you will first need to install the *Resync (Relata Edition)* application to your PC. Then, execute the *Resync (Relata Edition)* application when you are ready to synchronize your data.

System Requirements

Resync requires the following, in order to execute:

- Microsoft Windows 98, ME, NT, 2000, XP, or Vista
- Palm Desktop 4.01 or 4.1 (4.1.4 is not supported) or Microsoft Outlook 2000 – 2003 SP2.
- Pentium II 400 MHz or better
- 16 MB of RAM minimum
- 16 MB of free hard disk space

Launching Resync

Launch the *Resync* application by double-clicking the *Resync* icon on your desktop. *Resync* will open. In a few moments, you will be presented with the *Resync* window. *Resync* uses two-way data synchronization.

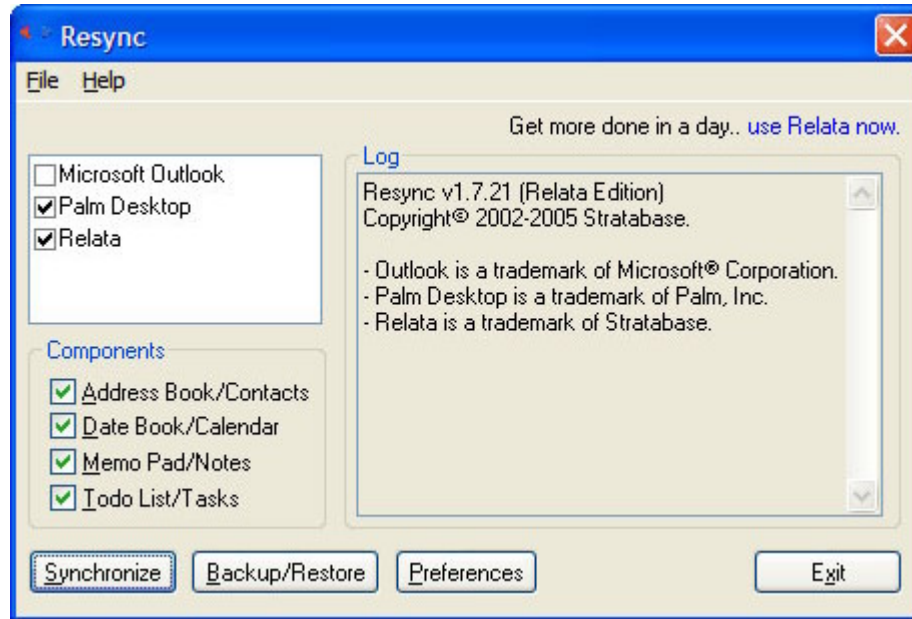


Figure 125: The Resync Window

Configuring Resync

From the *Resync* window, you can select which applications you would like to synchronize with. To synchronize Palm Desktop and SleekOffice, select *Palm Desktop* and *Relata*.

To configure the Palm Desktop plug-in, simply double-click it in the *Resync* window. Select your Palm username from the drop-down. Likewise, to configure the Microsoft Outlook plug-in, double-click it and select your Outlook profile from the drop-down menu. Changes are saved automatically when you exit *Resync*.

You can also select which components to synchronize against. The following table compares the various components.

SleekOffice Module Name	Palm Desktop	Microsoft Outlook
Contact Manager	Address Book	Contacts
Activity Manager – Calendar Items	Date Book	Calendar
Note Manager	Memo Pad	Notes
Activity Manager – To-do Items	To-do List	Tasks

Figure 126: Component Name Comparison Table

Setting the SleekOffice Preferences

Double-click the **Relata** plug-in name in **Resync**. You will be presented with the following window.

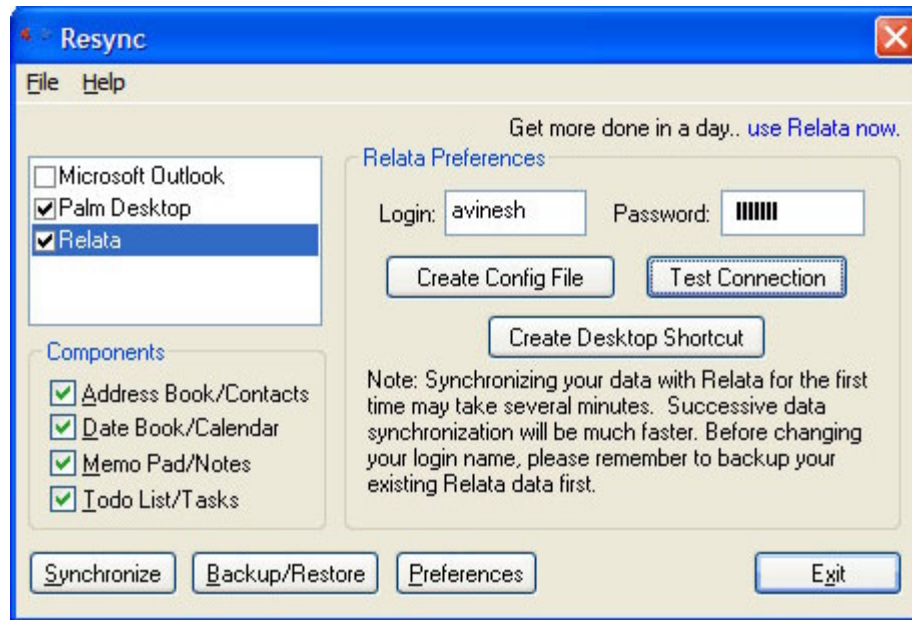


Figure 127: Relata (and SleekOffice) Preferences Window

Put your mouse cursor in the **Login** field and type in your **SleekOffice** username. Next, place the mouse cursor in **Password** field and type in your **SleekOffice** password.

