Add-On Products
WebTeam Central

User Guide

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Add-On Products
Roms Hule 8 – 7100 Vejle – Denmark
Phone: +45 7944 7000 Fax: +45 7944 7001

Mail: info@add-on.com
Internet: www.add-on.com

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CHAPTER 1.
Introduction

The purpose of this User Guide is to give you the information necessary to work with WebTeam Central. This document is intended for users who access and work with the application in their Web browsers via the Internet.

This guide includes the following chapters:

- Introduction
- Using WebTeam Central

The **Introduction** introduces you to WebTeam Central and briefs you about where to find specific information in this guide. This chapter also gives a brief overview of the Web application and contains a terminology list.

The **Using WebTeam Central** chapter gives you a closer look at how to work with WebTeam Central for performing specific operations. Furthermore, it provides you with a description of all the options you can find on the main toolbar in WebTeam Central. This chapter contains the following sections:

- **Main Functionality Quick Tour** – this section contains quick descriptions and links to subsection of each chapter, which helps you get to the needed topic in one click.
- **Getting Started** – this section tells you how to start working with the Web application and list the initial settings that you need to apply the first time you run it.
- **User Interface Items** – in this section you can find descriptions of all of the ways of working with WebTeam Central, from the main window to the toolbar buttons.
- **Initial Settings** – in this section you can find information on initial settings necessary to start working with the Web application.
- **Web Application Main Concepts** – this section contains several subsections each describing one of the main functions of the Web application: calendar, appointment, mail message, phone message, filter, and group.
- **User Options** – in this section you can read about the options you can set on the **User Options** page. These options are available if the Administrator has activated the **Allow Personalizing** function.

WebTeam Central Overview

Many organizations have installed Microsoft Exchange and use the electronic calendar in Microsoft Outlook as their central monitoring and planning tool.

This has led to greater efficiency in working together. WebTeam Central – a Web-based Team calendar – offers even greater opportunities for increased productivity and improved customer service.

WebTeam Central gathers and shares appointments from multiple Outlook calendars and gives companies and users the ability to collaborate no matter where an individual user might be. These features are utilized through an Internet connection and a browser to seamlessly fit in the 'Microsoft Way' seen in Outlook Web Access.

Using Microsoft Exchange Server and Microsoft Internet Information Services as the starting points, Add-on Products have developed a Web-based Team calendar for those who need to know what their colleagues are doing and where they are at a glance.

WebTeam Central lets you do more than just the calendar. Depending on the Web application permissions you have, you can modify this data, create and delete, or only view it.

The main window of WebTeam Central looks like this:

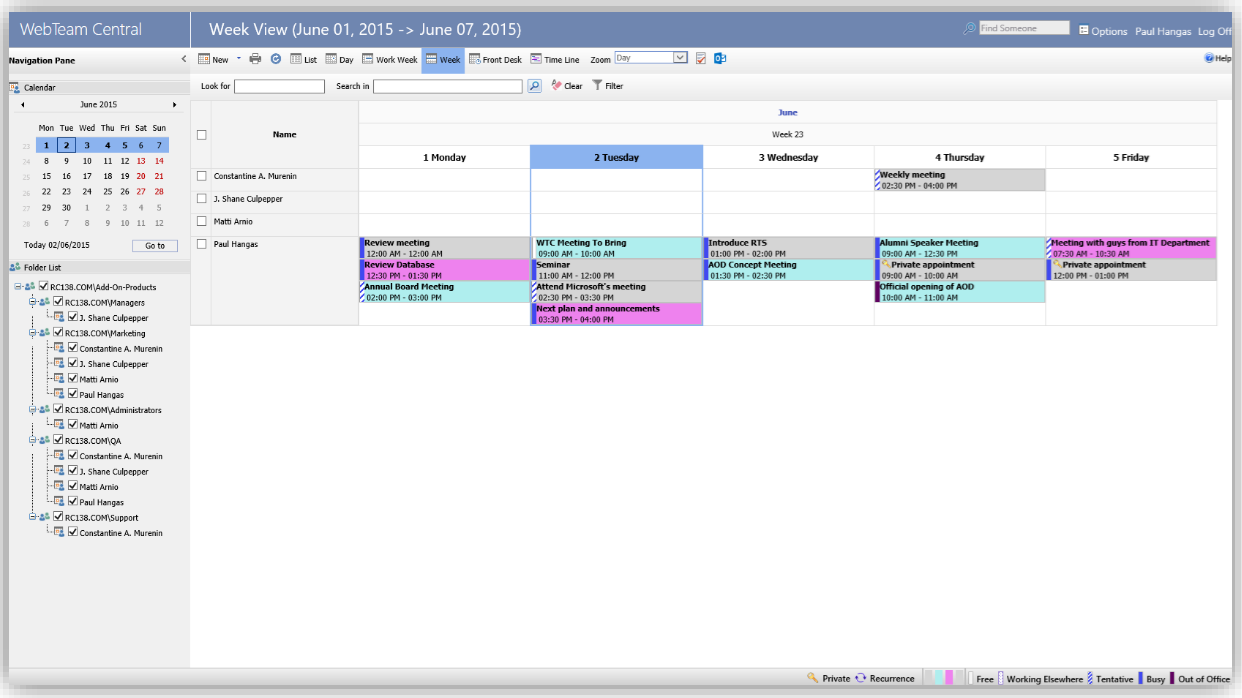


Figure 1. WebTeam Central main window

Definitions, Acronyms and Abbreviations

Term	Definition
Distribution list	A list of contacts combined into one or several groups with different properties.
IIS (Internet Information Service)	A Web server with integrated, reliable, scalable, secure, and manageable capabilities available over an intranet, the Internet, or an extranet, and is a tool for creating a strong communications platform for dynamic network applications.
Microsoft Exchange Server	Server software enabling you to send and receive e-mails and other forms of interactive communication through computer networks. Designed to interoperate with a software client application such as Microsoft Outlook.
Phone message	An e-mail message which has additional options for delivering information to a person while he or she is out or unavailable.
RTM (RealTime Manager)	The Windows application designed to configure RealTime Service.
RTS (RealTime Service)	This solution is aimed at collecting data from an Exchange Server and storing it in a WebTeam Central or Exchange Central database, Public Folder, or on a Global site.
WebTeam Central Web application, Web application, WTC	In this guide: a distributed application based around the Web, created with ASP.NET and hosted on Microsoft IIS. Throughout this Guide you will find the following references used: WebTeam Central and Web application. Both of them refer to the same product.

Table 1. Definitions, Acronyms and Abbreviations

CHAPTER 2.

Using WebTeam Central

This chapter describes how to work with WebTeam Central.

In this chapter you will learn what options and functions are available on the main page of the application. You will learn about the calendar groups you can work with and what main toolbar options are available to make using the Web application easier. You will also find out how to personalize the Web application by setting user options.

This chapter contains the following sections:

- Main Functionality Quick Tour
- Getting Started
- User Interface Items
- Initial Settings
- Web Application Main Concepts
- User Options

Main Functionality Quick Tour

The table below gives a quick description of the main operations you can perform when working with WebTeam Central. Click a section name to view the section of this document describing the corresponding operation.

Operation	Section	Chapter
Starting working with WebTeam Central using predefined parameters	Parameter	Getting Started
Finding information about distribution lists	DistList	Getting Started
Information on initial settings necessary to start working with WebTeam Central	Initial Settings	Initial Settings
Creating custom groups	Group Options	User Options
Changing the view of the WebTeam Central main window	Appearance	User Options
Customizing calendar options	Calendar Options	User Options
Changing calendar view	How to change the Calendar View	About Calendar
Seeing the schedule for a specific date	How to Display a Schedule for a Specific Date	About Calendar
Seeing the schedule for a specific person	How to Display a Schedule for a Specific Person	About Calendar
Organizing an appointment	How to Organize an Appointment	About Appointments
Editing an existing appointment	How to Edit an Appointment	About Appointments
Deleting an existing appointment	How to Delete an Appointment	About Appointments

View appointment status in Command	**How to View Appointment Status in Command**	About Appointments
Resending an appointment	**How to Resend an Appointment**	About Appointments
Locating an appointment created earlier	**How to Locate an Appointment**	About Appointments
Creating a meeting request	**How to Create a Meeting Request**	About Meeting Request
Creating a mail message	**How to Create a Mail Message**	About Mail Messages
Creating a phone message	**How to Create a Phone Message**	About Phone Messages
Learning about filter options	**Filter Options**	About Filters
Setting a filter profile	**How to Set Filters**	About Filters
Removing an applied filter	**How to Discard Filters**	About Filters
Edit a filter	**How to Edit a Filter**	About Filters
Deleting a filter	**How to Delete a Filter**	About Filters
Creating a custom group	**How to Create a Custom Group**	About Groups
Editing an existing custom group	**How to Edit a Custom Group**	About Groups
Deleting an existing custom group	**How to Delete a Custom Group**	About Groups

Table 2. Links to main functions of WebTeam Central

Getting started

To start WebTeam Central in your Web browser, you should enter the WebTeam Central address. If you do not know the address, contact your IT administrator.

By default, you can start WebTeam Central by entering one of the following URLs:

http://yourserver/WebTeamCentral/

http://yourserver/WebTeamCentral/Default.aspx

http://yourserver/WebTeamCentral/Login.aspx

Instead of **yourserver** you should insert the name of the server on which WebTeam Central is located.

Parameters

WebTeam Central can be launched with a number of start-up parameters appended to the Web address string. These start-up parameters will cause the program to behave in a certain way.

The parameters are typically used by users who wish to create hyperlinks from custom designed Web pages in their organization, thereby controlling the behavior of WebTeam Central.

You append the start-up parameters after the question mark, which is placed immediately after the Web address string using **Default.aspx** page:

http://yourserver/WebTeamCentral/Default.aspx?param=value

Where **param** stands for one of the possible start-up parameters, **value** stands for a parameter value and there is separated by the equals sign.

The possible start-up parameters are:

- **DistList**
- **View**
- **Mailbox**

DistList

With the **DistList** parameter appended to the WebTeam Central address, the program will start by displaying the schedules for the defined Distribution List as shown in the following example:

http://yourserver/WebTeamCentral/Default.aspx?DistList=Marketing

In this case the schedules of people in the Distribution list “Marketing” will automatically be displayed when WebTeam Central is called.

View

With the **View** parameter appended to the WebTeam Central address, the program will start by displaying a certain view as show in the following example:

http://yourserver/WebTeamCentral/Default.aspx?View=1 or

http://yourserver/WebTeamCentral/Default.aspx?View=Day

In this case the **Day View** will automatically be displayed when WebTeam Central is called. All the above examples will result in the same view.

The following View values are available:

- 0 (or List) – List view
- 1 (or Day) – Day view
- 2 (or Week) – Week view
- 3 (or WorkWeek) – Work Week view
- 4 (or TimeLine) – Time Line view
- 5 (or FrontDesk) – Front Desk view

DistList and View Together

The available parameters can also be used together, as shown in the following example:

http://yourserver/WebTeamCentral/Default.aspx?DistList=Marketing&View=1

Each set of parameters must be separated by an ampersand (&).

Mailbox

The “mailbox” parameters can be used to show the schedule of one individual user:

http://yourserver/WebTeamCentral/Default.aspx?mailbox=andrew@corp.com

User Interface Items

The main window consists of the following main elements: a toolbar with buttons, a navigation pane with groups, a calendar with scheduled appointments, and a status bar.

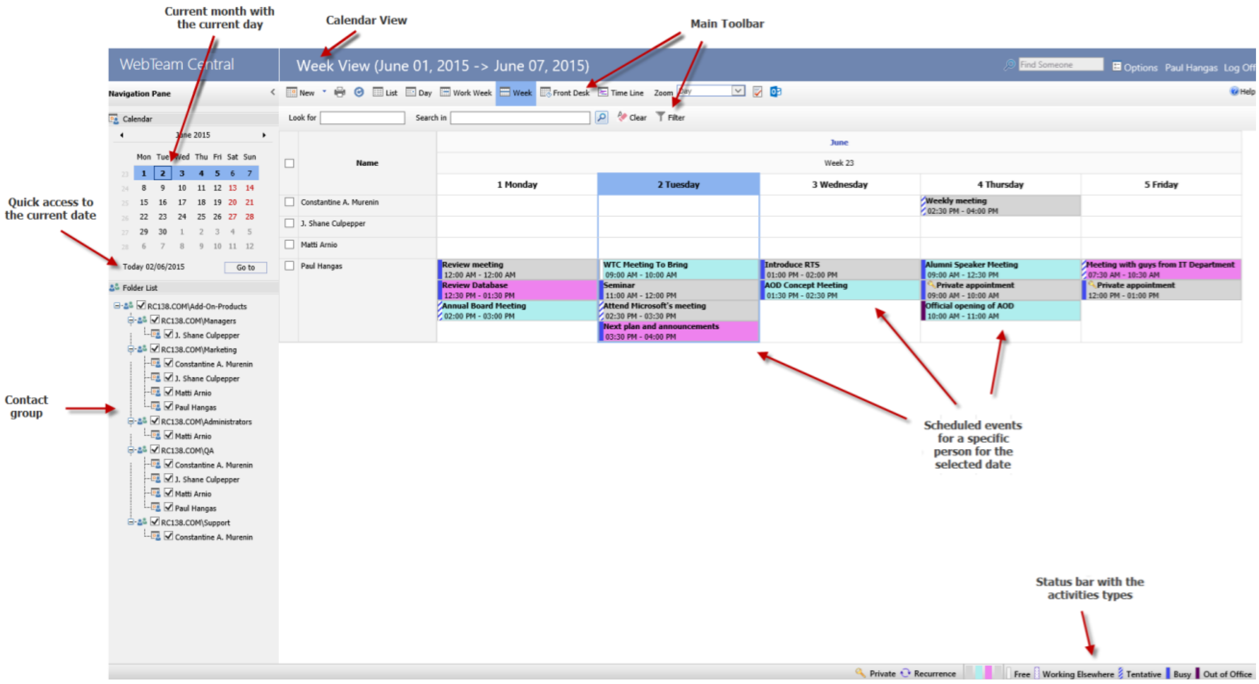
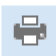


Figure 2. WebTeam Central main window

Toolbar Buttons

Toolbar buttons give you access to different calendar views and user options.

The table below contains all the buttons on the main toolbar and their descriptions.

Button	Action
	Click this button to see a drop-down submenu with the following options: Appointment, Mail Message and Phone Message. Click one of the options to create a new appointment, mail message, or phone message. To learn how to create each of these, we refer to the **How to Organize an Appointment**, **How to Create a Meeting Request**, **How to Create a Mail Message**, and **How to Create a Phone Message** sections of this Guide.
	Click this button to print out the current view of the page. Only a Calendar showing members of the selected group and their appointments will be printed out, and it will not print other elements of the main window.
	Use this function to update the calendar and commands list according to the filters and settings that you have.
	Click this button to display calendars as a list. In this view mode you are able to see a list of all the appointments scheduled in as many days as selected on the Date Picker.
	Click this button to display all the events scheduled for one day, for the currently selected user calendar. The events will be displayed in brief without any details.

