JAVLN Officetech
User Manual

Contents

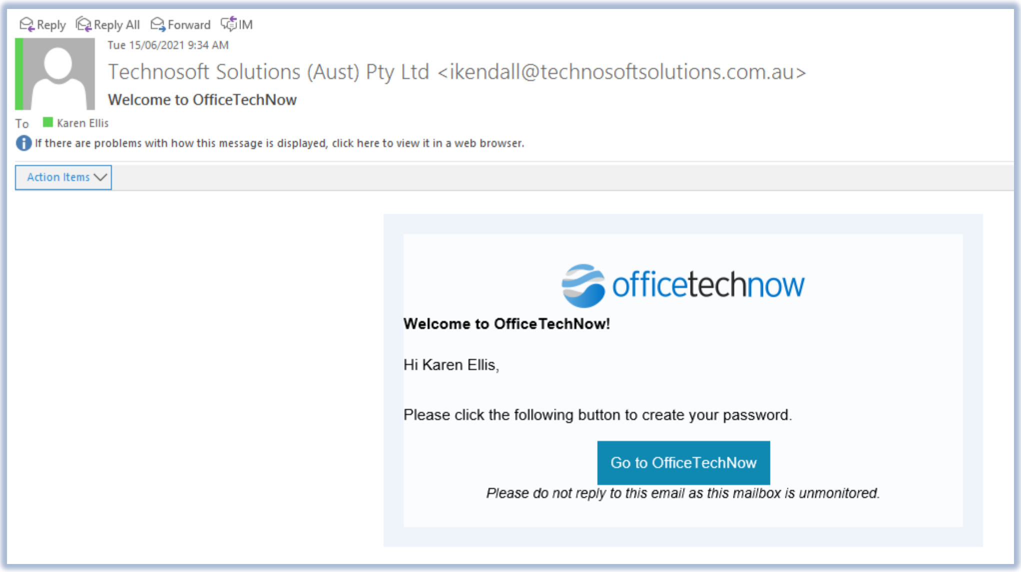
Getting Started

Login and Security

You will be sent an email from your OfficeTechNow Administrator which will contain a link to the URL and to set up your OfficeTechNow profile.

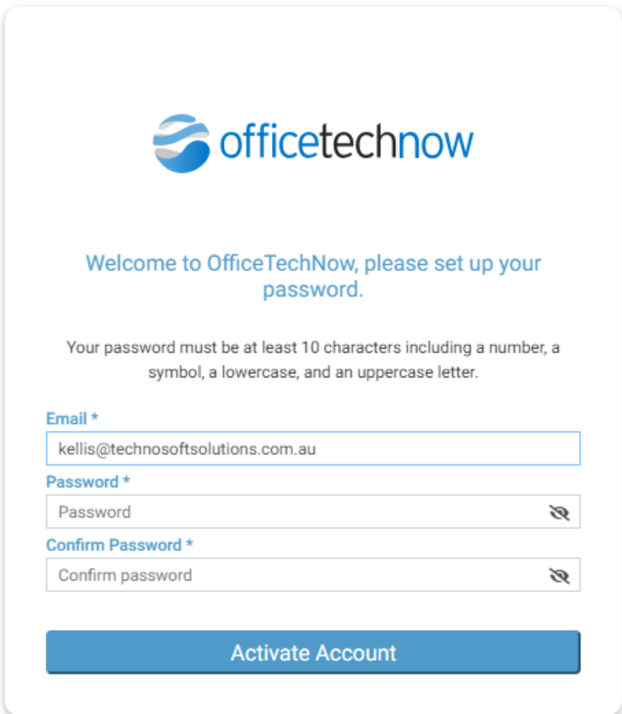
Upon receiving the email, please click link as per below.

The OfficeTechNow login window requires your email address and password to access the OfficeTechNow system. Once you have clicked the link, you will be prompted to set up your password.



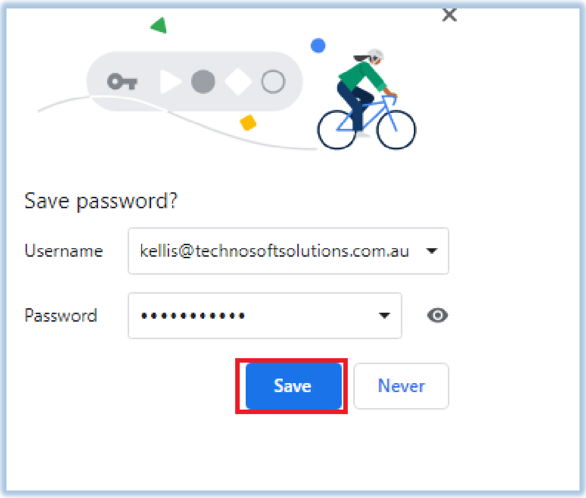
Your password must match the following criteria:

- Minimum 10 characters in length
- 1 number
- 1 special character
- 1 lowercase character
- 1 uppercase character



Saving your password

1. After you have logged into OfficeTech for the first time your browser will ask you if you want to Save your password.

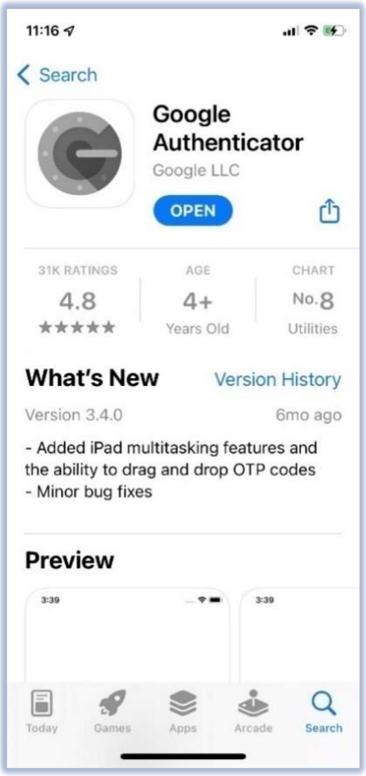


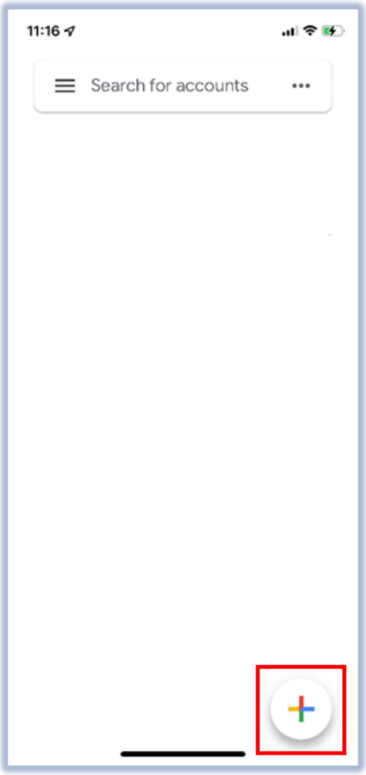
2. If you elect to Save your password, the next time you log in, the OfficeTechNow login window will prepopulate your Username and Password and you can simply click **Next** to be taken to the next window where you will be prompted to enter your One Time Password (OTP) that is generated by the Google Authenticator App that you will have downloaded previously.

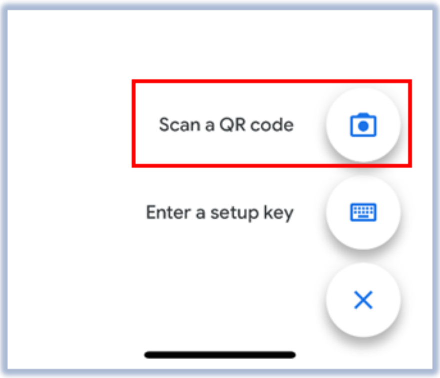
Google Authenticator

Once you have activated your account you will then be prompted to set up your 2-factor Authentication. You will be required to download and install the Google Authenticator app for Android or iPhone.

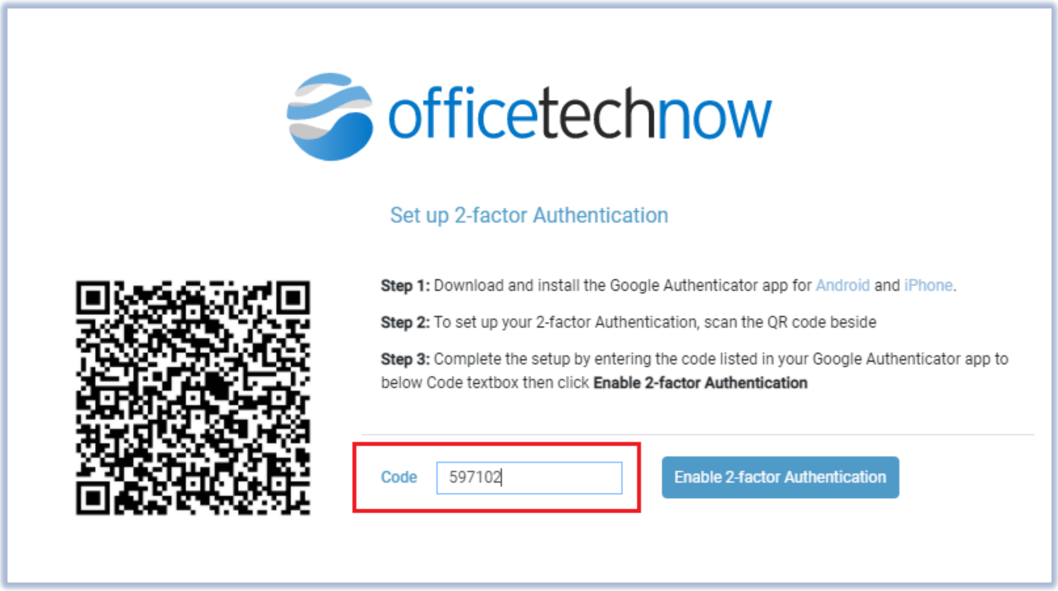
Open the Google Authenticator app and click on the **plus** icon, then select **Scan QR Code**.



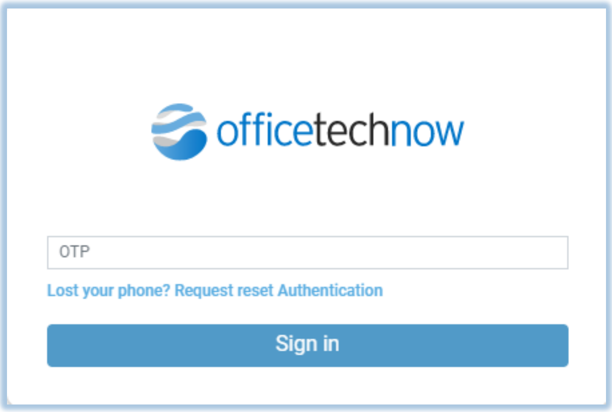




Scan the QR Code on your screen and complete the set up by entering the code that is listed in the Google Authenticator app.



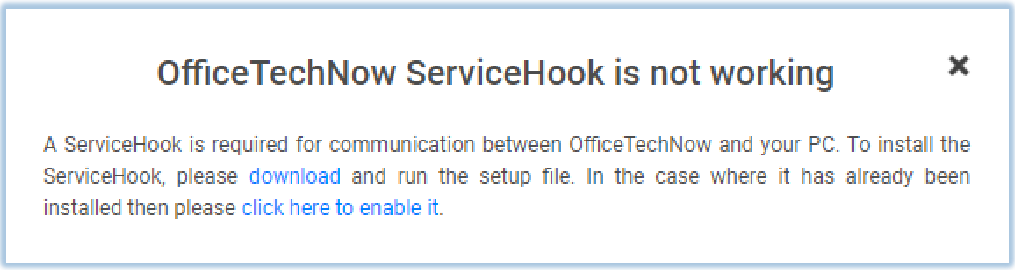
Now that you have set up the 2-factor Authentication, you will need to enter your OTP code again to log in.



You will then be taken to the OfficeTechNow Home Page.

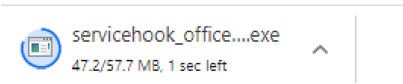
OfficeTechNow Service Hook

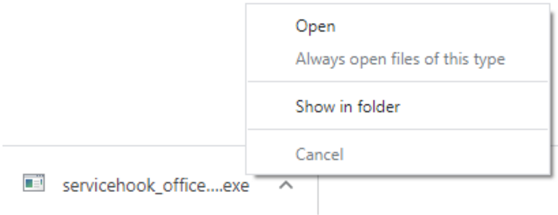
When you first log into OfficeTechNow you will receive the below message.



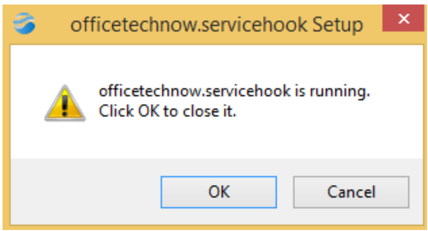
Please follow the steps below:

1. In the message, Click download
2. The following image will appear in the bottom left of your screen. Once it has loaded right click and select **Open** or double click on the file to open it





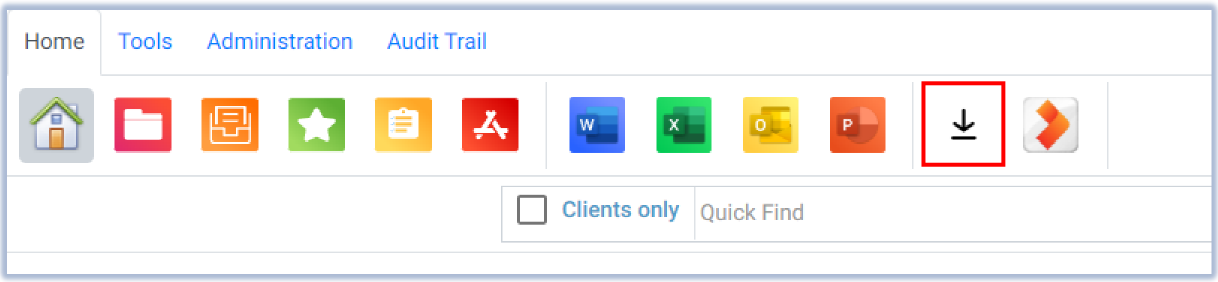
3. Once you have selected to open the file you will receive the messages below. Click **OK** and you will be returned to the OfficeTechNow Home Page.



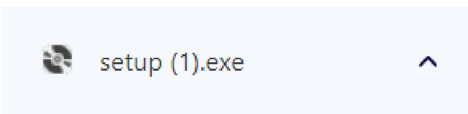
OfficeTechNow Outlook Add In

Now that you have installed the Service Hook, you will need to download and install the Outlook Add In.

1. Click on the arrow that appears on your Home Ribbon.

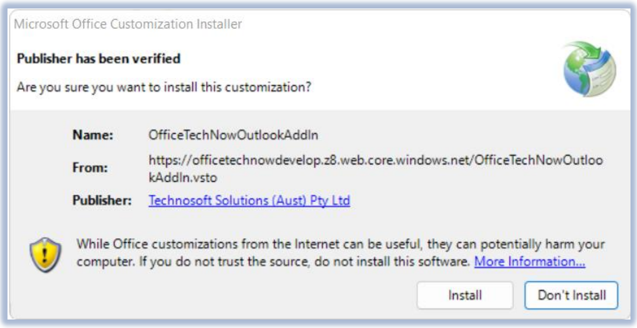


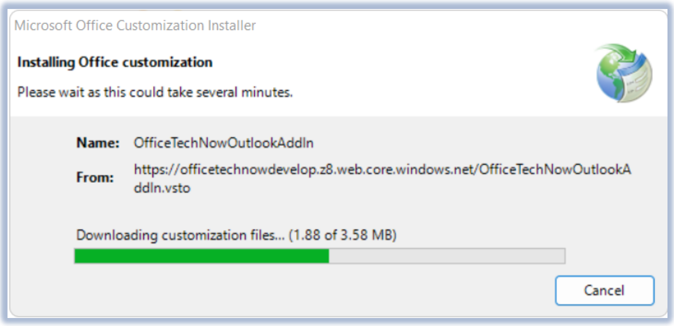
4. The following image will appear in the bottom left of your screen. Once it has loaded right click and select **Open** or double click on the file to open it



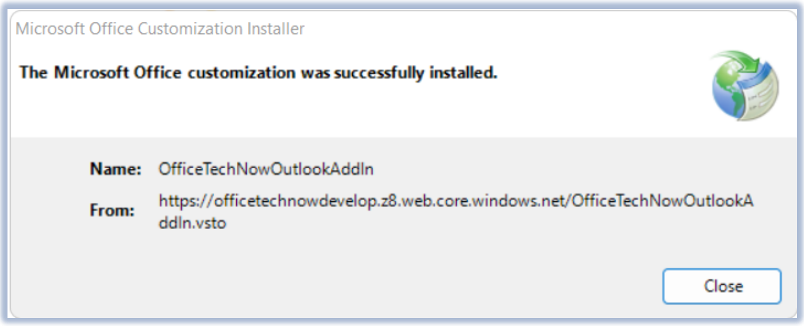
5. Once you have selected to open the file you will receive the messages below.

Click **Install** and your Outlook Add In will be installed.



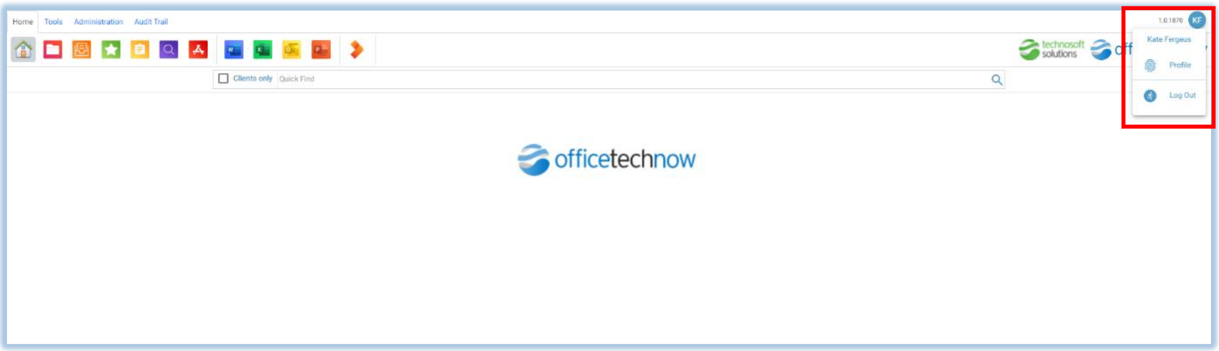


6. Click **Close** once the Outlook Add In has finished installing and you will be returned to the OfficeTechNow Home Page.

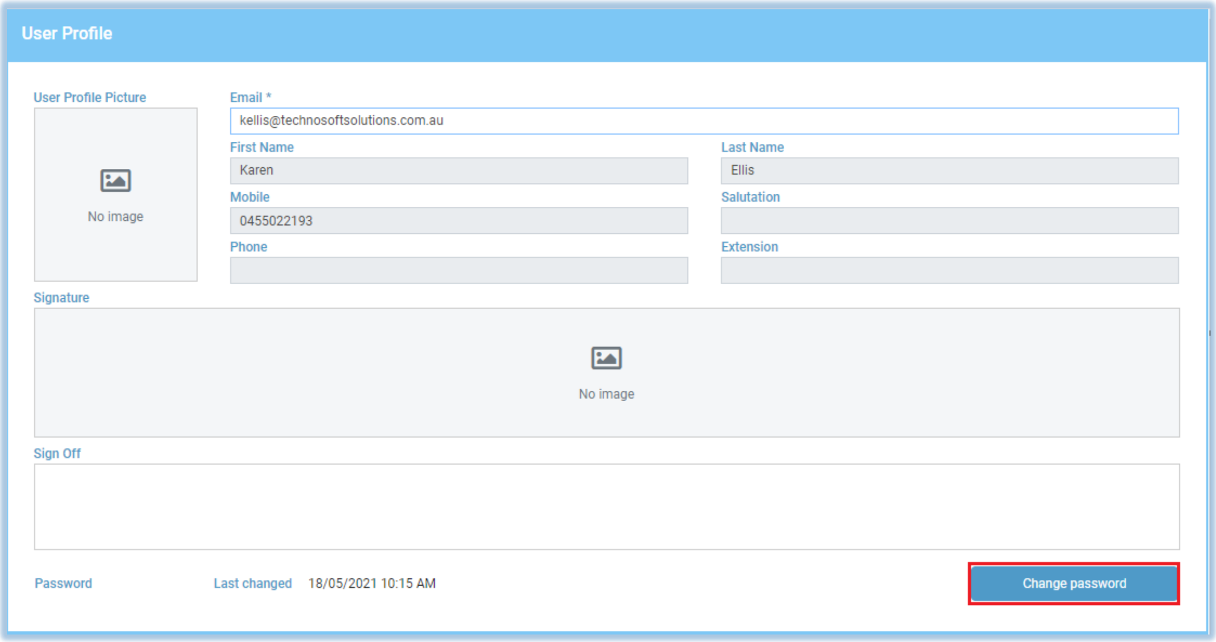


Change Password

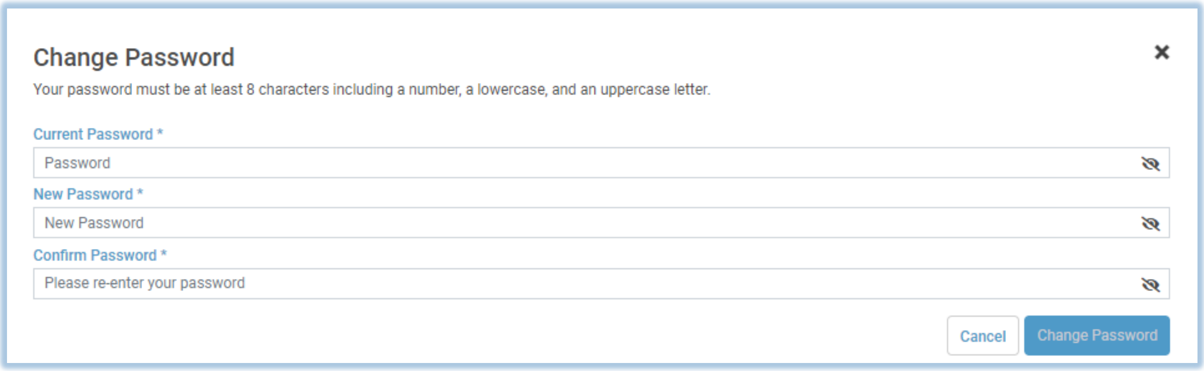
Users can change their password using the **Change Password** function which is found in your User Profile located to the right-hand side of the OfficeTechNow Interface.



Click **Profile** this will load your User Profile window. Select **Change Password** and the **Change Password** window will open allowing you to change your password. You will need to enter your Current Password followed by your New Password in order to change your password.

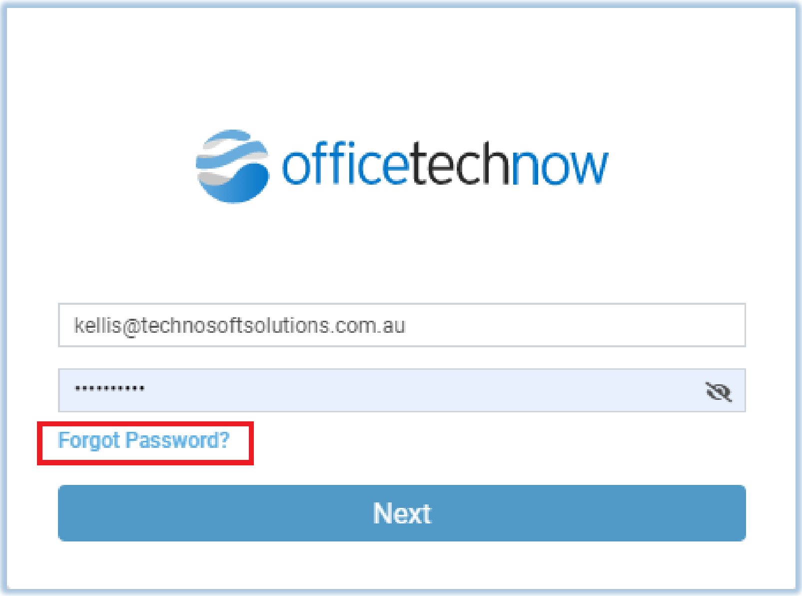


Click **Change Password** and the **Change Password** window will open allowing you to change your password. You will need to enter your Current Password followed by your New Password in order to change your password.

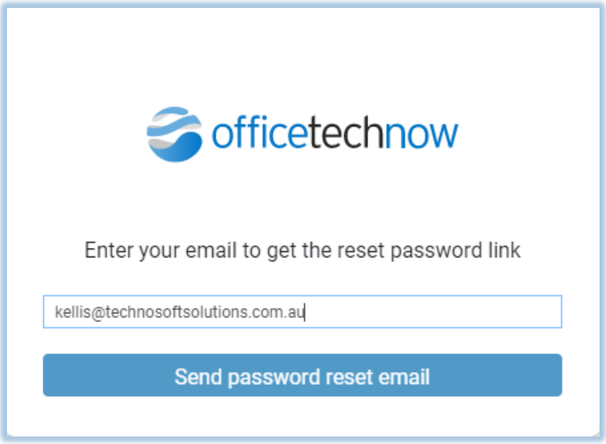


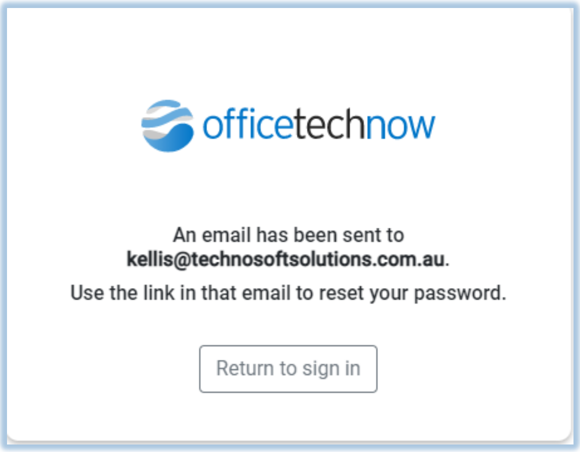
Forgot Password

On the login screen select **Forgot Password.**

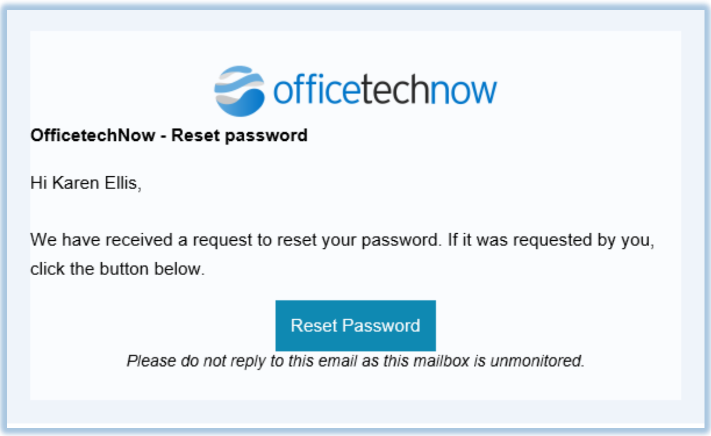


You will be prompted to enter your email address to receive a Reset Password link followed by confirmation that the link has been sent.

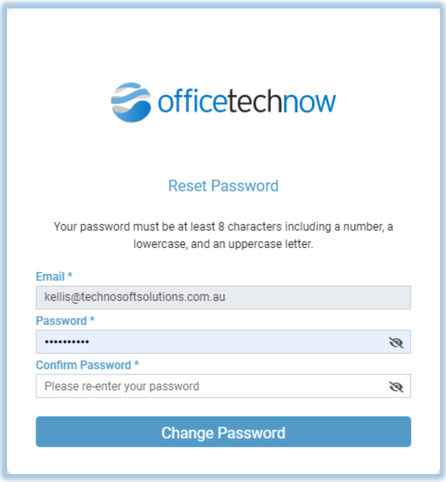


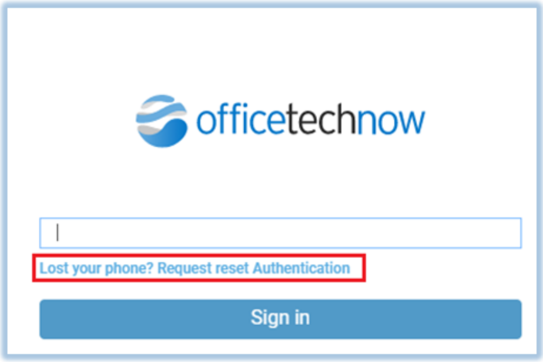


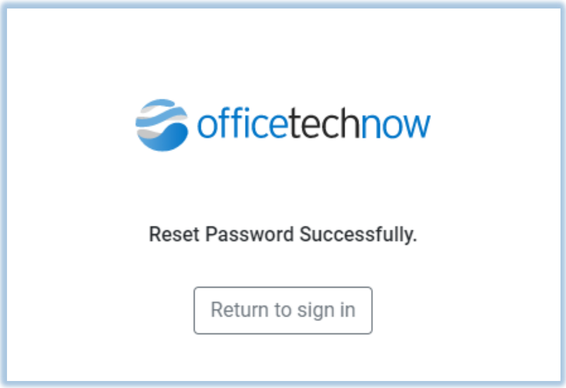
You will then receive an email with a Reset Pasword prompt

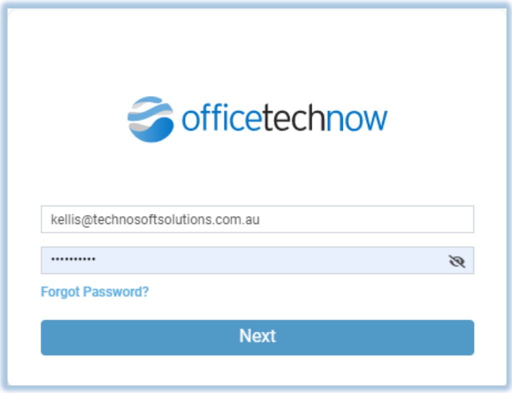


Click **Reset Password** and a window will appear asking you to enter a new password which once completed will advise of the successful completion of the Password Reset.







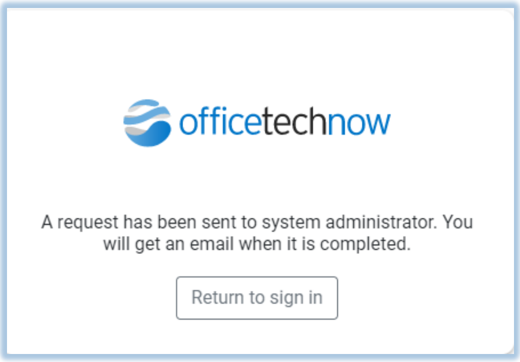


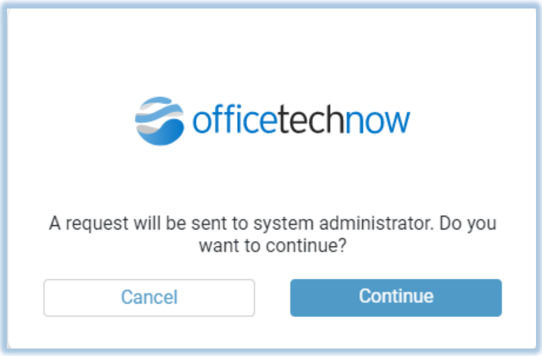
New or Lost Phone, Reset 2FA – User Request

If you have a new phone, lost your phone or require a reset of your 2FA, you can request an Authentication reset as follows:

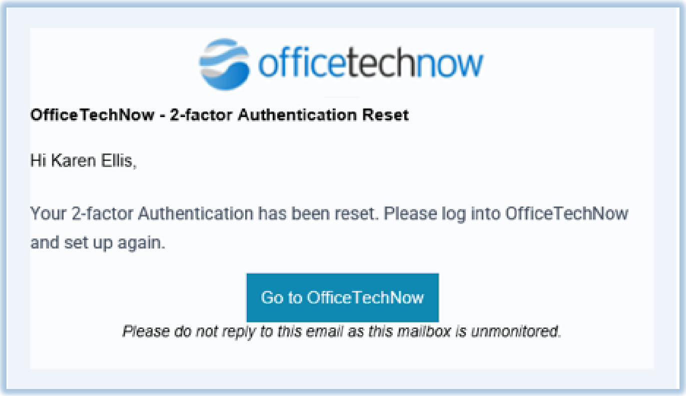
1. Log in using your previously created login details, Click **Next**
2. Click **Lost your Phone? Request reset Authentication**
3. You will receive a prompt that the request will be sent to system administrator for approval
4. Click **Continue**

5. You will then be given an option to return to the OfficeTechNow sign in page

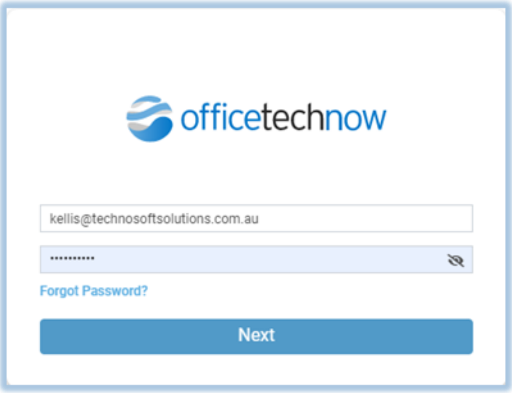




Once your system administrator has approved the request you will receive an email with a link as follows.



Click **Go to OfficeTechNow** which will open your default browser and display your login details
Click **Next**



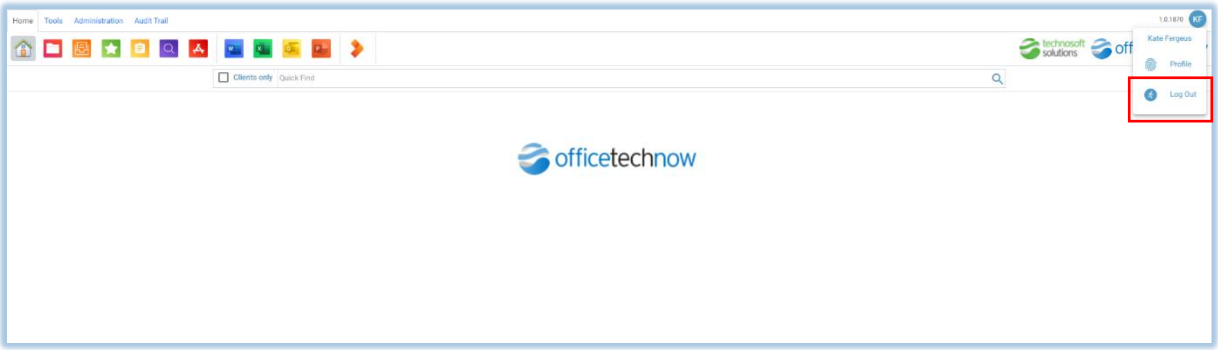
Note - You will be required to download and install the Google Authenticator app if you are setting up a new Phone before proceeding further.)

On the Google Authenticator App click on the + icon at the bottom of the screen and follow the instructions to scan the QR Code and then complete the set up by entering the code that is generated into the OfficeTech login window. Note you will be required to enter the OTP for a second time to complete the log in.

You will then be taken to the OfficeTechNow Home Page.