Your **SleekOffice** administrator should have supplied you with a file called **Relata.dat**, which is to be stored in the **Resync plugins** folder. If you are the sole user of **SleekOffice**, then you can click **Create Config File** to create the **Relata.dat** file for you. See the *SleekOffice Installation Guide* for detailed instructions on creating **Relata.dat**.

Once **Relata.dat** has been correctly installed or created, you can click **Test Connection** to test the connection between your computer and the **SleekOffice** server. If the connection between your computer and the **SleekOffice** server is working correctly, you will be presented with the following window.

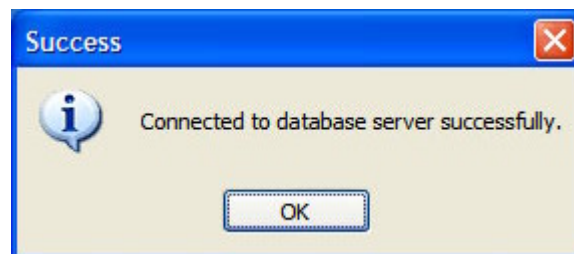


Figure 128: Connection Success Window

FREQUENTLY ASKED QUESTIONS (FAQ's)

General Questions

How much does SleekOffice cost? Can I upgrade to another version?

SleekOffice is available as a free download, with support for 10 users. You can upgrade your SleekOffice license to add additional users by going to <https://www.sleekoffice.com/>.

What are the system requirements to use SleekOffice?

SleekOffice requires the following:

- Apache 1.3.x or Apache 2.x. Internet Information Server (IIS) 6.0 or better.
- PHP 4.3.x or better.
- MySQL 3.x or 4.x. MySQL Max is recommended for corporate/enterprise users.
- ionCube loader for Linux or Windows (<http://www.ioncube.com/loaders.php>)
- eAccelerator 0.9.3 or ionCube PHP Accelerator (optional)
- phpMyAdmin for MySQL administration (optional)

User requirements:

- Internet Explorer 6.0 or better. Firefox 1.0.7 or better.
- Palm Desktop 4.1 or Microsoft Outlook 2000 – 2007 for data synchronization (optional)

For optimal use, we recommend a LAMP server – Linux, Apache, MySQL and PHP.

We recommend 10 MB of server disk space per user. If you have 100 users, you should have at least 1 GB of free disk space on your server for the SleekOffice database and user file storage.

Can I create additional users at any time?

Yes, see the *Settings Manager* module. The SleekOffice license governs the number of users that can be created. A SleekOffice license can be upgraded to support more users.

Licensing Questions

Can I install SleekOffice on more than one computer or server?

Yes, you may install SleekOffice on as many servers as you desire. However, licensed versions (more than 10 users) may only be installed on as many servers as there are licenses.

Installation Questions

I am not familiar with PHP or MySQL. Is there an easy way to install SleekOffice?

Yes, we recommend running the *SleekOffice Installation Helper*. It's located in the *install* directory of the SleekOffice archive, and is called *installhelper.php*. It will help you set up SleekOffice in minutes.

Can I run SleekOffice on a server running Windows?

Yes, as long as you meet the system requirements, you can run SleekOffice under Windows.

What are the system requirements to use SleekOffice?

SleekOffice requires the following:

- Apache 1.3.x or Apache 2.x recommended. Internet Information Server (IIS) 6.0 or better.
- PHP 4.3.0 or better.
- MySQL 4.x or 5.x.
- ionCube loaders (<http://www.ioncube.com/loaders.php> -- free)
- eAccelerator 0.9.3 or ionCube PHP Accelerator (optional)
- phpMyAdmin for MySQL administration (optional)
- 128 MB RAM minimum (256 MB or more recommended)
- 32 MB of disk space minimum (1 GB or more recommended)

User requirements:

- Internet Explorer 6.0 or better. Firefox 1.0.7 or better. 1024x768 screen resolution.
- Palm Desktop 4.1 or Microsoft Outlook 2000 – 2003 for data synchronization (optional)

We recommend allocating 10 MB of disk space per user. If you have 100 SleekOffice users, you should have at least 1 GB of free disk space on your server for the SleekOffice database and user file storage.

Support Questions

Can I get my data out if I want to discontinue using SleekOffice?

Yes, if for any reason you want to discontinue using SleekOffice, you can easily download your data through our Resync application, or through our standard *Backup* module.