Work Week	The Work Week view allows users to have an overview of the appointments as shown in the standard Microsoft Outlook 2007 group schedule view.
Week	This function allows you to see scheduled appointments for a week. You may select between viewing the whole week or only Monday through Friday. This is changed via the **User Options** page. The events scheduled for the currently selected group and week will be displayed with appointment's subject and time. You can also specify the number of weeks to be viewed in User Options via the **Week in Week View** list.
Front Desk	Click this button to switch to Front Desk view, which gives you the ability to perform a quick search for a specific person (e.g. Terry) and view the business related information of all the users that applies to the search string (e.g. Terry, Fletcher) – while at the same time being able to view the persons calendar appointments.
Time Line	If you click this button, the **Zoom** list becomes available and you can select additional calendar views: **Day, Week, Month, Quarter,** and **Year**.
Zoom Day	From this list select a calendar view. The possible options are **Day, Week, Month, Quarter,** and **Year.** This list becomes available, when you click **Time Line.**
	Use this function to delete or resend appointments. This button is available from the main toolbar, if the **Allow Access Commands** option is activated on the **Administrator Options** page. To read about using this function, we refer to the **How to View Appointment Status in Command** and **How to Resend an Appointment** section in this Guide.
	Click this button to access Outlook Web Access by the url specified by your Web application administrator.
Look for	Enter a word or a phase in the **Look for** field, to search for appointment
Search in	Select criterions, by which you want to search appointment, in the **Search in** list. To read about using this function, we refer to the **How to Locate an Appointment** section in this Guide.
Clear	Click this button to discard search criteria that you specified in the **Look for** field and **Search in** list.
Filter	Click this button to open the Filter pane on the Navigation Pane. Using Filters you can display records with selected information. To learn what filter settings you can customize, we refer to **About Filters** section later in this Guide.
Help	Click this button to launch WebTeam Central help page and get help information.

Table 3. Main window toolbar buttons

Navigation Pane

The Navigation Pane contains the **Date Picker** (a small calendar allows users to quickly choose a date) and the **Folder List** (which contains Group and My Groups). To read more about groups, we refer to the **About Groups** in this Guide.

Date Picker

The Calendar at the upper part of the Navigation Pane is the Date Picker which is use to navigate among dates. The single-arrow icons move forwards and backwards in time by increments of a month. Dates which have at least one appointment will be indicated with **bold**. The selected date will be mark with yellow color. In List view, if you want to select multiple dates at once, hold down the Control key and click the dates.

The Date Picker also supports Week numbers and can be viewed with different formats. To read more about setting these options, we refer to the **User Options** section in this Guide.

Folder list

The Folder list pane contains a Calendar tree, in which the users can select the calendars that they want to view. To read more about groups, we refer to the **About Groups** in this Guide.

Calendar

The right part of the page normally contains a calendar with the selected group's appointments. Here all of the scheduled appointments are displayed for all of the groups. You can display events scheduled for one day, a week, a whole month, a quarter or even a year. Looking at the calendar you can see if a certain person is available on a specific date, how the appointment time this person is involved in should be treated, whether this person is busy or he is out of office.

To learn about the calendar, read the **About Calendar** section in this Guide.

This area is also used for setting the initial options on the **Initial Settings** form. You will see this form when you start working with WebTeam Central for the first time. On that form you have to set up groups to work with. For more information about initial settings, see the section entitled **Initial Settings**.

Also you will use this area to display the **User Options** page which has a number of sections containing different user settings. Here you can change general options, group options, calendar-related settings, and category colors. To read about user options, we refer to the **User Options** section in this Guide.

Status Bar

The status bar of the main window can contain three possible sets of elements used to display appointments:

- Free/Busy colors
- Category colors
- Category icons

These elements are used in the calendar to at a glance distinguish between events.

Free/Busy colors shows how the schedule looks to others in the calendar and can be one of the following types:

- Free
- Working Elsewhere
- Tentative
- Busy
- Out of Office

Figure 3. Free/Busy colors in the status bar

The status bar can alternatively contain colors or icons for displaying different categories for appointments in the calendar. If you hold a cursor over one of the colors in the status bar, a tooltip with the corresponding category name will pop up:

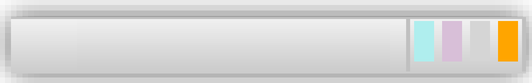


Figure 4. Category colors in the status bar

Besides the colors, icons can also be used for distinguishing categories:

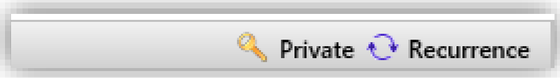


Figure 5. Category icons in the status bar

The categories can be one of the following:

- Use the **Private** icon to indicate that the meeting should be considered a private one. Using this feature, you can prevent all access by other people to the details of this meeting.
- The **Recurrence** icon is used to indicate an appointment occurs repeatedly.

The view of the elements in the status bar and the way the appointments will be distinguished can be set on the **User Options** page. Appointments can be distinguished by Free/Busy colors, Category colors, Category icons concurrently and the Status bar looks like this:

Figure 6. The status bar with all three elements used

Initial Settings

The first time you open WebTeam Central, the **Web Calendar** page will appear. On this page you must select at least one standard group to work with. This page is shown only once when a new user starts working.

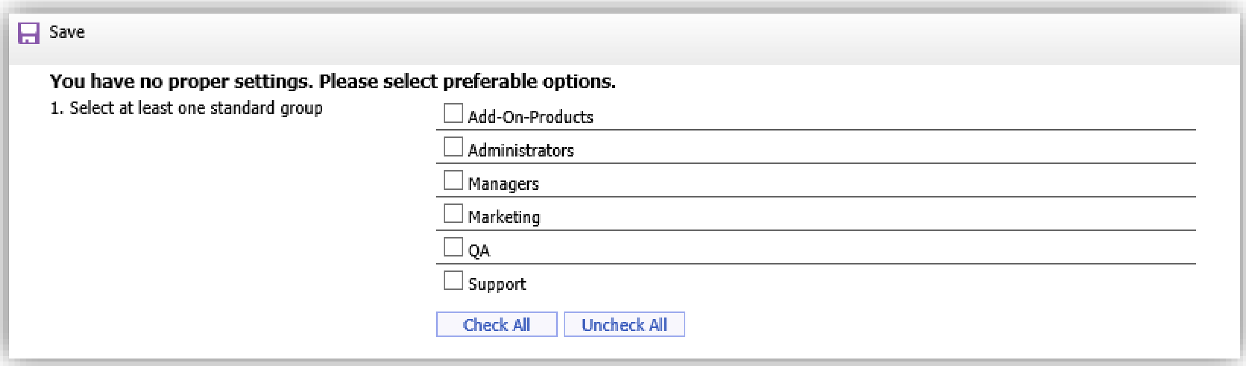


Figure 7. Initial page for a new user

You can click **Check All** to select all the groups in the list, or click **Uncheck All** to clear all the groups in the list.

After you have made the selection, click **OK** to start working with WebTeam Central. If necessary, you can later on change these settings on the **User Options** page.

Web Application Main Concepts

This section will guide you in your work with the WebTeam Central. You can find instructions on how to perform different tasks in the application.

The table you see below gives you an idea, about what you can find in this chapter.

Section	Sub-section
About Calendar	How to change the Calendar View
	How to Display a Schedule for a Specific Date
	How to Display a Schedule for a Specific Person
About Appointment	How to Organize an Appointment
	How to Edit an Appointment
	How to Delete an Appointment
	How to View Appointment Status in Command
	How to Resend an Appointment
	How to Locate an Appointment
About Meeting Request	How to Create a Meeting Request
About Mail Messages	How to Create a Mail Message
About Phone Messages	How to Create a Phone Message
About Filter	Filter Options
	How to Set Filters
	How to Discard Filters
	How to Edit a Filter
	How to Delete a Filter
About Groups	How to Create a Custom Group
	How to Edit a Custom Group
	How to Delete a Custom Group

Table 4. Sections and subsection of this chapter

About Calendar

Calendar is the scheduling component of WebTeam Central, and is fully integrated with e-mail, contacts, and other features. In Calendar, you can with one click display events scheduled for the group for one day, a week, or a whole month. With Calendar you can:

- Organize appointments.
- Locate a person or an appointment.

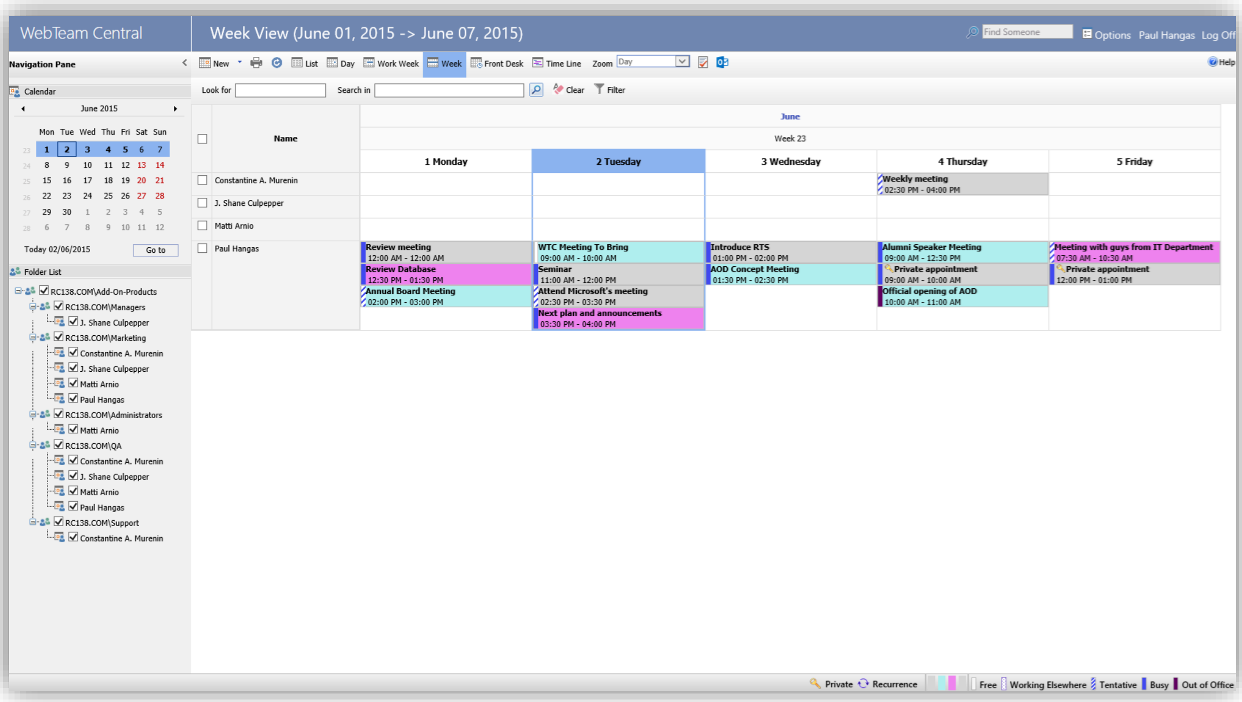


Figure 8. The main page of WebTeam Central

To read about organizing appointments, we refer to the **How to Organize an Appointment** section in this Guide. To read about groups, we refer to the **About Groups** section in this Guide.

How to Change the Calendar View

In Calendar you can switch between several different calendar views: 1 day, 1 workweek, 1 week, 1 month, 1 quarter and 1 year. The default view depends on the options set on the **User Options** page.

To change the calendar view, do the following:

1. To see the list of all appointments scheduled for the selected days, click on the **List** button List on the WebTeam Central toolbar. By selecting a number of days on the Date Picker in the left-upper corner of the main window, you will be able to see a list of all the appointment scheduled on these days. The right pane of the main window will have the following view:

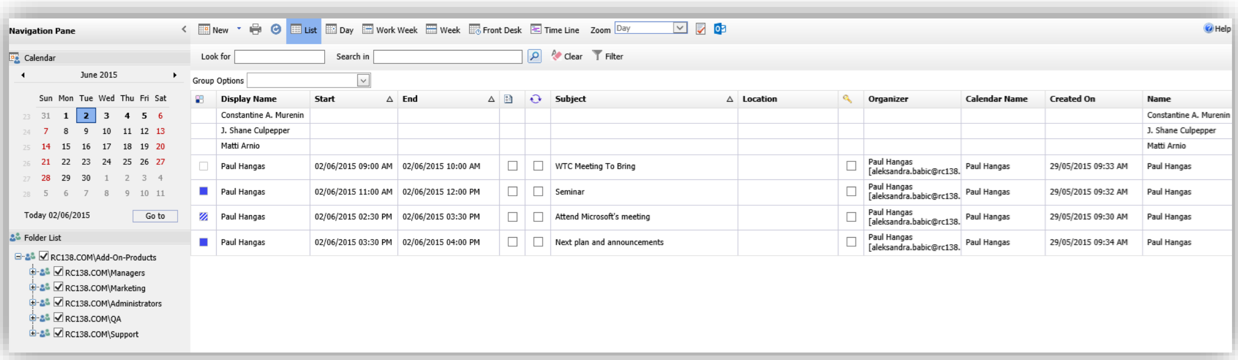


Figure 9. The List calendar view

You can choose which columns to be visible, by right clicking on the list and check/uncheck the columns' titles. It is also possible to resize the width of the columns and switch their place. To save the new configuration so it can be use as default next time, right click and select Save .

Right click and select Reset, then press F5 to restore the default setting configured by the administrator.

Refer to the **Group section** of **WebTeam Central Administrator's Guide** for information about how to add more columns to display in the List view:

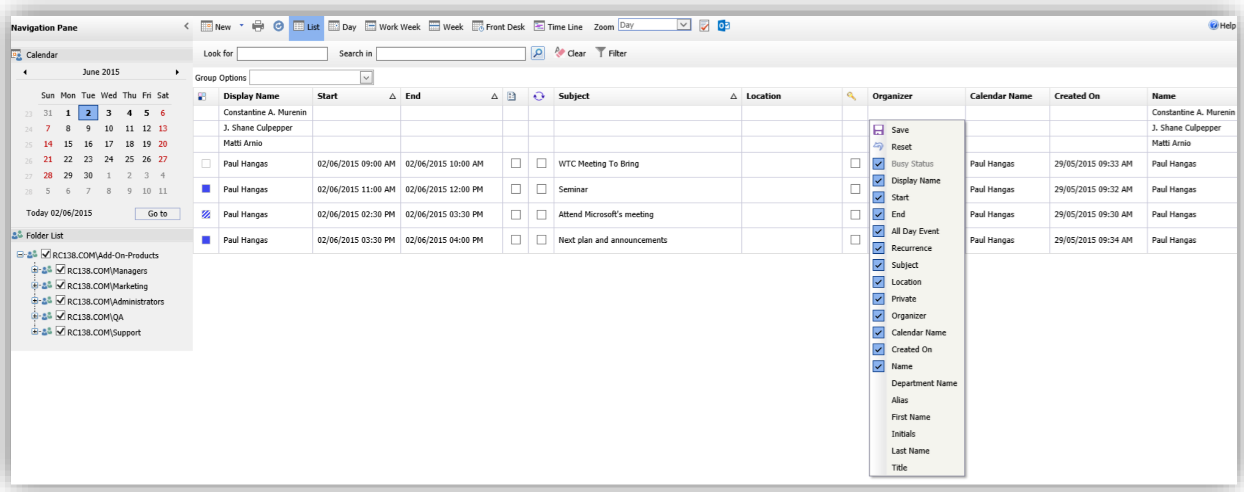


Figure 10. Configuring columns in the List calendar view

The Group Options dropdown list is to select a sorting type for appointments in list view.

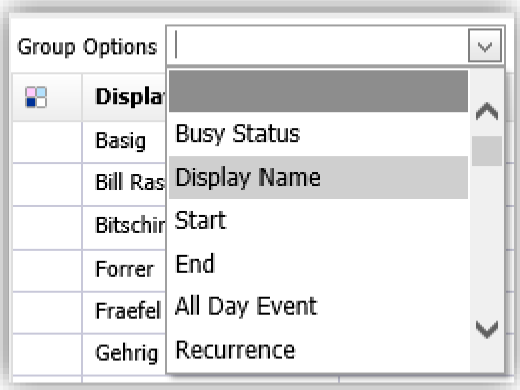


Figure 11. Group Options (Sorting) in List calendar view

To add another column to sort by (add level), drag the column title to the grey area below Group Options dropdown list. The sorting types displayed from left to right have the sorting level from high to low.