Logout

Users can logout of OfficeTechNow by clicking on the User Profile located to the right-hand side of the OfficeTechNow Interface. Click **Logout.**



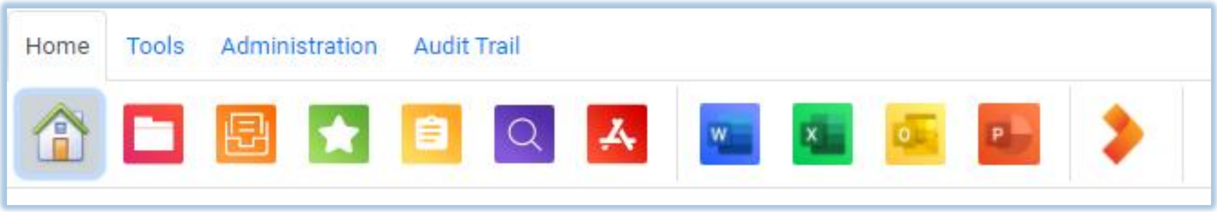
OfficeTechNow Ribbons

OfficeTechNow provides access to various functions through a Tab system located across the top section of the Interface.

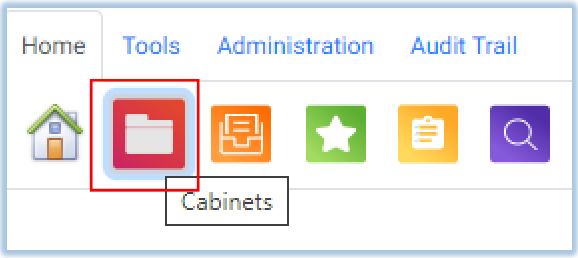
The Tabs available to you will be determined by the permissions granted by your System Administrator.

Home Tab

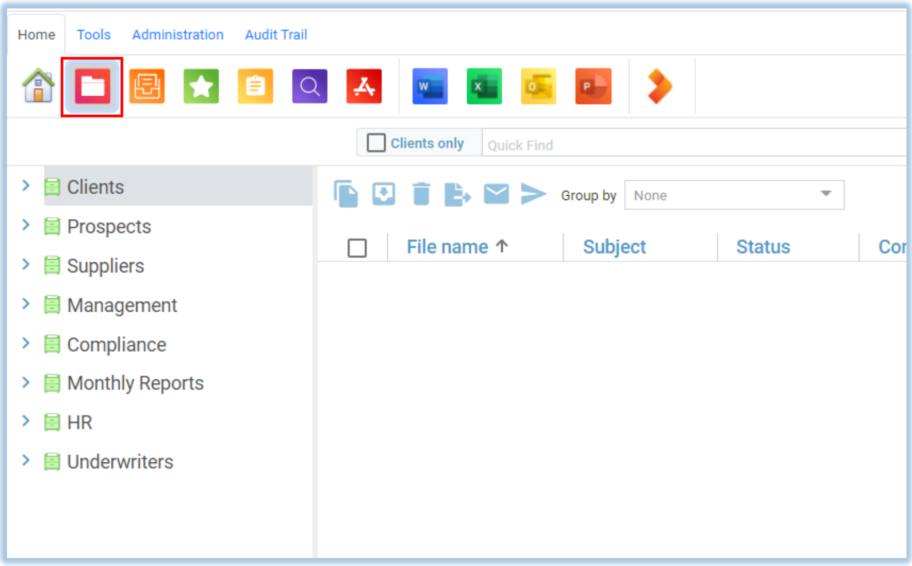
The **Home** Ribbon is the default screen when you first open OfficeTechNow. It displays the main interface of the OfficeTechNow system. Here you can move in and out of your Cabinets and access the various OfficeTechNow features and functions. It will also display the OfficeTechNow Home Page.



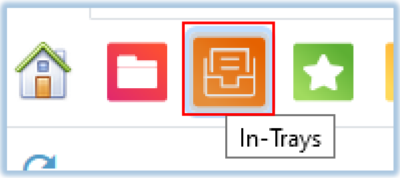
Cabinets



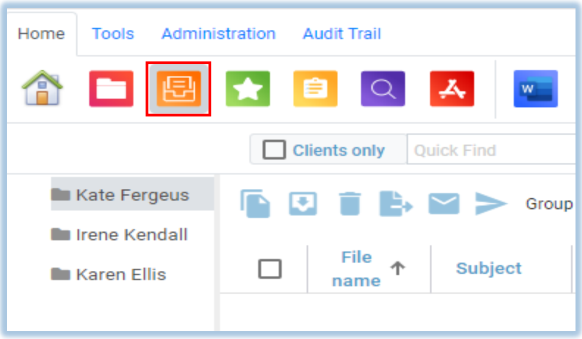
The **Cabinets** displays all available Cabinets in the system to your profile.



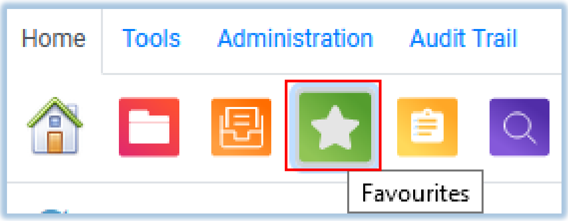
In-Trays



Each user in the OfficeTechNow system has an **In-Tray**. **In-Trays** can be used to temporarily store documents that otherwise do not fit easily into a folder within your system. Your personal **In-Tray** will be highlighted when you select the In-Trays icon.

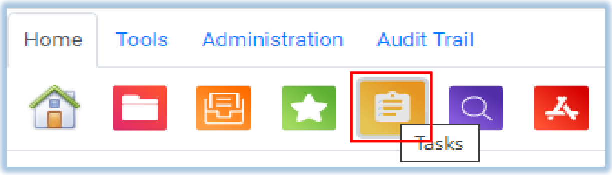


Favourites



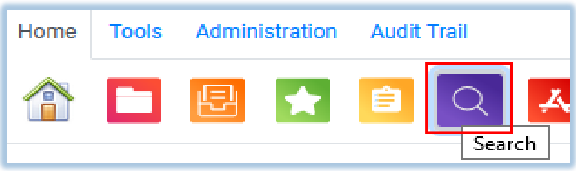
OfficeTechNow allows you to nominate Cabinets, folders, or subfolders as Favourites, making them easily accessible via the Favourites icon.

Tasks



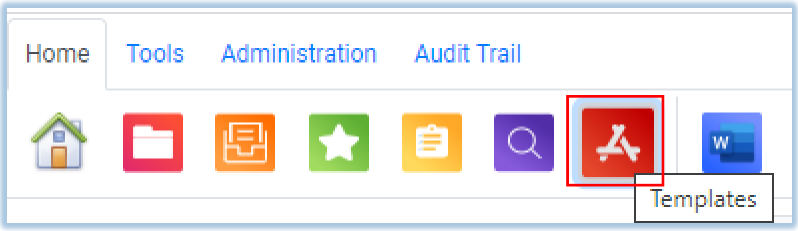
OfficeTechNow contains an inbuilt workflow **Tasks** module. **Tasks** are accessible by clicking the **Task** icon in the **Home** Ribbon.

Search

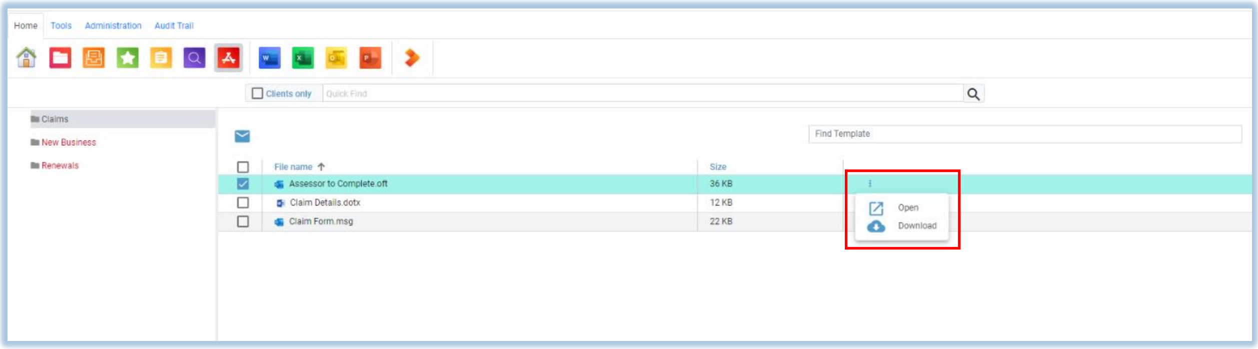


OfficeTechNow contains an inbuilt search function that allows you to search for documents using a variety of filters, including keywords and numbers.

Templates



OfficeTechNow contains an inbuilt **Templates** system that allows all Users to access the same document, spreadsheet, and email templates. You can access the **Templates** by clicking on the **Template** icon and navigating to the folder and file you require. To open the **Template,** click the Ellipsis button at the end of the row and click **Download** to open the required file.

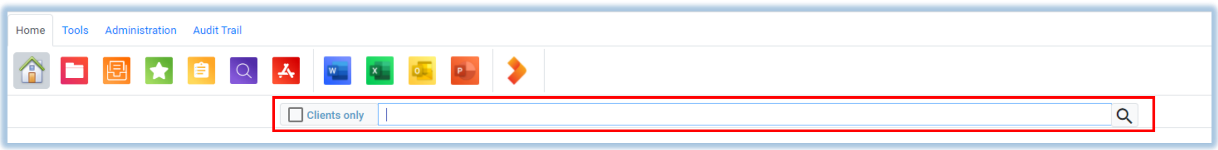


Application Links

The above group of icons can be used to launch their respective applications. By hovering over the toolbar button, it will reveal the name of the application. To open any of the applications simply click the large icon for the required application and a new instance of application will open.

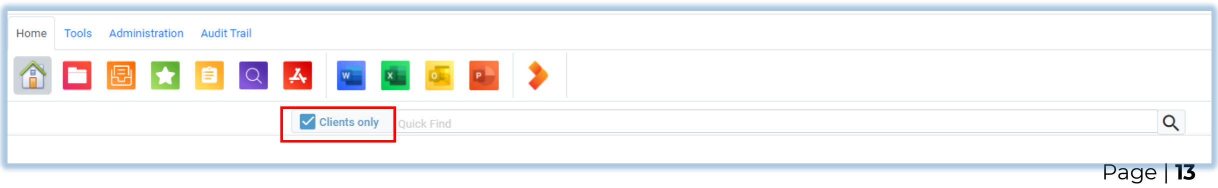
Quick Find

The OfficeTechNow **Quick Find** feature allows you to quickly navigate to any Client/Cabinet folder in the system by typing any part of that Client/Cabinet folder name in the **Quick Find** field.



You can configure the **Quick Find** feature to only look for Clients by ticking the **Clients Only** checkbox next to the **Quick Find** field.

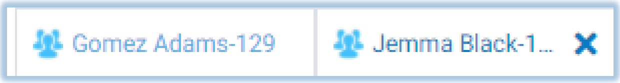
The Clients only check box limits the request find to the Client Cabinet only.



Navigation Trail

OfficeTechNow displays a **Navigation Trail** of the locations you recently accessed across the bottom of the interface.

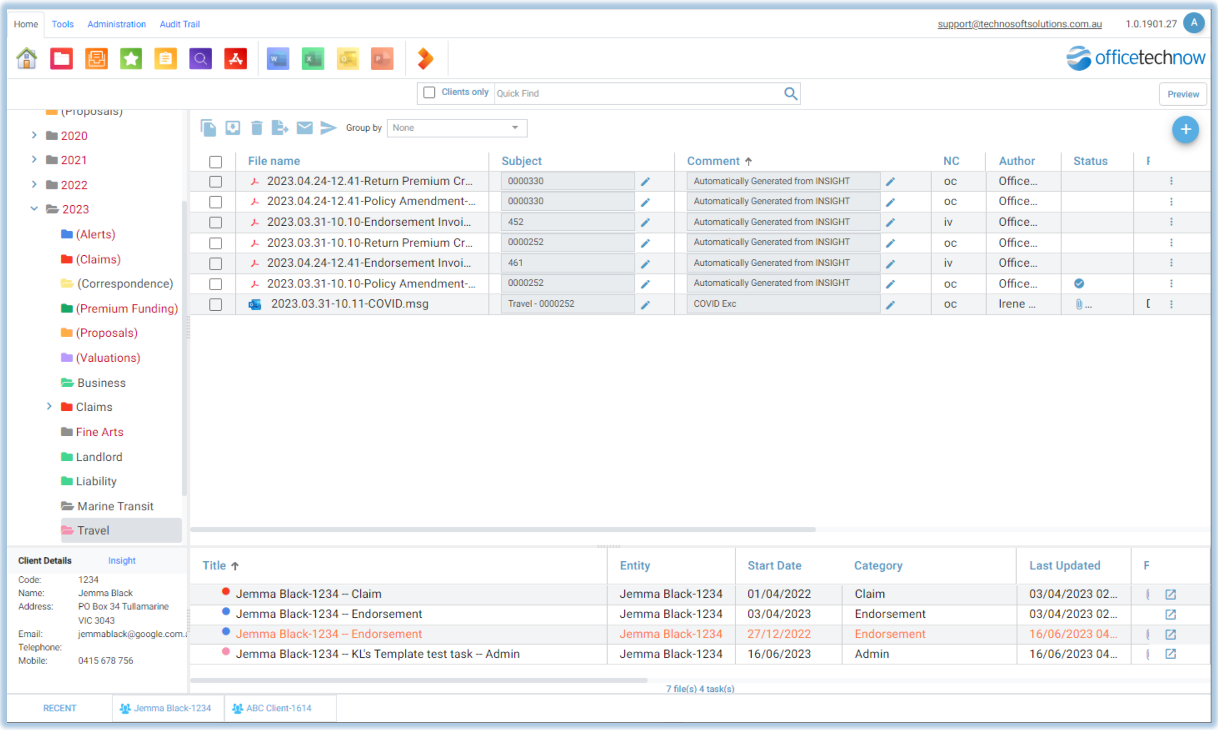
This trail is useful for quickly returning to a recently visited folder or Client. You can clear the locations in the Navigation Trail by selecting the ✕ icon next to the location name.



File View

The OfficeTechNow **File View** displays the files in the selected folder.

The **File View** will automatically display when selecting a folder via the **Cabinets** icon or via the **Quick Find** feature.



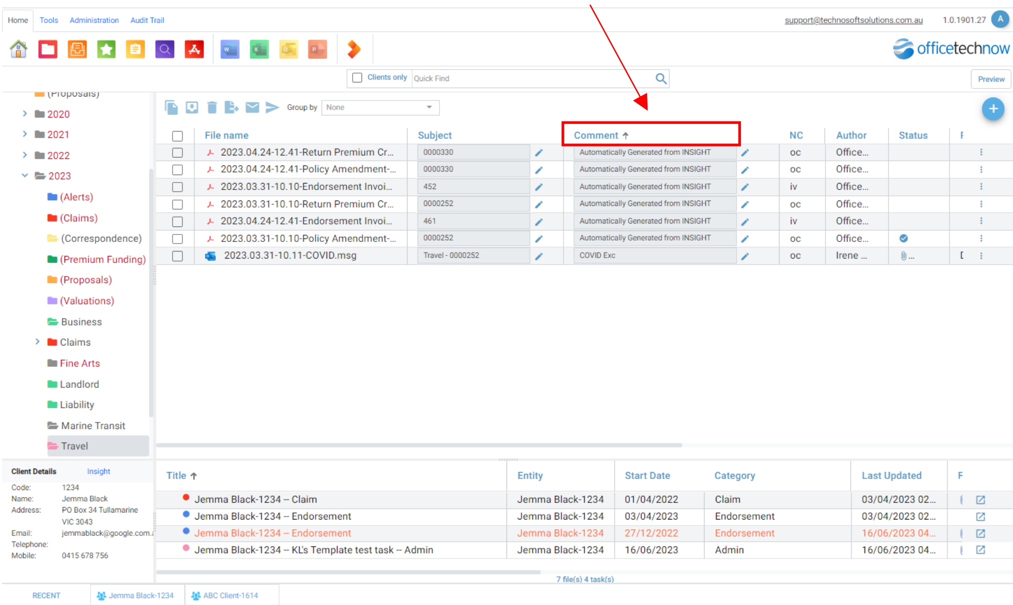
File View Columns

OfficeTechNow records information against each file, in the following categories:

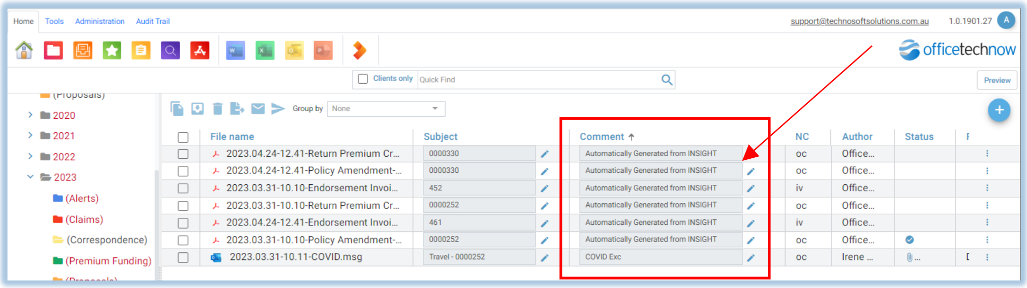
File Property	Description
NC	The Naming Convention is the Type of document entered during the Save process and allow the User to allocate meta data to a document to indicate it as Incoming Correspondence, Outgoing Correspondence, a File Note, an Invoice, a Task and so on
File Name	The File Name is a combination of the Document Date, and the Description that is entered during the Save process
Subject	Subject contains information regarding the product, asset, or policy class that the file relates to. For example, in some systems this will be a dropdown list of policies from the Client's profile in INSIGHT
Comment	Comment allows for additional information about the specific nature of the file saved to be added
Author	Author records the creator of the document or email or the name of the person who saved the document into OfficeTechNow. This will differ depending on the settings of each system
Recipient	Recipient records the original recipient of the email
Status	Indicates attachments, task linked files, protected documents, and the checked-out status of the file
	Signifies that the email has an attachment
	Signifies that the document is protected from being edited
	Signifies that the file is attached to a Task
	Signifies that the document is currently being edited by you or another User. Only one person can edit a document at a time.
Created	Displays the date and time that the file was saved to OfficeTech
Last Updated	Displays the date and time the file was last edited
Checked-Out Status	The checked-out status will list the name of the User who currently has the file opened for editing. Only one person can edit a document at a time.
Type	Displays the file extension or type of the document
Size	Displays the size of the file

OfficeTechNow allows you to re-arrange, re-size and sort by each column heading. You can do this anywhere where Files or Tasks are displayed.

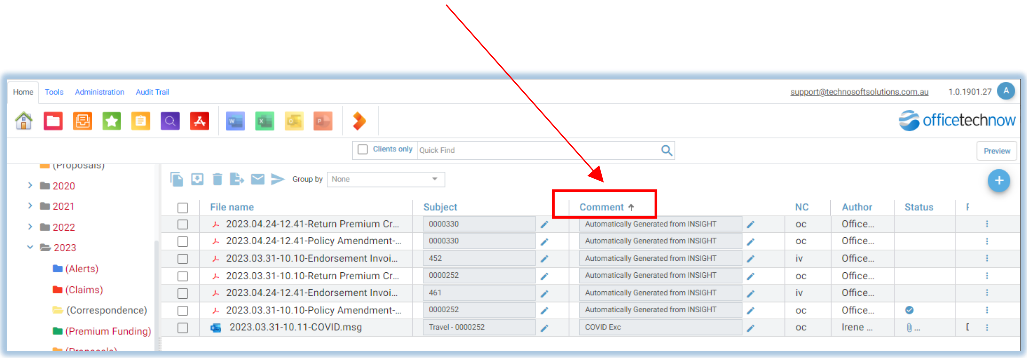
To re-arrange your columns, click and drag the column header to the desired location.



To re-size your column, click the border of the column heading and drag it to the desired width.

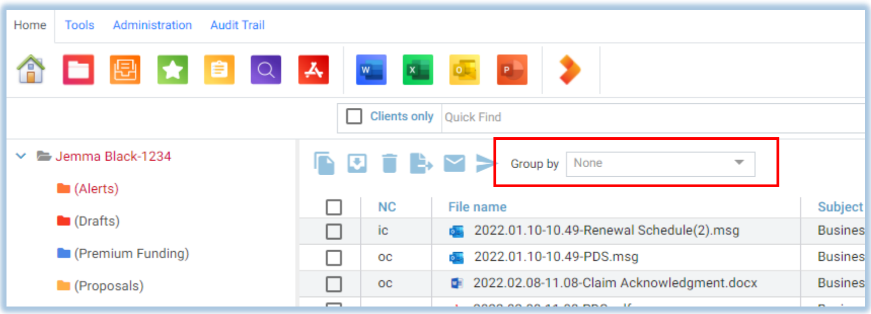


To sort by a column, simply click on the column heading and an arrow will appear to indicate which column is currently being sorted.



Group By

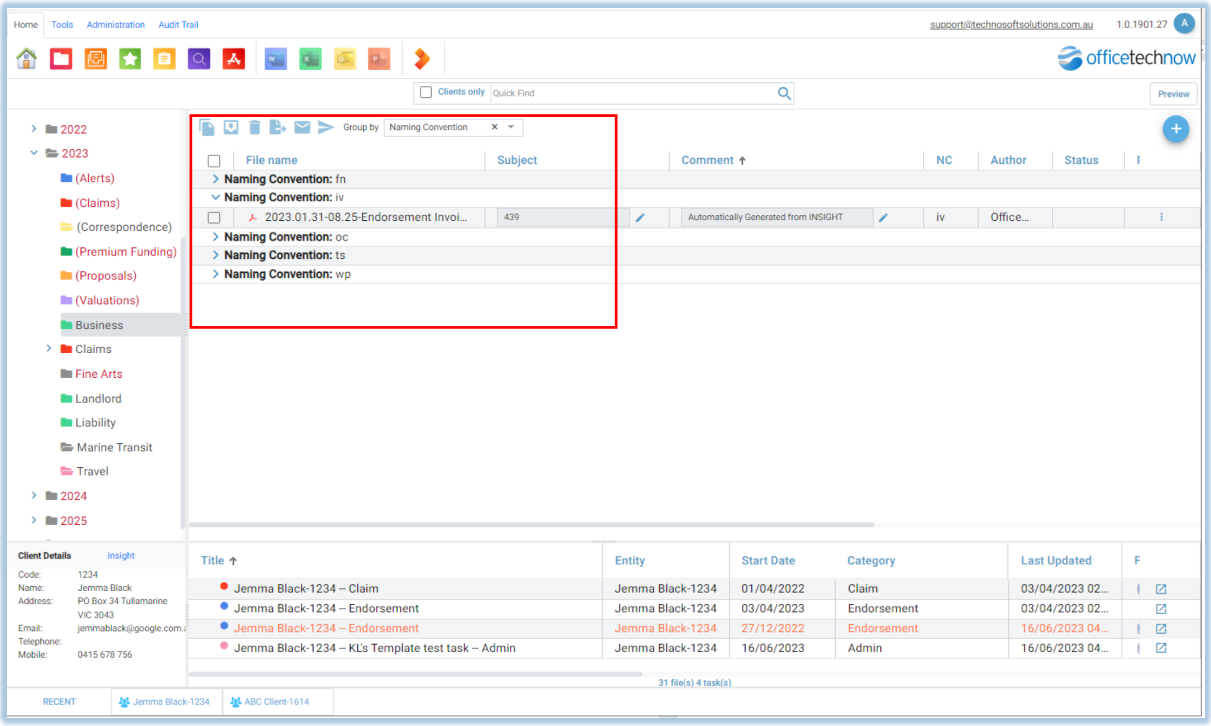
The Group By function allows you to group the files in the File View by any document property.



The Group By filters available include:

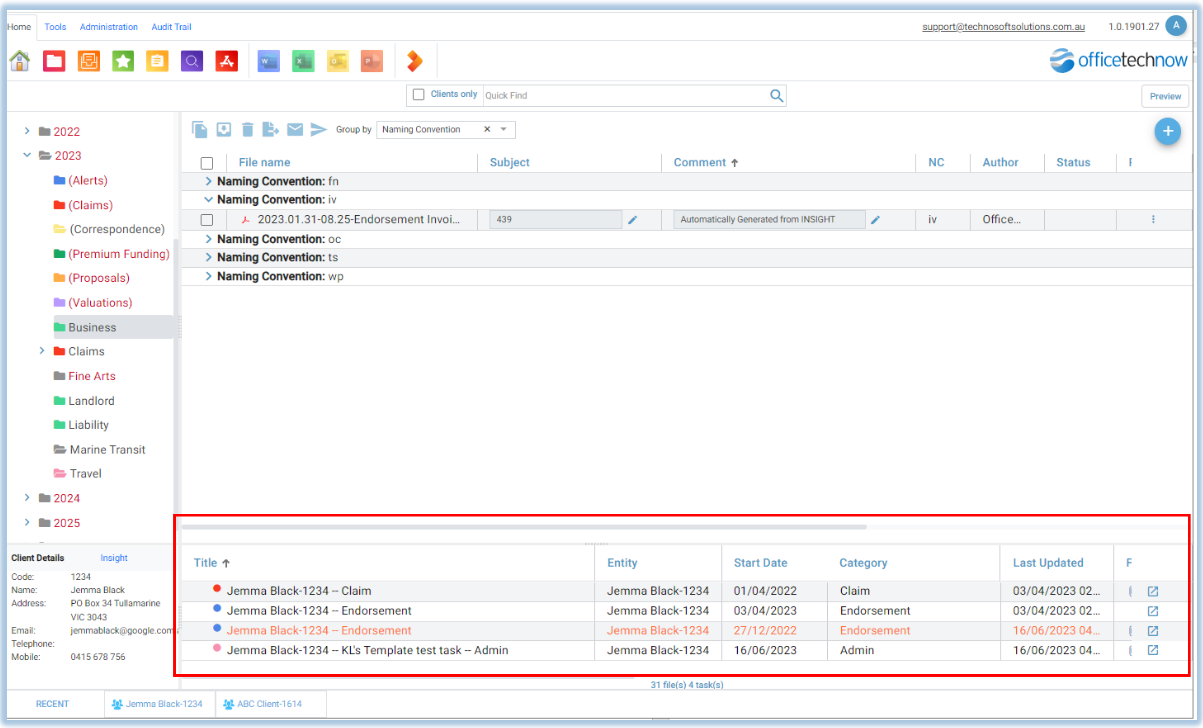
- Naming Convention
- Subject
- Comment
- Author
- Created
- Last Updated
- Type
- Size
- Recipient

Once grouped, OfficeTech will create a group for each value allowing you to focus on the particular group you are interested in. Expand the grouping by clicking on the arrow.



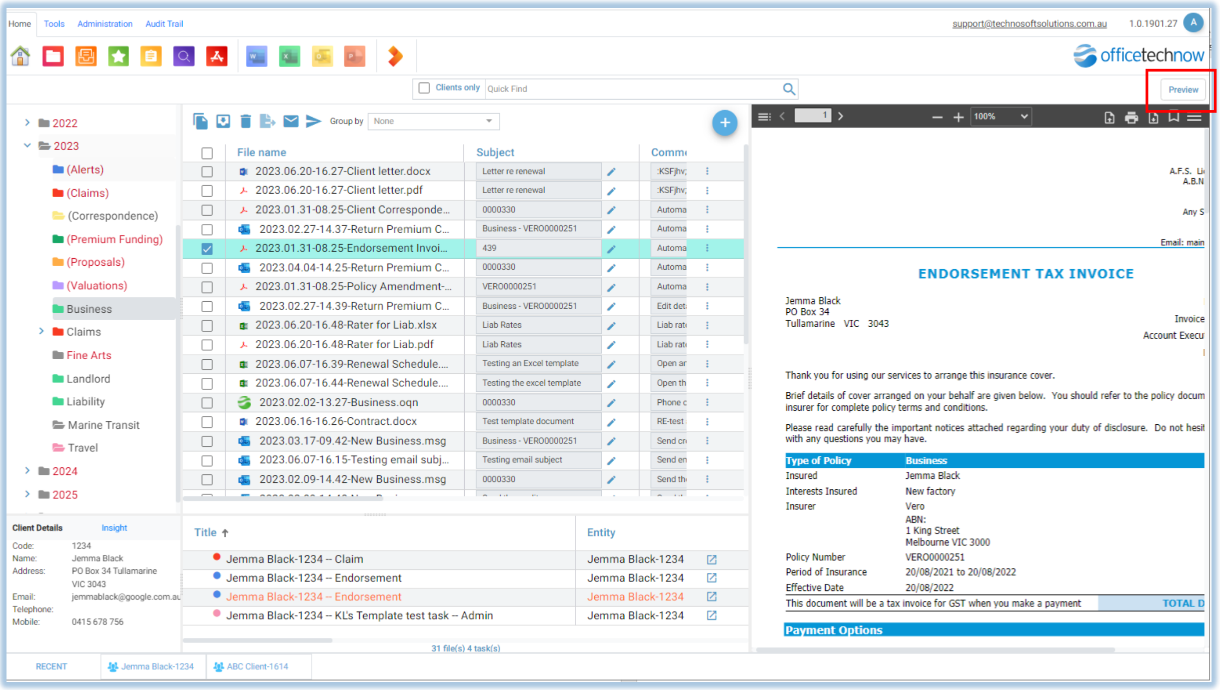
Task Pane

Active Tasks will automatically be listed at the bottom of the File View for the currently selected client.



Preview Pane

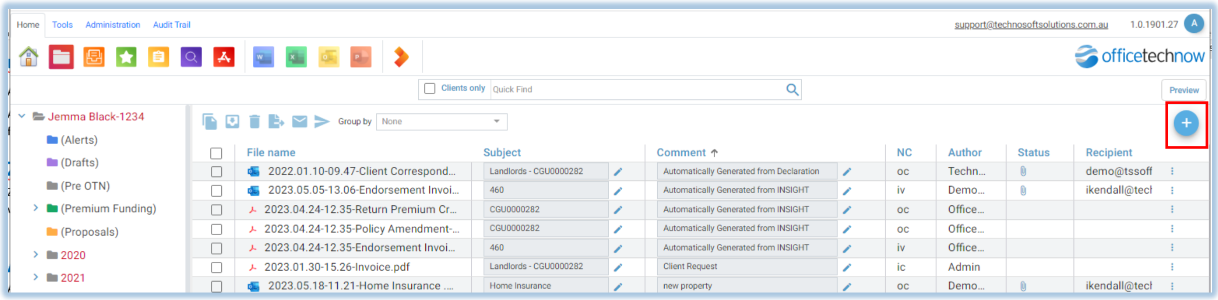
The **Preview Pane** provides quick viewing access to the contents of any file, image and Task without having to open the file or Task. Select the **Preview Pane** button from the top right-hand corner of the OfficeTechNow Interface to display the content of a file or Task.



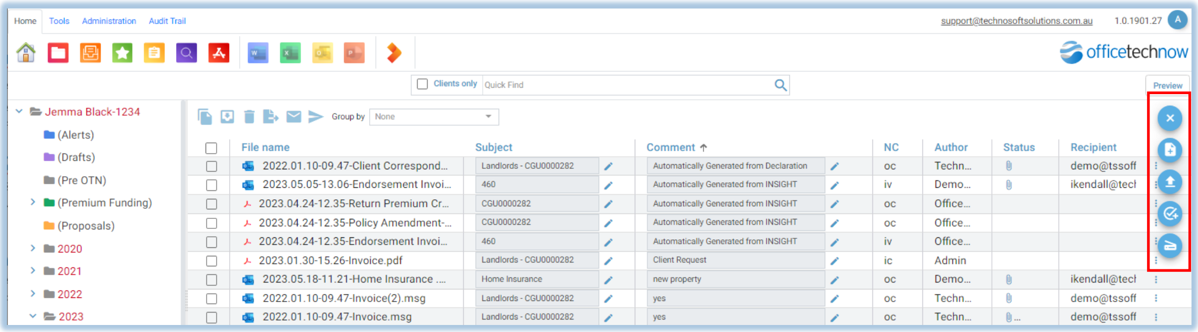
NOTE: To view the attachments of an email you must open the email completely, the Preview Pane cannot preview email attachments if they are not saved separately to the email.

File View Action Functions

To access the File View Action functions, click on the ⊕ icon which is available in the File View of any Cabinet. This will offer the File View Actions that are available in OfficeTechNow.



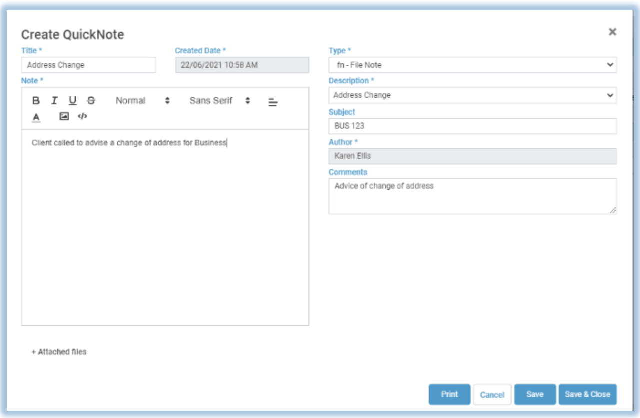
Clicking the ⊕ icon will expand the menu as in the below image, the functions of which are then explained.



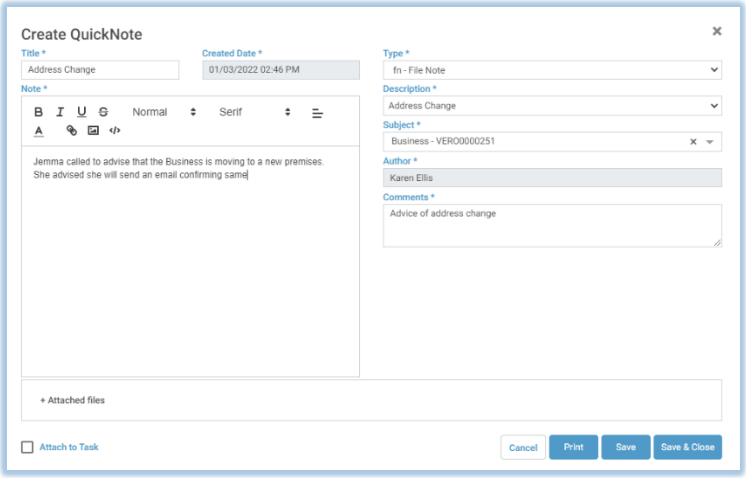
QuickNote

A **QuickNote** is a file note generated from the File View Functions menu.
To create a **QuickNote**:

- Navigate to the folder you require the **QuickNote** to save to.
- Click the Plus ⊕ icon in your File View which will open the File View Function Menu
- Click the icon in your function menu which will open the **QuickNote**
- Enter your title in the **Title** field (this automatically populates your **Description**)
- Enter the **Subject** and **Comments** in the subsequent fields

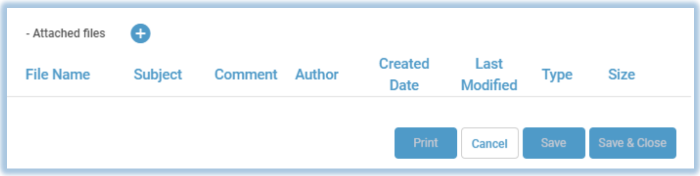


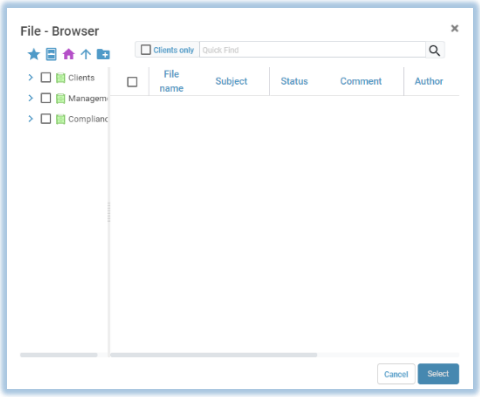
- Enter your notes in the notes field. Once you save the **QuickNote** your notes will be locked and date & time stamped



- Click **Save & Close**

You can also attach files to your **QuickNote** by selecting **+Attached files** followed by the icon which will open the **File Browser** and allow you to search for and attach the required file.