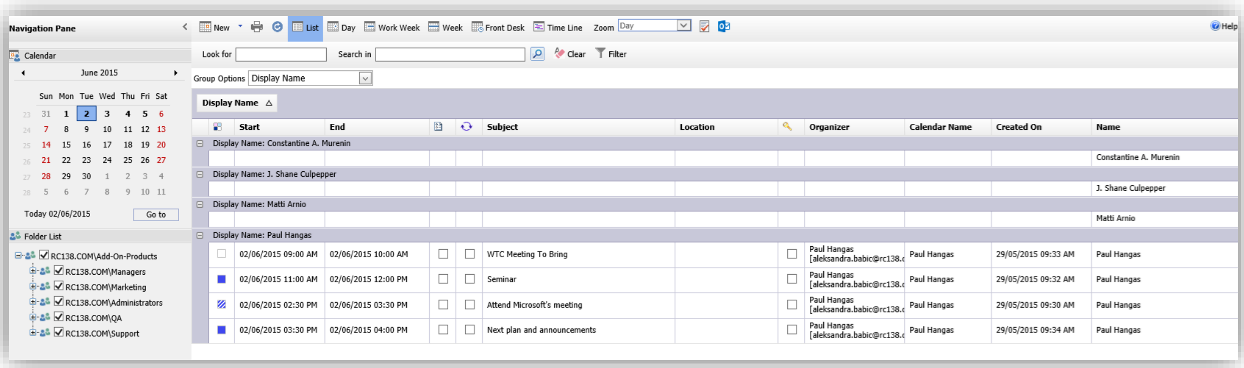


Figure 12. Multi-level Sorting in the List calendar view

2. Click **Day**  to switch to the day calendar view. This view provides you with brief information about scheduled appointments. You can see what time the appointment is planned at and its subject. The main window with the **Day** calendar view looks like the following:

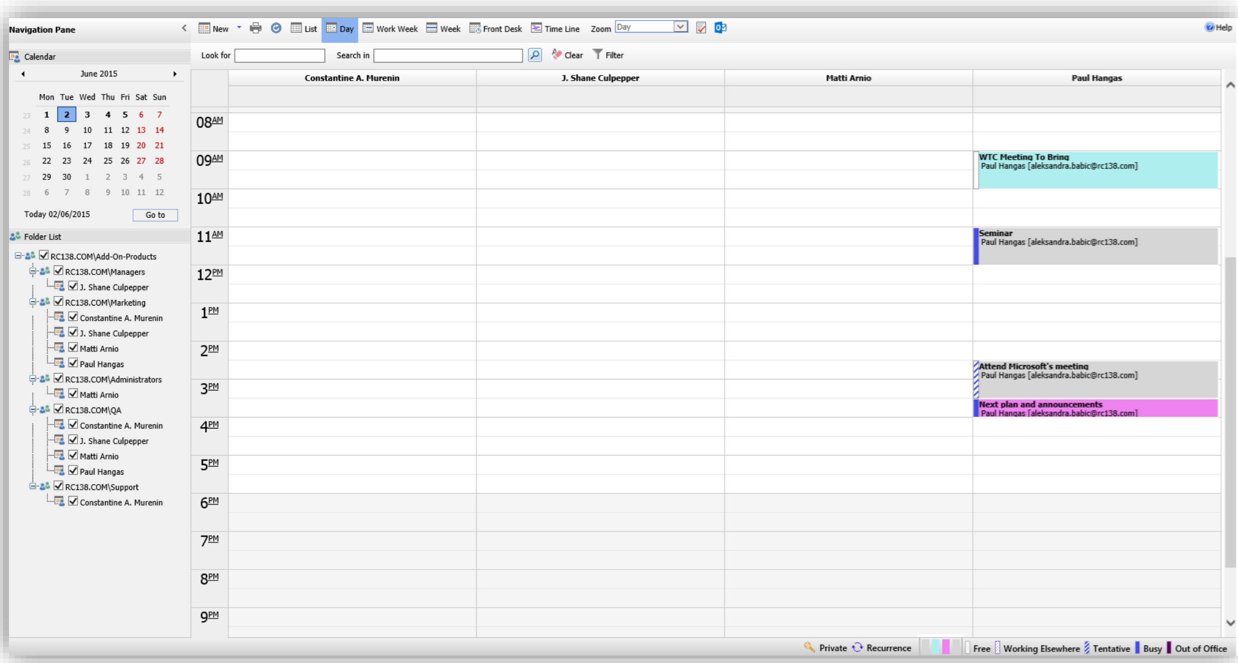


Figure 13. The Day calendar view

In the **Day** view the hours are displayed as: working and non-working hours. Working hours are displayed in light grey color while non-working hours have dark grey color. You can change whether to display non-working hours on the **User Options** page. To read more about user options, we refer to the **User Options** section in this Guide.

To see details of a scheduled appointment, click on it. You will see all information that relates to the selected appointment. The main window will have the following appearance:

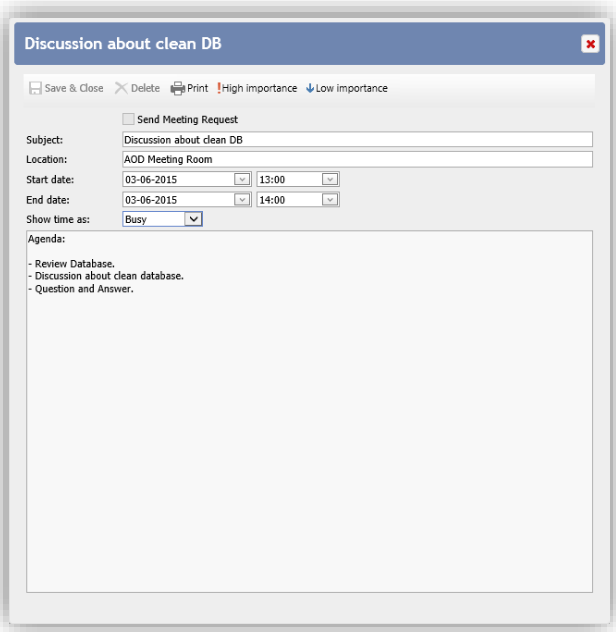


Figure 14. Detailed information on the selected appointment

3. Click 

to change the Calendar into **Work Week** view. This view will display all appointments of all selected people in one work week. The events scheduled will be displayed with appointment's subject and the time it takes place:

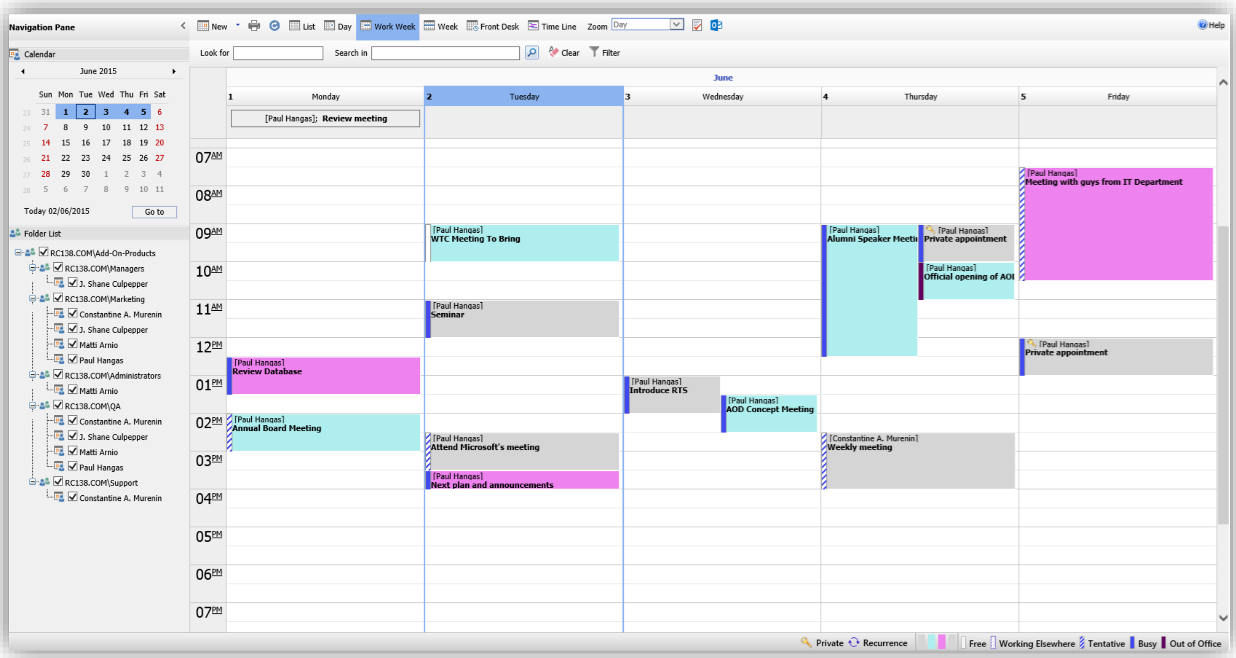


Figure 15. The Work Week calendar view

4. To see scheduled appointments for a week, click **Week** 

. The Week view gives an overview of all appointments that occur in the week. You may select between viewing the whole week or only Monday through Friday. This is changed via the **User Options** page. The events scheduled for the currently selected group and week will be displayed with appointment's subject and the time it takes place. You can also specify the number of weeks to be viewed in User Options via the **Week in Week View** list.

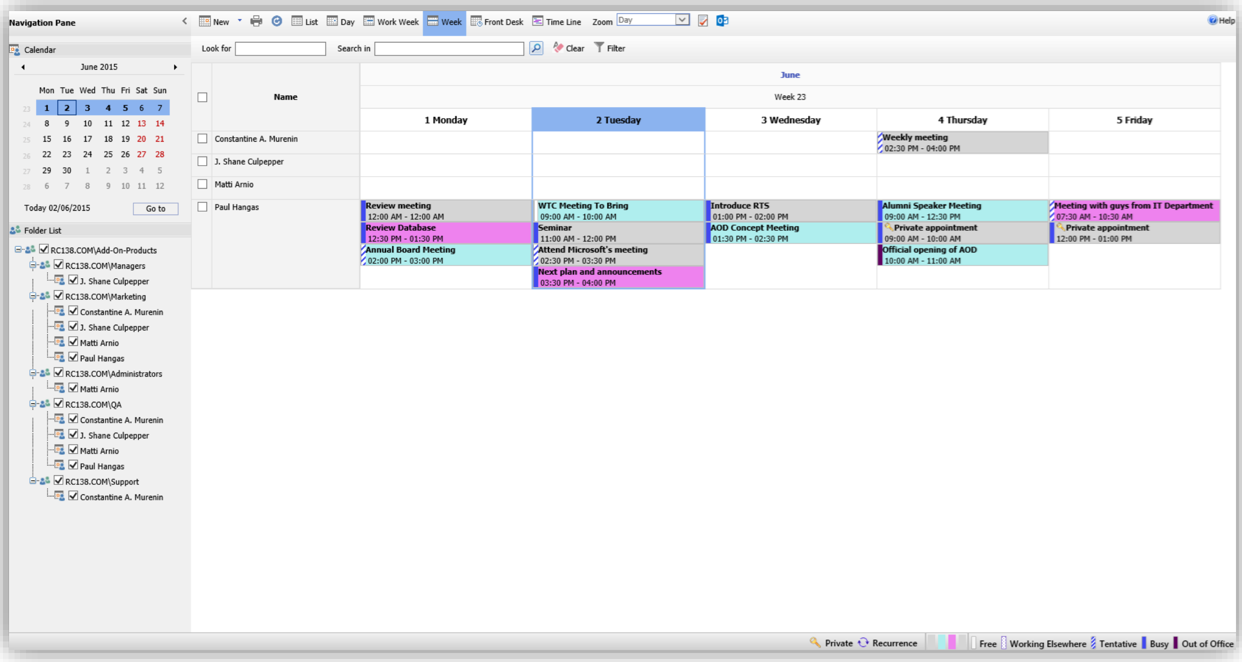


Figure 16. The Week calendar view

5. Click the **Front Desk** 

button to switch the Calendar into Front Desk view. This view gives you the ability to perform a quick search for a specific person (e.g. Terry) and view the business related information of all the users that applies to the search string (e.g. Terry, Fletcher) – while at the same time being able to view the person's calendar appointments.

Whenever a mailbox is created on the Exchange Server, a number of properties can be entered, such as name, account, phone numbers, addresses, etc. This set of information can also be displayed with Exchange Central utilizing the Front Desk view. It is, of course, important to keep this information updated on the Exchange Server for this to be of any value to the users.

The individual user only needs to switch to Front Desk view and enter part of the name – then a filtered list of accounts appears and the user can then mark the person and view the specific person appointments. It is also possible to change dates, number of days in the view using the navigation pane.

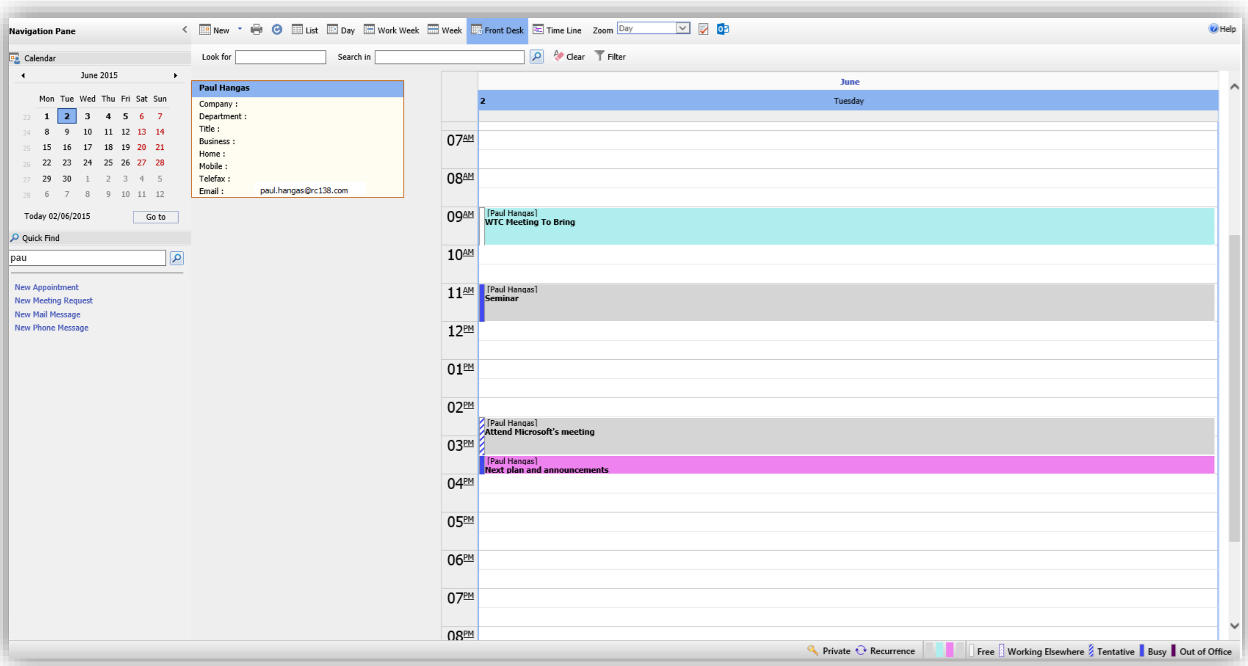


Figure 17. The Front Desk calendar view

6. To display the day, week, month, quarter, or year view, click on the **Time Line button** . The **Zoom** list becomes available. From the **Zoom** list select one of the options: **Day, Week, Month, Quarter,** or **Year.** The screen shot below shows the Week calendar view selected from the Zoom list.

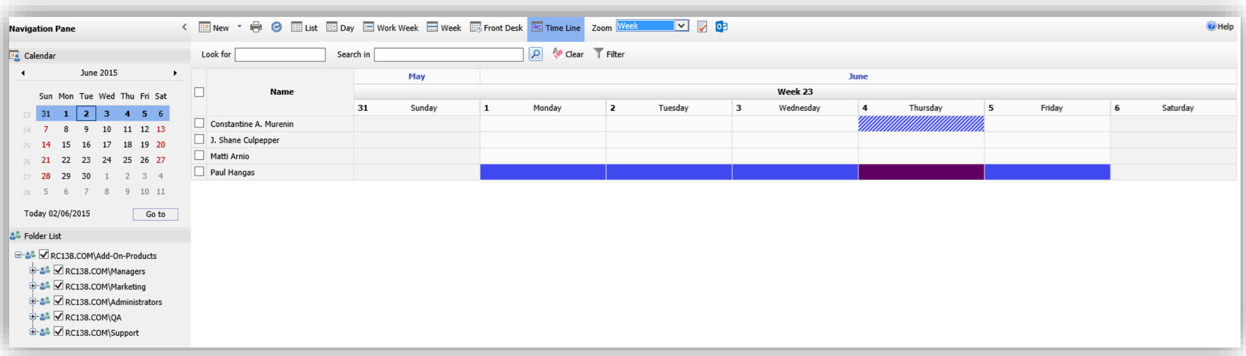


Figure 18. The Week view chosen from the Zoom list with the Time Line option selected

In the **Week** calendar view working days and weekends are distinguishable: weekends are shown in dark grey color, working days – in light grey color.

If you place a mouse pointer over the colored area that shows scheduled appointments, a tooltip will appear with a list of the appointments scheduled for this day with time and subject information.

NOTE

If you click on the **Day, List, Work Week,** or **Week** button on the main toolbar, the **Zoom** list becomes unavailable. To be able to select views other than **Day** and **Week**, click the **Time Line** button to activate the **Zoom** list.

From Time Line views other than Time Line (Day) view, you can switch to several Time Line views depending on the view you are currently working with. For instance, if it is the **Time Line (Month)** view, you can switch to the **Time Line (Week)** and **Time Line (Day)** views. To do that, click on the corresponding label on the calendar view. The main window with the **Time Line (Month)** view looks like this:

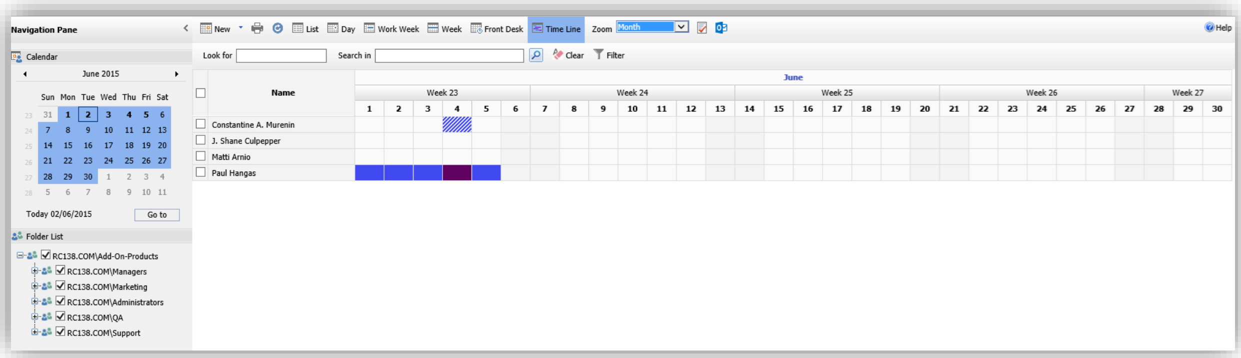


Figure 19. The Month view from the Zoom list with the Time Line option selected

How to Display a Schedule for a Specific Date

To go to a specific date and display the schedule for that day:

1. On the Date Picker in the Navigation Pane, click the **Go to**  button. The Select Date window appears
2. Select a month, year, and day. Click Select to display the calendar for the selected date. Click **Cancel** to cancel the procedure.

The main page will display all scheduled appointments for the selected date.

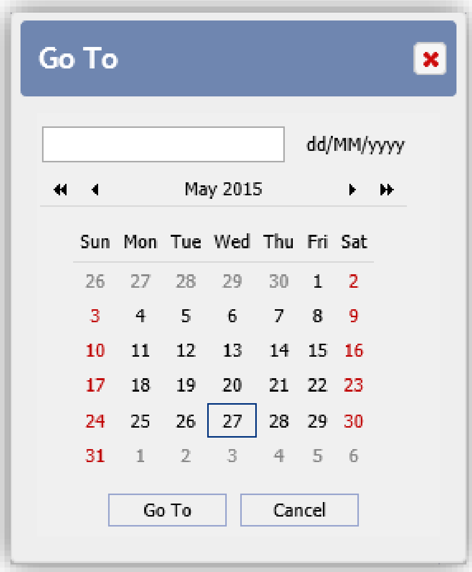


Figure 20. The Go To window to select a day for displaying schedule

How to Display a Schedule for a Specific Person

To display a schedule for a person, use the **Find Someone** function of the Web application.

1. In the **Find Someone** field at the top right of the main window, enter the name of the person whose schedule you want to display
2. Press Enter to find the person. All the people whose names match the criteria will be highlighted in the calendar tree

Figure 21. The Search function

About Appointments

An appointment is an event you schedule and reserve resources (a room, computer, or other equipment) for if needed. You can organize appointments for yourself and other people, if you have the permission to. When organizing appointments, you specify the people you want to invite, subject, location and appointment time. The importance level of the appointment and appointment type can be change as well.

The figure below displays an appointment.

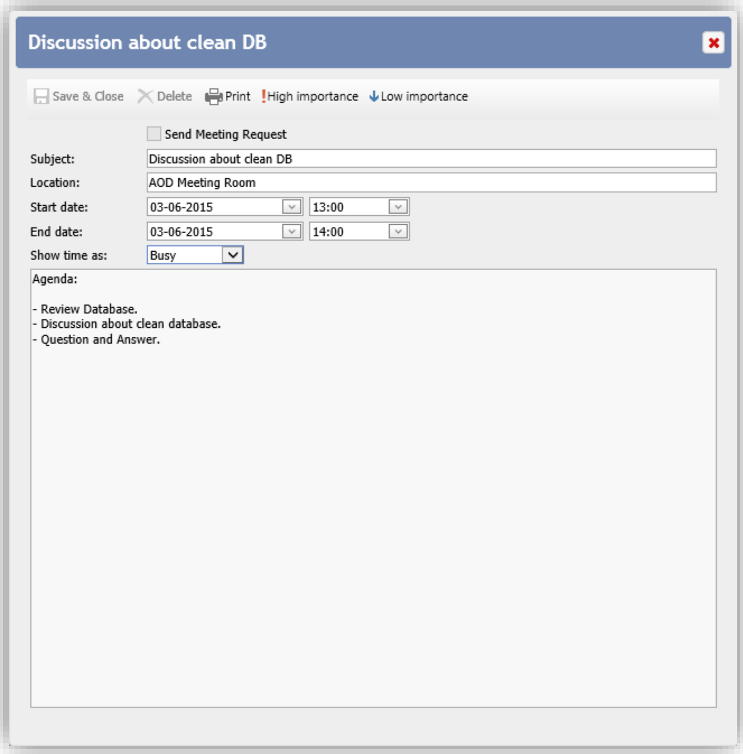


Figure 22. The Appointment page

How to Organize an Appointment

It is possible to organize a new appointment for one or more users.

To organize an appointment, follow this procedure:

1. Click New and choose Appointment. The Appointment page appears.
2. Click **Address Book** next to the **To** field.
3. In the Address Book window that appears, click **Find** to retrieve a list of all contacts available in this address book.

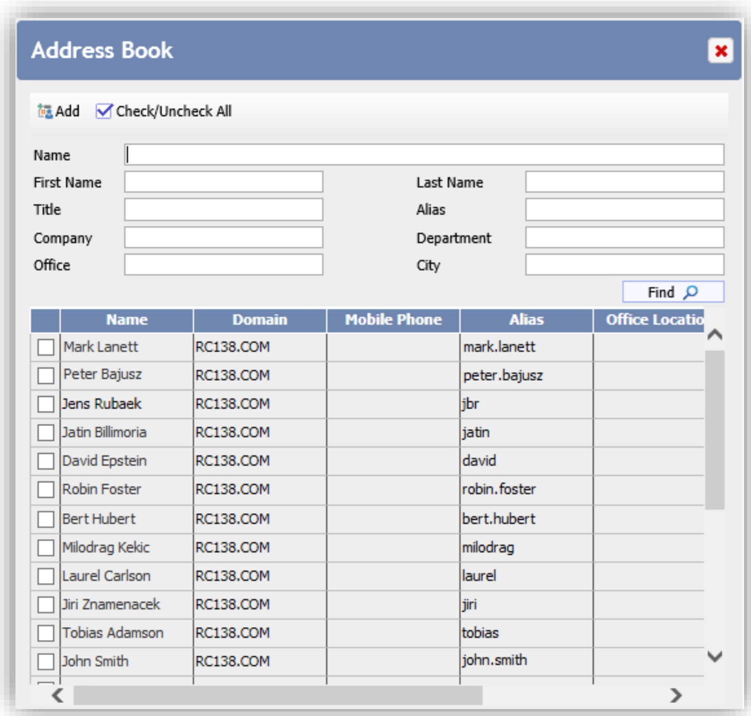


Figure 23. The Address Book window with all available contacts

However, you can also filter the contacts by specifying additional information in the fields such as Name, Last Name, First Name, Title, Alias, Company, Department, Office, and City and then clicking Find.

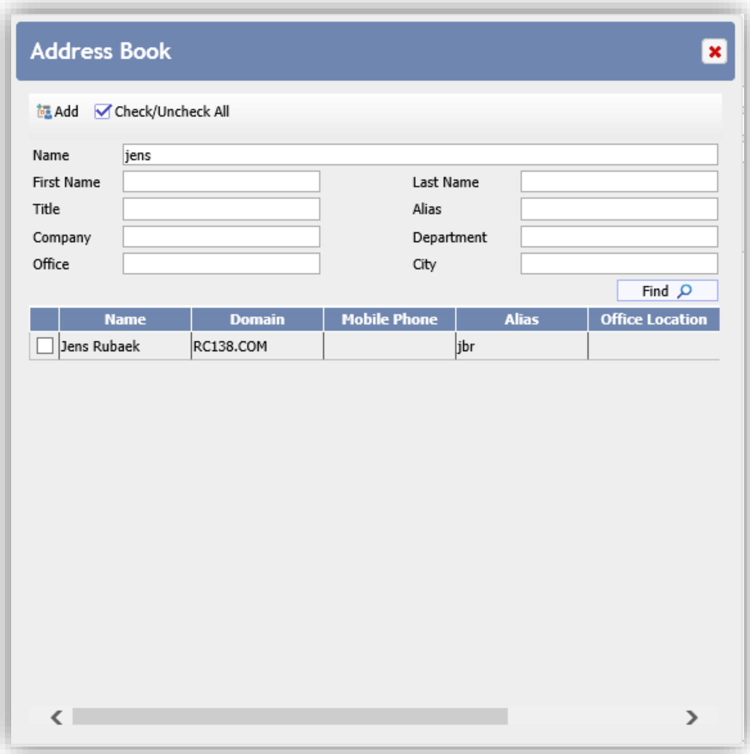


Figure 24. The Address Book window with contacts filtered by Name

4. In the list, select the people who are invited to the appointment and click **Add,** to add them to the **To** field in the Appointment window. You can click **Check/Uncheck All** to alternate selecting and clearing all the check boxes.

   Close the Address Book window.

   If you have selected addresses in the calendar view by selecting the corresponding check boxes, their addresses will automatically be inserted into the **To** field.

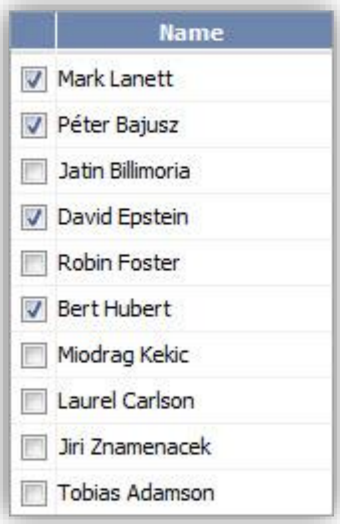


Figure 25. Select contacts to insert their addresses into the To field

5. In the Appointment window, in the **Subject** field, enter a description of the appointment
6. In the **Location** field enter the place where the appointment will be held

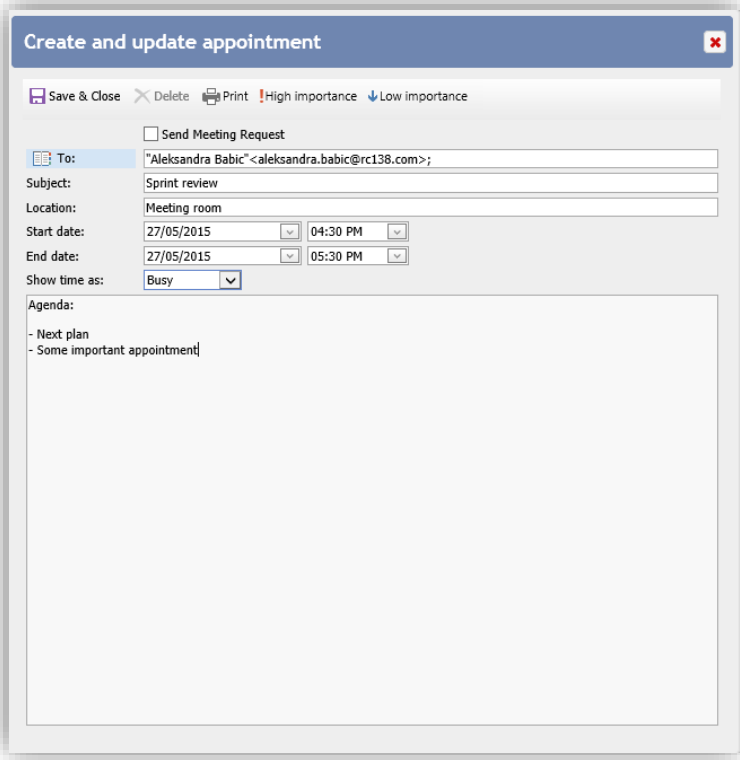


Figure 26. The Appointment window

7. Enter start and end dates and times.
8. If your appointment is scheduled to take the whole day, you can show it in the Calendar, by selecting the **All Day Event** field in the Appointment window.
9. Check **Send Meeting Request** option if you want to send this as a meeting request as well. If you uncheck this option, this will be sent as an appointment only.
10. In the **Show time as** dropdown list select the appointment time type: **Free, Working Elsewhere, Tentative, Busy**, or **Out of office**. The appointment will be displayed on the calendar in the color depending on the time type you selected.
11. Click **Save and Close** to save and close the appointment. The message will be sent to the addressees you specified. If you do not want to save and send the message, click **Cancel**.

You are able to set other options as well. For instance, in the appointment body you can write an agenda for the appointment or print the current view of the appointment by clicking **Print**. You are also able to change the importance level of the appointment:

- To mark the appointment as very important, click .
- To assign low importance to the appointment, click .

NOTE You can only create appointments for people whose calendar you have permission to create appointments in.

How to Edit an Appointment

You can edit an existing appointment, for example modify the appointment subject, time or cancel it. To edit an appointment:

1. In Calendar, click the appointment you want to change to open it.
2. Modify the subject, location, time or appointment time style.
3. To save your changes, click **Save and Close.**

NOTE You can only edit or delete appointments of people whose calendar you have permission to edit.