QuickNote Interface

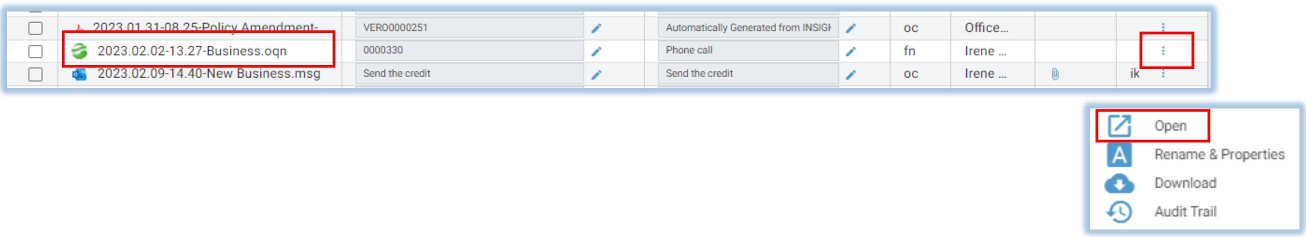
The interface of a QuickNote allows immediate access to all fields as outlined below:

Function/Field	Description
Title	A short description that should summarise the content of this **QuickNote**. Please note that the Title field will automatically populate the Description field.
Created Date	This field is automatically populated with the creation date of the **QuickNote**
Notes	This field is for the entry of notes. Each entry will be time, date, and name stamped once saved
Attached Files	Files that are linked to a **QuickNote** will be displayed here. To add or remove a file from a **QuickNote,** click the or after clicking the **Attached Files** tab
Document Properties (Type, Description, Author, Subject, Comments)	These fields are in line with the standard Document Properties that must be entered when saving a file within OfficeTechNow
Print	Allows you to print the **QuickNote** directly to the current default printer set in Windows
Save	Saves the **QuickNote** but keeps it open and allows the user to continue adding notes within the **QuickNote**
Save & Close	Saves the **QuickNote** into the current folder within OfficeTechNow
Cancel	Closes the **QuickNote** window

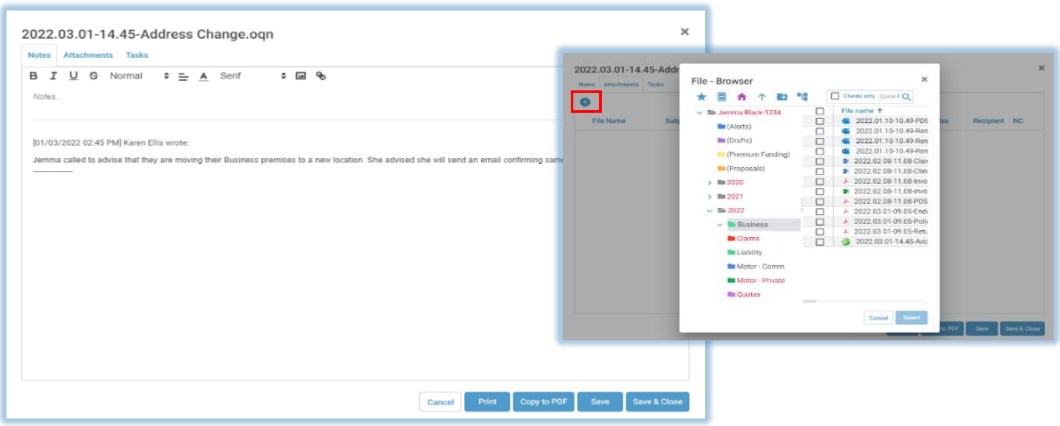
Update an Existing QuickNote

To update a QuickNote:

- Navigate to the folder where the QuickNote has been saved into
- Highlight the QuickNote in the File List, click on the Ellipsis button at the end of the row and from the options that will become available, select **Open**

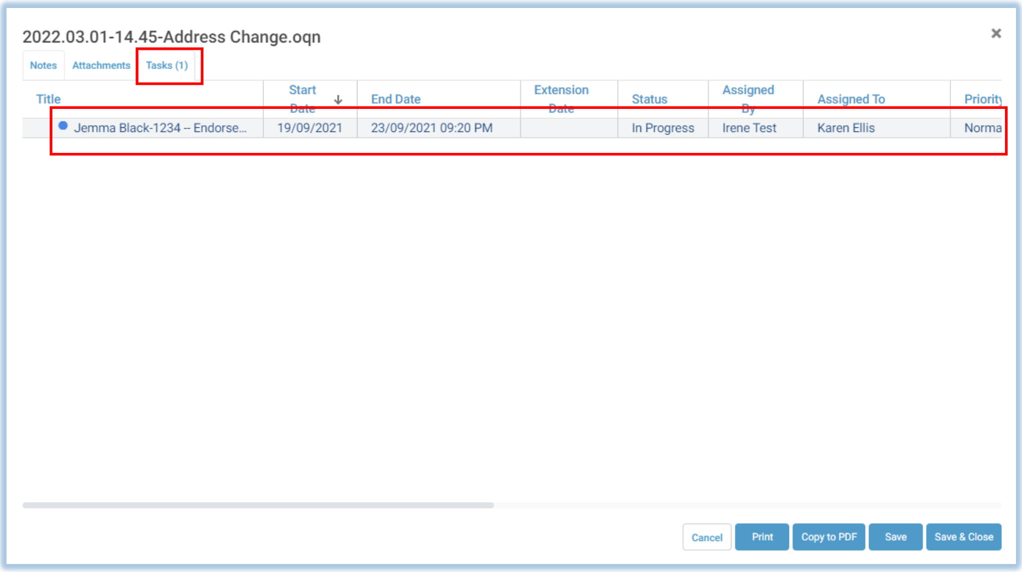


- Add your new notes in the **Notes** field . You can also add an attachment to the QuickNote by clicking on the **Attachments** tab and selecting the icon which will open the **File** Browser and allow you to select and attach a file.

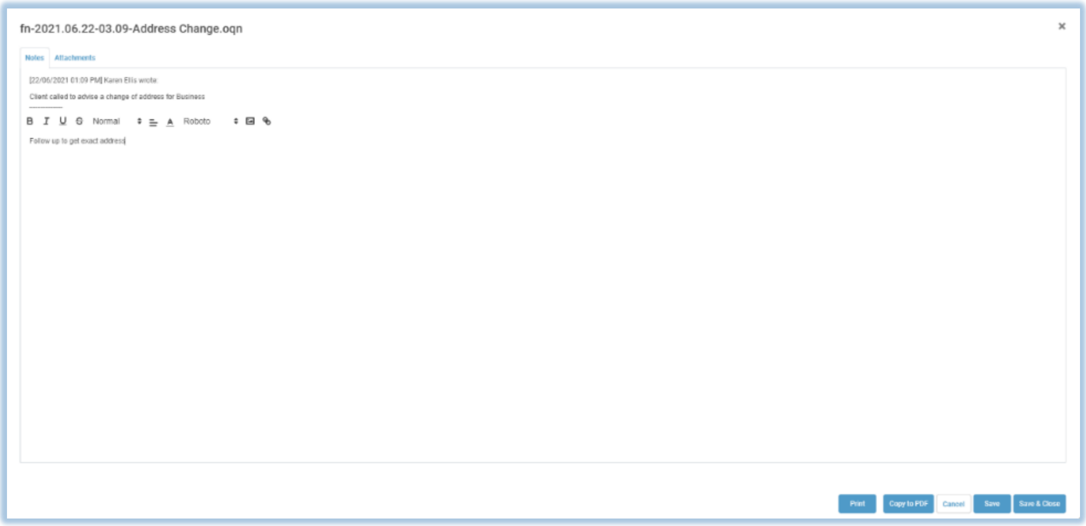


- You can also attach a **QuickNote** to a Task at the time of creating the **QuickNote** by selecting **Attach to Task** check box ☐ Attach to Task in the **QuickNote** interface or by adding the **QuickNote** to the Task after it has been created.

  Tasks that are linked to **QuickNotes** can be viewed by navigating to the **Tasks** Tab in the **QuickNote** interface.



- A PDF copy of the QuickNote can be created by selecting **Copy to PDF**



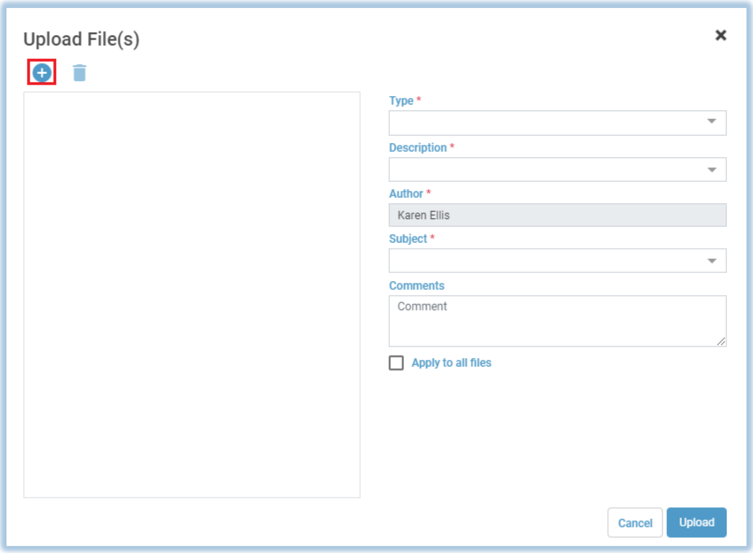
- Click **Save** or **Save & Close**

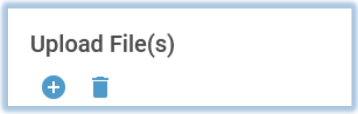
Upload

The **Upload** funtion allows you to save a file or files into OfficeTechNow directly from your Windows environment.

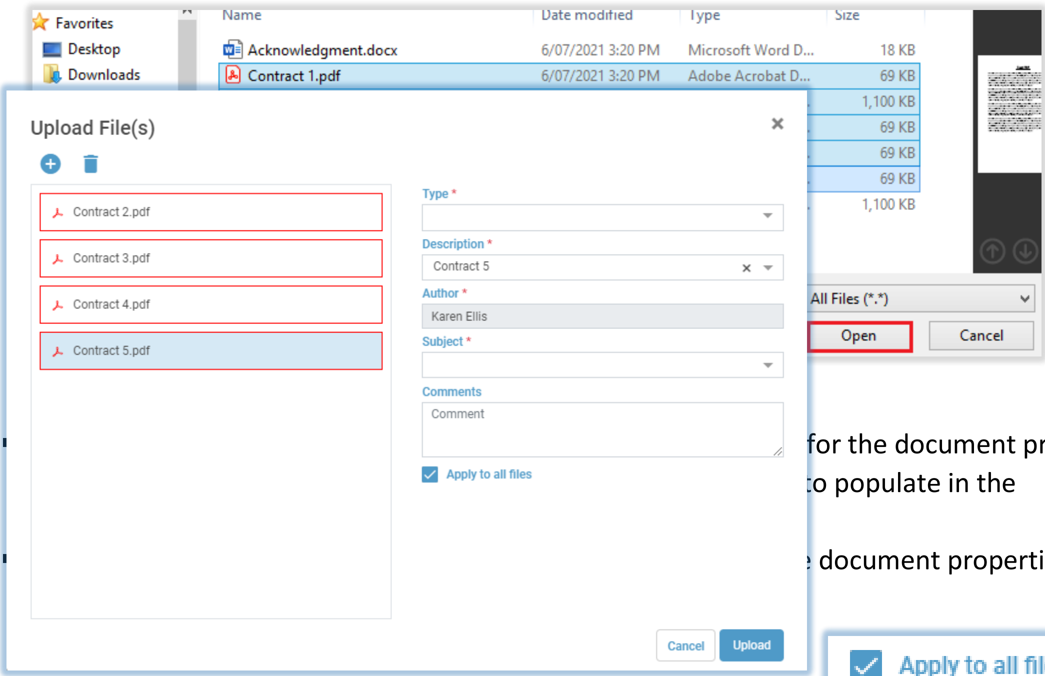
To upload a document via the **Upload** function:

- Navigate to the folder where you want to upload the document to
- Click the icon in your File View which will open the File View Function Menu
- Click the icon to open the **Upload** window
- Click the button to browse to your local desktop to select the required file(s)



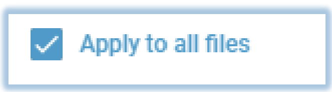


- Select the file(s) to Upload and click **Open** button

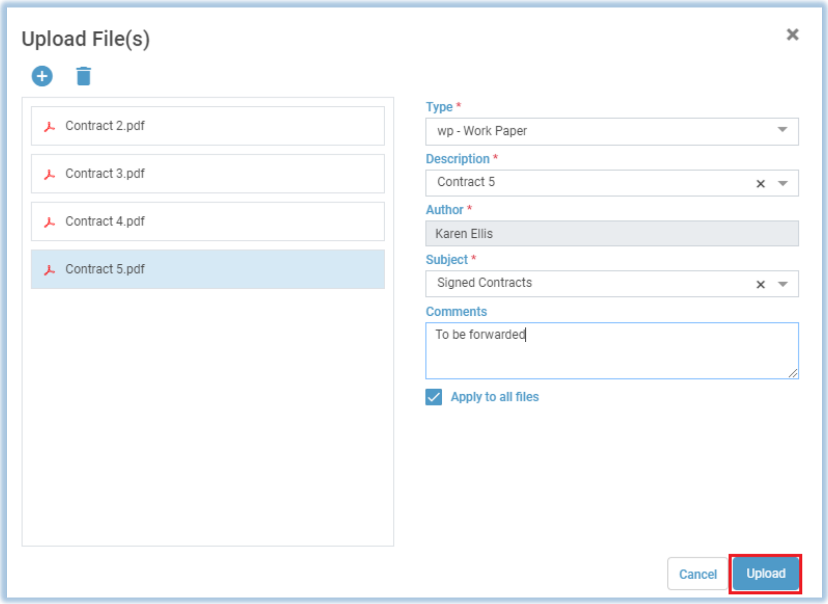


for the document properties
o populate in the

document properties to

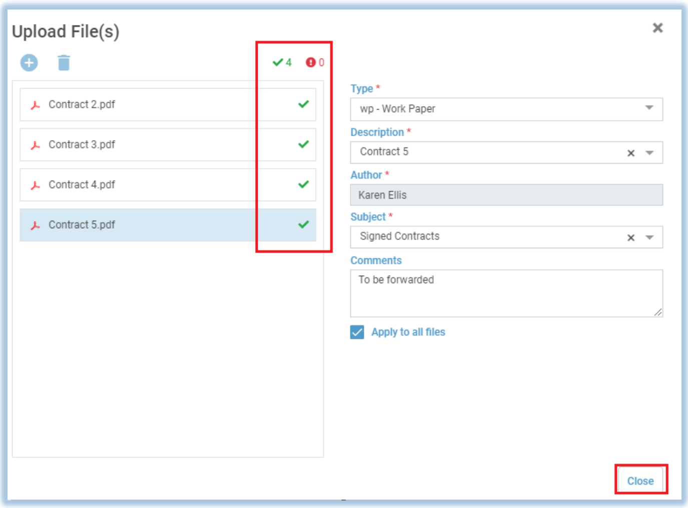


- Complete the document properties and select the **Upload** button to complete the Upload process



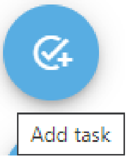
- The result screen window will display as follows

Confirmation is also shown in the **Upload** window with green ticks



- Click **Close** to close the **Upload Window**

Add Task

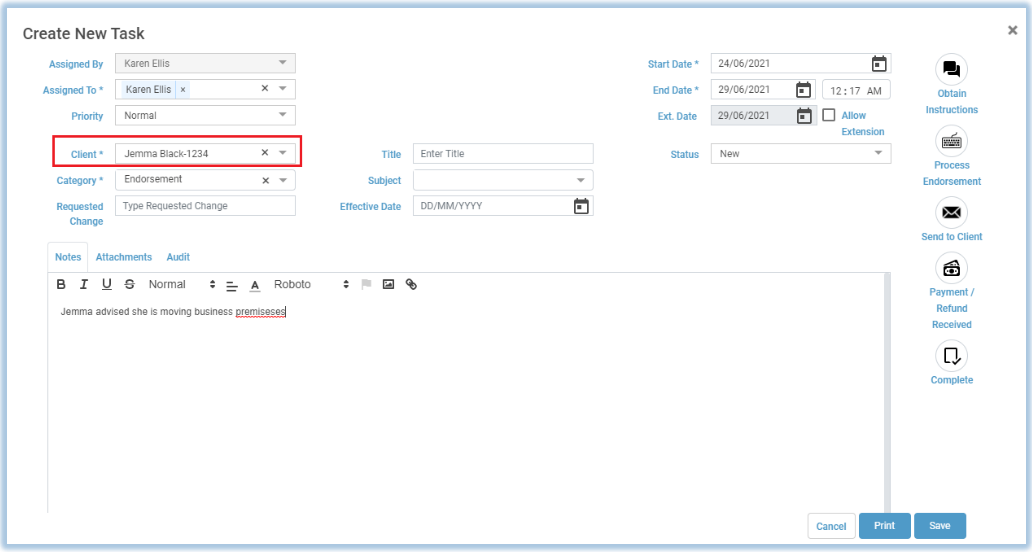


The **Add Task** feature will open the **Create New Task** window so that a new Task can be created for the Client you are currently viewing.

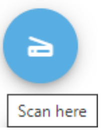
To create a new Task via the File View Functions menu:

- Click the icon in your File View which will open the File View Function Menu
- Select the **Add Task** icon
- Complete the Task parameters and notes as required
- Click **Save** or **Save & Close**

When creating a new Task via the File View Functions menu, OfficeTechNow will input the current Client Folder name or Cabinet into the **Client** field automatically.



Scan Here

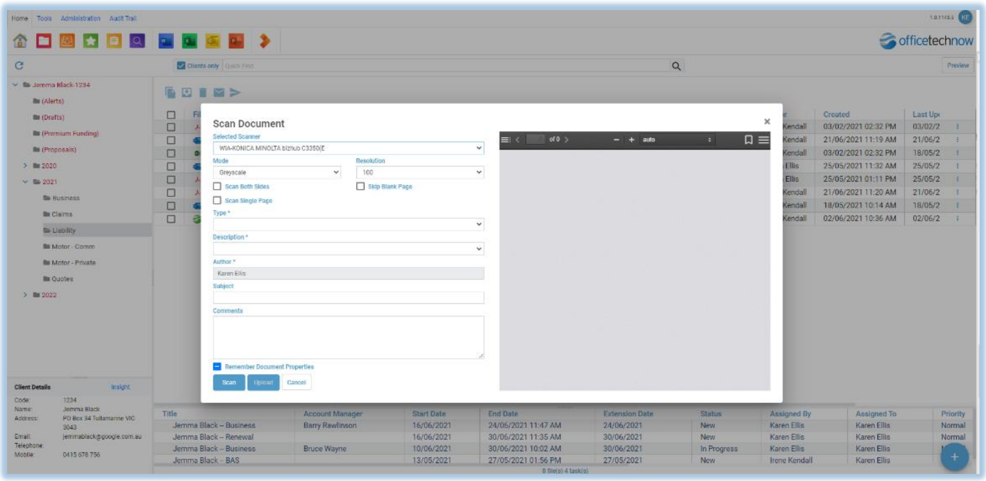


The **Scan Here** file function allows you to scan documents from a connected and compatible Desktop Scanner directly into the current folder.

To scan a document via the Scan Here function:

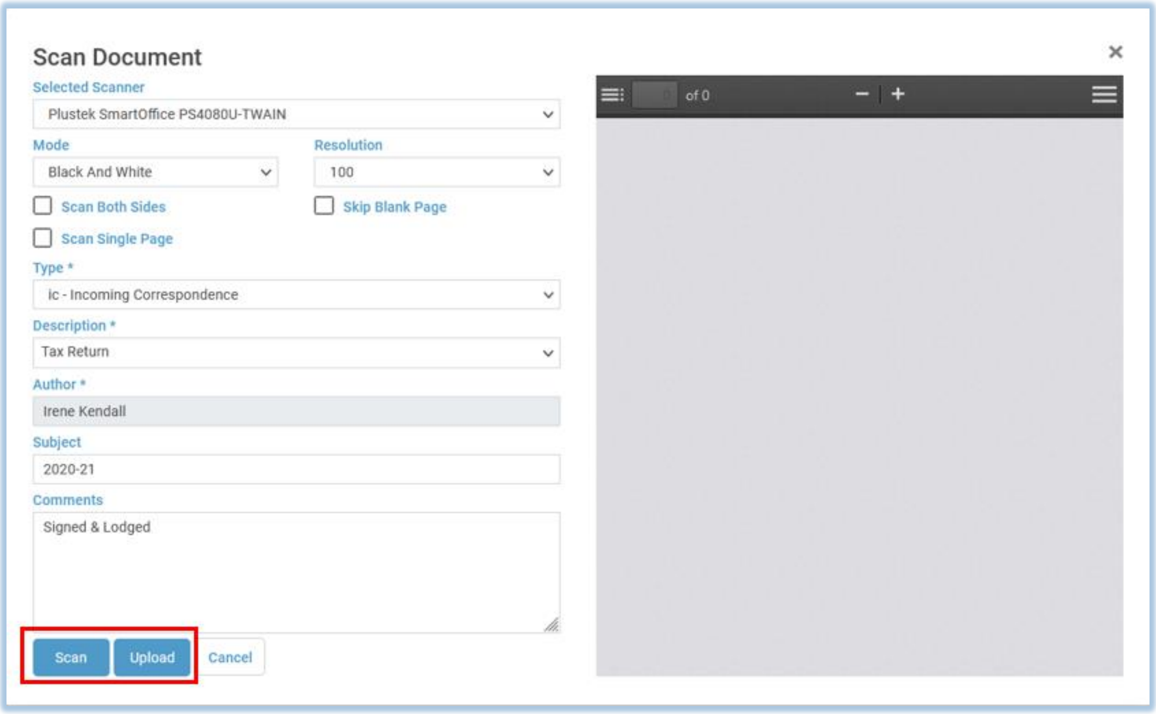
- Navigate to the folder where you want to save the scanned document to
- Click the Plus icon in your File View which will open the File View Function Menu
- Select the **Scan Here** icon
- Select your Scanner in the **Selected Scanner** field
- Set the **Mode**, and **Resolution** settings to the desired values

- If required, check the **Scan Both Sides** button (if your scanner supports duplex scanning)
- Enter your Document Properties, in the **Type, Description, Subject, and Comments** fields
- Click **Scan**



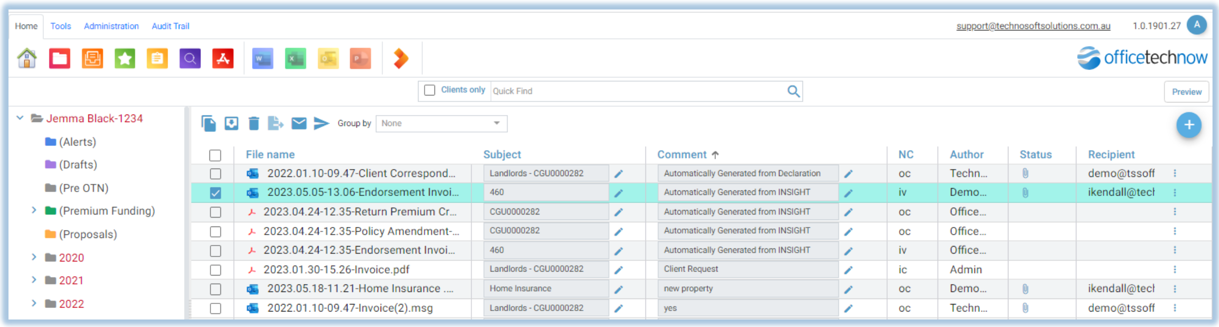
The Scan Here window gives you access to variety of functions including:

Function/Field	Description
Selected Scanner	Selects the Scanner from which to scan from
Mode	Selects the colour grade of the incoming scanned document
Resolution	Selects the resolution of the incoming scanned document. A minimum resolution of at least 200 dpi is recommended
Scan Both Sides	Scans both sides of the document, if supported by your scanner
Scan Single Page	Allows the scanning of multiple page documents and to have them saved as individual, single page PDF files
Skip Blank Page	Skips the scanning of any blank pages when scanning a multiple page document
Document Properties (Type, Description, Author, Subject, Comments)	These fields are in line with the standard Document Properties that must be entered when saving a file within OfficeTechNow
Scan	Initiates the scan and displays all scanned pages in the Preview Pane. Once all pages have been scanned, a message will be displayed asking if additional pages need to be scanned which allows you to combine multiple input documents into a single PDF in OfficeTechNow.
Save	Saves the scanned document as a file in the destination folder using the Document Properties entered



File Action Functions

The File Action functions are located at the top of the File View window.

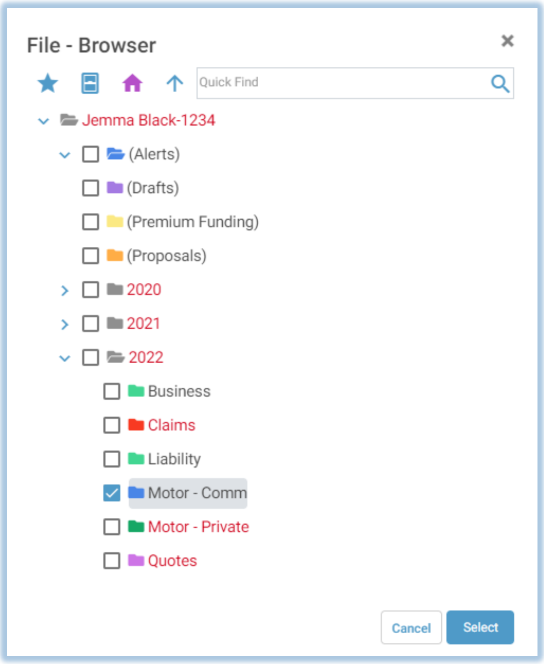


Copy To

The **Copy To** file function allows you to copy files into another location in OfficeTechNow.

To Copy a file or files:

- Highlight the file(s) in the File List
- Select **Copy To**
- Navigate to the target destination in the **File Browser** window



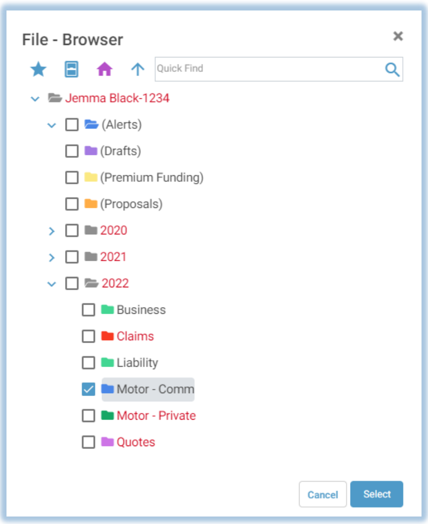
- Click **Select** to complete the copy

Move To

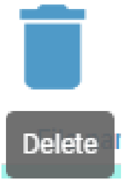
The **Move** file function allows you to move files into another location in OfficeTechNow.

To Move a file or files:

- Highlight the file(s) in the File List
- Select **Move**
- Navigate to the target destination in the **File Browser** window
- Click **Select** to complete the move



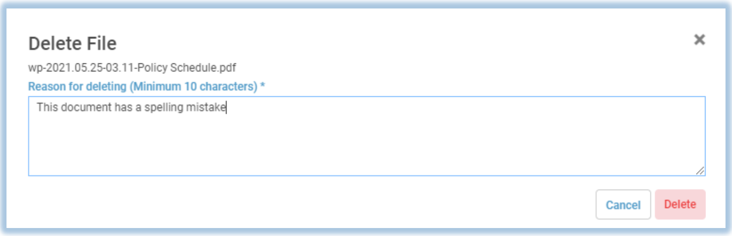
Delete



The **Delete** file function allows you to delete files from OfficeTechNow. Files can only be deleted if you have the required User Permission to do so.

To delete a file or files:

- Highlight the file(s) in the File List
- Select the **Delete** icon 
- Enter a brief explanation as to why you are deleting in the **Reason for Deleting** field (this explanation must be at least 10 characters long)
- Click **Delete**

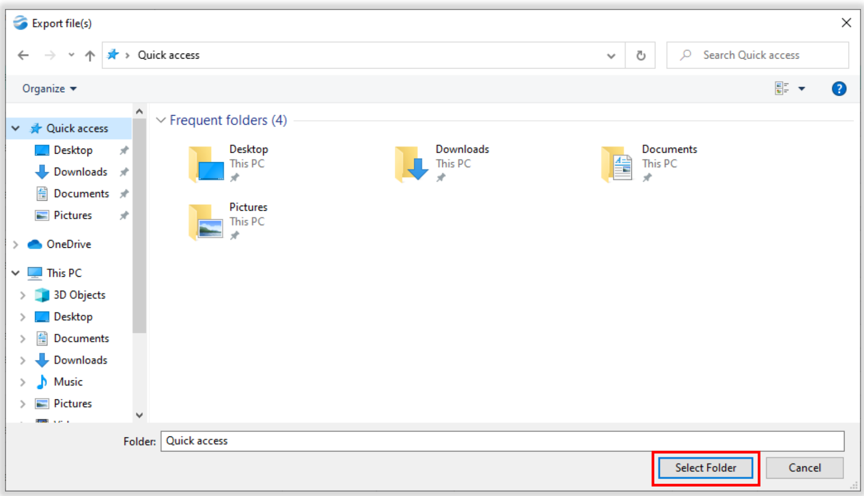


Export

The **Export** file function allows you to export files from OfficeTechNow to a Windows folder or USB.

To export a file or files:

- Highlight the file(s) in the File List
- Select **Export** which will open your Windows Explorer Drive allowing you to select the location you want to export your files to
- Click **Select Folder**

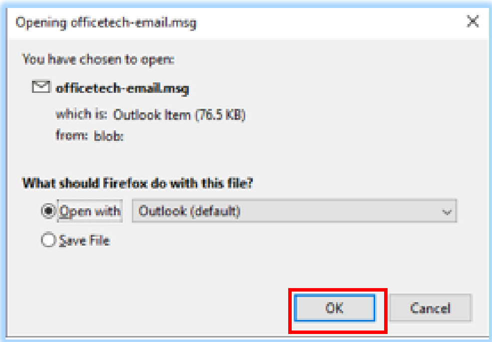


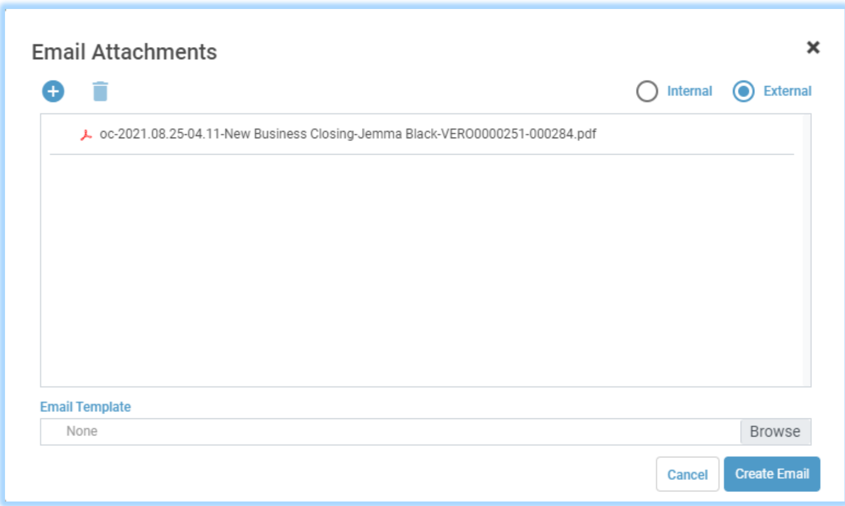
New Email

To attach a file to an email from the OfficeTechNow file view, select the file and click the **New Email** icon .

Note: The first time you perform this, a new window will appear asking to select Outlook as default application.

Select **OK** for Outlook default.

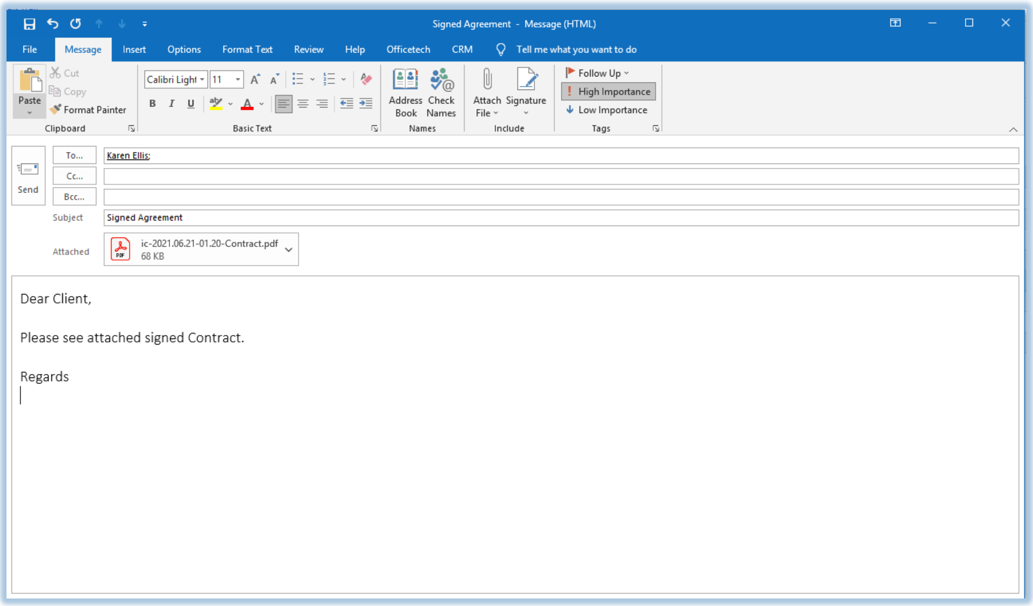




- To add additional files to the email, click the button to add additional files from other OfficeTech locations
- Too remove file from the email, click the button to remove the selected file(s) from the new email
- Click the **Browse** button to select an email template to attach your files to
- Click **Create Email**

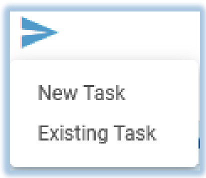
This will generate the Outlook email window, with the attachment, from where you will populate the email details and send.

Outlook will send your email.