How to Delete an Appointment

You can delete an existing appointment by doing the following steps:

1. In Calendar, click the appointment you want to change to open it.
2. Click **Delete.**

How to View Appointment Status in Command

Click the **Commands** button on the main window toolbar to open the Commands page. This page contains a list of the appointments you have organized and sent. In the Command Status field you can see the current status of the appointments sent to the addressees that have been specified

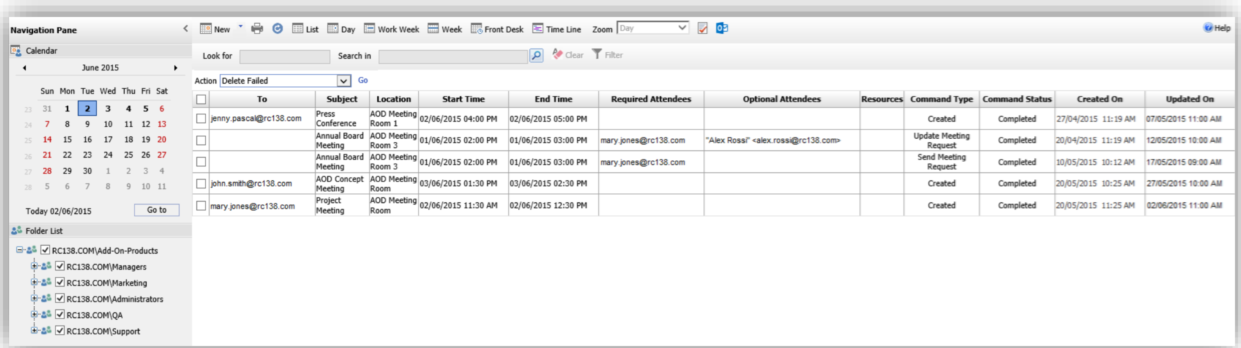


Figure 27. The main window with commands available

In the table below you can see the list of the command statuses and descriptions of them.

Command Status	Description
Executing	Appointments are being processed before sending to the addressees. It may take some time.
Pending	An appointment with this status is in a queue for processing.
Completed	The processing of the appointment has been finished and the appointment was sent to the recipients.
Failed	The appointment could not be processed

Table 5. Status of appointments sent

To delete appointments in the Command, do the following:

1. In the main window, click the **Commands** button. The pane with all appointments will be displayed.
2. Select appointments by placing check marks to the left of the **Subject** field.
3. In the **Actions** list select one of the options. Possible actions are **Delete Failed**, **Delete Successful, Delete Selected, Resend Failed,** and **Resend Selected**. If you select the appointments manually, you can choose either **Delete Selected** or **Resend Selected**.
4. If you want to select all of the appointments to delete them, click the **Check All** button. The caption of this button will change to **Uncheck All**. Click **Go** to delete all of the appointments.

The other method to delete appointments is to select them by their status. You can do this by using the **Actions** list.

1. In the **Commands** page select one of the following actions: **Delete Failed** and **Delete Successful**. The **Commands Status** check box for appointments with the selected status will be selected.
2. Click **Go** to delete the appointments with the selected status.

The **Check All** button works the following way: when you click this button, all the check boxes become selected and the button caption changes to **Uncheck All**. As you click this button again, all the check boxes become cleared and the button caption changes to **Check All.**

How to Resend an Appointment

You may need to resend an appointment, for example, if it has failed to be processed. You can do this by using the **Commands** page.

To resend an appointment:

1. In the **Commands** page, select the appointment you want to resend.
2. To select appointments manually, select the check boxes to the left of the **Subject** field. To select all of the appointments, click **Check/Uncheck All**.
3. In the Actions list select Resend Selected.

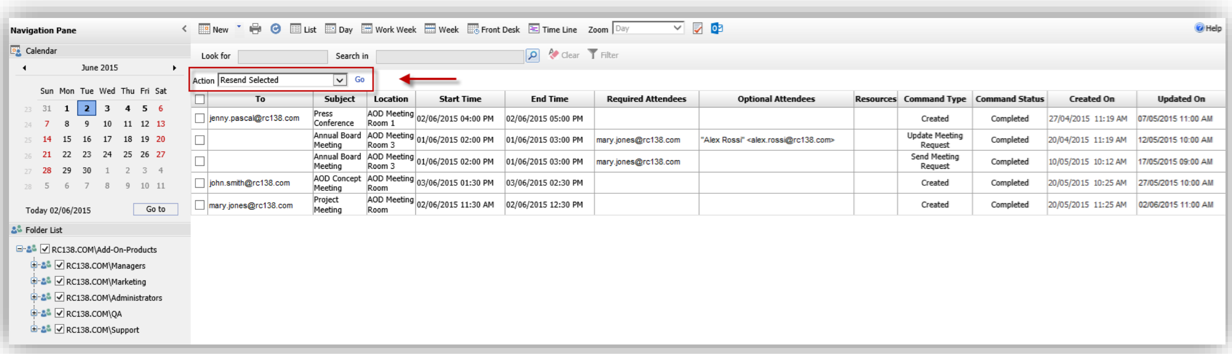


Figure 28. The Command page with the Resend Selected option selected

4. You can select appointments by their status, to do so, in the Actions list select Resend Failed to resend only failed appointments.
5. Click **Go** to perform this action.

NOTE You cannot resend appointments that have the Completed status.

How to Locate an Appointment

With the **Look for** option located in the area above the current calendar view, you can easily locate an appointment. The function searches throughout the groups and appointments and shows all matches.

1. In the **Look for** field, enter a word or a phase without any quotes or wildcards

NOTE The asterisk is not a substitute for any character – the **Search** function will look for it just like any other character you enter.

2. In the **Search in** list select criterions you want to search by. If you enter an appointment subject in the **Look for** field, select **Subject** in the **Search in** list. Other criterions you might choose are **Category**, **Location** and **Organizer**

Figure 29. Criteria for finding an appointment

3. Click button to search for the appointments

About Meeting Request

You can send meeting request to any of your contacts. To create a meeting request, you should follow these steps:

1. Click **New** and choose **Meeting Request**. The Send Meeting Request page appears:

Figure 30. Send meeting request page

2. Click **Address Book** icon next to **Required** field.
3. In the Address Book window that appears, click **Find** to retrieve a list of all contacts available in this address book (see screenshot in the Appointments section).
4. In the list, select the people who are invited to the appointment and click **Add**, to add them to the Required field in the **Send Meeting Request** window. You can click **Check/Uncheck All** to alternate selecting and clearing all the check boxes. Close the Address Book window.
5. You can also select optional receivers by clicking Address Book icon next to Optional field. The procedure is similar to what you have done with Required field.
6. To select resources (venue for the meeting), click **Address Book** icon next to **Resources** field. The difference here is you should select specific resource in the list.
7. Enter start and end dates and times.
8. Check **Send Meeting Request** option if you want to send this as a meeting request. If you uncheck this option, this will be sent as an appointment.
9. In the **Show time as** dropdown list select the meeting time type: **Free, Working Elsewhere, Tentative, Busy**, or **Out of office**. The meeting will be displayed on the calendar in the color depending on the time type you selected.
10. Click **Save and Close** to save and close the Meeting Request. The message will be sent to the addressees you specified. If you do not want to save and send the message, click **Cancel.**

For other activities such as editing, deleting, resending, etc. a meeting request, see the procedures mentioned in Appointments section for more details.

NOTE: Only Organizer of the meeting can Edit, Resend and Delete the meeting request. Others can only View the meeting request.

About Mail Messages

You can send an email to any of your contacts. To create an e-mail, you should follow these steps:

- Specify an e-mail address.
- Indicate a subject for your letter.
- Enter the text in the letter body.

With these messages you can send information to your contacts.

A mail message window looks like the following:

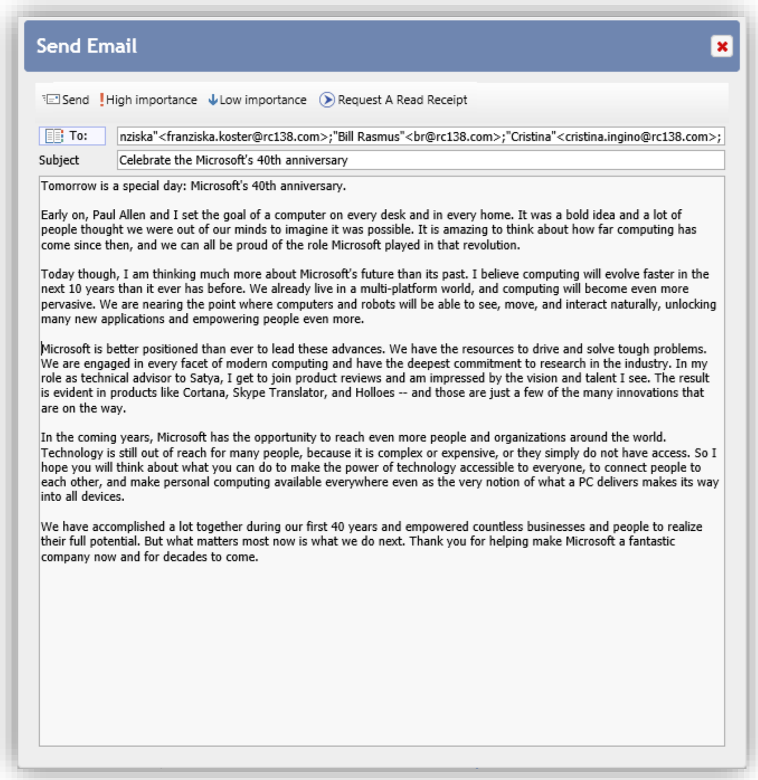


Figure 31. The Mail Message page

How to Create a Mail Message

1. Click New and choose Mail Message. The Mail Message page appears.
2. Click on the address book button to the left of the **To** field and select one or more addressees from the address book.
3. In the **Subject** box, type the subject of your mail message.
4. In the message body, type in the content of your mail message.
5. If you want to, you can setup other options to be included in the message. For example, you can set the message importance level. To change the importance level:
   - Click to set the importance level as high.
   - Click to set the importance level as low.
6. If you want to be sure that the recipient read your mail message, you can use the **Request a Read Receipt** function. Click the button on the Mail Message window. As soon as your letter is opened by the recipient, you will get a notification about it.

About Phone Messages

A phone message is an e-mail message that you can send to a recipient if they are unavailable and cannot answer the phone. It also has additional options for delivering information.

The following figure shows the way the Phone Message window looks:

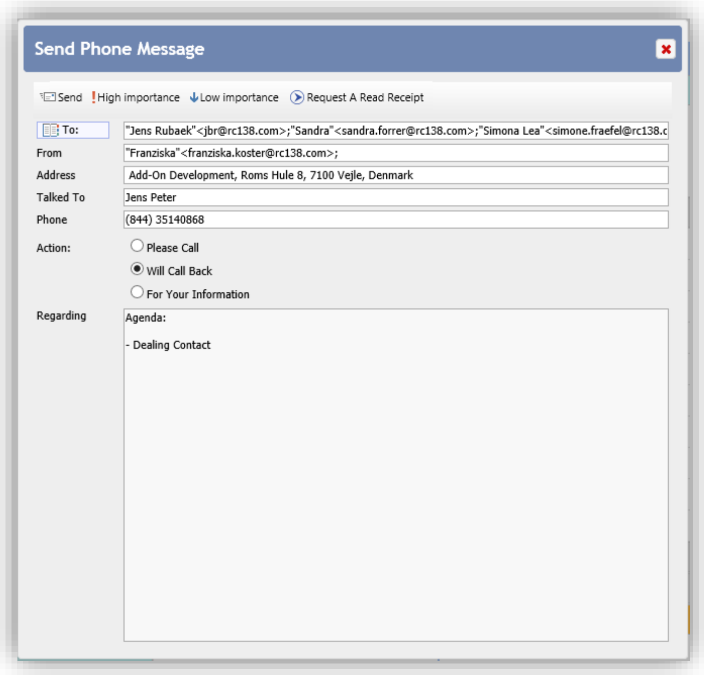


Figure 32. The Phone Message page

How to Create a Phone Message

1. Click New, and choose Phone Message, The Phone Message page will appear.
2. Click the **Address Book** to the left of the **To** field and from the address book select the address.
3. In the **From** field enter your e-mail address.
4. In the **Address** field enter the address, if any, left by the person who called.
5. In the **Talked to** field, enter the name of the person you talked to.
6. Fill in the **Phone** field with the phone number and the extension of the person who called.
7. In the **Action** area select one of the available options:
   - Please Call
   - Will Call back
   - For Your Information

   Select the appropriate option to notify your recipient about what action he should take after receiving the message.
8. In the **Regarding** field enter a brief note about the purpose of the call.
9. Click **Send** to send the message. If you do not want to send it, click **Cancel**. All information that you have entered will be lost.

If you want to, you can setup other message options. For example, you can set the message importance level. To change the importance level:

- Click to set the importance level as high.
- Click to set the importance level as low.

If you want to be sure that the recipient reads your mail message, you can use the **Request a Read Receipt** function. Click the  button on the **Phone Message** window. As soon as your letter is opened by the recipient, you will get a notification about it.

About Filters

The filter view is an easy way to see only those items that meet the criteria that you specify. Click 

, the **Filter** pane will appear in the Navigation pane, and will replace the Folder List.

When you filter items, you selectively choose what items will appear in your view.

The Filter window offers you a variety of ways to select and organize your appointments according to the defined criteria. For example, you can display only items with the **Busy** and **Is not empty** subject condition.

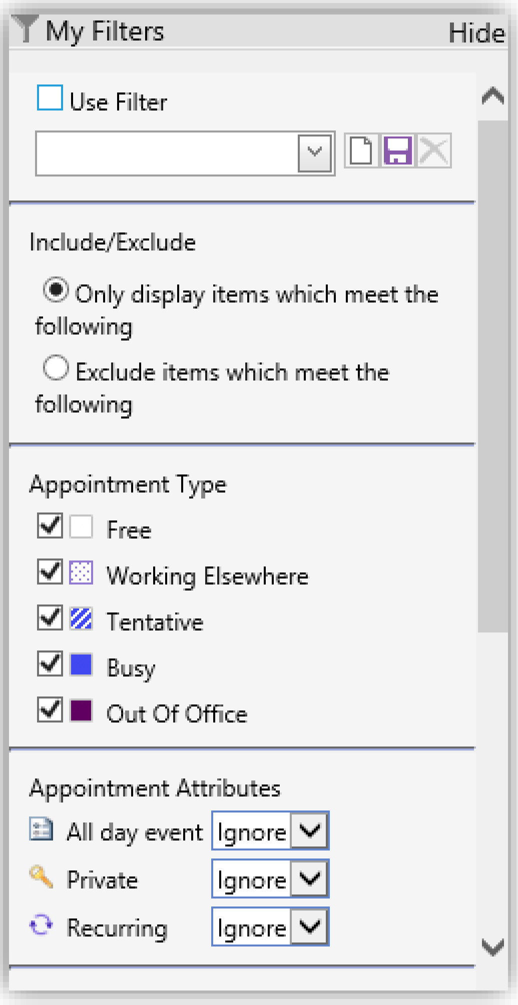


Figure 33. The Filter pane

Filter Options

Select the **Use Filter** check box and click **Save** to use one of the available filter profiles. The following options for all of the profiles are available:

In the **Include/Exclude** area, select one of the two options, depending on what you want to display.

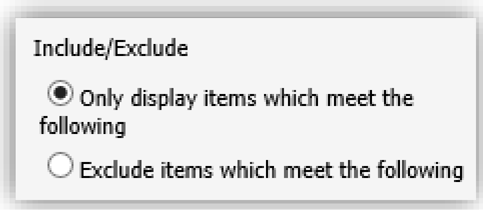


Figure 34. The Include/Exclude area

- **Only Display Items, which Satisfy the Following –** To display only items, which fit the criteria, set below in this filter pane.
- **Exclude Items, which Satisfy the Following –** To not display items that fit the criteria set in this filter pane.

In the **Appointment Types** area select one or more check boxes to indicate an appointment type.

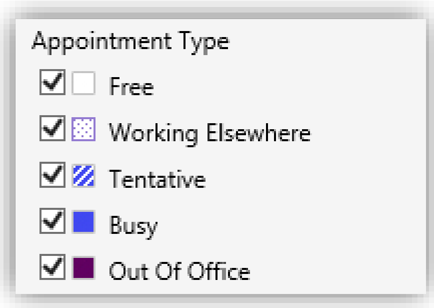


Figure 35. The Appointment Types area

Choose among:

- **Free** – defines the appointments time as free.
- **Working Elsewhere** – indicates that this appointment will take place elsewhere
- **Tentative** – indicates that this appointment is still under consideration.
- **Busy** – indicates that during the appointment you will be busy and do not want to be disturbed.
- **Out of Office** – specifies that the appointment will take place out of office.