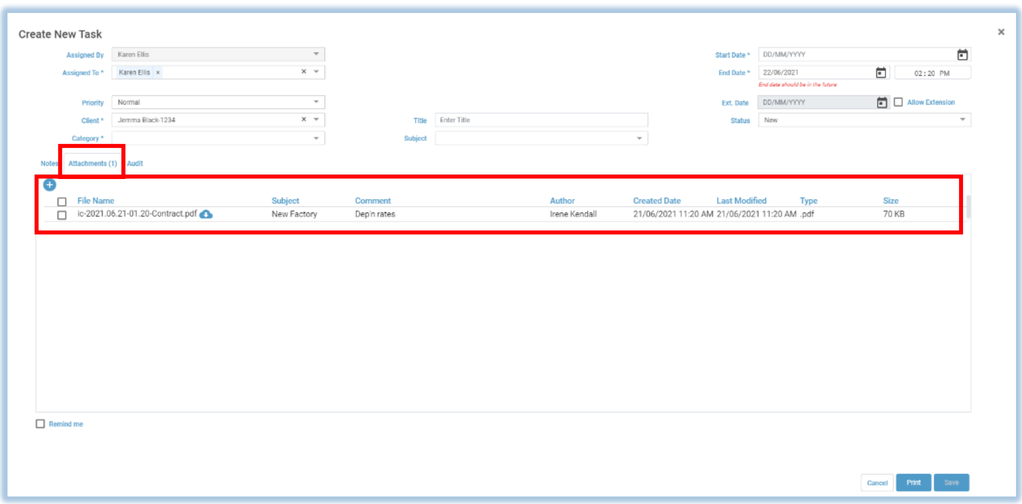


Send To Task

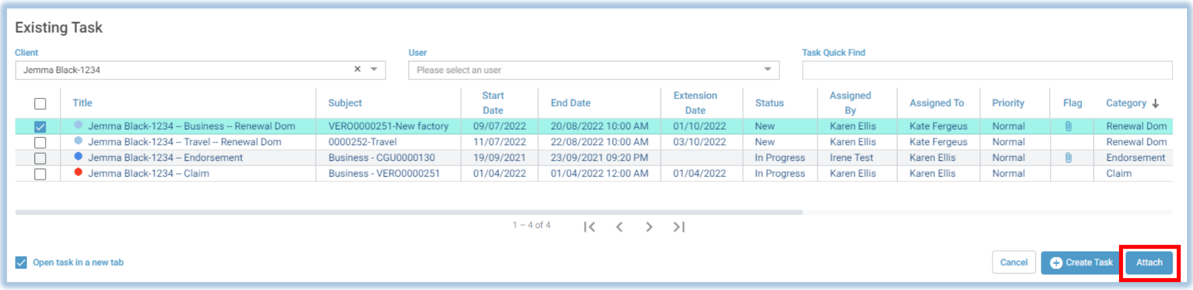
The **Send To Task** action allows you to attach an existing file or files to a task. When you select the **Send To Task** action you have the option of attaching files to a New or an Existing task.



If you select **New Task**, it will generate a new task window with the selected file(s) attached:



If you select **Existing Task**, it will open the window and display all existing **Tasks** for that Client.



To attach your file to an existing Task, select the Task and click **Attach**.

If the Task you want to attach your file to has not yet been created, you can still create a new Task from this window by selecting **Create Task**.

If you don't want to open the Task after attaching your file, untick the Open task in a new tab option in the Existing Task window. If this option is ticked, your Task will open in a new tab after selecting **Attach.**

PDF Tools

PDF Split

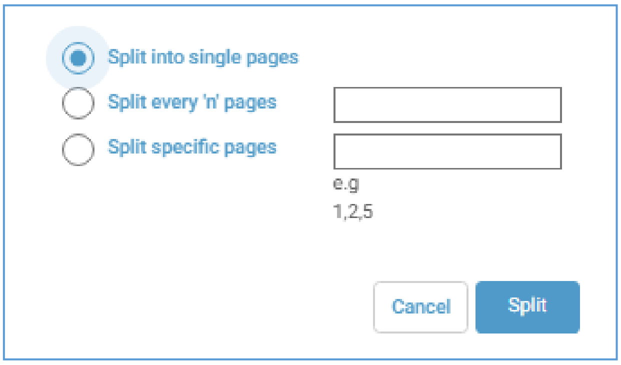
The **PDF Split** file function allows you to split a PDF file into individual pages, or at certain intervals. When a PDF is split, the original file is preserved and a new PDF is created for each split page or section using the original file name appended with a number, e.g. (1).

PDF files can only be split if you have the required User Permission to do so.

To Split a PDF:

- Click on the PDF file to be split
- Select **Split PDF**

- Check the **Split into single pages** checkbox to split the PDF into single pages, or
- Check the **Split every 'n' pages** checkbox and enter a value to split the PDF into multiples of the entered value, or
- Check the **Split specific pages** checkbox and enter the page numbers separated by a comma to split the PDF at those specific page numbers
- Click **Split**



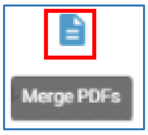
Split Files will be displayed as below:

PDF Merge

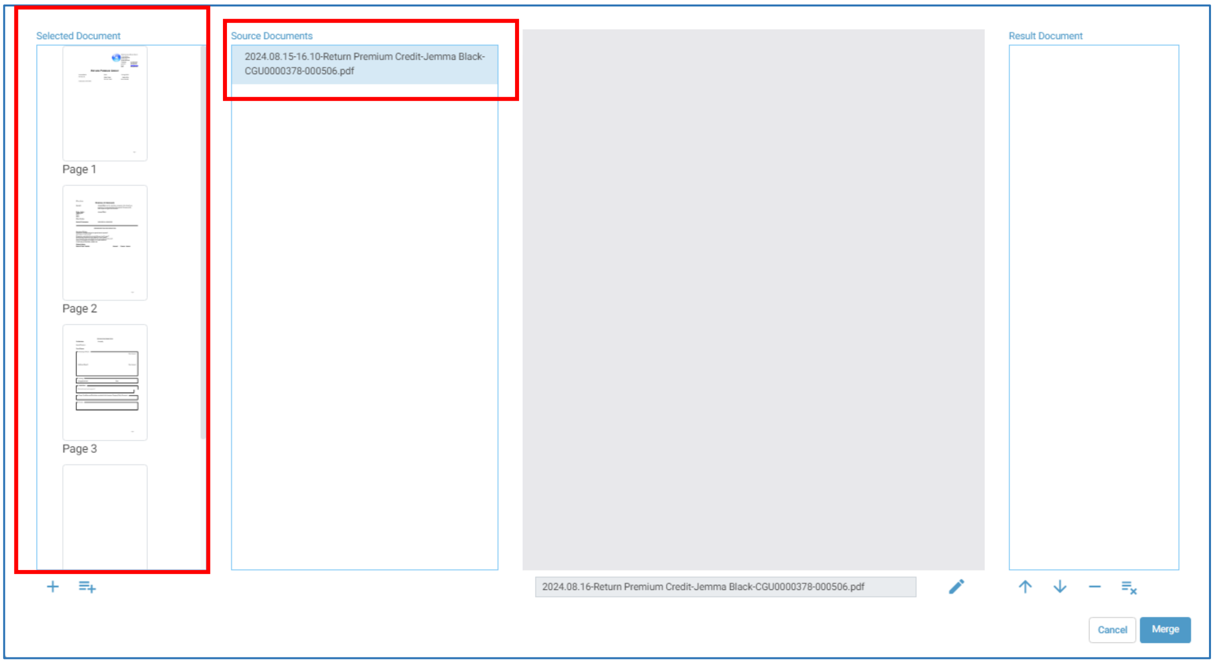
The **PDF Merge** function allows you to merge multiple PDF files (or to merge specific pages out from single or multiple PDF files) from an OfficeTech folder into a single PDF file.

To Merge PDF files into a single file:

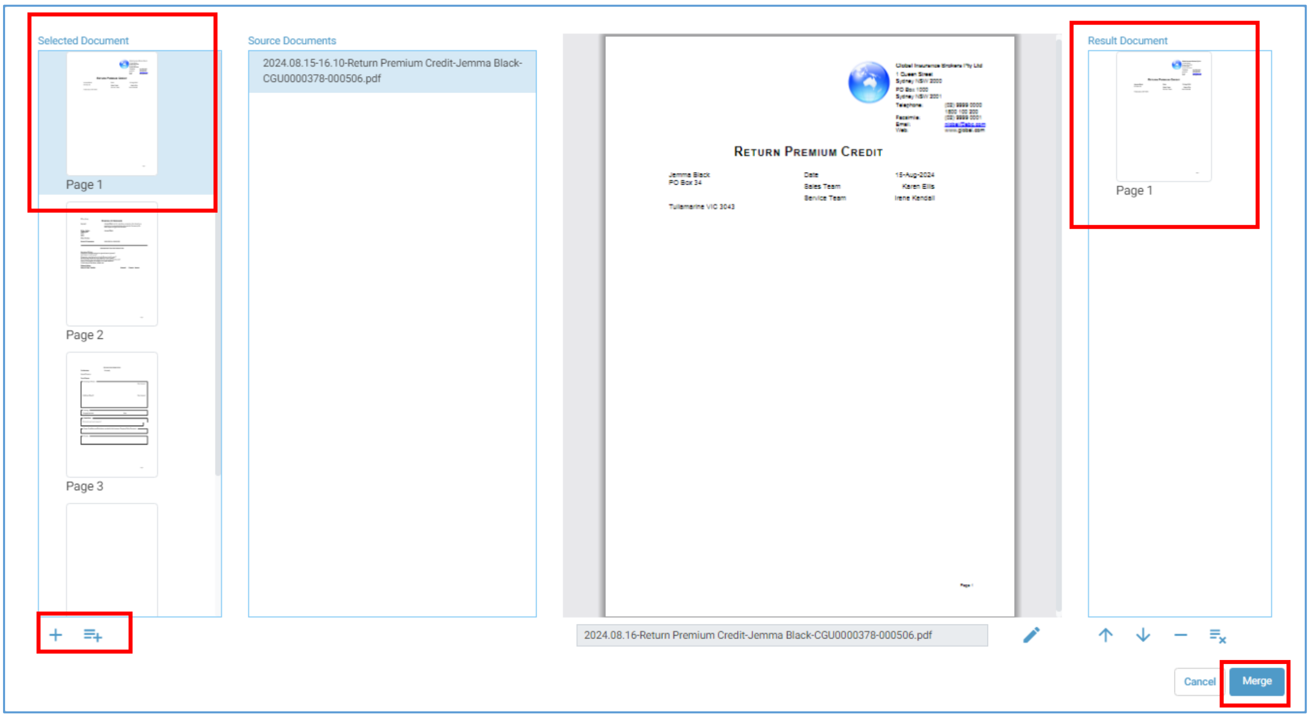
- Highlight the file or files in the File List to be merged
- Select **Merge PDFs**



- Highlight the **Source Documents** Column to list the individual pages in the Selected Document field



- Select the page(s) in the **Selected Document** field to add to your output PDF and click the + button to add Selected Pages or click to add all pages from the current Source Document



- Repeat the previous step for any additional Source Documents
- Use the **arrow** buttons to order the individual pages in the **Result Document** field to reflect the final order of the output PDF file
- To rename the file, click **the pencil icon** and input the desired Type, Description, Subject, and Comments for the output PDF file
- Click **Merge**

The newly merged PDF will be saved into the folder where the PDF Merge function was initiated.

The interface of the PDF Merge tool is outlined below:

Function	Description
Selected Document	Displays the pages within the currently selected Source Document
+	Adds the currently selected page(s) to the Result Document
	Adds all pages from the currently selected Source Document to the Result Document
Source Documents	Displays the currently available source documents
Preview of Selected Page	Displays a preview of the currently selected page in either the Selected Documents field or the Result Document field
Result Document	Displays the output PDF pages in the order they will appear once merged framed in Blue

↑ ↓	Moves the currently selected pages in the Result Document field to the left or right, i.e. earlier or later in the output PDF
–	Removes the currently selected page(s) from the Result Document field
	Removes all of the pages from the Result Document field
2024.08.16-Return Premium Credit-Jemma Black-CGU0000378-000506.pdf	Displays the current output PDF filename
	Allows you to specify the Type, Description, Subject, and Comments of the merged PDF
Merge	Finalises the merge and generates your output PDF
Cancel	Disregards all changes and closes the Merge PDF window

PDF Edit(M)

The **PDF Edit(M)** file function allows you to permanently redact information from a PDF file. Once finalised the information *cannot* be retrieved, not even by the OfficeTech Support Desk.

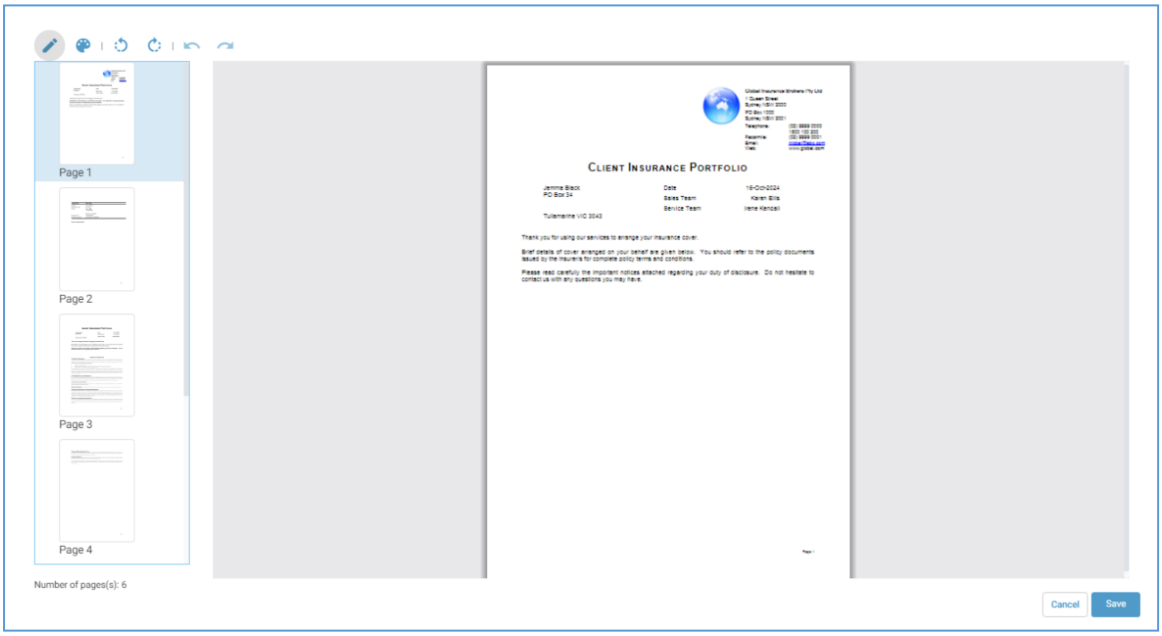
PDF files can only be redacted if you have the required User Permission to do so.

To redact information from a PDF file:

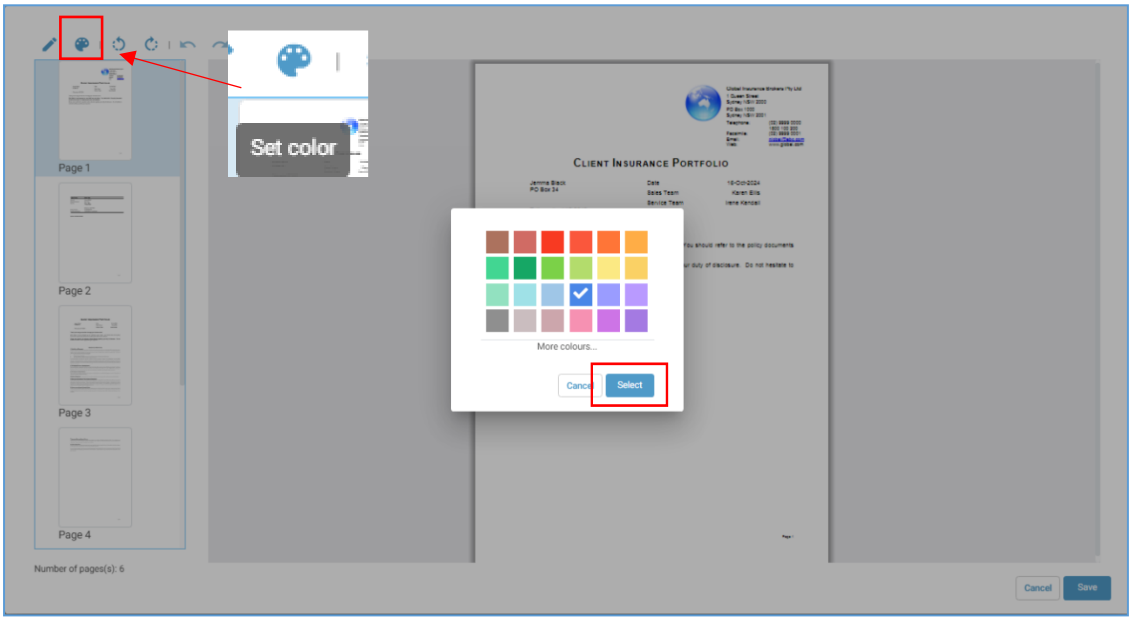
To Merge PDF files into a single file:

- Highlight the file that you wish to Edit
- Select **Edit PDF (M)**

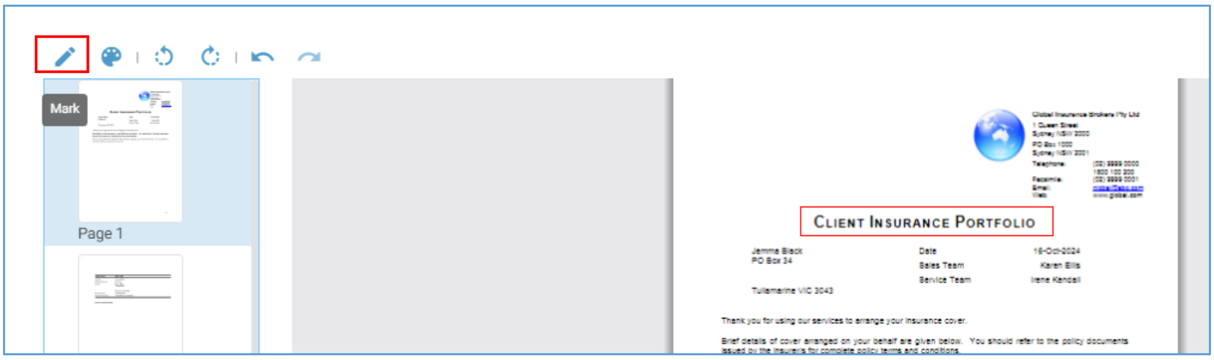
- The Edit PDF (M) window will open allowing you to choose the section or sections of the document that you wish to redact information from



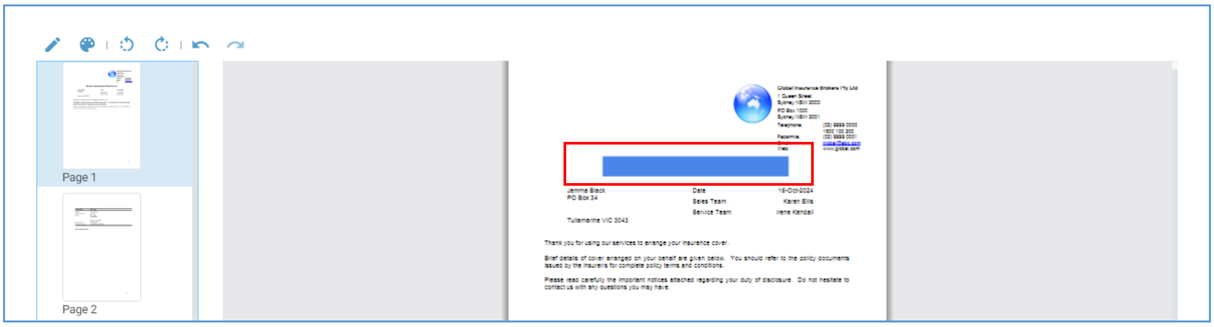
- Choose the **Set Colour** to select the colour you wish to redact the information in and click on **Select**



- With your mouse, draw a box around the section you wish to Mark out and Select the **edit icon**



- This will then Mark out the selected area as below. Select **Save** to save the action



- You can also rotate the document 90 degrees left or right if required by selecting one of the Roate Icons
- Actions can be undone by selecting the Undo icons

The interface of the Edit PDF (M) tool is outlined below:

Function	Description
Mark	Redacts the current selection
Set Colour	Allows a User to select the colour they wish to use to redact the selected text of the document with
Rotate Left	Rotates the current page 90 degrees to the left
Rotate Right	Rotates the current page 90 degrees to the right
Undo	Reverts your last action
Redo	Reapplies your last Undo action
Save	Permanently applies your changes to the PDF file

Edit PDF (H)

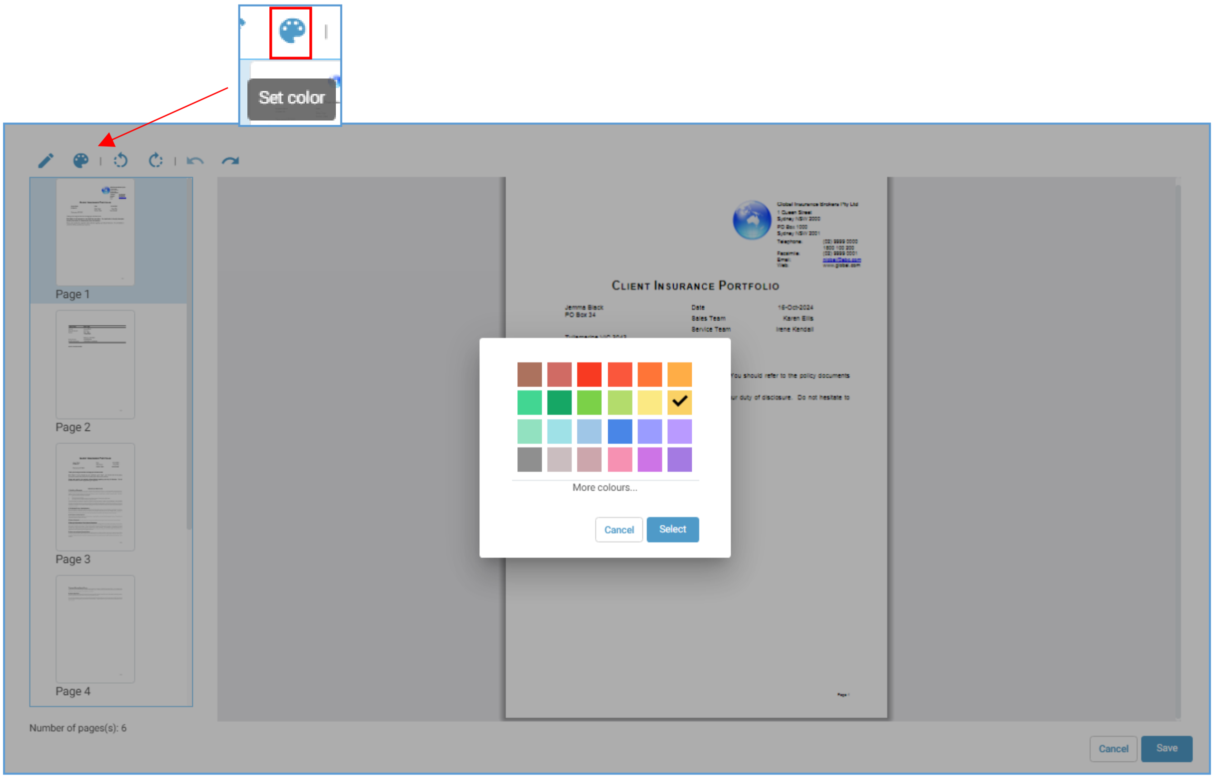
The **Edit PDF (H)** file function allows you to permanently highlight information in a PDF file. Once finalised the highlight *cannot* be removed, not even by the OfficeTech Support Desk.

PDF files can only be highlighted if you have the required User Permission to do so.

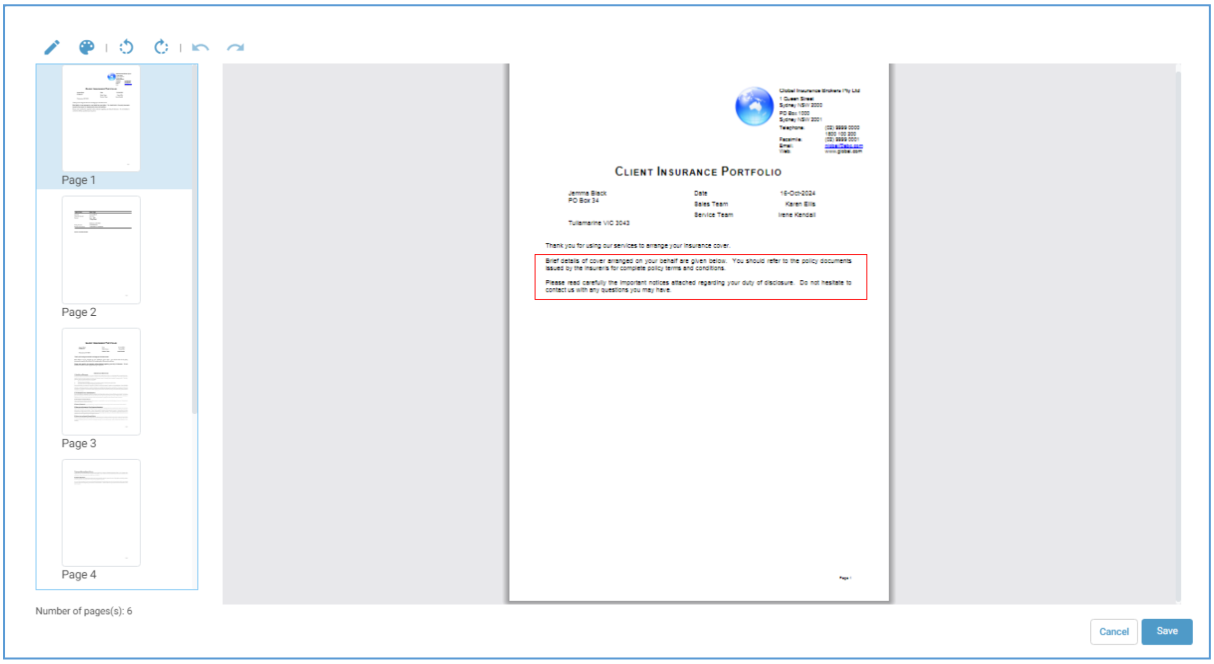
To highlight a section of a PDF file:

- Click on the PDF file to be highlighted Select **Edit PDF (H)**

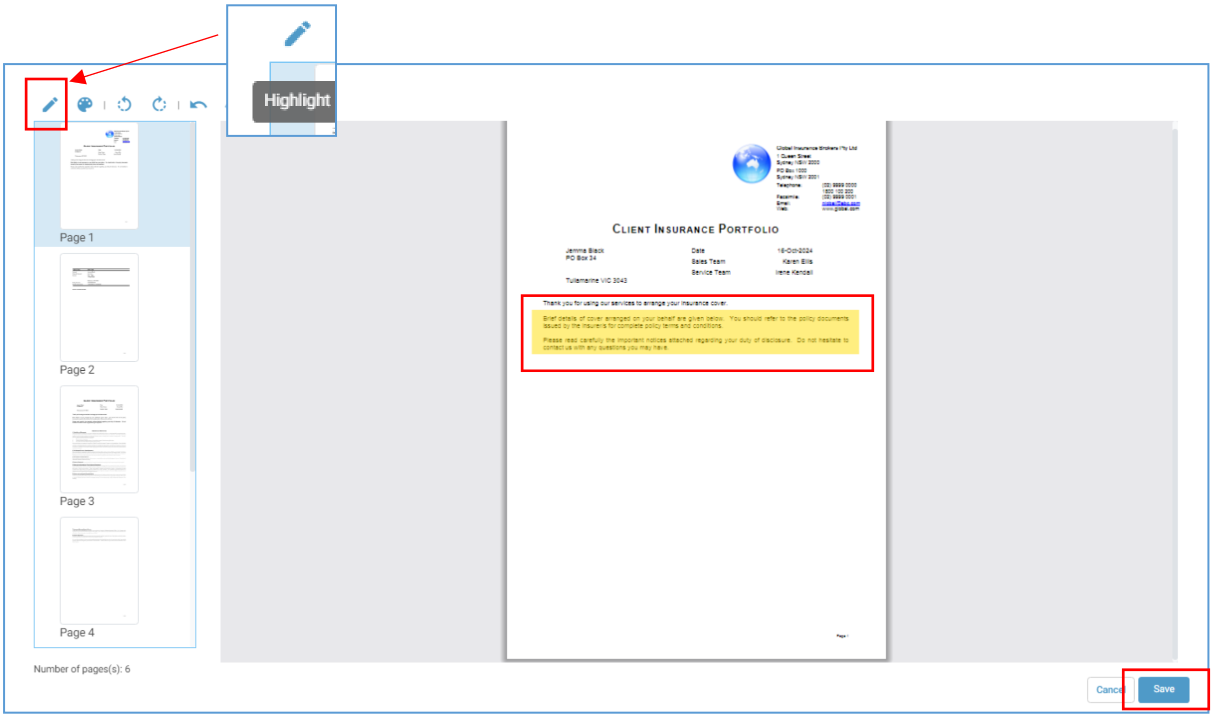
- Click on the **Set Colour** dropdown to select the colour of the highlight



- Using your mouse cursor, highlight the area of the PDF file to be highlighted



- Click **Highlight** to highlight the desired area



- Click **Save**

Note: You can have multiple highlights of different colours on a single PDF file.

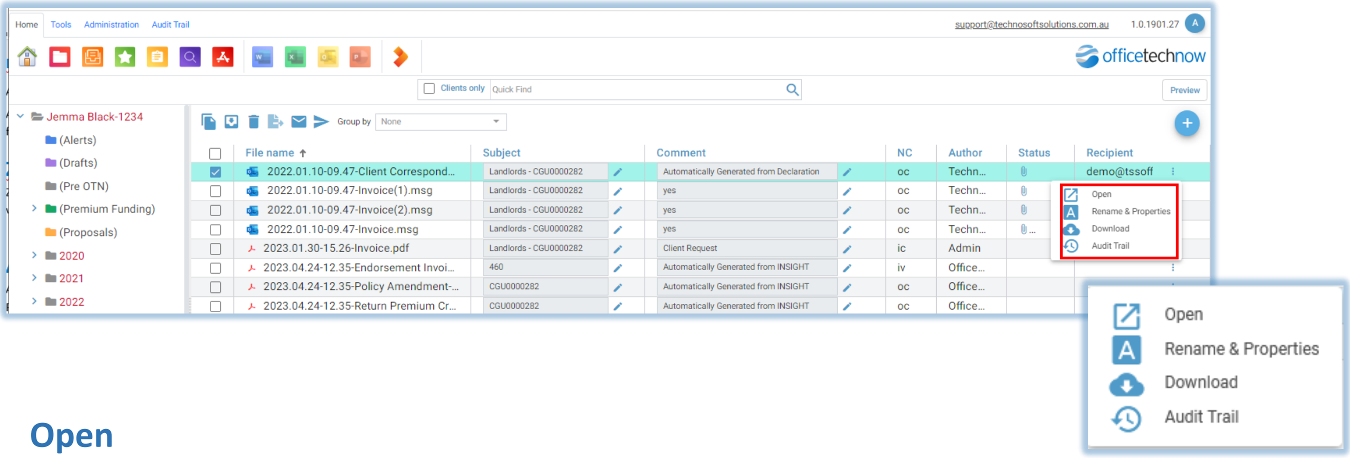
- You can also rotate the document 90 degrees left or right if required by selecting one of the Roate Icons
- Actions can be undone by selecting the Undo icons

The interface of the Edit PDF (H) tool is outlined below:

Function	Description
Set Colour	Sets the colour of the highlight function
Highlight	Highlights the current selection based on the Set Colour
Rotate Left	Rotates the current page 90 degrees to the left
Rotate Right	Rotates the current page 90 degrees to the right
Undo	Reverts your last action
Redo	Reapplies your last Undo action
Save	Permanently applies your changes to the PDF file

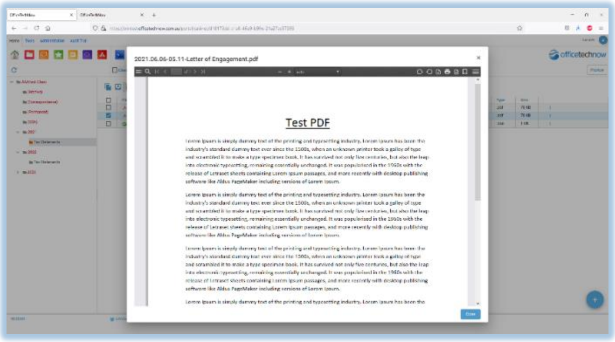
File Document Actions

These are the actions that pertain specifically to a file in the list view and are located in the menu that is accessed via the Ellipsis button at the end of the row.



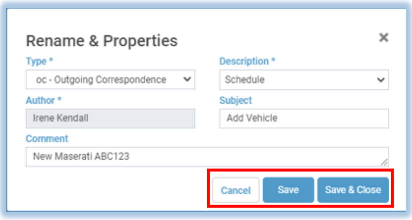
Open

The **Open** option will open the selected file and display on your screen. For any editable file. i.e. an unprotected Word document, you will need to open the file to make any edits. To edit a file, select the Word document from the list and select open.



Rename & Properties

The **Rename & Properties** option allows you to rename any details on the selected file.

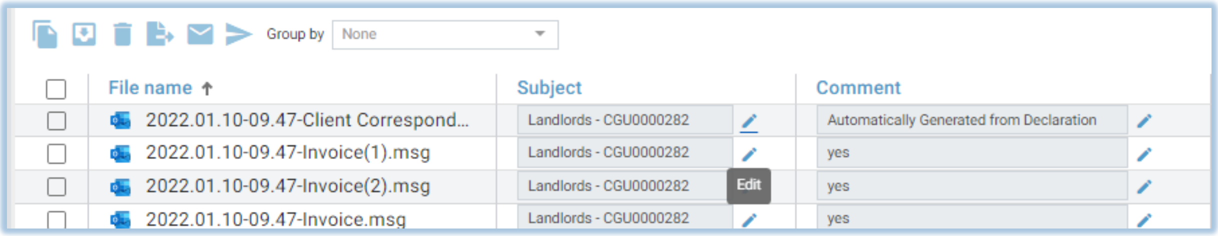


Make the required changes to the document properties and select **Save** or **Save & Close**. This will update the details on the selected file.

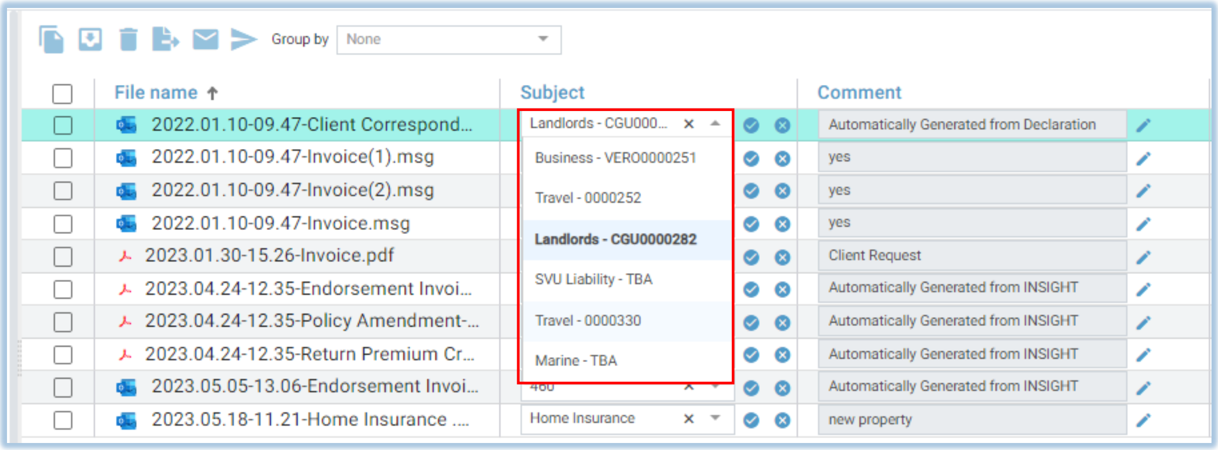
<u>Note:</u> You cannot rename a file while it is Checked Out.

You can also rename the Subject and Comment fields by using the "soft touch" feature. To use this feature:

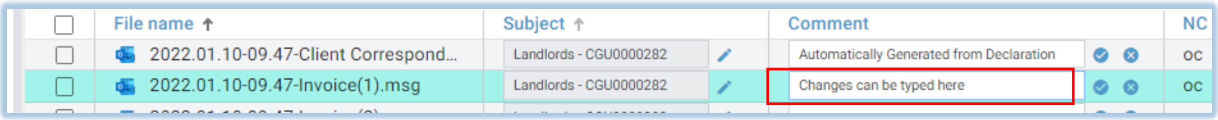
1. Click on the Edit pencil



2. This will open up the field to allow you to make changes such as select a different policy number if you are in the subject field



3. You can also free type data into the field



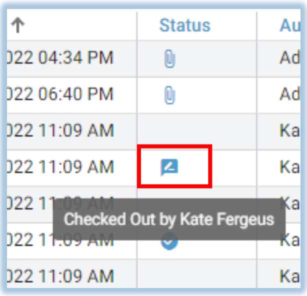
4. Click the for the changes to take effect or the to discard

Check In

The check in document file function allows you to check in a word document that you have recently closed.

The Checked-Out icon in the status column signifies that the document is currently being edited by you or another user. Hovering your mouse over the Checked-Out icon will tell you who has the document open.

Only one person can edit a document at a time.



To Check In a document:

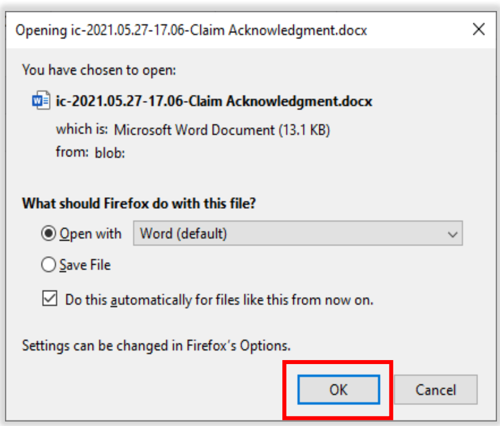
- Open the File Functions menu
- Select **Check In**

NOTE: OfficeTechNow will not automatically check a document back in immediately, so it is best practice to check your document back in once you have closed it. The Check In option will only be available if the document is currently Checked Out

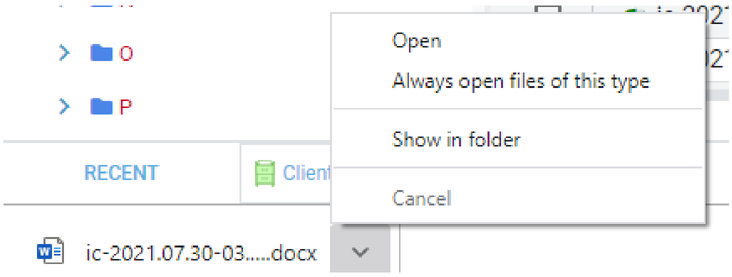
Download

The download function will allow you to download the file. To download a file, select the document from the list and select download.

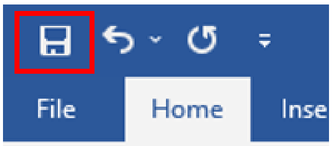
The first time you perform this action, a window may appear confirming to open the file with Word:



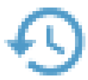
Click **OK** and the Word document will download, your web browser will display a prompt to open the file. This prompt may look different depending on which web browser you are using.



If you want to save any changes made to the document, simply select the **Save** icon at the top of the Word Document.



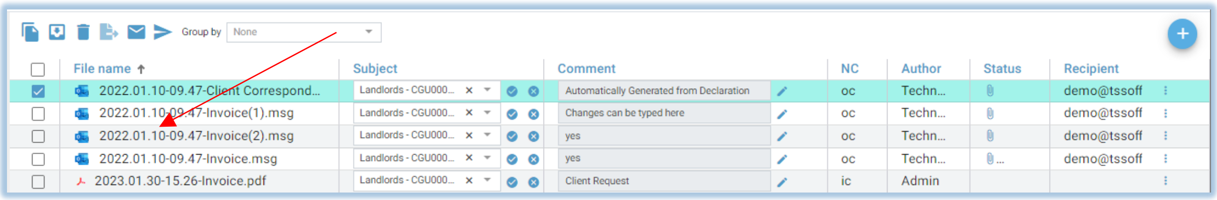
Audit Trail



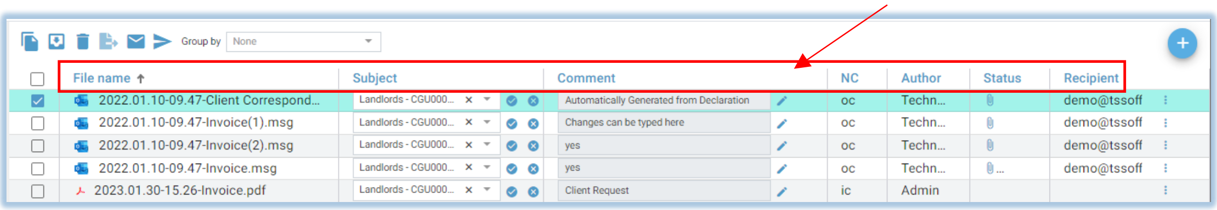
To see the history of actions on any file you can select the **Audit Trail** action.
This will open the **Audit Trail** window and display the current days actions on the file. Filters on the **Audit Trail** can be used to filter by Username, Action and Date.

File View

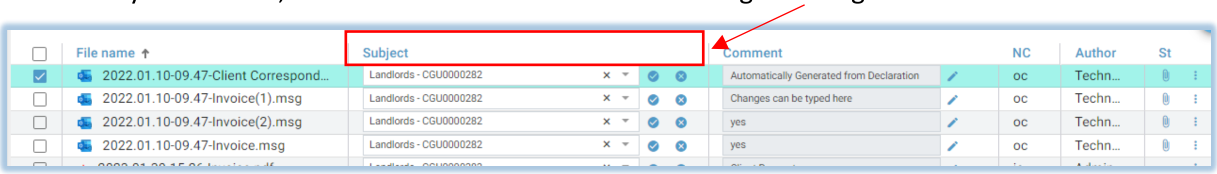
To sort by a column, simply click on the column heading and an arrow will appear to indicate which column is currently being sorted.



To re-arrange your columns, click, and drag the column header to the desired location.

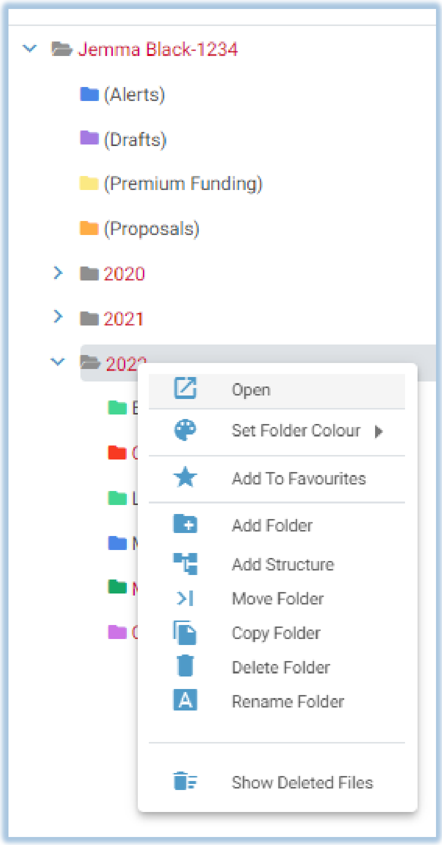


To re-size your column, click the border of the column heading and drag it to the desired width.



Folder Functions

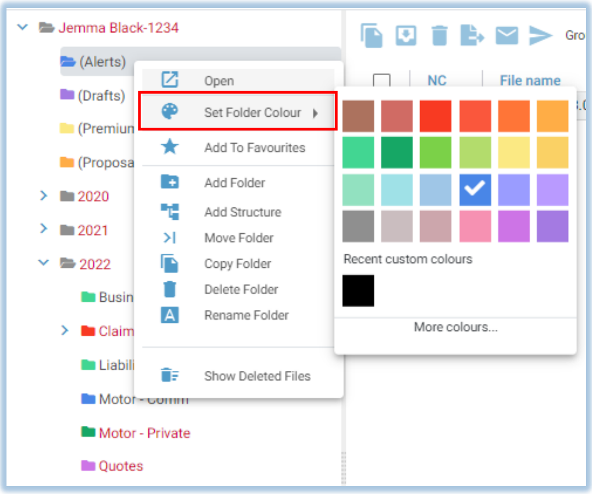
Right Click on a folder to expose the context menu available. The options that will appear will depend on the induvial User's permissions.



Filter	Description
Open	Opens the selected folder in a new window
Set Folder Colour	Allows user to select the desired colour for the selected folder
Add to Favourites	Bookmarks the selected folder to the User's List of Favourites
Add Folder	Adds a sub folder to the selected folder
Add Structure	Allows you to add a predetermined folder structure to the selected folder
Move Folder	Moves the selected folder
Delete Folder	Deletes the selected folder
Copy Folder	Copies the selected folder to a selected location
Rename Folder	Renames the selected folder
Show Deleted Files	Shows all deleted files from the selected folder

Set Folder Colour

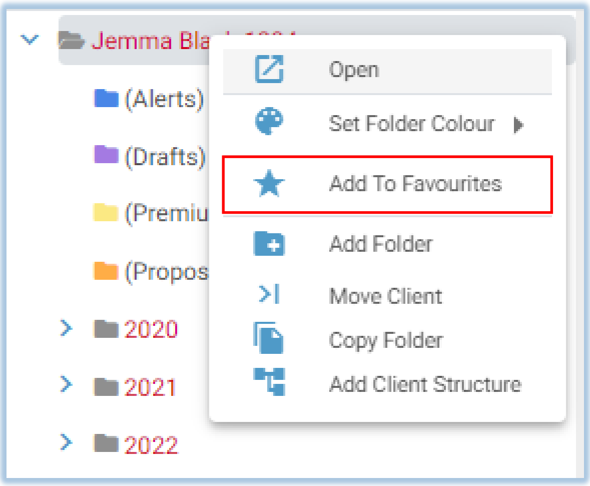
To change the colour of a folder, right click on the required Folder and choose **Set Folder Colour** from the context menu.



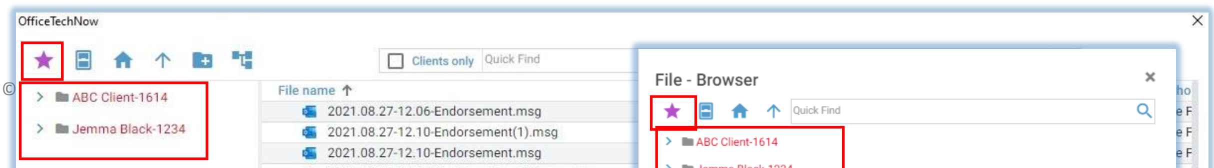
NOTE: This is a global change, i.e. all other folders of the same name will also change colour

Add to Favourites

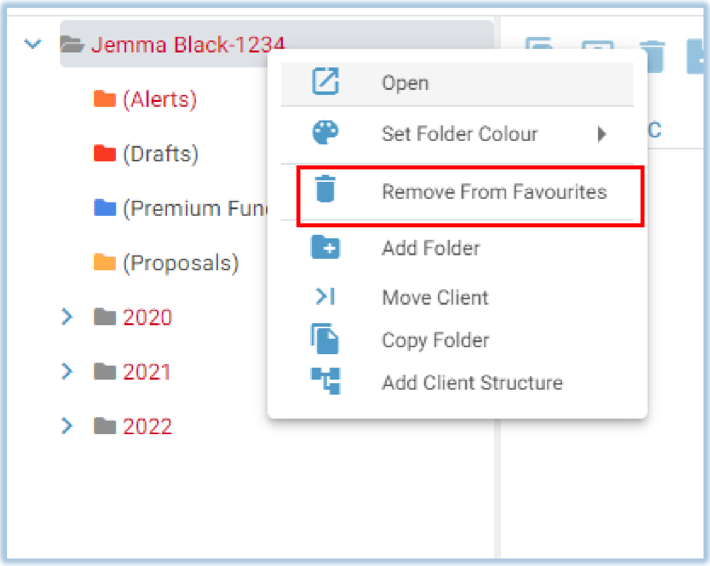
To add a Client to your **Favourites** list, right click on the selected Client and select **Add To Favourites** from the context menu.



Favourites are also available in the OfficeTechNow Save window and the File Browser window.

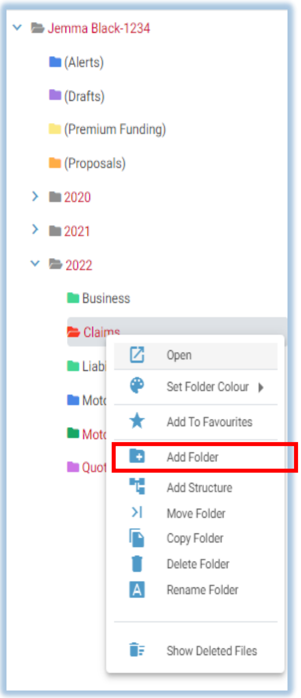


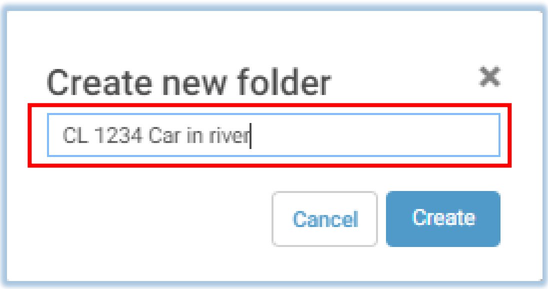
To remove a folder from your favourites, right click on the folder and select **Remove From Favourites.**



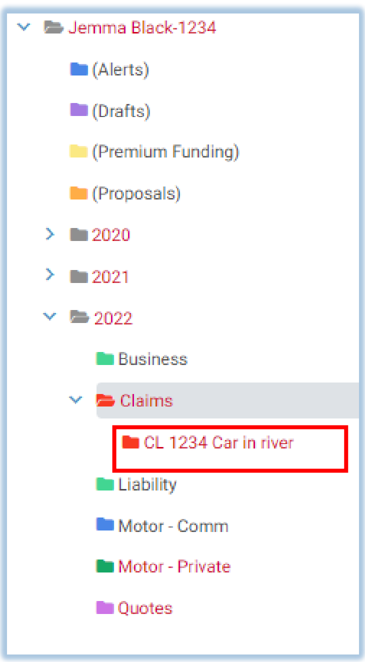
Add Folder

To add a Folder, right click on the selected Cabinet or Folder and select **Add Folder** from the context menu.

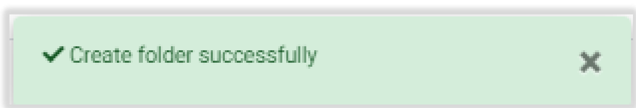




A window will appear allowing you to Create a new Folder. Give your folder a name and click **Create.**

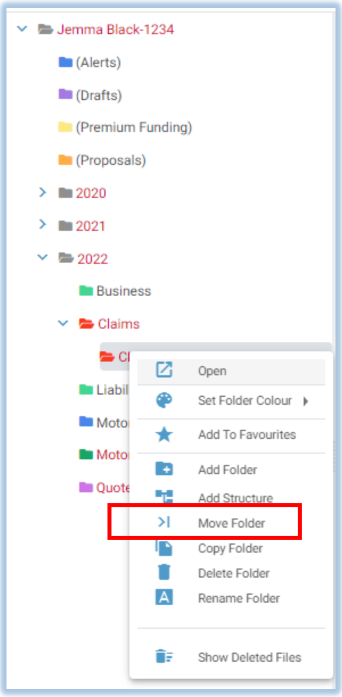


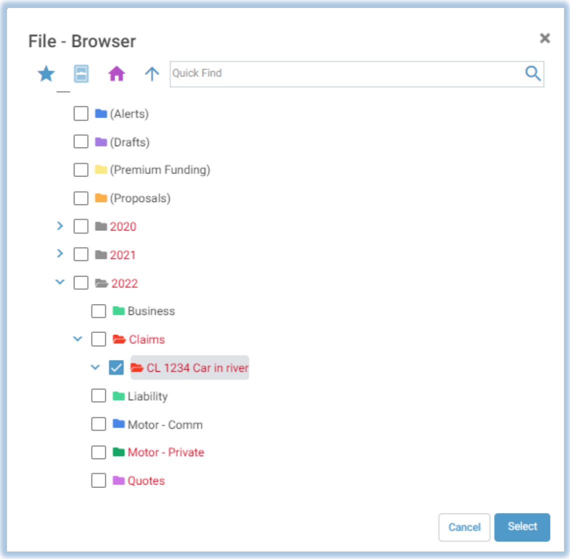
The new folder will create and you will receive a message that the folder has been created



Move Folder

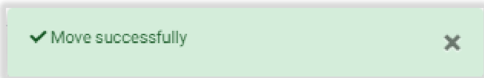
To move a Folder, right click on the selected Client, Cabinet or Folder and select **Move Folder** from the context menu.





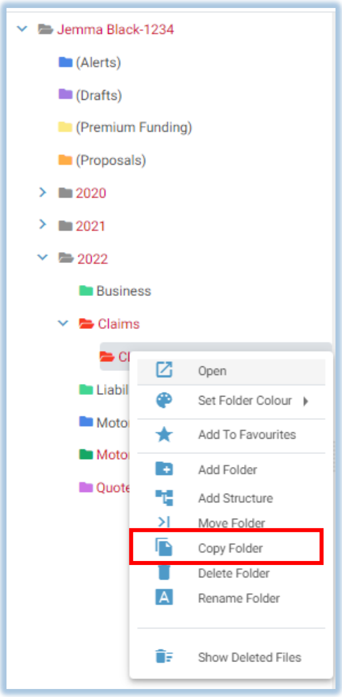
The File Browser window will open, allowing you to select the location you would like to move your folder to. Click **Select.**

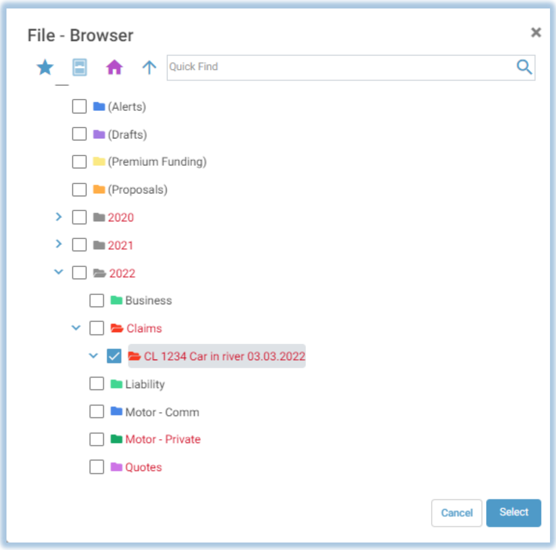
You will then receive a message that the move has been performed successfully



Copy Folder

To copy a Folder, right click on the selected Client, Cabinet or Folder and select C**opy Folder** from the context menu

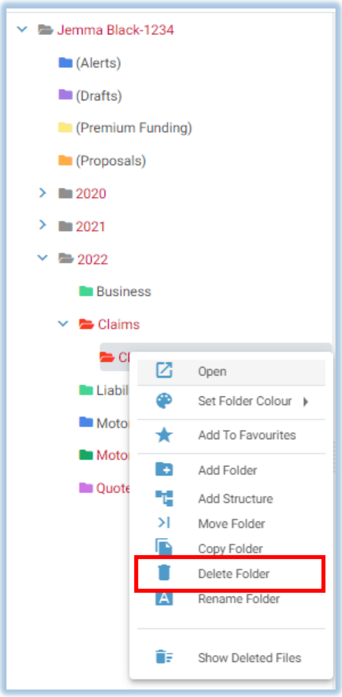


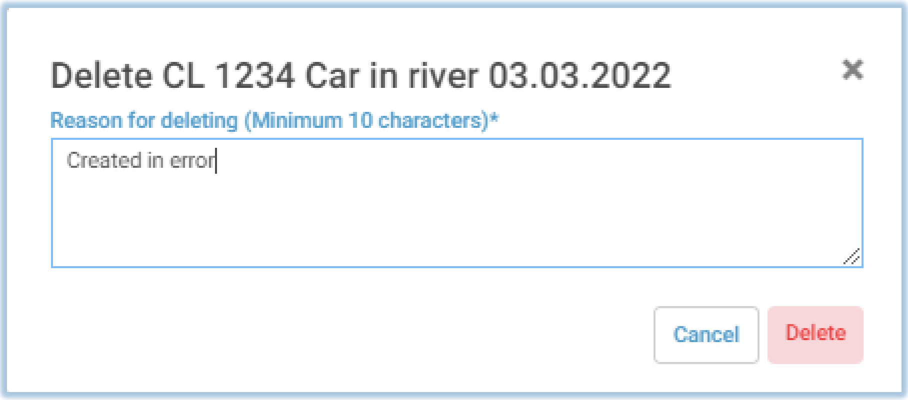


The File Browser window will open, allowing you to select the location you would like to copy your folder to. Click **Select.**

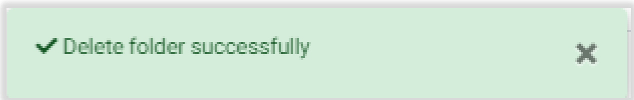
Delete Folder

To delete a Folder, right click on the selected Client, Cabinet or Folder and select **Delete Folder** from the context menu.



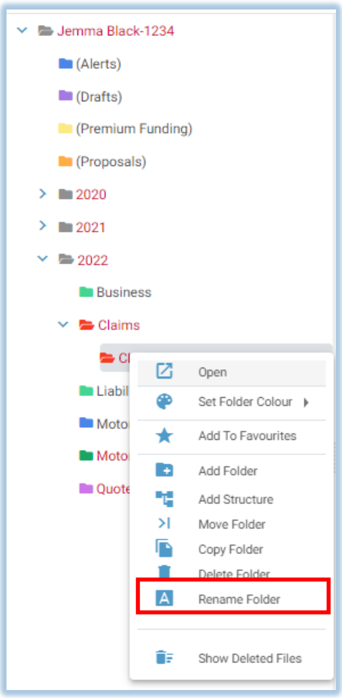


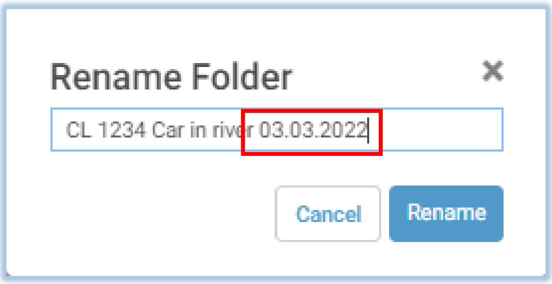
A window will appear allowing you to delete your folder. You must enter a 10-character reason for deletion which will appear in the Audit Trail. Click **Delete.**



Rename Folder

To rename a Folder, right click on the selected Client, Cabinet or Folder and select **Rename Folder** from the context menu.



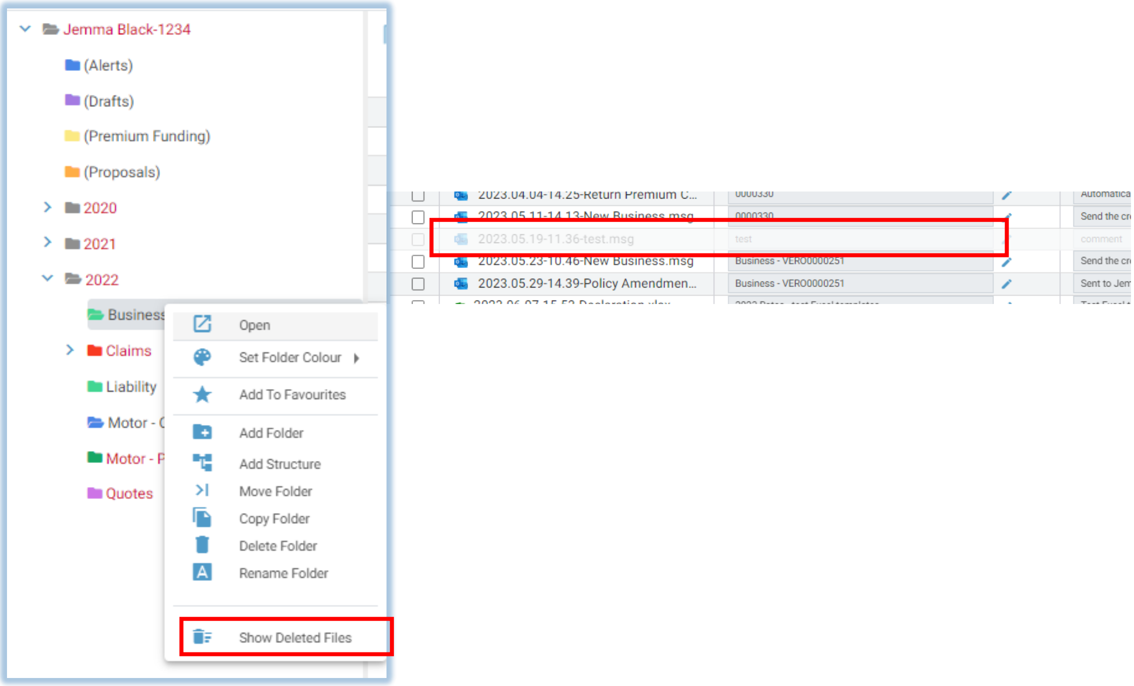


A window will appear allowing you to rename your folder. Click **Rename.**

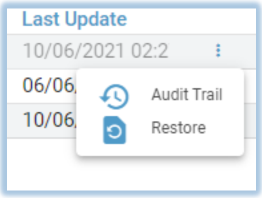
Show Deleted Files / Restore Deleted File

Previously deleted files can be restored as follows:

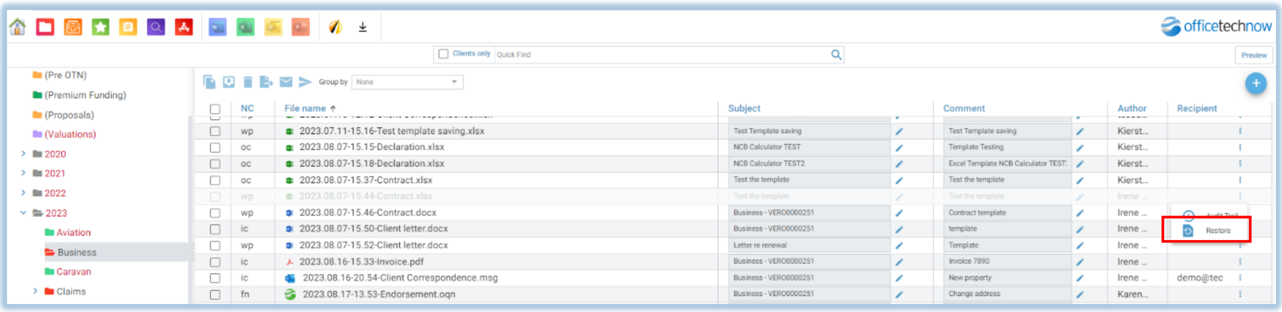
1. Go to the folder that you have deleted the file from and select **Show Deleted Files**
2. Deleted files will show as greyed out



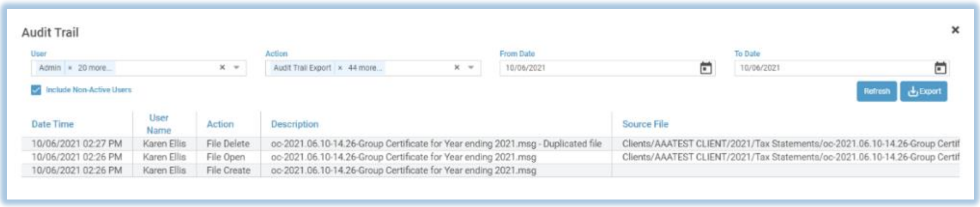
3. Highlight the deleted file that you wish to restore and click the menu at the end of the row



4. Select **Restore** and the file will be restored to the folder was deleted from



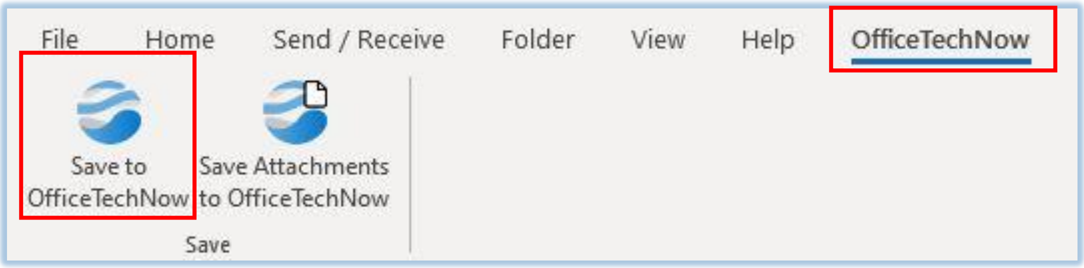
5. You can also view the Audit Trail of the Deleted file by selecting **Audit Trail**



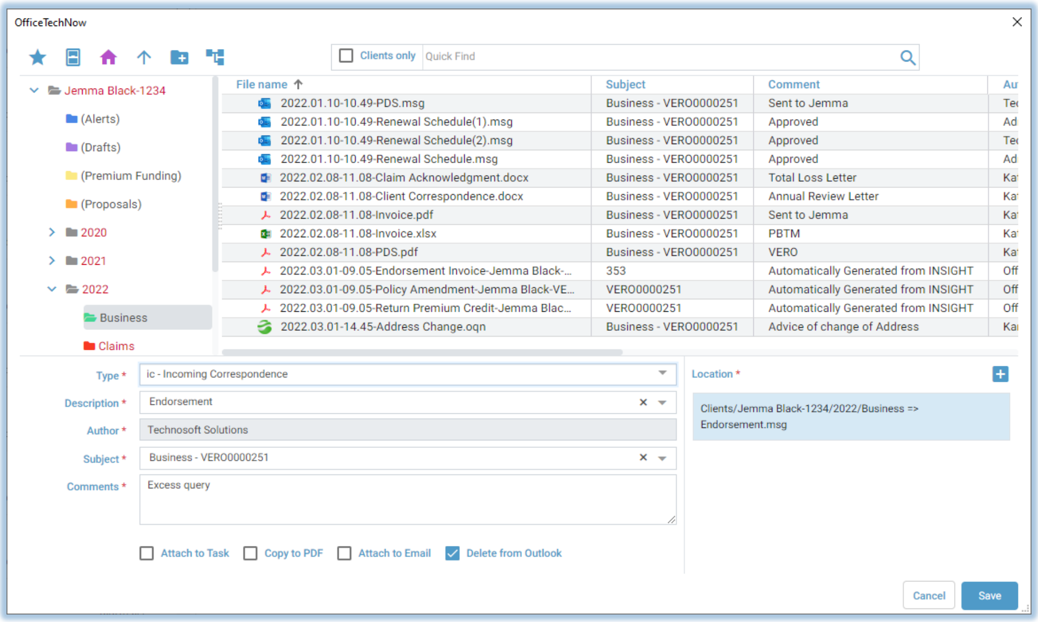
Saving to OfficeTechNow

The OfficeTechNow Save Form is the method used to save documents into OfficeTechNow.
To save a file to OfficeTechNow, select the **Save to OfficeTechNow** button from the toolbar. This button is available in all Microsoft Applications, i.e. MS Word, Excel, Outlook and PowerPoint.

Outlook OfficeTechNow Save



To save emails, select the email/s from the Inbox list, and click the **Save To OfficeTechNow** button this will launch the OfficeTechNow Save Form.

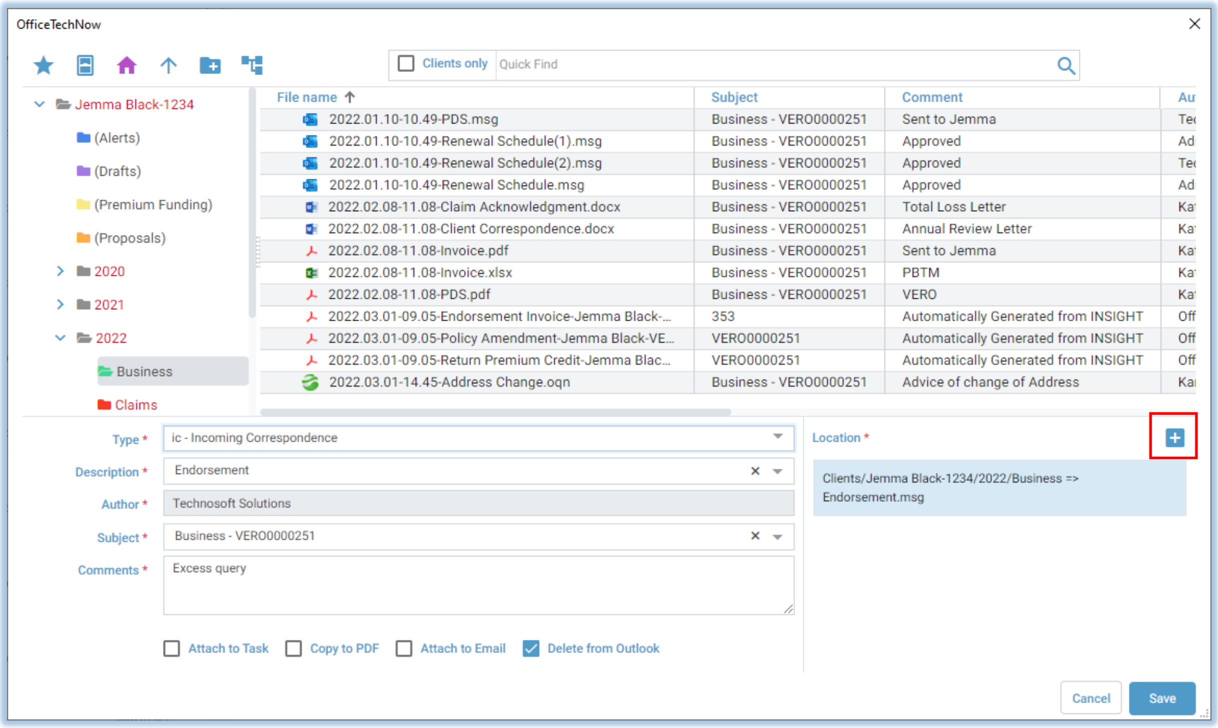


Function	Description
	Takes you to your list of saved Favourites
	Takes you to a list of the In-Trays of all users in your System. The current logged in user will be highlighted by default
	Selecting Home will take you to the list of all Cabinets that you have available to you
	Press the Up button in the Save As screen, to go up one level in the directory

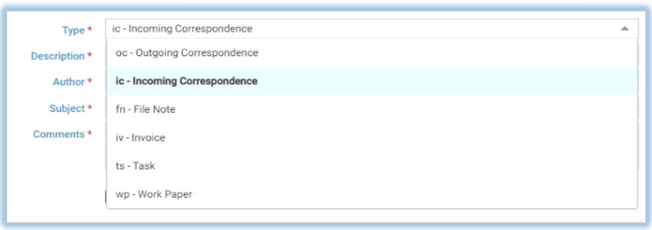
	Allows you to add an additional folder to a selected location whilst saving (depending on a user's available permissions)
	Allows you to add an additional structure to a selected location whilst saving (depending on a user's available permissions)

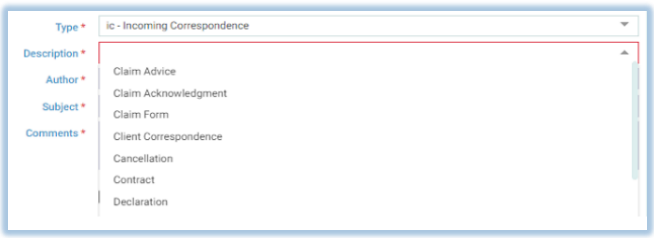
The additional locations option has been included to allow a file to be saved to multiple locations in the one process.