In the **Appointment Attributes** area, specify which appointment type will be included in the filter:

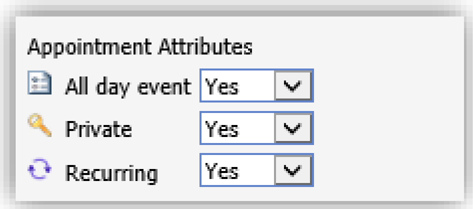


Figure 36. The Appointment Attributes area

- **All Day Event** – Defines that the appointment will take you all day.
- **Private** – Indicates that this appointment is private.
- **Recurring** – It is a repeat appointment.

For each of these attributes, you can select one of the available options to further refine your filter

- **Yes** – The appointments with the attribute will be included in the filter.
- **No** – The appointments with the attribute will be excluded in from the filter.
- **Ignore** – The attribute will be ignored in the filter.

In **Figure 33**, the **All day event** attribute will be ignored in the filter, private appointments will be included in, and recurring appointments will be excluded from the filter.

In the **Categories** area select category which should be included in your filter:

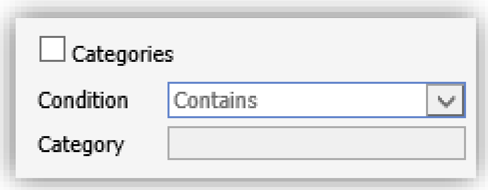


Figure 37. The Categories area

In the **Conditions** list select one of the available options:

- **Contains** – The category contains the some part of the entered characters.
- **Is (Exactly)** – The category text is exactly as written here.
- **Does not Contain** – The appointment category excludes the specified text.
- **Is Empty** – The appointment does not belong to any category.
- **Is not Empty** – The appointment belongs to a category.

In the **Categories** field enter the category text you want to filter by.

Clear the **Categories** check box in this group, if you do not want to filter appointments by these criteria. In the **Subject** area you define conditions of the **Subject** field.

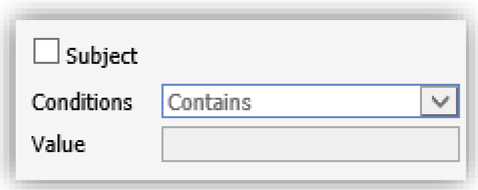


Figure 38. The Subject area

In the **Conditions** list select one of the available options:

- **Contains** – The subject contains some part of the entered characters.
- **Is (Exactly)** – The subject text is exactly as written here.
- **Does not Contain** – The appointment subject excludes the specified text.
- **Is Empty** – The appointment has no subject.
- **Is not Empty** – The appointment has a subject.

In the **Value** field enter the subject text that you want to filter by.

Clear the **Subject** check box in this group if you do not need to filter appointments according to their subjects.

In the **Location** area define conditions of the **Location** field available in the Appointment window:

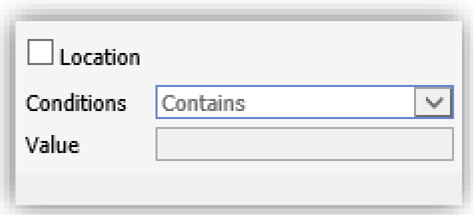


Figure 39. The Location area

In the **Conditions** list select one of the available options:

- **Contains** – The location contains some part of the entered characters.
- **Is (Exactly)** – The location text is exactly as written here.
- **Does not Contain** – The appointment location excluding the specified text.

- **Is Empty** – The appointment has no location.
- **Is not Empty** – The appointment has a location.

In the **Value** field enter the location text that you want to filter by.

Clear the **Location** check box in this group if you do not need to filter appointments according to their location.

How to Set Filters

Setting up filter makes it easier for you to display the necessary information on appointments. To set a filter, follow these steps:

1. In the Filter window, click **Create New Filter**. This will allow you to create a new filter. In the **Name** field enter the name of the new filter. You can create more than one filter, each with its own settings.

   NOTE You cannot create filters with empty or existing names.

2. When you have entered the filter name, click the **Save Filter** **button**. After you have saved the filter, it will be added to the **Filters** list.
3. In the **Include/Exclude** area, select whether you want to display items that satisfy the criteria you set below this area, in the filter pane.
4. In the **Appointment Type** area, select what type of appointments you want to display/hide.
5. In the **Appointment Attribute** area, select what specific appointments you want to display/hide.
6. In the **Categories** area, select what conditions and categories will have appointments that will be displayed/hidden.
7. In the **Subject** area, select the subject criteria for the appointments to be displayed/hidden.
8. In the **Location** area, select the location criteria for the appointments to be displayed/hidden.

The filter now has been set up. If you want to apply this filter, select the **Use Filter** check box on the Filter window and click **Save**. The currently selected filter will be applied. You can apply different filters, each with its own settings. To apply them one-by-one, repeat the steps described above for each of the filter names you select.

How to Discard a Filter

If you do not want to filter appointments, you can discard the applied filter and see all of the appointments in Calendar.

To discard a filter clear the **Use Filter** check box in the Filter window and click **Save**. The filter will not be applied to the appointments, but its settings remain saved so that later on you can use this filter again.

How to Edit a Filter

You are able to edit a filter with the following steps:

1. In the **Filter** list select the filter that you want to edit. Its name will appear in the **Name** field and the criteria that you have set.
2. Edit the criteria that you want to modify.
3. Click to save changes.

How to Delete a Filter

If you do not need a filter and its particular profile, you can delete it:

1. In the **Filter** list select the filter that you want to delete. Its name will appear in the **Name** field.
2. Click the **Delete Selected Filter** **button** to delete the currently selected filter.

3. A message appears asking you whether you want to delete that filter with all of its settings. Click **Yes** to confirm your decision.

The filter will be deleted with all its settings.

About Groups

The calendar group makes it easy for you to see the combined calendars of a number of people at a glance. Using groups you can see events scheduled for each group you work with.

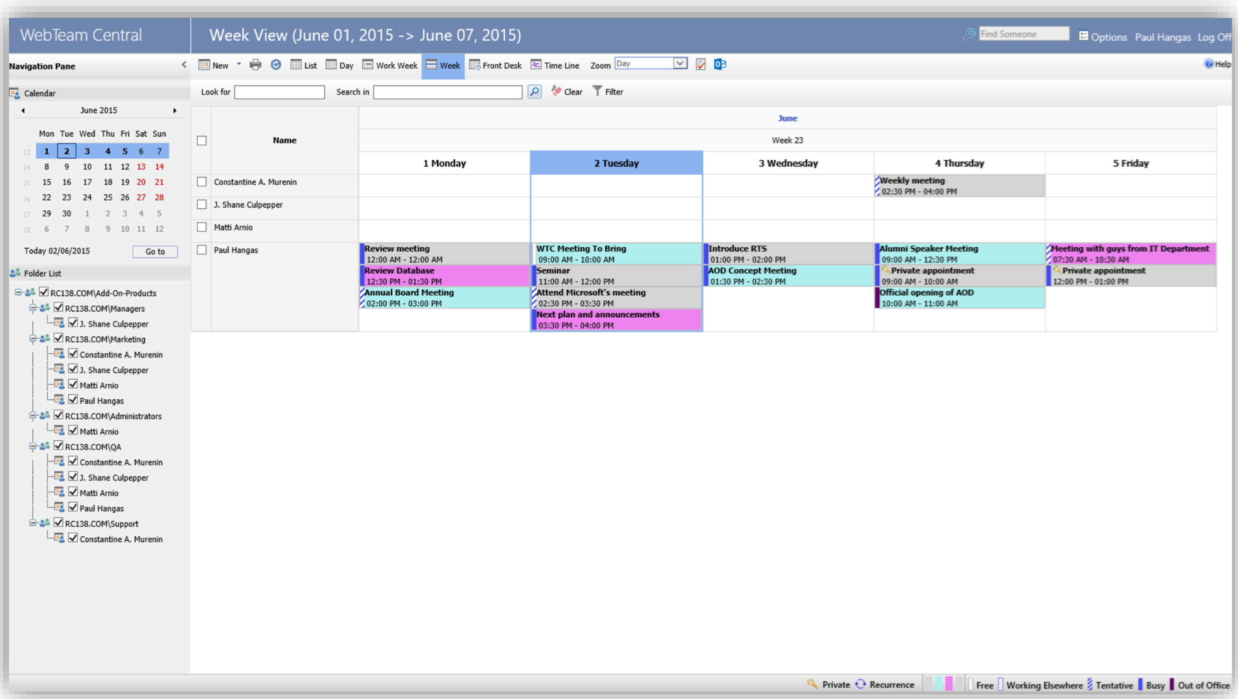


Figure 40. Existing groups created on the User Options page

There can be two types of groups:

- Predefined groups which consist of distribution list contacts and are stored in the Active Directory.
- Custom groups which can be created in the **User Options** page. Custom groups (my groups) can be modified by changing names, adding or removing people who belong to them.

Both types of group will be shown in the Calendar tree and can be distinguish by the two icons above. To read about it, we refer to the [How to Edit a Custom Group] section in this Guide.

How to Create a Custom Group

Custom groups can be created on the **Group** subpage of the **User Options** page.

1. On the main window toolbar click the **Options** button to open the **User Options** page.

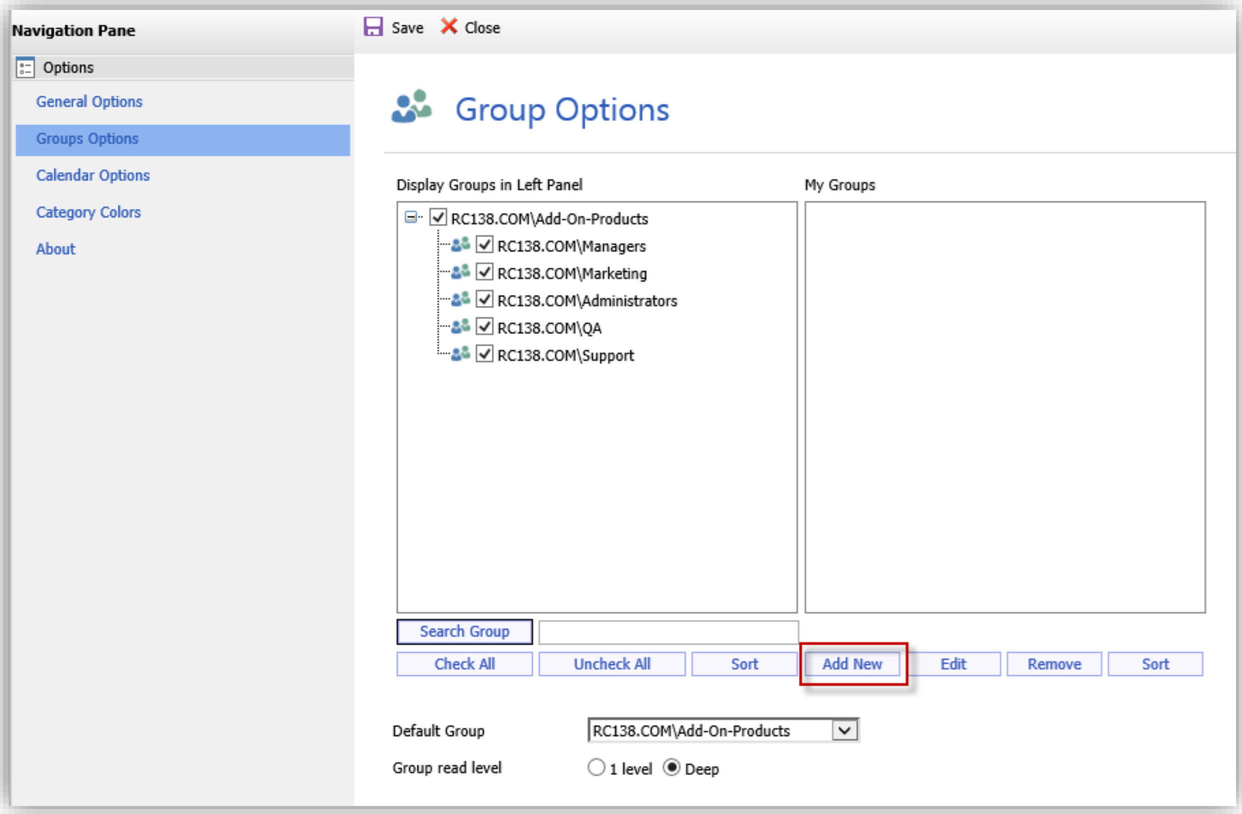


Figure 41. Group options on the Group subpage of User Options

2. On the **Group** section, click the **Add New** button. The Group window appears.

3. In the **Parent Group** drop-down box of the window select the name of the Parent group where you want to create a new group.

4. In the **Group Name** field of the window enter a name for the new group you are creating.

5. In the **Group Members** area select the people who you want to include in the group. Being in a group means that if you look for a person's schedule, you will also see events scheduled for the group this person belongs to, not for its individual members. You can click **Check All/Uncheck All** to select all available people at once.

   The Group window will look like this:

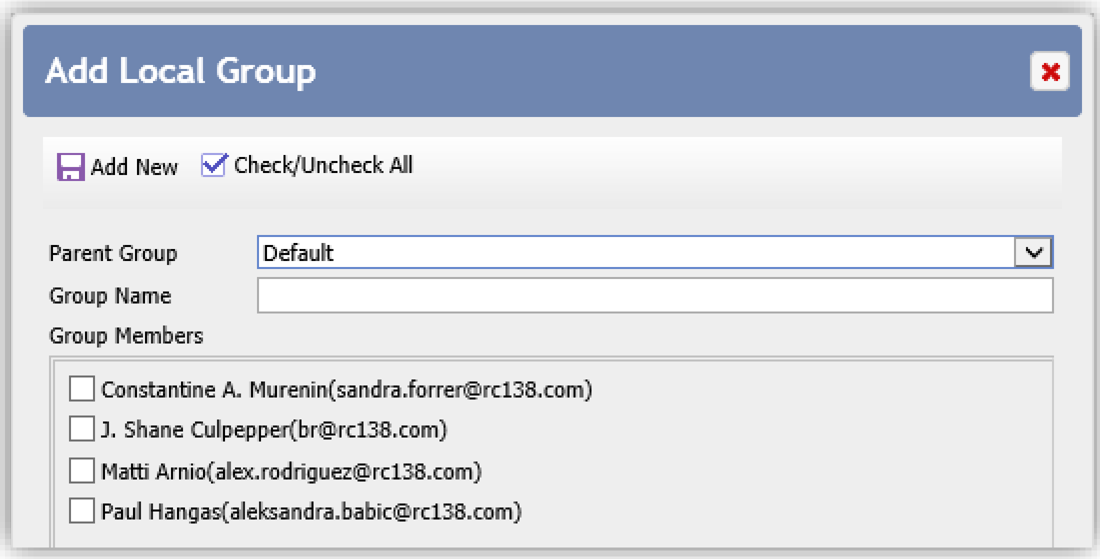


Figure 42. The Group window where you create custom groups

6. Click **Add New** to save the group you have just created or **Cancel** to close the window without saving the information.

7. The newly created group will be displayed in the **My Groups** list on the **Group** section of the User Options.

8. From the **Default Group** list select what group calendar you want to display when the main window opens and when no group is selected for displaying scheduled events.

9. In the **Display Group in Left Panel** list, select the groups whose calendars you want to see.

To read more about other user options that you can change, we refer to the [User Options](#) section in this Guide.

How to Edit a Custom Group

You can edit a custom group that was created earlier by following the steps below:

1. On the main page toolbar click the **Options** button. The **User Options** page will be displayed and the **Group** section will be active.

2. In the **My Groups** list on this page select the group you want to edit and click **Edit**. The Group window appears.

3. In this window you can modify the group name in the **Name** field and add or remove group members by selecting or clearing check boxes next to their names.

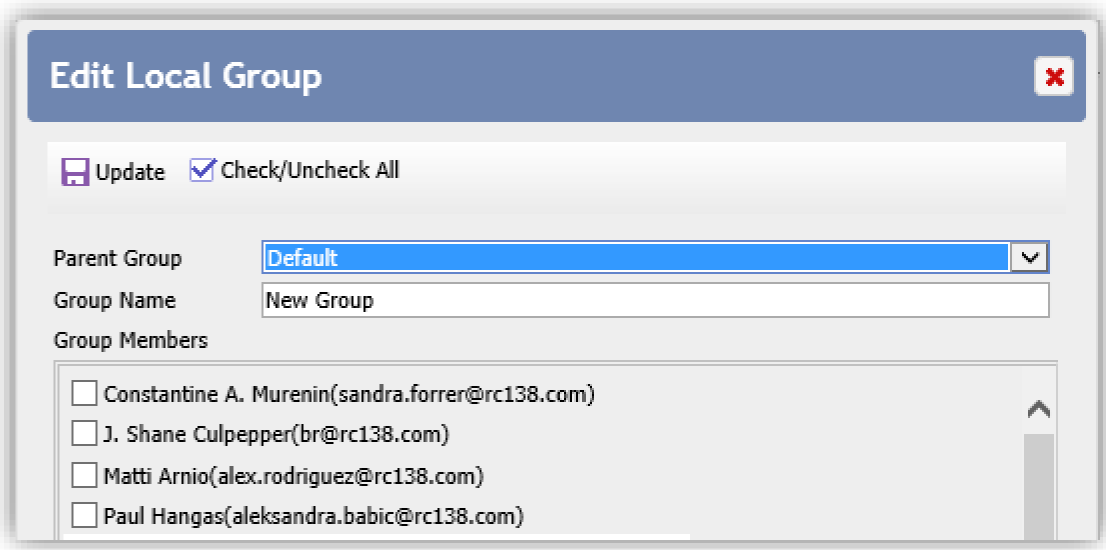


Figure 43. The Group window where you edit an existing group

4. After modifying the group, click **Save and Close** to save your settings.

How to Delete a Custom Group

If you do not need an existing custom group any more, you can delete it:

To delete a group:

1. On the main window toolbar click the **Options** button. The **User Options** page appears and the **Group** section is opened.
2. In the **My Group** list, select the group you want to delete and click **Remove**. The selected group will be deleted immediately.

User Options

On the User Options page you can create custom groups, adjust the appearance of the WebTeam Central main page, and set other user-related options.

The **User Options** page contains five sections, each with its own settings:

- General Options
- Groups Options
- Calendar Options
- Category Colors
- About

NOTE

Click the **Save** button to save the information you have entered on any of the subpages of the **User Options** page and then clicking the **Navigation Pane** button in the upper left to finish setting up the options. You will be returned to the main window view. If you click on the **Navigation Pane** button without clicking **Save**, all entered information will be lost.

When there are any changes in certain section in Options, if you navigate to another section without clicking Save there will be a message warning you might lose the changes you have made since your last save.

You can create and save multiple calendar groups, each showing events for a group of people. For example, one group schedule might contain all employees in a department. Another group might contain your custom contacts defined in the **User Options** page.

If the administrator set the **Allow Personalization** option to **No** on the **Administrator Options** page, the **Options** button in the Web application will be unavailable and you will not be able to modify a single option.

General Options

In the **General Options** section you can adjust WebTeam Central **Appearance, Language, Behavior** and **Date and Time.**

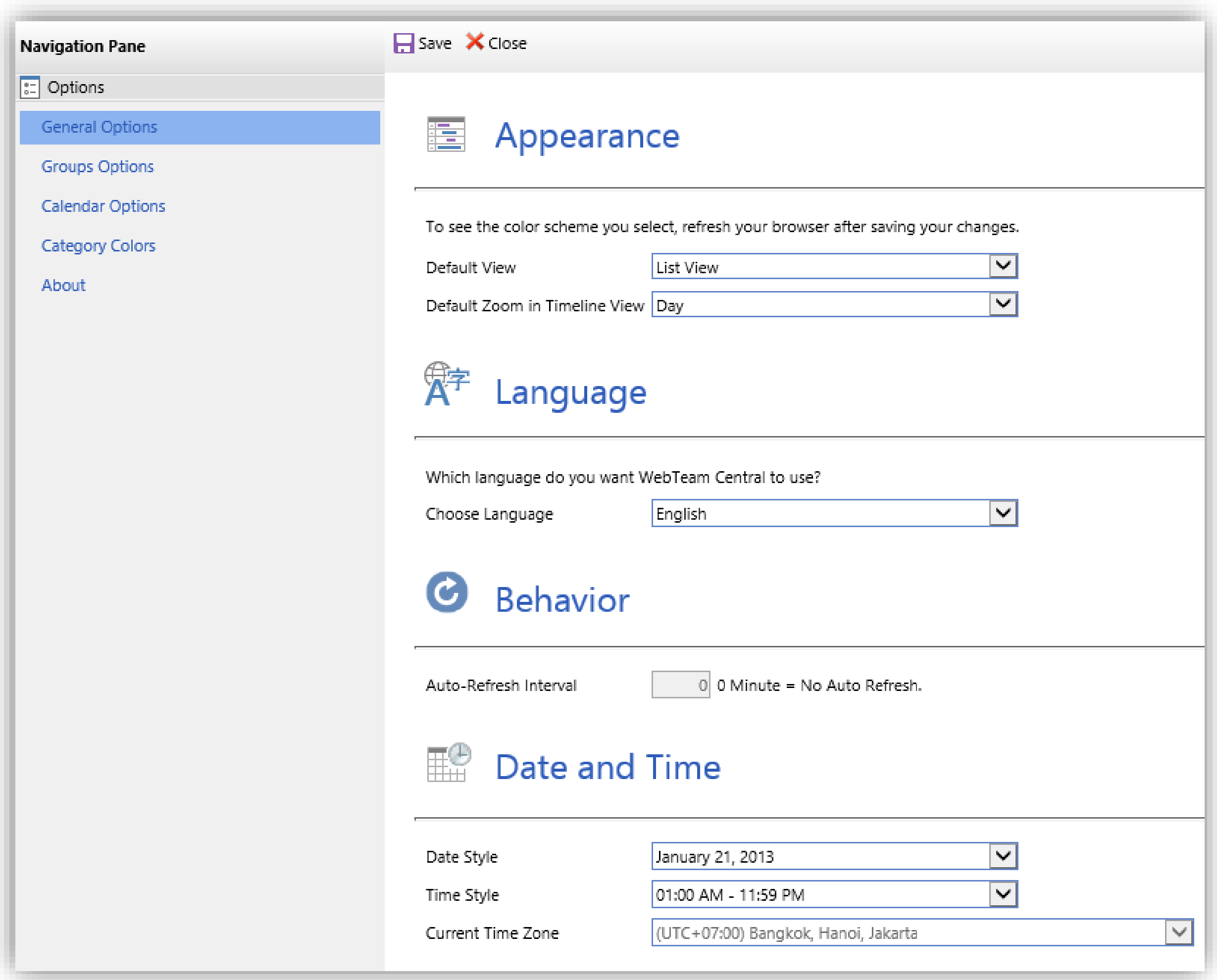


Figure 44. The General Options section

Appearance

Color scheme – here you can define the color to be used throughout the Web application. The possible options here are **Outlook 2007, Outlook 2003, Olive Green, Silver, Burgundy,** and **Dark Blue**. By default the color scheme is set to **Outlook 2007.**

Defaults View – you select the preferred calendar view, which will be used by default. The possible options are **List, Day, Week, Work Week** and **TimeLine.** The default value for this option is Day.

Default Zoom in Timeline View – you can select the default Zoom type for Timeline view of the main page of WebTeam Central Web application. This option will be used as the default whenever ”**Time Line**” calendar view is selected.

Language

From the language list you select what language should be used throughout the Web application. The possible options are **English, Danish, Dutch, German, French, Swedish** and **Norwegian.** The defaults value for this option is **English.**

Behavior

Auto-Refresh Interval – here you can define the interval for activating auto-refresh. If you enter 0 in the **Auto-Refresh Interval** field, it will not be auto-refreshed.

Auto-refresh is used to synchronize your calendar with the current status of the WebTeam Central database where all the appointments from other Outlook calendars are stored. If you do not synchronize your calendar, your information becomes out-of-date – no new appointments are displayed in the Calendar, no existing appointments are updated.

If the **Auto-Refresh Interval** option is set to 0 or the interval is too long and you want to refresh your calendar manually, click **Refresh** on the toolbar.

> If the administrator set the **Allow User Set Auto-Refresh Interval** option to **No** on the **Administrator Options** page, the **Behavior option** in the Web application will be unavailable.

Date and Time

These settings let you set the date style, time style, and current time zone that will be used in WebTeam Central.

Date style - Select the date style from the options that are available in the list:

- 21/01/1999 – dd/mm/yyyy
- 21/01/99 – dd/mm/yy
- 21/1/99 – dd/m/yy
- 21.01.99 – dd.mm.yy
- 1999-01-21 – yyyy-mm-dd
- 21-01-1999 – dd-mm-yyyy
- 21-01-99 – dd-mm-yyyy
- 01-21-1999 – mm-dd-yyyy
- 01-21-99 – dd-mm-yy
- January 21,1999 – Month dd,yyyy

The default option is set to 21/01/1999 (dd/mm/yyyy)

Time style - Select the time style from the options that are available in the list:

- 01:00 - 23:59
- 1:00 - 23:59
- 01:00 AM - 11:59 PM
- 1:00 AM - 11:59 PM

The default option is set to 21/01/1999 (dd/mm/yyyy)

Current Time Zone – Select the time zone in which you want to view appointments.

Groups Options

In this section of the **User Options** you can create, edit, sort and delete your groups. Here you select which groups are displayed on the **Groups** pane.

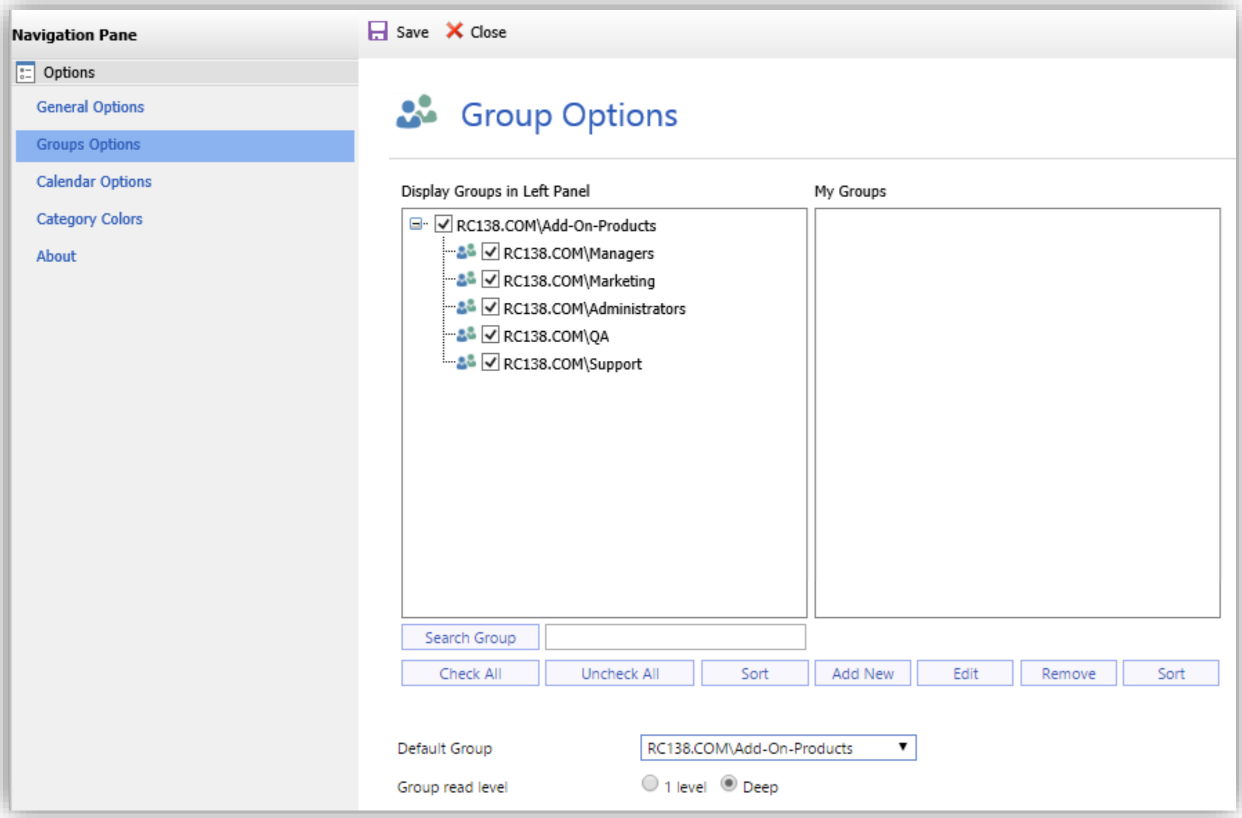


Figure 45. The Group section of the User Option

Display Groups in Left Panel – in the list you select the groups to be displayed in the **Groups** pane.

My Groups – in this field you maintain the personal groups that are to be accessible in the navigation pane.

Default Group – choose the group (Distribution list) to be checked on start-up.

Group Read Level – 1 level will display direct contacts of the all displayed groups. **Deep** will display children groups with all their contacts if any.

NOTE: Custom groups are always displayed in the Folder List section.

How to customize order of contacts in a Group

WTC enables customizing order of contacts/direct subgroups in a group based on logged in user, so that each user can have a preferred or unique order of contacts/direct subgroup in a group.

NOTE: Order of the root folders cannot be reorganized.

For example:

In the above **Figure**, ***Add-On Products*** and ***Add-On Support*** are root folders so its position in the tree structure cannot be reorganized. But order of contacts/direct subgroups under them (such groups as ***Support, Accountant, Logistics*** etc.) can be reorganized.

In the **Display Groups in Left Panel** area, click the group whose order of contacts you want to reorganize. Then click **[Sort]** button, the “**User Sorting**” window appears with contacts in current order:

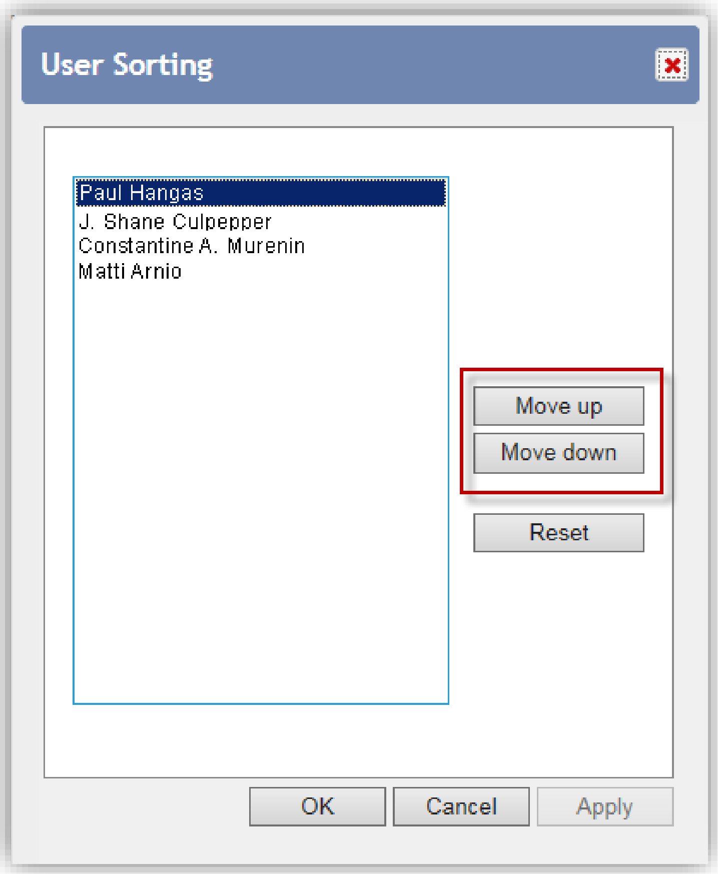


Figure 46. User Sorting window

Select the contact you want to reorganize and use **[Move up]/[Move down]** buttons to move this contact to the new position in the list.