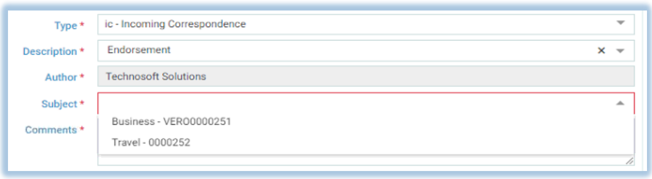
To add the additional Save Locations, Click the button, highlight the location you wish to add and click the button once more. You must also ensure that the document properties are completed for each location that you add. There is no limit to the number of locations you can add.

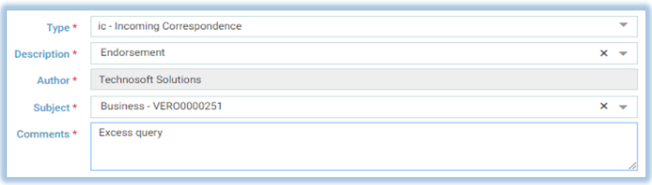


To apply Document Properties to the file, select from the drop-down menus for the default options or simply type your own properties. Default properties that are available will depend on your system set up. **Type, Description & Subject** can be set up with default options. **Comments** are free form. Once you have allocated all the relevant properties to the file, select **Save.**









Delete from Outlook

The check box **Delete from Outlook** will remove the saved email from Outlook as you save to OfficeTechNow.

Copy To PDF

The check box **Copy to PDF** will create a PDF copy save to the desired location.

Attach To Task

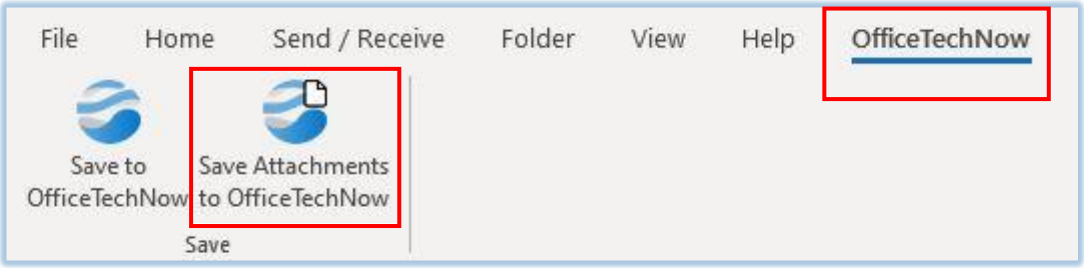
Selecting **Attach to Task** as you are saving a document allows you to attach the document to a new or existing task. If you check the **Attach to Task** tick box a new window will pop up asking if you want to save to a New or Existing Task.

Attach To Email

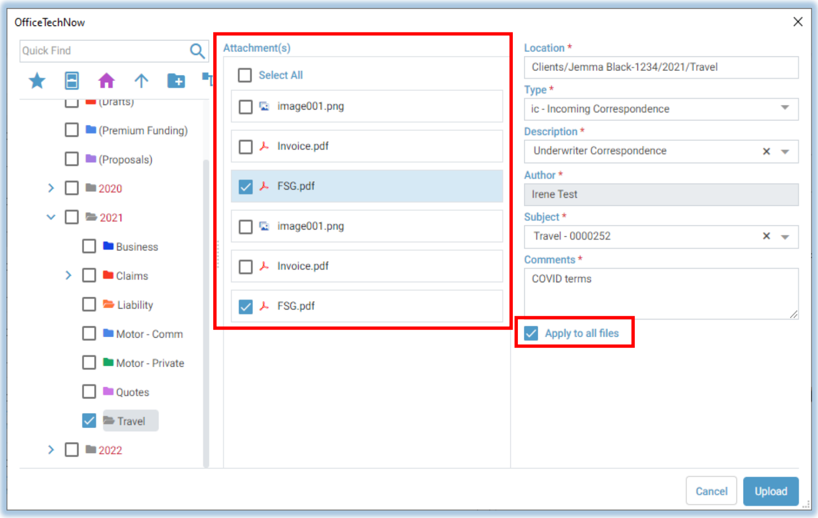
The **Attach to Email** function will allow you to attach the document that you are currently saving to a new email.

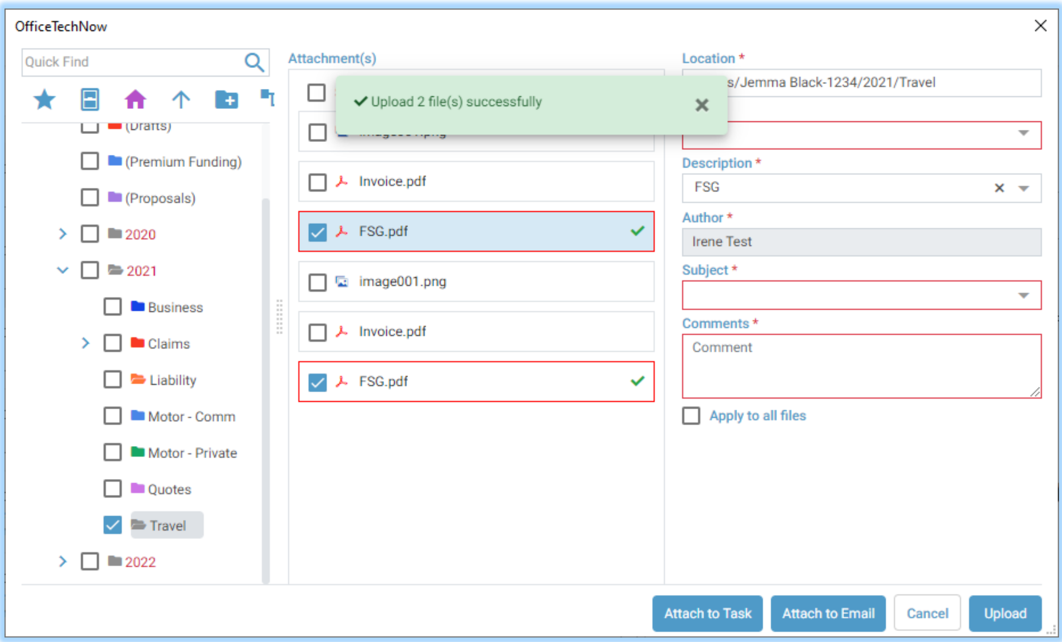
Outlook OfficeTechNow Save Attachments

The Save Attachments button is located next the Save to OfficeTechNow button and when selected will load email attachments into the OfficeTechNow Save Attachments window. If multiple emails are selected, all attachments contained in the selected emails will appear in the window.



Attachments can be individually selected, and properties added, before uploading.





Once the selected files have uploaded, additional functions become available for these files.

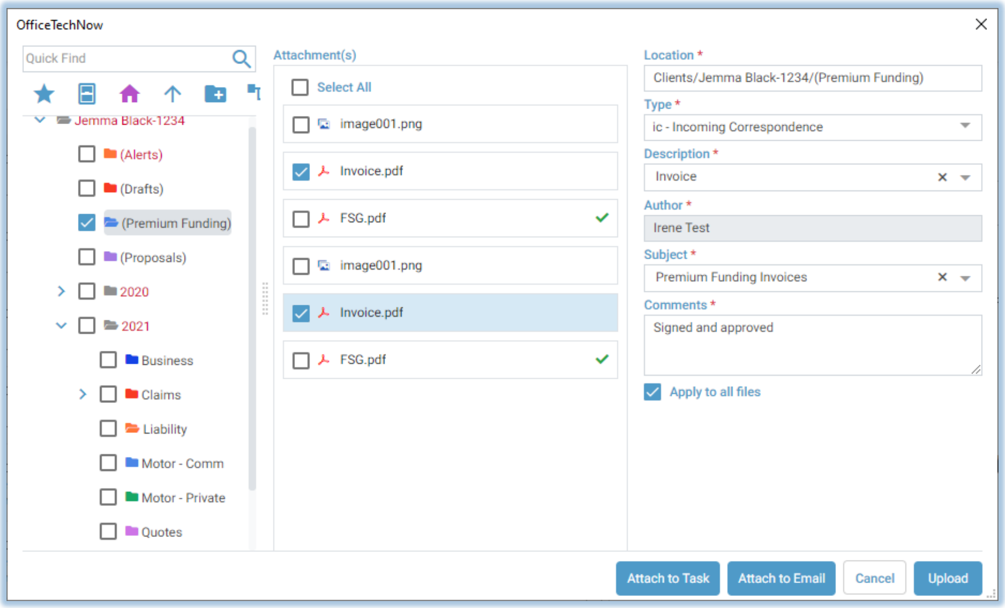
Attach to Task

The **Attach to Task** option will open the attach to task functions allowing the uploaded files to be added to tasks.

Attach to Email

The **Attach to Email** option opens the Email Attachments window to generate a new email
If neither of the above actions are required, continue with the upload actions on remaining files.

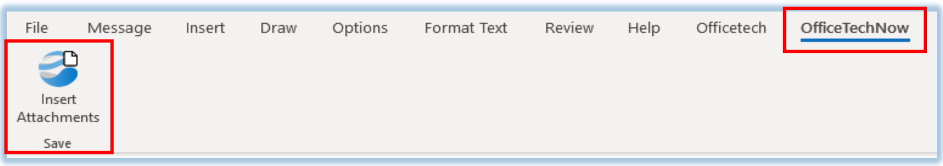
A second upload can be performed from the same window after the first upload.



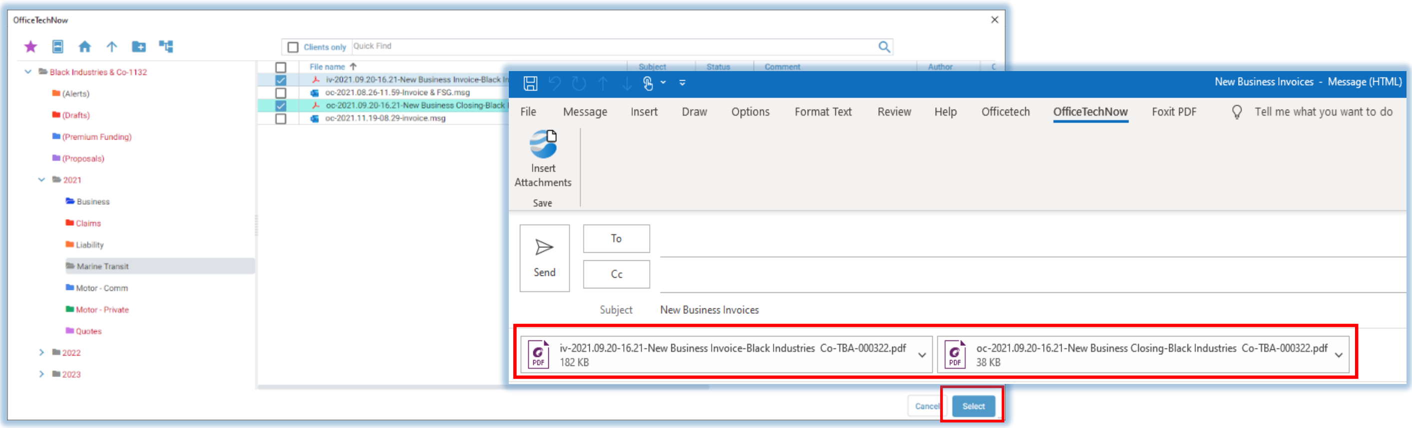
NOTE: Previously uploaded files are marked with a ✔ and can be excluded from the second upload.

Insert Attachments

When creating an email, replying to an email, or forwarding an email the Insert Attachment button is available in the new email.

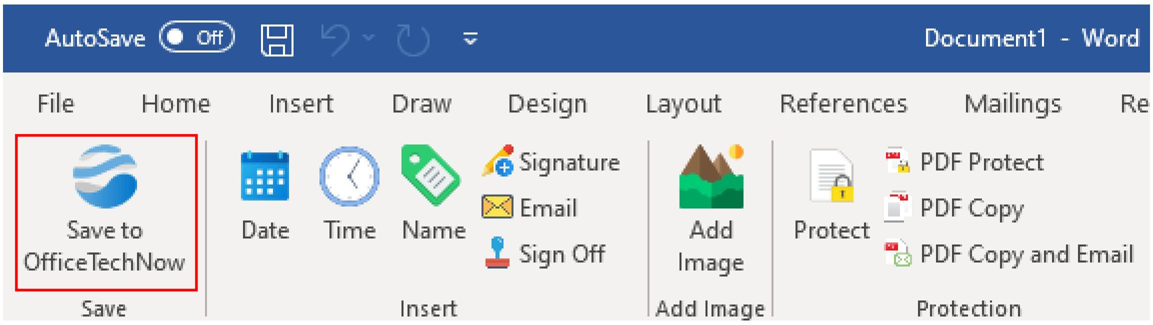


When the Insert Attachment button is selected, the OfficeTechNow browse window will open. Select the location of the files to attach and click **Select.**

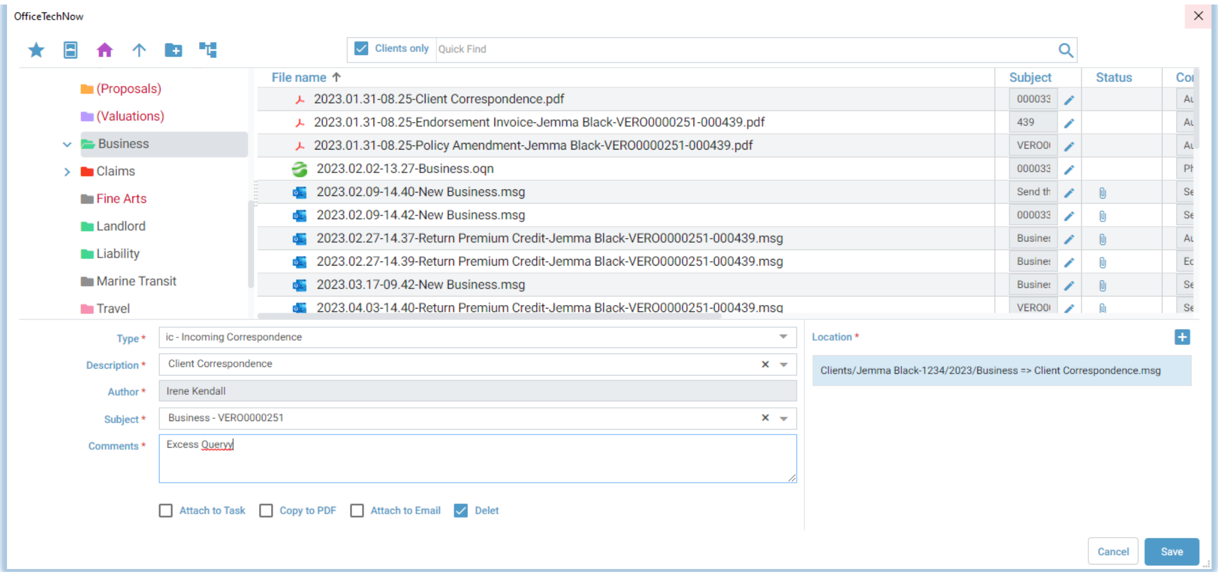


You can continue to navigate to different locations to add attachments.
Complete the email and send.

WORD OfficeTechNow Save

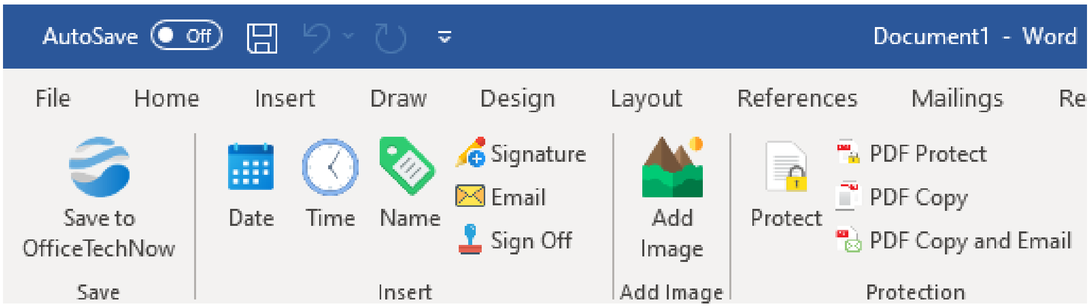


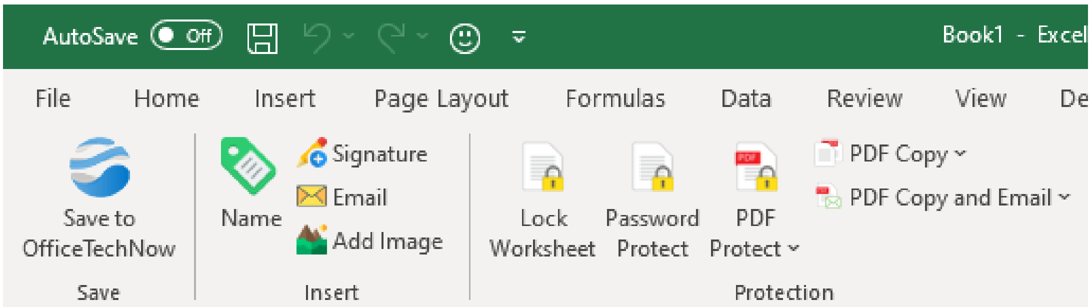
The Save Form will open when you click on the **Save to OfficeTechNow** button.



To save a file, select the location and the destination for your file. If you do not wish to save to a Client Folder, you can also select from any of the available Cabinets.

MS Word and MS Excel Tool Bar Functions:





Function	Description
Save to OfficeTechNow	Opens the OfficeTechNow Save window to save the entire document
Date	Inserts the current date as a non-dynamic field – re-opening the document in the future will not automatically update the date
Time	Inserts the current time as a non-dynamic field – meaning opening the document in the future will not automatically update the time
Name	Inserts your name based on your User Profile in OfficeTechNow
Signature	Inserts an image of your signature into the document
Add Image	Inserts an image from anywhere in OfficeTechNow
Email	Inserts your email address based on your User Profile in OfficeTechNow
Sign Off	Inserts your document Sign Off based on your User Profile in OfficeTechNow. This may include additional information like title, accreditations, qualifications, etc. – your System Administrator can modify your Sign Off
Protect	Places a randomly generated password on your document that is not known by anybody, preventing any further modification or changes. This effectively locks the document against editing, making it compliant.
PDF Protect	Converts your document to a PDF, deleting the original version in the process
PDF Copy	Creates a copy of your document as a PDF in the same folder and using the same name as the source document
PDF Copy & Email	Creates a copy of your document as a PDF in the same folder and using the same name as the source document and attaches it to a new email

Refresh

The **Refresh** function allows you to refresh your OfficeTechNow System. In most circumstances OfficeTechNow will refresh automatically so continual refreshing is not required.

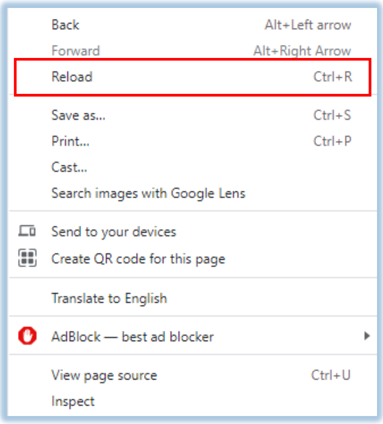
There are several ways you can refresh your OfficeTechNow System.

Keyboard shortcuts:

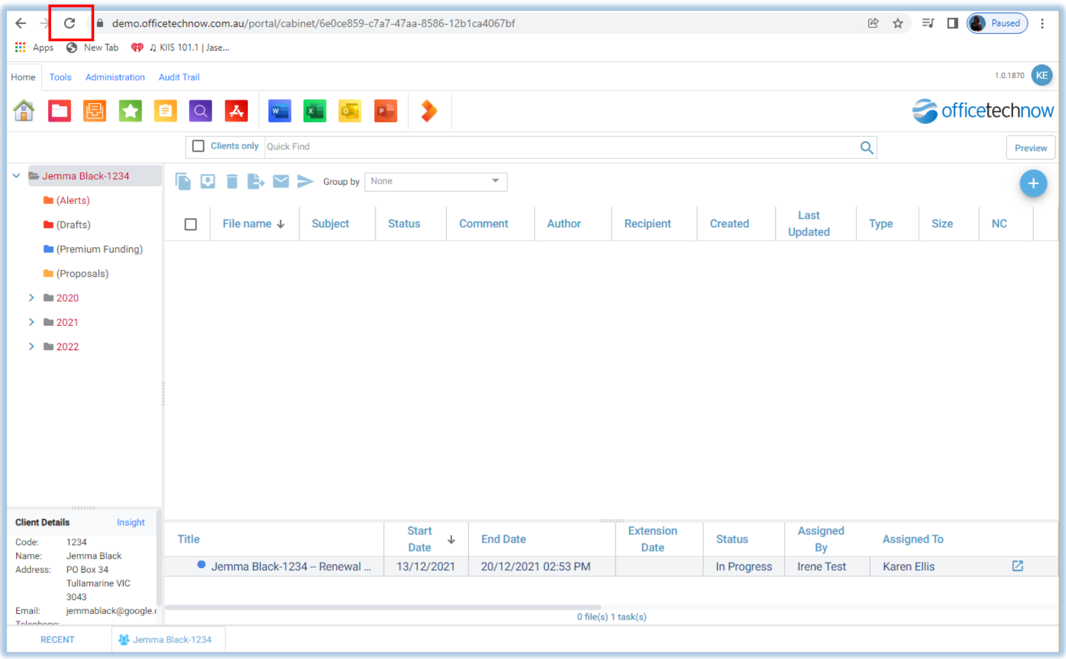
- Press **CNTRL + R**
- Press **F5**

Using your mouse:

- Right Click anywhere in your browser to expose the menu and select **Reload**



- Click on the refresh button located next to the URL address bar at the top of the window.



Tasks

Introduction

The OfficeTechNow **Tasks** feature provides extensive functionality for assigning, managing and tracking your daily activities and Client transactions. It allows you to create **Tasks**, add notes, set reminders and monitor the progress of **Tasks**. Once completed, **Tasks** are saved into OfficeTechNow as a completed file under the relevant folder.

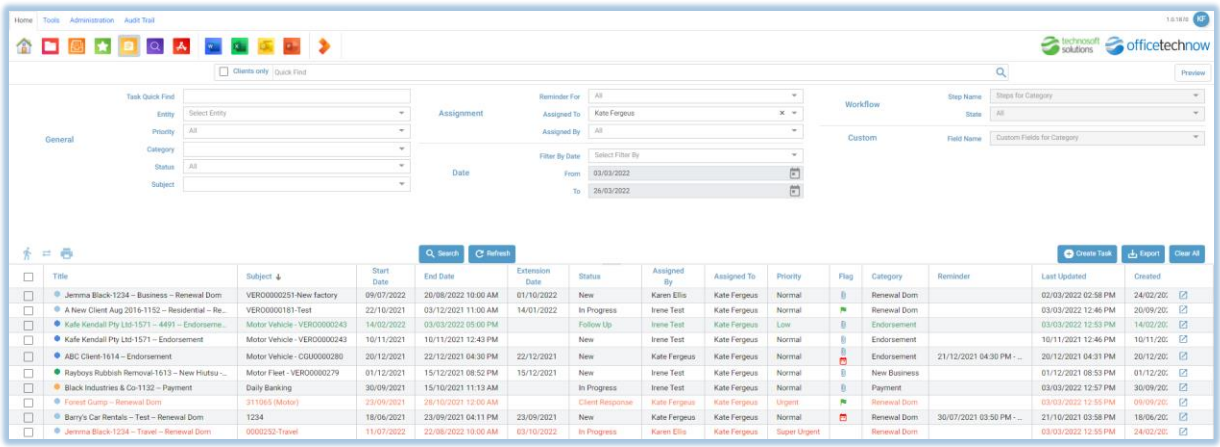
Tasks are a transparent, collaborative, and compliant tool that can be accessed by all Users.

All **Tasks** can be viewed, updated, and completed by any User. OfficeTechNow records the date/time and Username of all updates to **Tasks** making it easy to see who has been working on a particular **Task**.

Interface

To access the **Tasks** feature, click the **Tasks** button in the **Home** Ribbon in OfficeTechNow.

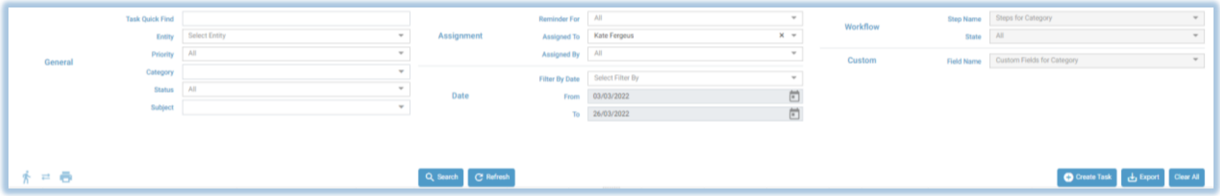
Once selected you will be taken to the Task interface which includes the Task Filters, Task List, and Task Function buttons



Tasks displayed in the Task interface are dependent on the current filters, with the initial display being filtered being your name in the **Assigned To** field – so **Tasks** assigned to you will always appear first after logging in to OfficeTechNow.

View Filters

OfficeTechNow provides multiple filtering options when viewing **Tasks**. These View Filters allow greater control over the **Tasks** being viewed and can be used in tandem.

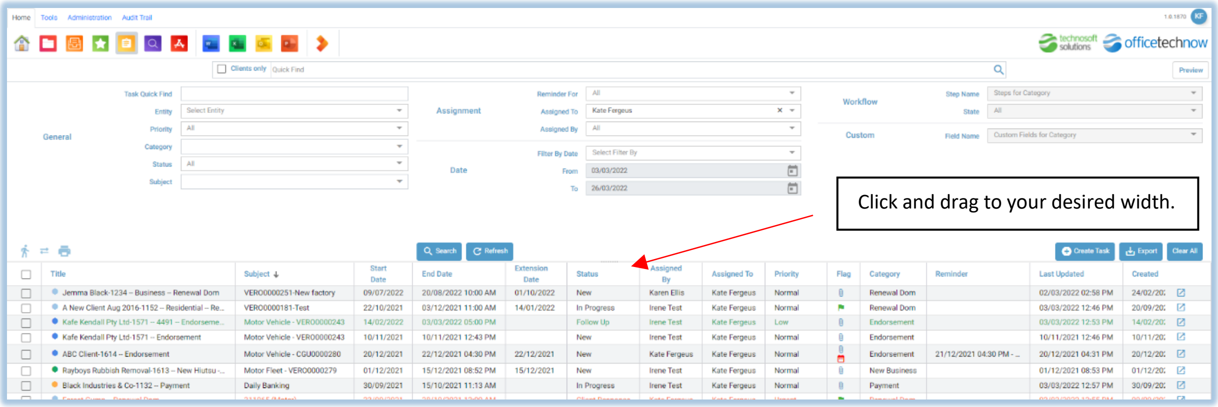


The View Filter options available in the Task interface are outlined below:

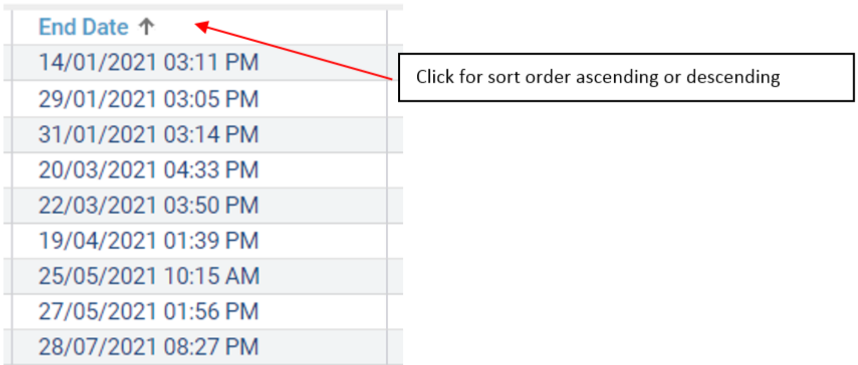
Filter	Description
Task Quick Find	Filters by keyword or number in the contents of **Tasks**
Entity	Filters by Client or Prospect folder names
Priority	Filters by the selected Priority of **Tasks**
Category	Filters by the selected Category of **Tasks**
Status	Filters by the selected Status of **Tasks**
Reminder For	Filters by the selected User who currently has Reminders Set on any Task
Assigned To	Filters by the selected User who the Task is currently Assigned to
Assigned By	Filters by the selected User who the Task was created by
Filter By Date	Filters by either Create, End, or Reminder Dates
From	Sets the initial date for the **Filter By Date** option
To	Sets the final date for the **Filter By Date** option
Step Name	Filters by the Task **Step Name**
State	Sets the state for the **Step Name** filter
Field Name	Filters by any custom Task field
Value	Sets the value for the **Field Name** filter

In addition to the available filters, OfficeTechNow allows the width, order, and sorting of the **Tasks** to be modified. Once modified, OfficeTechNow will remember your personal preferences and maintain the formatting your Task List moving forward.

To modify the width of a column, click on the border of a column heading and drag it.



To modify the sorting of the columns, click on a column heading to sort ascending, and click one more time to sort in a descending manner.



Task List

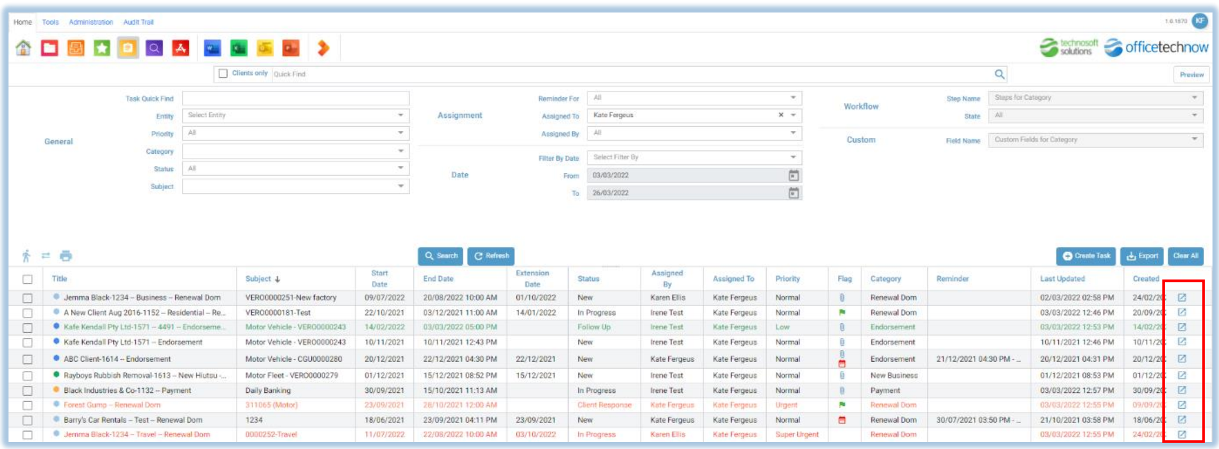
The Task List is the main viewing platform when viewing **Tasks** in OfficeTechNow. The listed **Tasks** are controlled via the Task Filters, outlined in the previous section.

The Task List columns available are outlined below:

Column	Description
Title	Displays the Task Colour Tag, Entity, Title, and Category fields in combination
Start Date	Displays the current Start Date of the Task
End Date	Displays the current End Date of the Task
Extension Date	Displays the current extension date of the Task
Status	Displays the current Status of the Task
Assigned By	Displays the User who created the Task
Assigned To	Displays which User(s) the Task is currently Assigned To
Priority	Displays the current Priority of the Task
Flag	Displays icons for Attachments and Reminders
Category	Displays the current Category of the Task
Entity	Displays the current Client or Prospect of the Task
Reminder	Displays the User and Date of the current Reminders of the Task
Late Update	Displays the last date that an update was made to the Task
Subject	Displays the current Subject of the Task
Created	Displays the date the Task was created

Viewing a Task

OfficeTechNow **Tasks** can be viewed by selecting the required Task and clicking on the which will open the Task window as a new tab in your browser. This can be done in either the Task Interface or when viewing a Client in Single Client View mode.



Task Interface Functions

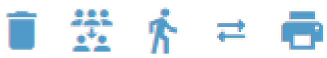
The OfficeTechNow **Tasks** interface contains action buttons that provide access various functions.

Function	Description
Search	Searches the current Tasks based on the current Filters
Refresh	Refreshes the current Task list based on the current Filters
Create Task	Opens a new Task window
Export	Allows you export your Task List as a MS Excel file
Clear All	Clears all your Task filters

The following functions are also available in the Task Interface:

Function	Description
Search	Searches the current Tasks based on the current Filters
Refresh	Refreshes the current Task list based on the current Filters
Create Task	Opens a new Task window
Export	Allows you export your Task List as a MS Excel file
Clear All	Clears all your Task filters

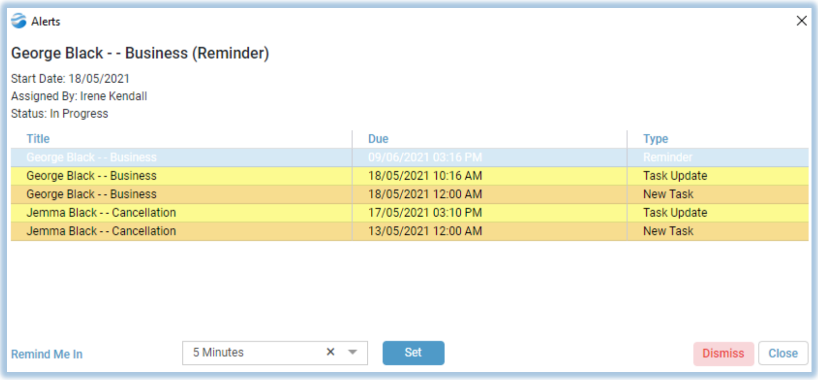
The following functions are also available in the Task Interface:



Function	Description
	Deletes the selected **Tasks**. **CAUTION**: Once **Tasks** are deleted, they cannot be retrieved by anyone, including the OfficeTechNow Support Desk.
	Allows for the reassigning of any selected Task(s)
	Takes you to the Client
	Allows you to set the **Status** of the Task
	Enables the Task to be printed

Task Alerts

OfficeTechNow **Tasks** uses an Alert system that provides Task Alert Pop-Up to generate. **Alerts** will be listed in your **Alerts** window and will also appear as Toast Alerts that will pop up within your OfficeTechNow window.



The Listed **Alerts** are colour coded based on the type of Alert generated.

Alerts can be dismissed or postponed. Simply highlight the **Alert(s)** and click **Dismiss** or choose a time to postpone the **Alert** and click **Set**.

Task Alerts will automatically trigger for:

Alert	Description
Task Start Date	Assigning a new Task to another User, the assignee will receive an **Alert** based on the Task Start Date
Task Reassign	Reassigning an existing Task to another User, the assignee will receive an **Alert** immediately
Task Update	Updating another Users Task, that User will receive an Update **Alert** immediately
Task Reminder	Setting a Reminder on a Task, you will receive an **Alert** based on the date and time you have entered into the Reminder section
Task Completed	Setting a **When Completed** Reminder on a Task, you will receive an **Alert** once that Task has been competed

Task Reminders

To set a Reminder Alert on an OfficeTechNow Task (either your own, or on another User's Task):

- Locate and Open the Task in which to set a reminder
- Check the **Remind Me** checkbox
- Check the **On** checkbox and enter in the date and time of the reminder, **OR**
- Check the **When Completed** checkbox to be alerted when that Task is completed
- Click **Save** or **Save & Close**

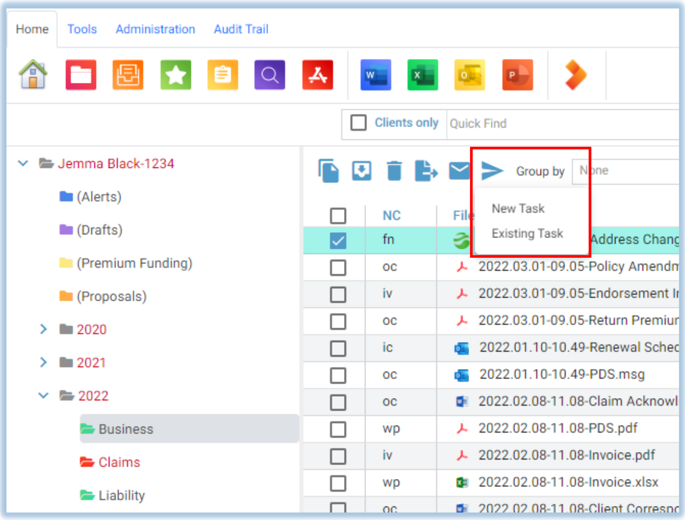
Reminders will also appear in your Alerts Window.

Creating Tasks

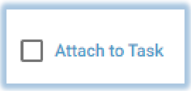
There are several ways to Create a Task:

To create a new Task from the Task Interface, click the **Create Task** button. 

To create a Task while attaching a file, click the Send to button and select **New Task.**



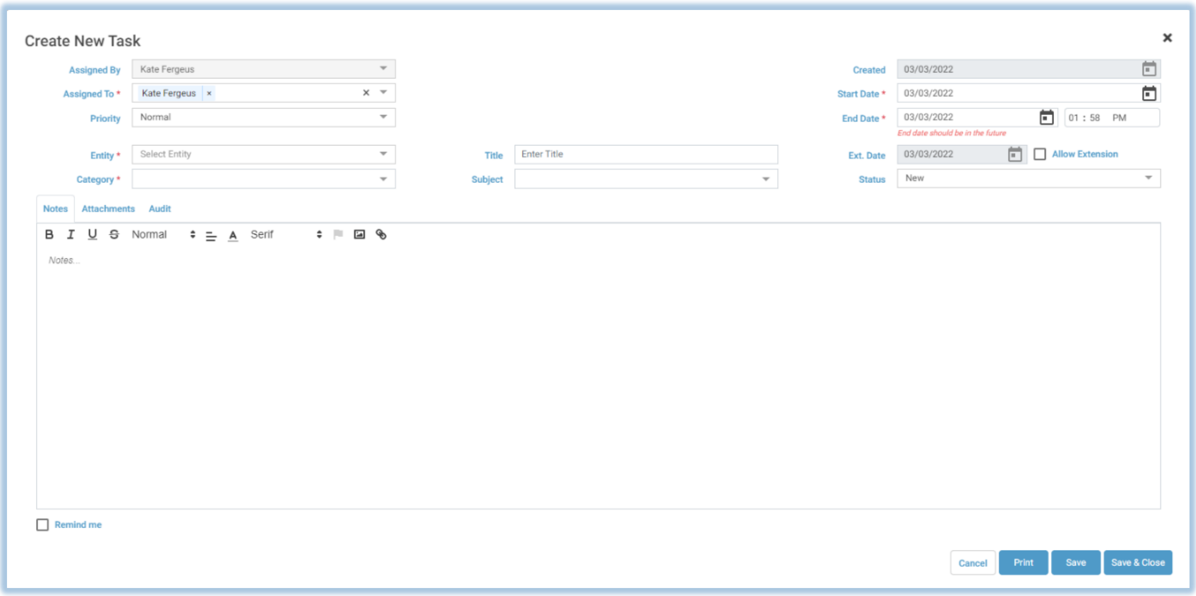
Selecting **Attach to Task** in the OfficeTechNow Save Form as you are saving a document allows you to attach the document to a new or existing task. If you check the **Attach to Task** tick box a new window will pop up asking if you want to save to a New or Existing Task.



The above actions will open a new Task window.

By default, the Task is assigned to you, however, you can easily assign a Task to another User (or Users) by modifying the displayed value in the **Assigned To** field.

If a new Task is assigned to another User, that Task will appear in that User's Task List and they will receive a Task Alert on the Start Date of the Task – however that Task will still be visible to all other Users in OfficeTechNow.



When creating a new Task ensure you complete all relevant fields to ensure the Task contains the correct information and can be easily followed by other Users in your absence.

The fields and functions in a Task are outlined below:

Field/Function	Description
Assigned To	Displays the User responsible for the Task processing/completion
Priority	Defines the urgency of the Task
Created Date	This date reflects the date of creation
Start Date	This date can be left as the current date, or the date when the Task needs to be commenced
End Date	This date reflects the date the Task needs to be completed
Time	This time reflects the time the Task needs to be completed
Ext. Date	This date reflects the current extension date, i.e. the date beyond the end date that has been allowed for completion
Allow Extension	Defines whether an extension date is allowed for the Task
Entity	Reflects the Client or prospect that Task relates to
Category	Reflects the type of Task being worked on, e.g. transaction type
Title	Reflects additional information that can be displayed in the Title column in the Task List
Subject	Reflects the specific product or policy class/number that Task relates to
Status	Reflects the current status of the Task
Notes	This is where compliant notes are made against a Task. **Notes** entered here are automatically user/date/time stamped and cannot be edited once saved
Notes Formatting	The icons at the top of the **Notes** field allows for various formatting options for **Notes**
Add Flag	A flag can be added to a Task Note to direct the User easily to important notes. This is useful when flagging important information inside a Task
Attachments	Displays a list of files that are linked ***(not attached)*** to a Task
Audit	This field logs changes made
Remind Me	Allows for the setting of reminders on a Task
Print	Will generate the Print options for the User to print the current Task
Save	Will save your most recent changes and keep the Task open
Save & Close	Will save your most recent changes and close the Task
Cancel	Will cancel your most recent changes and close the Task

Updating Tasks

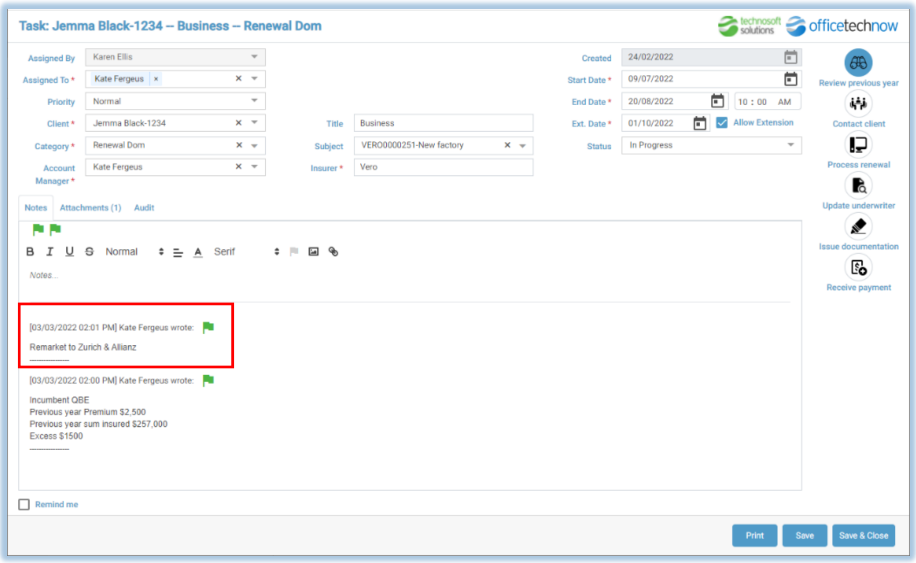
OfficeTechNow **Tasks** can be updated directly through the Task Interface, or whilst saving a file or email to OfficeTechNow.

Adding Notes

Task Notes can be added by any User to any Task. When adding notes, ensure that your cursor is below the perforated line as text above this line is locked and cannot be edited.

To add a note to an OfficeTechNow Task:

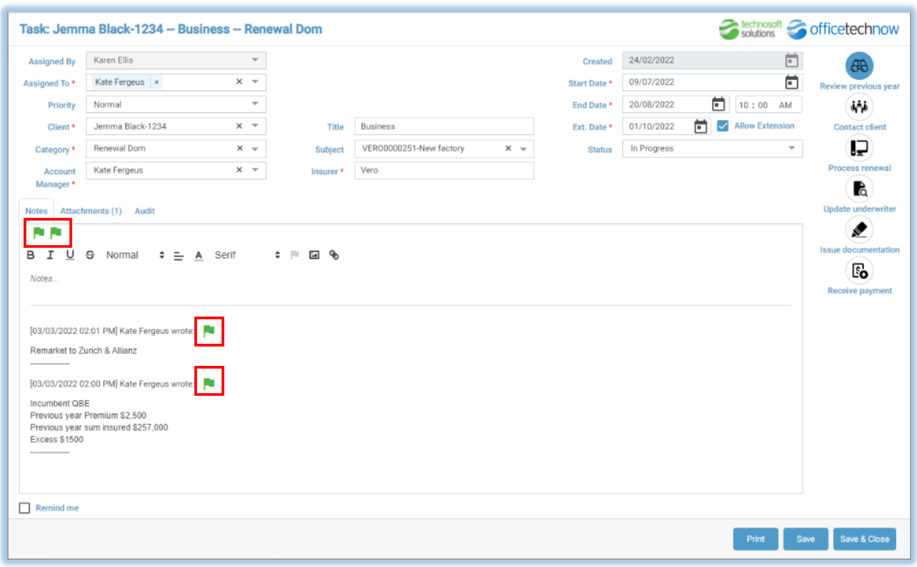
- Locate and Open the Task to be updated
- Type your note in the **Notes** field of the Task
- Click **Save** or **Save & Close**



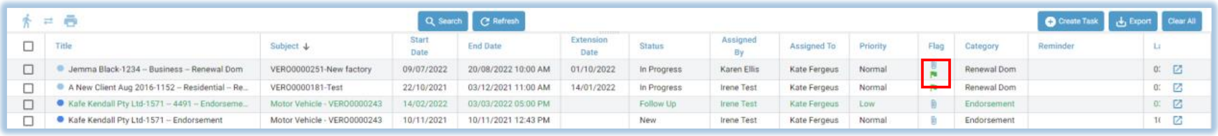
OfficeTechNow will now add your note to the Task, which will be user/date/time stamped and cannot be modified making the note fully compliant.

Adding Note Flags

Task note **Flags** can be added to a note to make it easy to identify. Once a note Flag has been added it is visible to all Users, by way of a list of flags across the top of the **Notes** field.

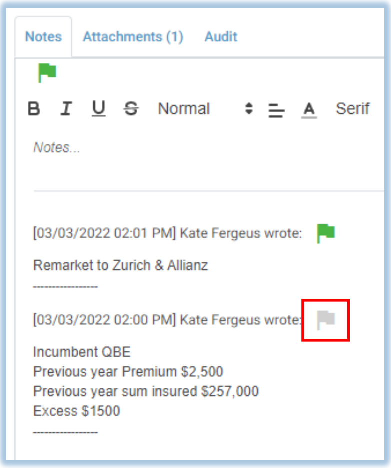


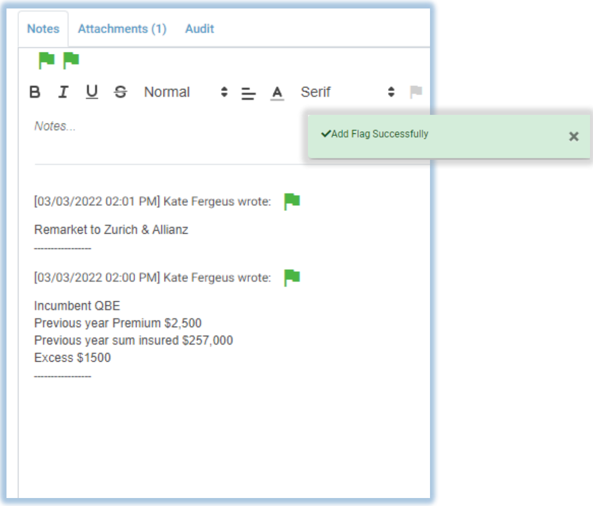
The note Flag will also appear in the **Flag Column** on the Task List.



To add a note flag to an OfficeTechNow Task:

- Locate and Open the Task to be updated
- Locate the note to be flagged in the **Notes** field
- Click the **Flag** icon which will appear when you hover over the note. Once you have selected the flag it will turn green to indicate that the note has been flagged and will append to the note once you have Saved the Task. You will also receive a message that the **Flag** has been added successfully. Click **Save** or **Save & Close**





The note flag will now be visible to anybody opening the Task. Note flags appear in the order that the flags were placed, not the chronological order of the notes themselves.

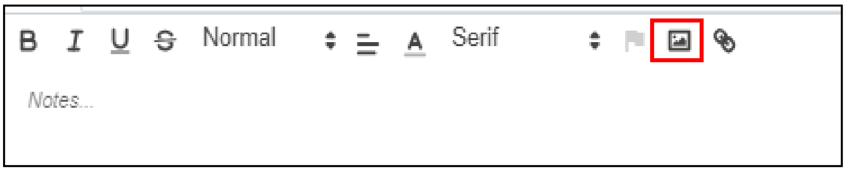
To remove a note flag to an OfficeTechNow Task:

- Locate and Open the Task to be updated
- Locate the note to be unflagged in the **Notes** field
- Click on the Flag icon which will remove the Flag from the note
- Click **Save** or **Save & Close**

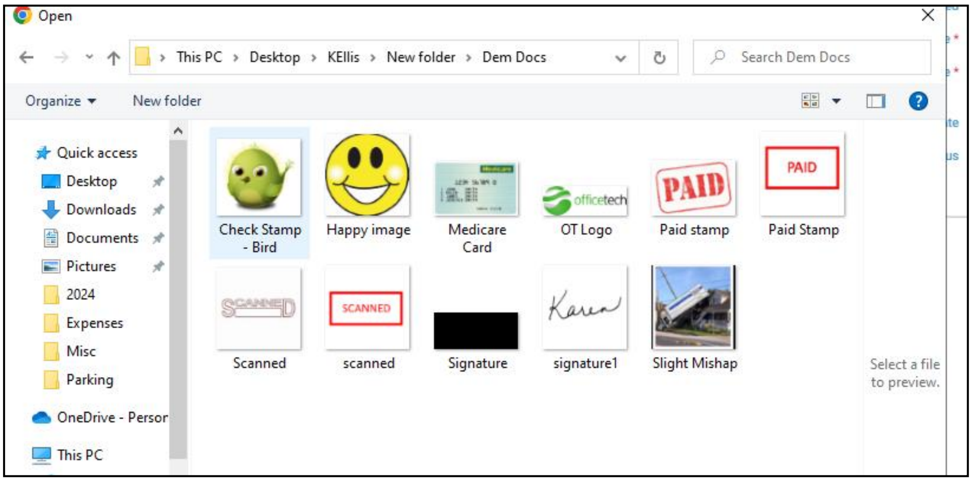
Adding images to Taks Notes

To add an image to a Task Note, first you must save the image outside of OfficeTech to your windows environment. You can then load then using the Image Icon in the Task and QuickNote ribbons.

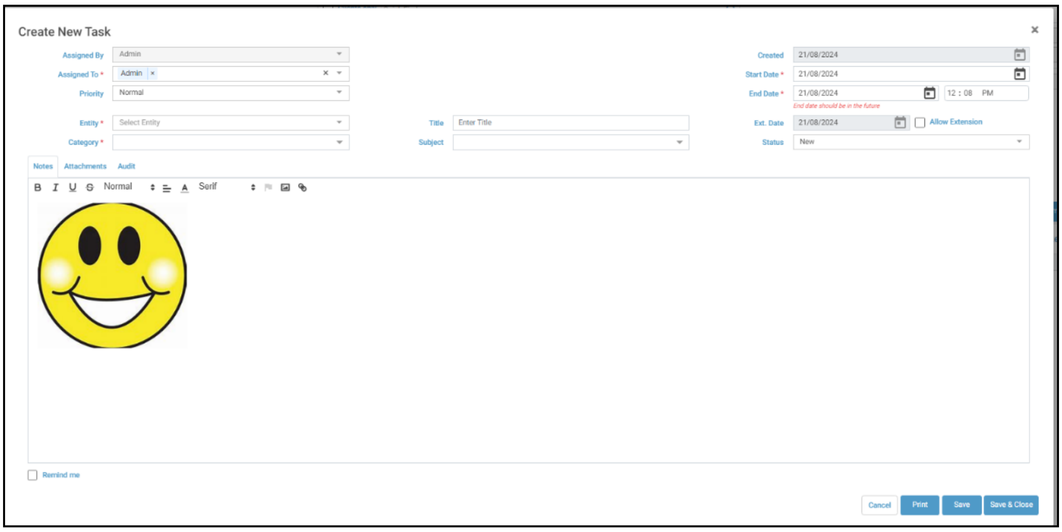
1. From the Toolbar inside an open Task, select the Image Icon



2. This will take you to your Explorer Driver to select a saved image



3. Select the Image and click Open and it will load into your Task.



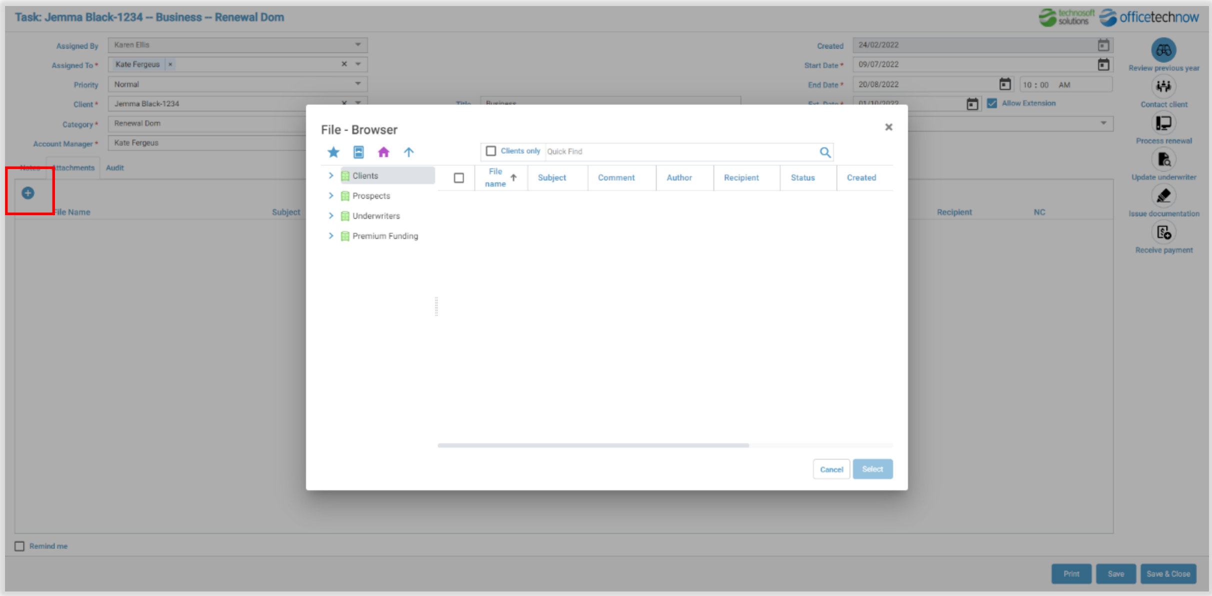
Updating Attachments

OfficeTechNow allows you to link files in OfficeTechNow to **Tasks**. The file must be saved to OfficeTechNow in order to be linked to a Task.

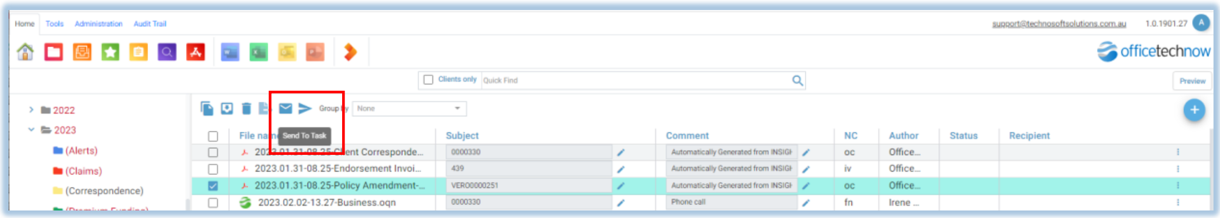
Note: adding a file to a Task creates a **link** to the file, it **does not** create a separate copy of the file into the Task therefore once a file is linked to a Task it should remain in OfficeTechNow and not be deleted.

There are several ways to add a file to a Task:

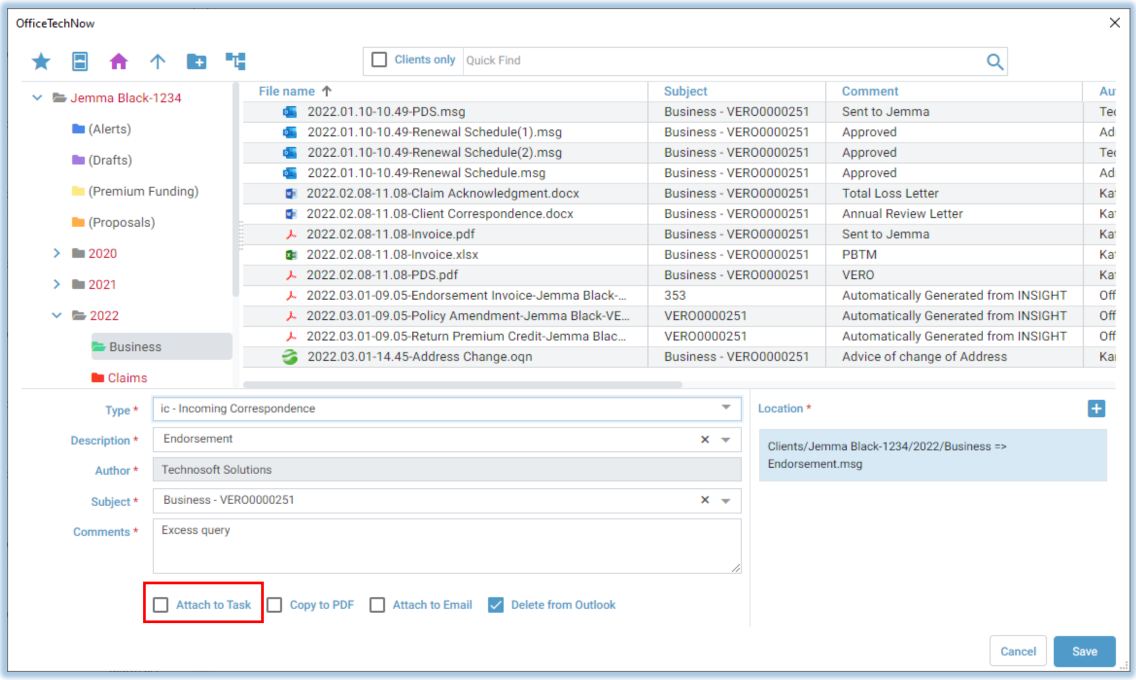
- From the Task window – using the icon which will open the Select File Browser window



- From the OfficeTechNow File View – click the **Send to Task** Icon -



- Via the OfficeTechNow Save Form – **Attach to Task** checkbox - Attach to Task

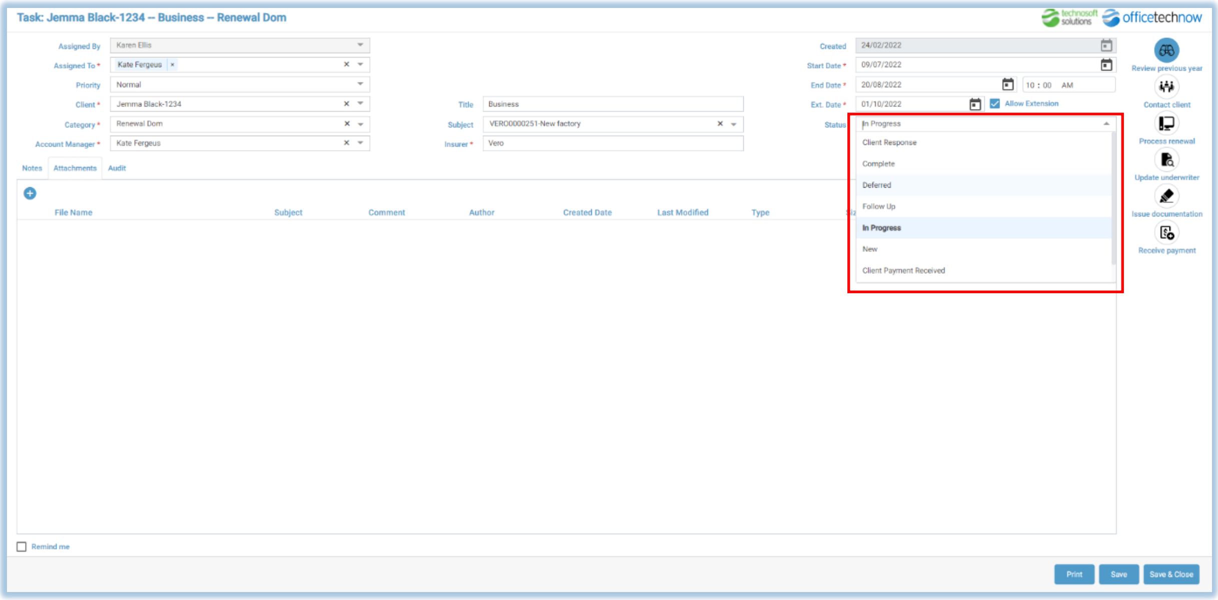


Updating Task Status

There are two ways to update the **Status** of an OfficeTechNow Task:

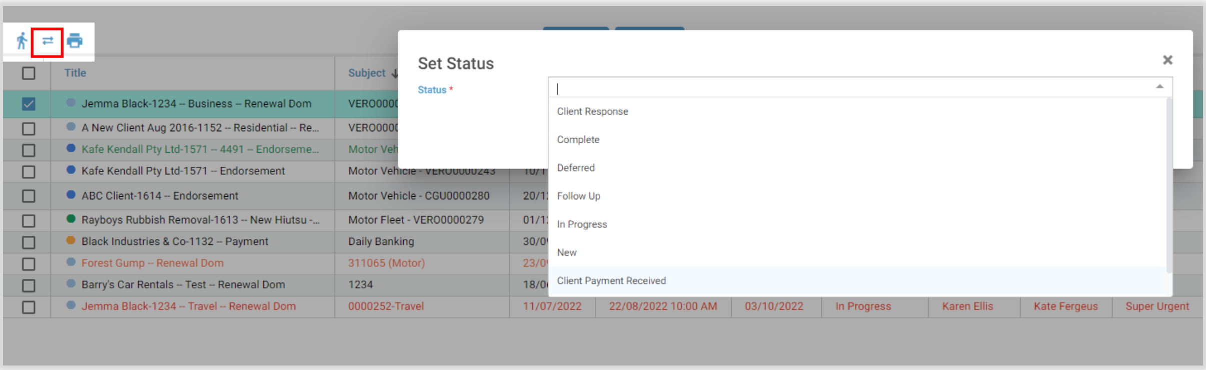
Via the Task Interface

- Locate and Open the Task to be updated
- Click the dropdown list of the **Status** field
- Update the **Status** to the desired value
- Click **Save** or **Save & Close**

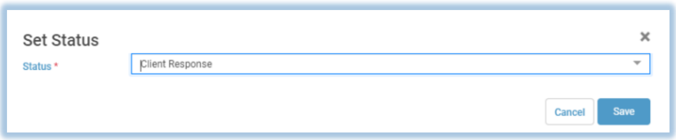


Via the Task List

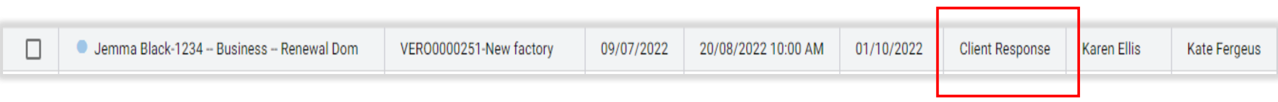
- Locate and highlight the required **Task**
- Click the **Set Status** icon



- Update the **Status** to the desired value

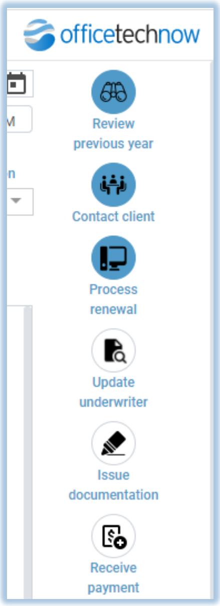


- Click **Save** and the new status will be reflected in the Task List



Completing Task Steps

OfficeTechNow **Tasks** may contain **Task Steps** which provide guidance on the individual steps that need to be taken when completing a Task. These Steps will appear on the right-hand side of a Task and will be accompanied by a Step Icon and a Tooltip when hovering over the individual Steps.



The **Task Steps** for a particular category of Task is controlled by your System Administrator.

To complete an OfficeTechNow Task Step:

- Locate and Open the Task to be updated
- Click the **Task Step** Icon that to be completed
- Entre any relevant notes in the **Notes** field
- Click **Save** or **Save & Close**

Once a **Task Step** is completed OfficeTechNow will stamp the Audit field in the Task.

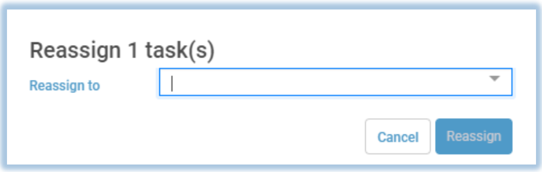
Note: If a **Task Step** has been set up as mandatory, you must be complete the Task Step for the Task to be saved to the appropriate folder in OfficeTechNow.

Reassigning Tasks

There are two ways to reassign an OfficeTechNow Task:

From the Task List

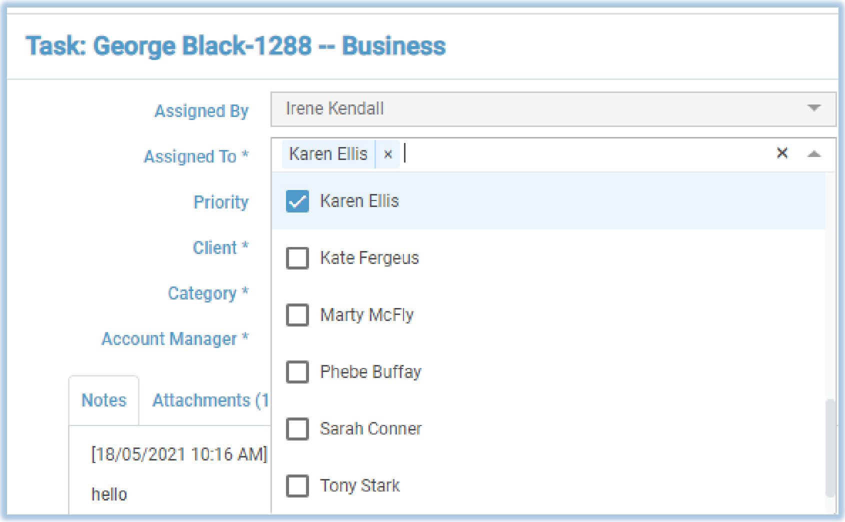
- Locate and highlight the Task or Tasks to be reassigned
- Click the **Reassign** icon
- Update the name in the **Assigned To** field



- Click **Reassign**

From the Task Interface

- Click the dropdown list of the **Assigned To** field
- Update the name in the **Assigned To** field
- Click **Save** or **Save & Close**



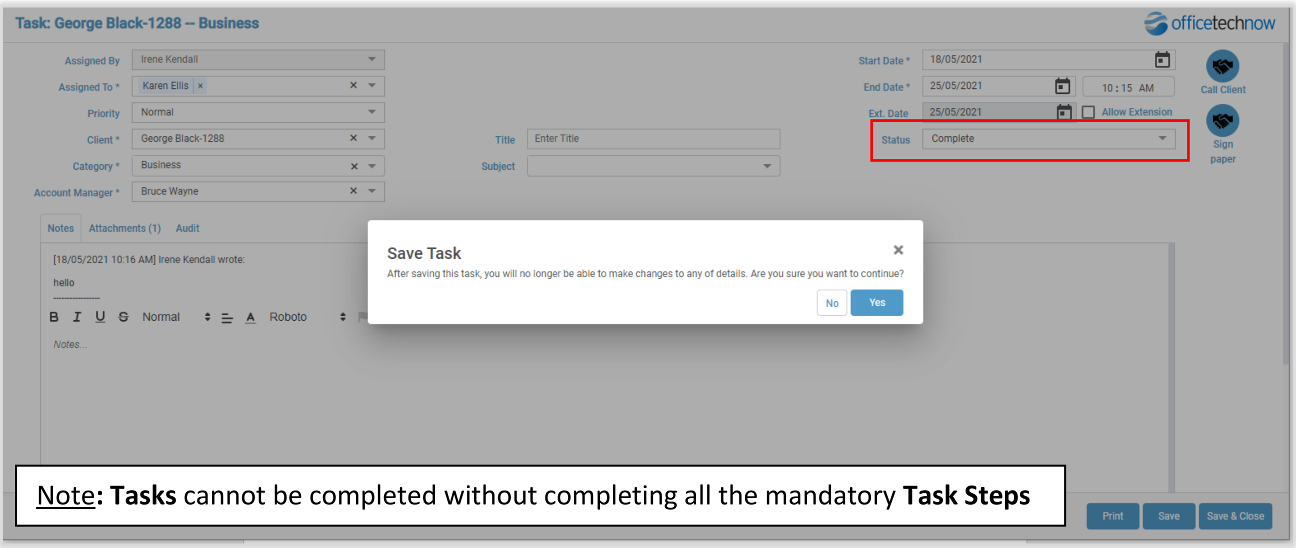
Completing Tasks

Once a Task is completed, the Task needs to be saved into the relevant folder in OfficeTechNow.

Completed **Tasks** are a read-only record of the original Task and cannot be modified once saved. They serve as an audit trail of the completed transaction which is viewable to all Users.

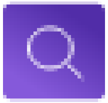
To complete an OfficeTechNow Task:

- Locate and Open the Task to be completed
- Ensure all Task Steps have been completed
- Click the dropdown list of the **Status** field
- Update the **Status** to Completed
- Click **Save & Close.** A message will prompt you to confirm to proceed.
- Click **Yes,** to proceed. An OfficeTechNow Save window opens allowing you to save the completed Task to any folder in OfficeTechNow.

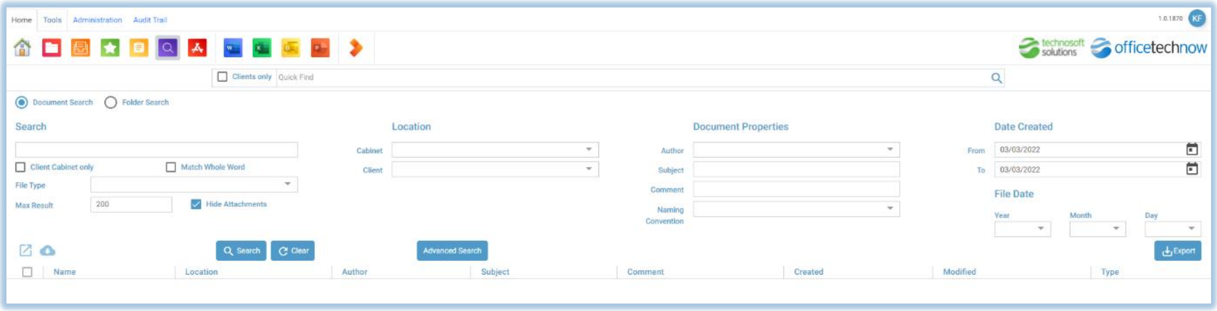


<u>Note</u>: **Tasks** cannot be completed without completing all the mandatory **Task Steps**

Search

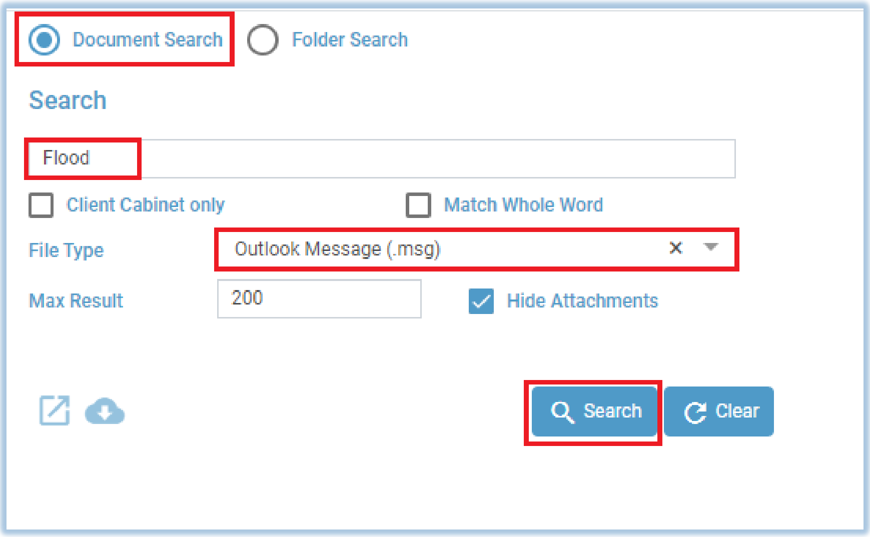


The **Search** function in OfficeTechNow provides full text-based searching on all text-based documents. Filters in the Search window allow for filtering unmanageable results into manageable lists so the user can locate a file.

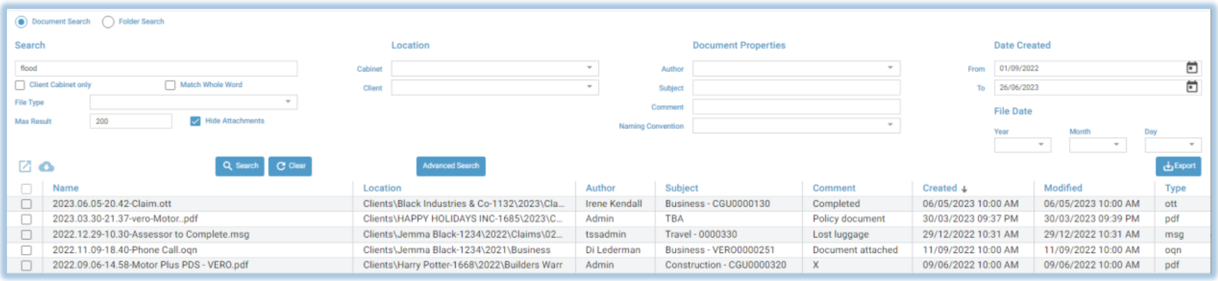


Document Search

To search and find a file in OfficeTechNow, open the **Search** screen, and type a keyword in the Search field. If you know the type of file you are looking for, you can also use the **File Type** Filter.



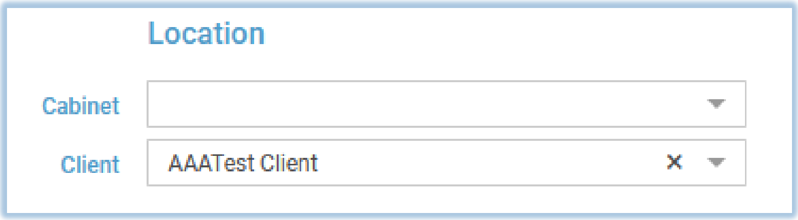
Click **Search** and the matching documents will appear in the list.
If the results generated are too extensive to locate the document, use the additional filters available.



Search Filters also include:

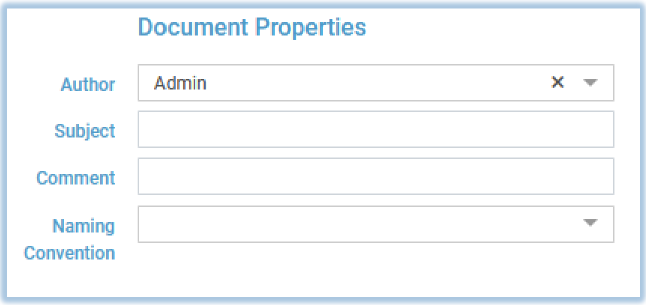
Location:

Select a specific Cabinet or Client for your search request. With this filter results from other locations will not be generated.



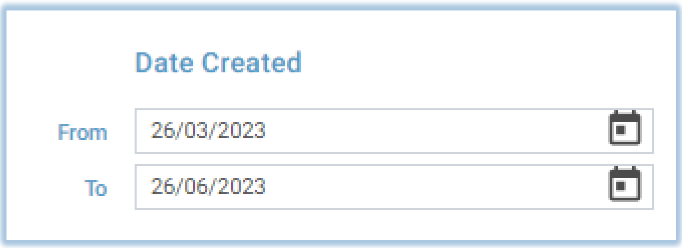
Document properties:

These properties can be used to limit the results to the requested Author or Subject etc.
With these filters, results from documents without the selected properties will not form part of the search results.



Date Created:

These filters are useful if looking for documents created on a specific date, or in a date range. The default date range is set to a range to include 3 months prior to the current date up to and including the date of the Search.



All the filters can be used in combination but remember, each added filter will remove possible files from your search results.

Action Buttons:

Search:

Generates the Search based on your requested filters, if any.

Clear:

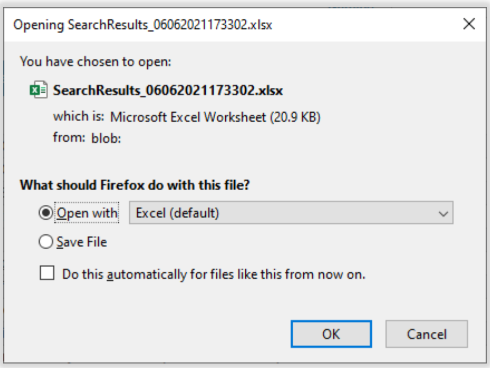
Clears all search filters that have been loaded.

Advanced Search:

See below

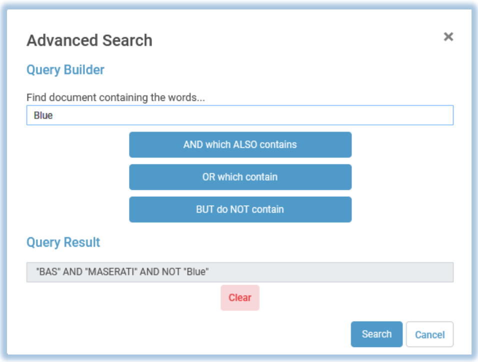
Export:

Allows the generated search results to be export from the search engine.
If you **Export** the search results, the window will request you open the download into Excel.
Select **OK** to export the results to Excel.

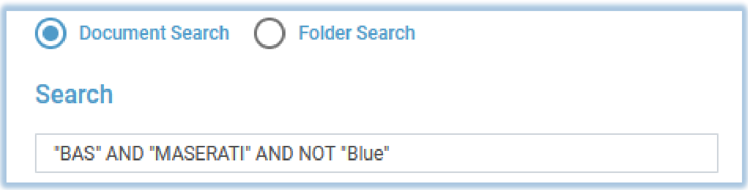


Advanced Search

The **Advanced Search** function is also useful for generating a more specific or advanced search result. The **Advanced Search** function is a query builder to build search word combinations that filter results based on your query request. The more combinations you add, the greater the filtering of results.

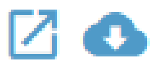


Your query will be populated into the Search field as follows:



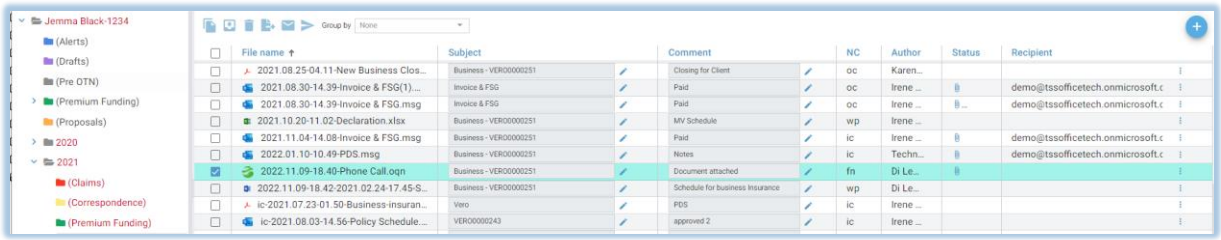
Search Results Actions

Once you have the search result list in the screen there are two File actions available:



Go To Location:

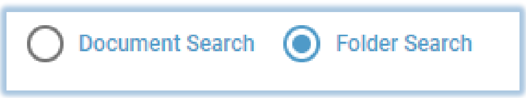
Select a file in the result list and tick the check box. When you click on **Go to Location** you will be taken to the location of the file. The selected file will be highlighted within the folder to which it has been saved to.



Download:

The **Download file** function in Search works the same way in the File Action options.

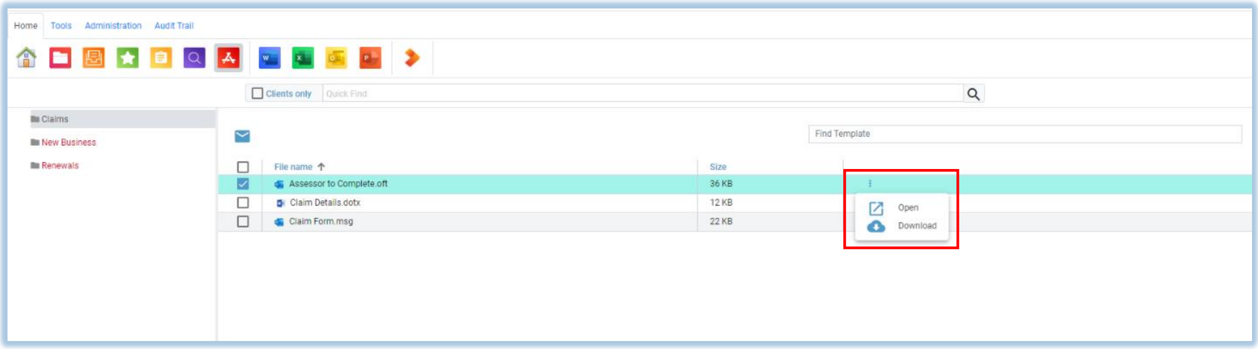
Folder Search:



The **Folder Search** feature provides the option to search for a specific folder in the system, by Folder name or part name.

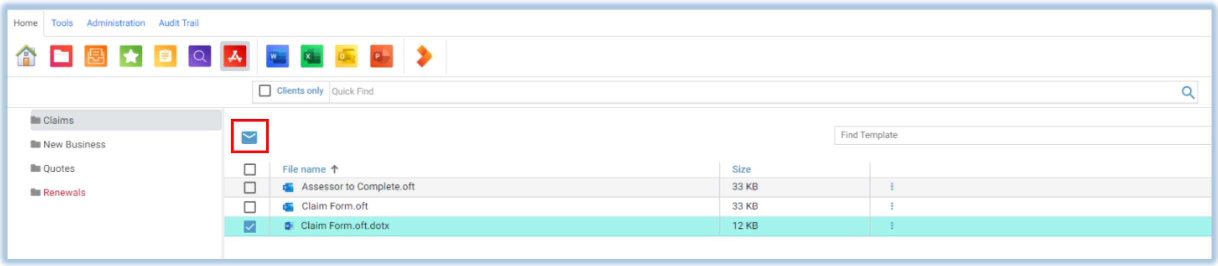
Templates

OfficeTechNow **Templates** allows all Users to access the same document, spreadsheet, and email templates. To open a **Template,** click the Ellipsis button at the end of the row and click **Download** to open the required file.

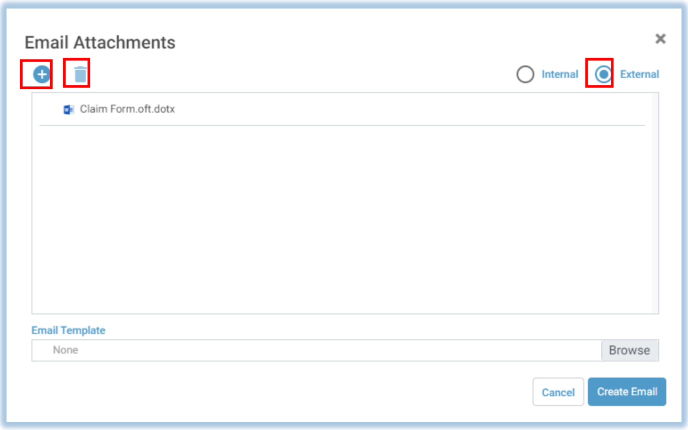


Attach to Email

Attach to Email will attach the Template to a new email.

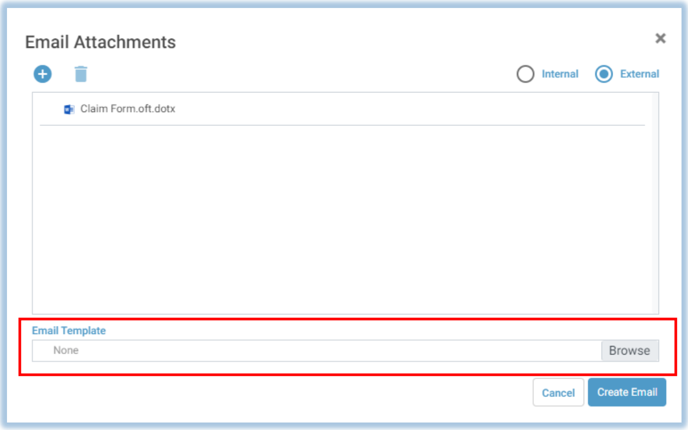


To attach a **Template** to an email, select the Template and click the **New Email** icon.



- If needed, Click the button to add additional files from other OfficeTech locations
- If needed, Click the button to remove the selected file(s) from the new email
- When the **External** checkbox is selected, all of the files listed will be inserted into your email (this is set as default and should be the option selected when sending emails to people who do not have access to your OfficeTech, i.e. clients).

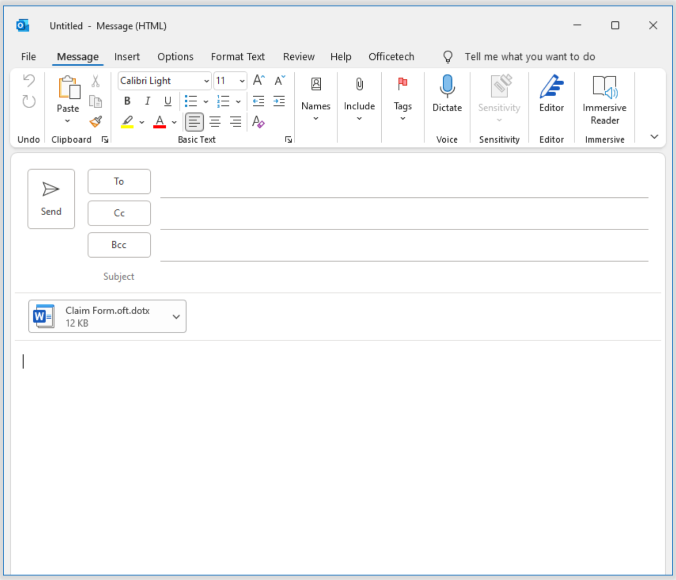
- The **Internal** checkbox inserts links to the files listed, which can only be opened by users who have access to your OfficeTech system, i.e. colleagues.
- You can also attach the document to an Email Template. To do this, click the **Browse** button to select an email template to attach your files to



- Click **Create Email**

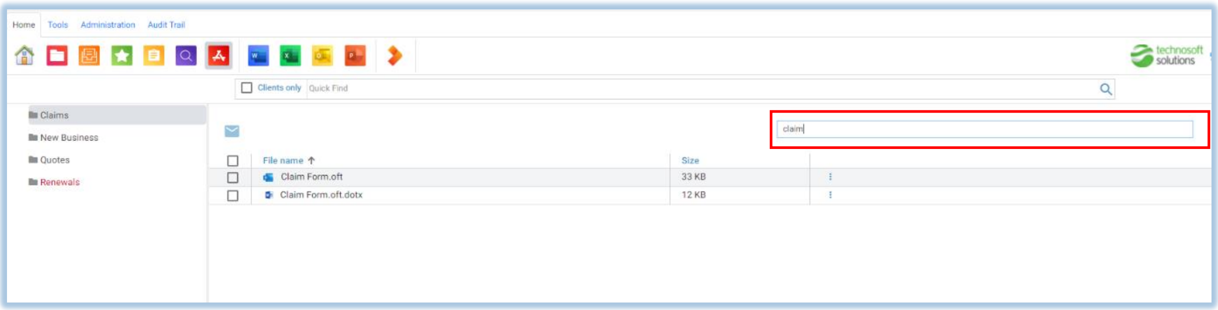
This will generate the Outlook email window, with the attachment, from where you will populate the email details and send.

Outlook will send your email.

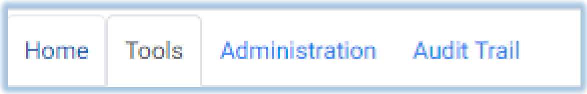


Find Template

To search for a **Template,** you can enter a keyword in the **Find Template** field.

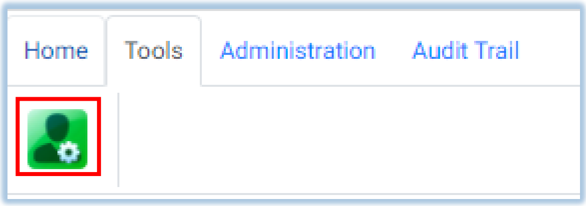


Tools Tab



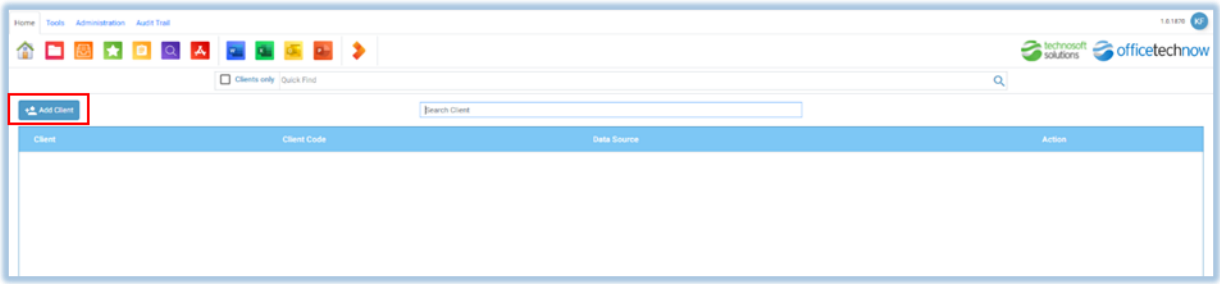
The Tools Tab allows you access to the Client Maintenance tool. You may not have access to this function if you are using INSIGHT to create Clients.

Client Maintenance

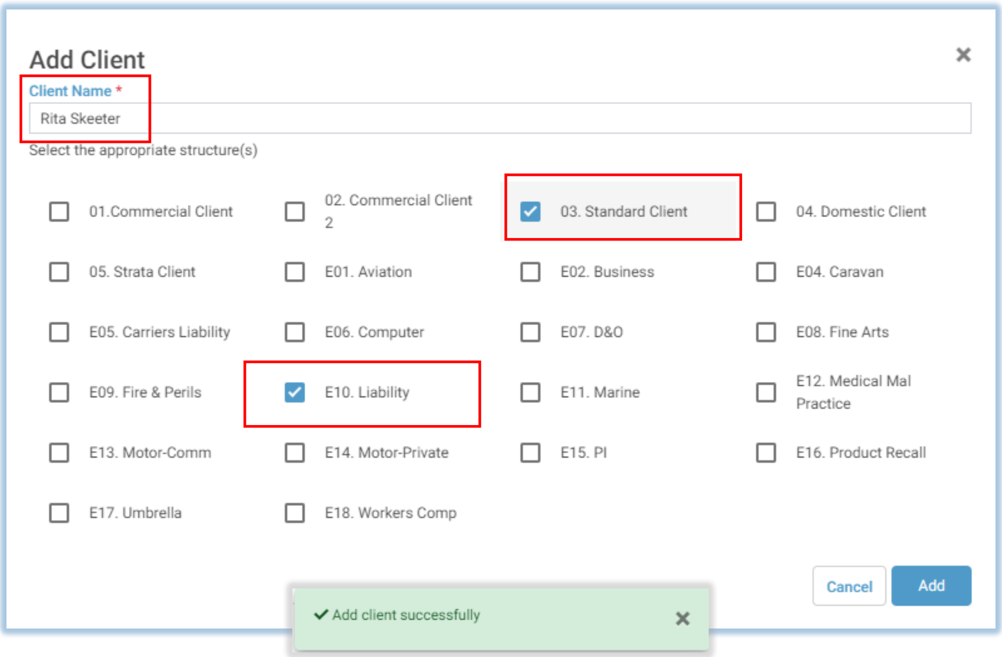


Add Client

To add a Client in OfficeTechNow, click **Add Client.**



A window will appear allowing you to give your client a name and select the appropriate Folder Structures. Click **Add.**

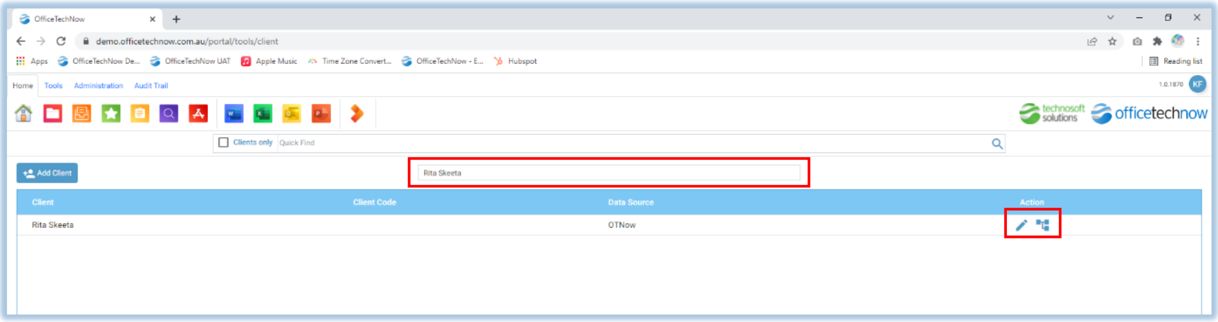


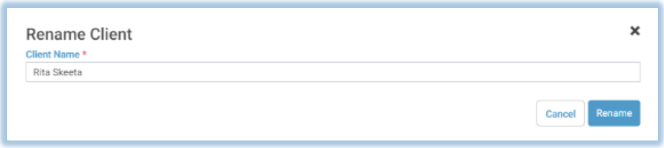
Your Client will be created and the relevant folder/s will be applied.

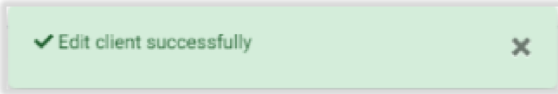
Rename Client

To rename a client, search the Client name in the **Search Client** field.

Click on the button to open the Rename Client window. Rename your client and then click **Rename.**

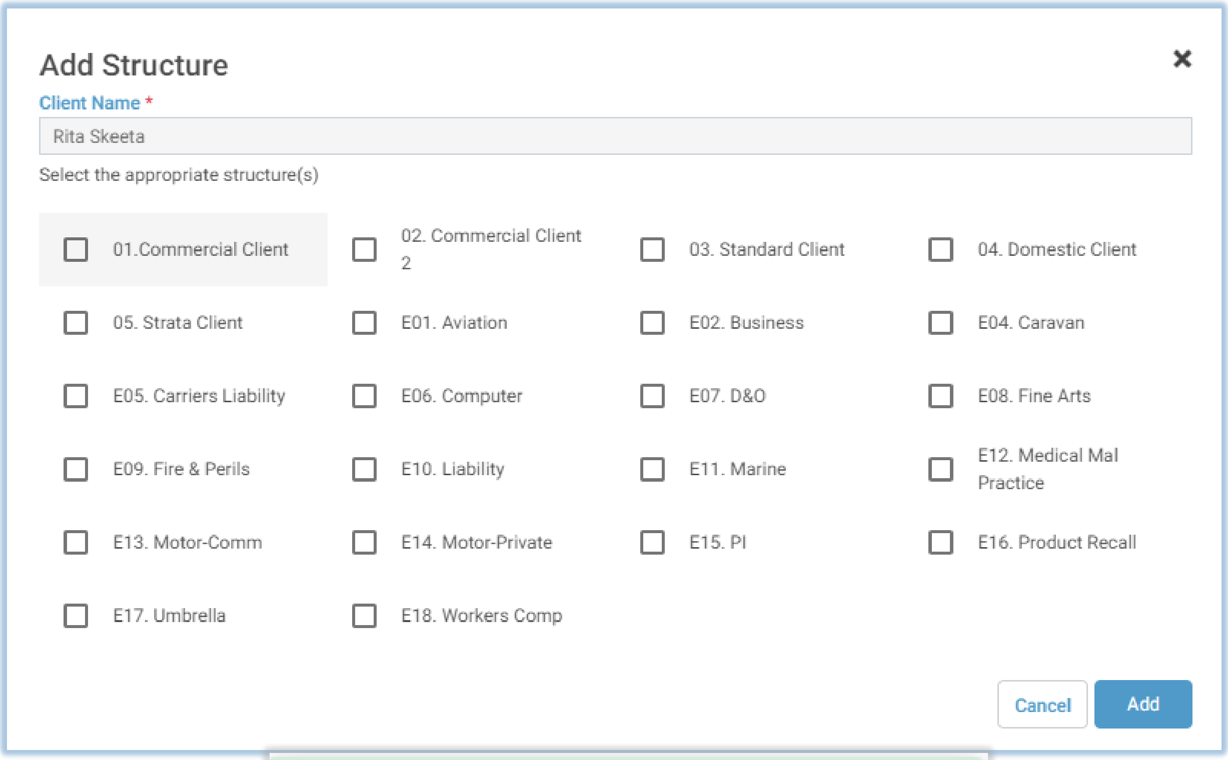


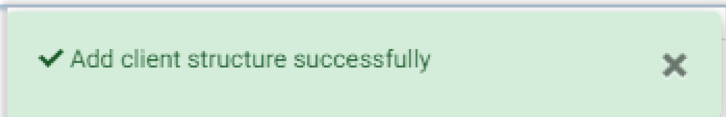




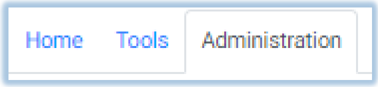
Add Structure

To add a folder to a Client Structure, click on the button to open the Add Structure window. Select the appropriate folder Structure/s and click **Add.**

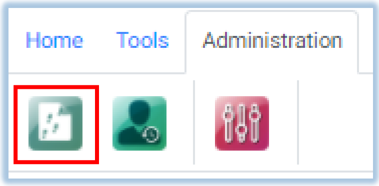




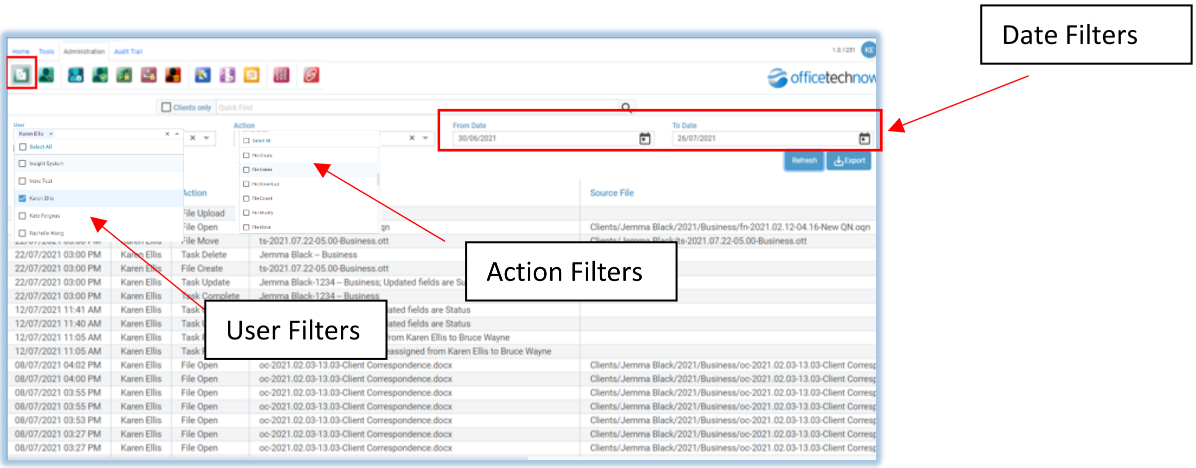
Administration Tab



Audit Trail



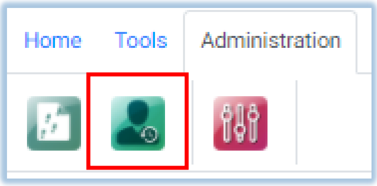
The **Audit Trail** function displays the activity of all User's, as it occurs in OfficeTechNow. There are various filters that can be used to track those actions. Once filters have been applied the results will display below



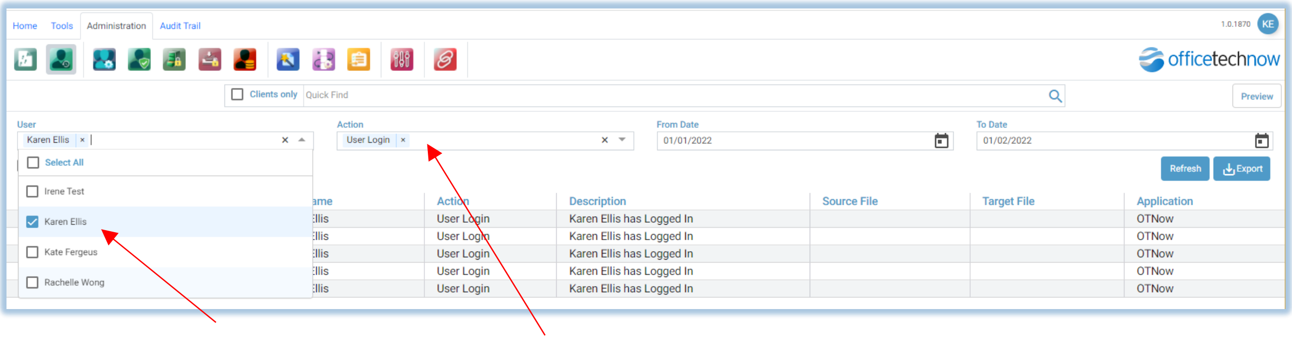
Audit Trail Filters

Filter	Description
User	Filters actions by individual Users. OfficeTechNow will default to you as the logged in User.
Action	Filters by actions performed in OfficeTechNow. Multiple Actions can selected if required
From Date	Filters actions from and including the date selected
To Date	Filters actions up to and including the date selected
Include Non-Active Users	Allows for any no longer active Users actions to be displayed
Refresh	Once the filters have been applied clicking **Refresh** will display the results
Export	Exports the current results to an MS Excel Spreadsheet

Login History

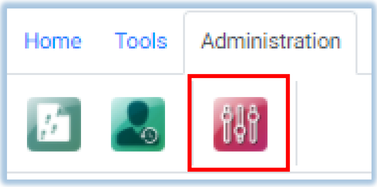


Displays full details of all Users' **Login History** logging the Login and Logout date and time. The filters available in the Login History interface are the same as those in the Audit Trail Interface and the descriptions for these can be found above.



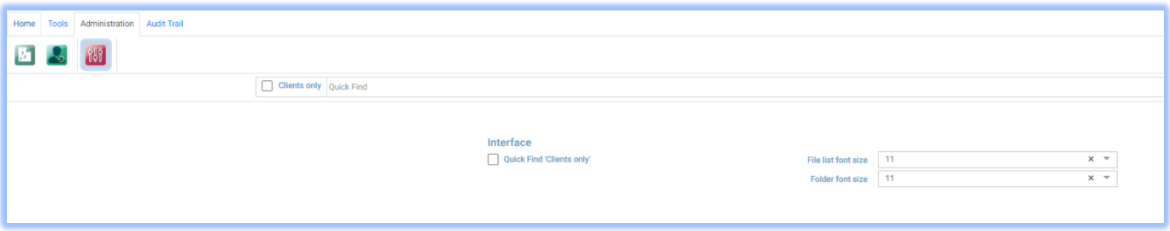
Filtered by specific user & Login as the Action

Preferences



The **Preference** window located in the **Administration** tab will allow the following actions.

1. Adjust the Font Size of your Folder List and the File View separately.
   To adjust your font size, select your preferred Font size either for Files and Folders, or both. This will determine the size of the font of the lists displayed in the interface.



2. Enable the ability to have **Clients Only** ticked on by default for your Quick Find Selections. To enable the Clients Only tick box to remain selected, simply click on the **Quick Find Clients only** checkbox and select **Save** which will enable the Clients Only checkbox to remain selected in the OfficeTech interface.