If you want all contacts in the group to be sorted alphabetically, click **[Reset]**.

Click **[OK]** to finish. You can see the result on **Navigation Pane**, **Folder List** section

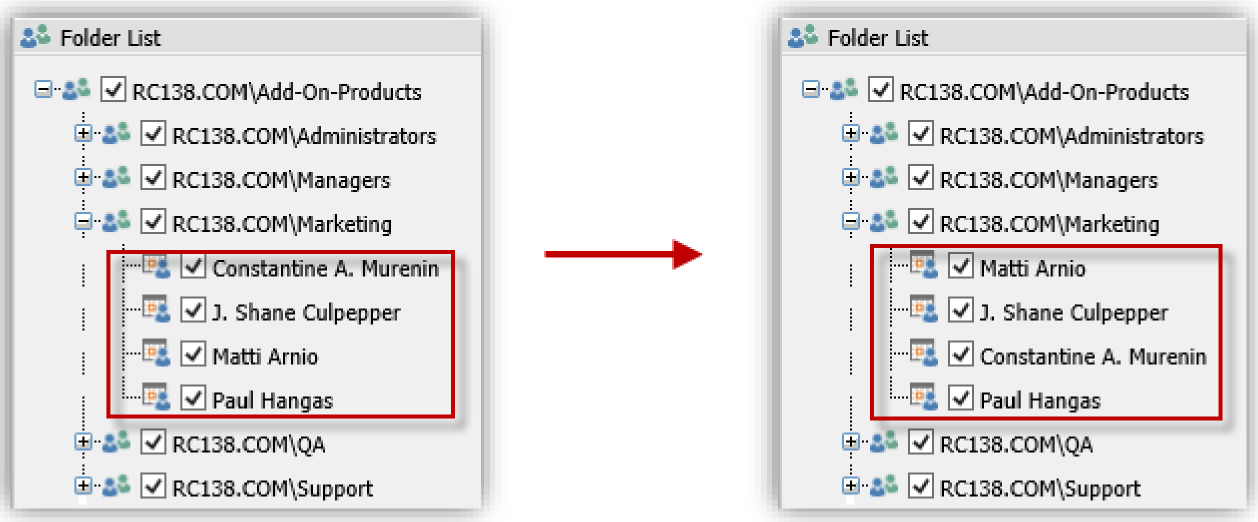


Figure 47. Order of contacts in Support group before and after being sorted

NOTE: Sorting function is similarly applied for custom groups.

Calendar Options

In the **Calendar Options** section of the **User Options** page you can define calendar-related options.

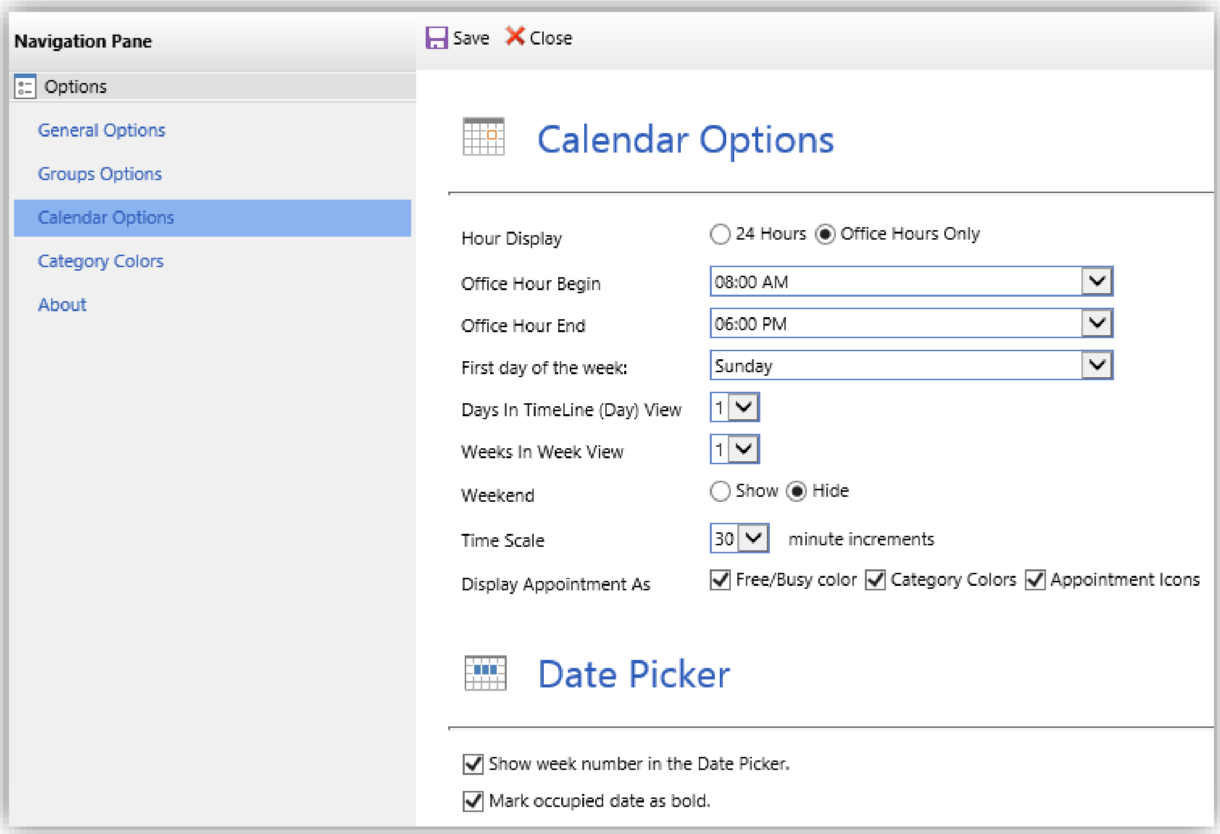


Figure 48. The Calendar Options page of the User Option

Hour Display – This option defines the hour presentation mode. There are two parameters to choose from:

1. **24 Hours** – in this mode all 24 hours of the day will be displayed in the calendar.
2. **Office Hours Only** – in this mode, only office hours will be displayed, for example, from 9 am to 5 pm. If this option is selected, The Office Hour Begin and Office Hour End field will be enabled for you to specify when the office hours begin and end.

The default option is set to **24 Hours** mode**.**

First Day of Week – Using this list you can define what day of the week the calendar will start from. The possible options are **Sunday** and **Monday.** The default option is **Sunday.**

Days in TimeLine (Day) View – When selecting from this list you choose how many days will be displayed in the **Day** view. The possible days/values are 1-7. The default value is 1.

Weeks in Week View – Choosing from this list means that you decide how many weeks will be displayed in the **Week** and the **Week Detail** view. Possible values are 1-5. The default value is 1.

Time Scale – define the time increment displayed when the calendar view is Day view, Work Week view, Week view, or Time Line (Day) view. The possible options are 15, 30 and 60 minutes.

Display Appointment as – Select the check boxes in this area to define how the appointments will be distinguished. Appointments can be distinguished by **Free/Busy** colors, **Category Colors**, **Category Icons** concurrently. The default option is set to Free/Busy.

Date Picker Options

Select the **Mark occupied date as bold** checkbox to display occupied dates with bold in the Calendar. Select the **Show week number in the Date Picker** check box to view week number in the Date Picker.

Category Colors

In this section you can choose colors for customized categories that are assigned to your appointments.

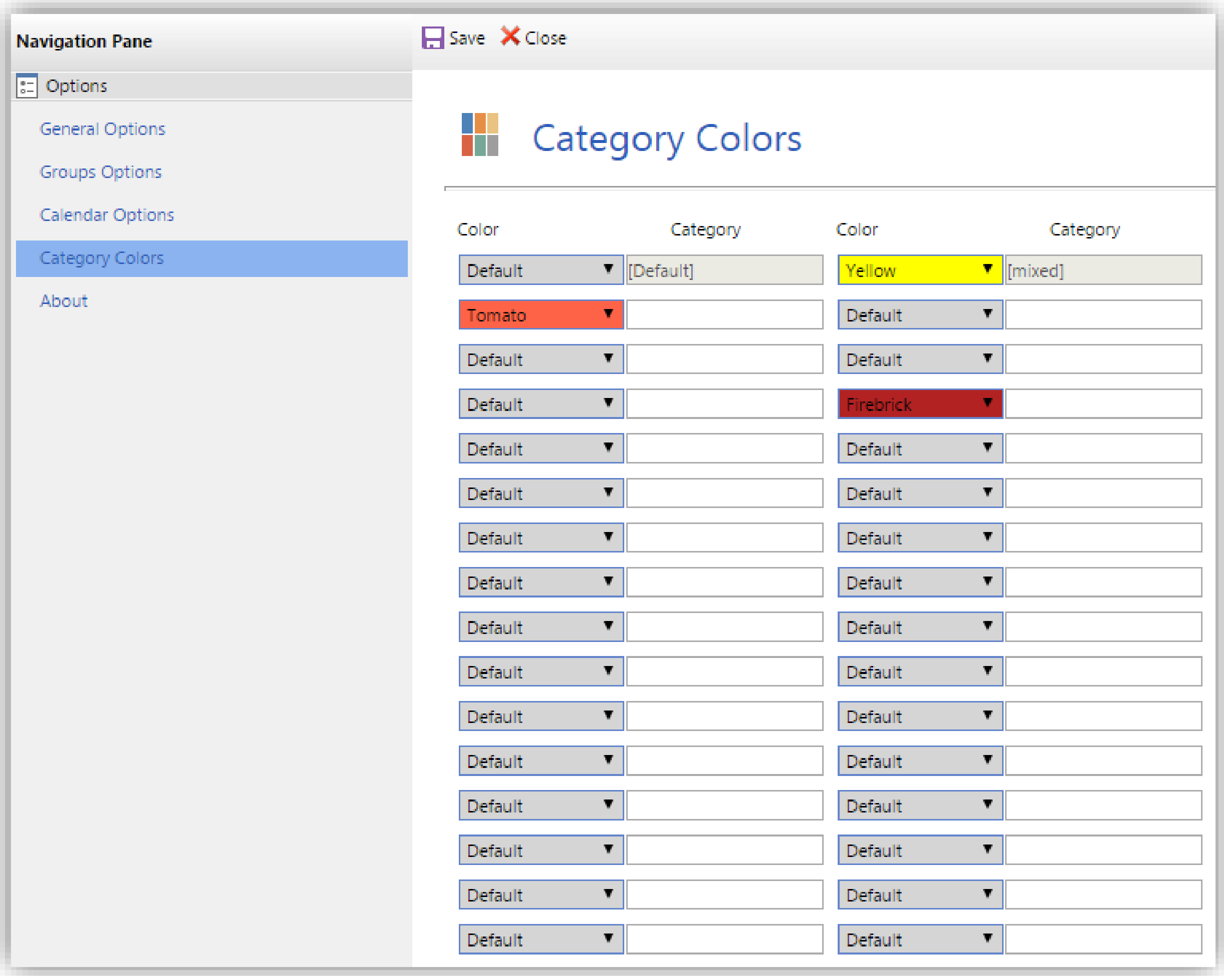


Figure 49. The Category Colors page of The User Options

There are 32 rows of the Color and Category fields, which you can configure.

You can assign a color to several categories.

To assign a color to a category:

1. In the **Color** field, select the color you want.
2. In the **Category** field, type in the name of the category. If you want to assign one color for a number of categories, type in all the categories by separating them with a semicolon (";").
3. Repeat Step 1-2 for as many category colors as you need.
4. Click **Save.**

The first two categories (**"[default]"** and **"[mixed]"**) are pre-defined and read-only. However, you can change their colors.

The **"[default]"** color marks any appointment that does not belong to any category.

The **"[mixed]"** category color marks any appointment that belong to a number of categories and the combination of these categories have no color set up.

After you have set up a number of category colors, you can now view them in the main window, if you have selected to display appointments as **Category Colors** on the **Appearance** page (see **Display Appointment as**).

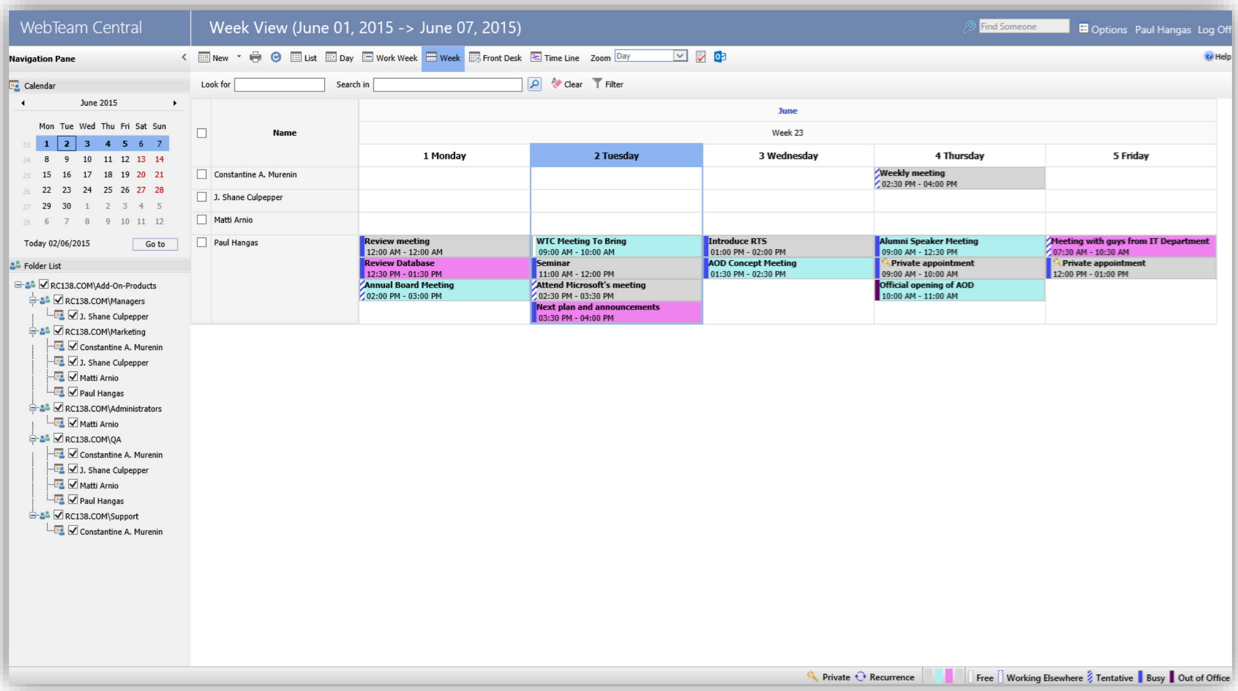


Figure 50. Category colors in the main page

1. The appointments in the main window are now marked with different colors according to the categories assigned to them.
2. In the Web application status bar, you can see all the categories, for which you have specified colors, including two pre-defined categories. If you hold a cursor over one of the colors on the status bar, a tooltip with the corresponding category name will pop up.

About

This section provides you brief information about license and current version number of WebTeam Central.

CHAPTER 3.

Trouble shooting

Print function does not print all information and picture

If a user prints the calendar view but is unable to print all of the information and pictures on the screen, the Print Background option in your Internet Explorer might be disable. To enable this option, please follow these steps:

1. Click **Tool** menu, select **Internet Options.**
2. In the **Advanced** tab of the **Internet Options** window, click the **Print background colors and images** check box.

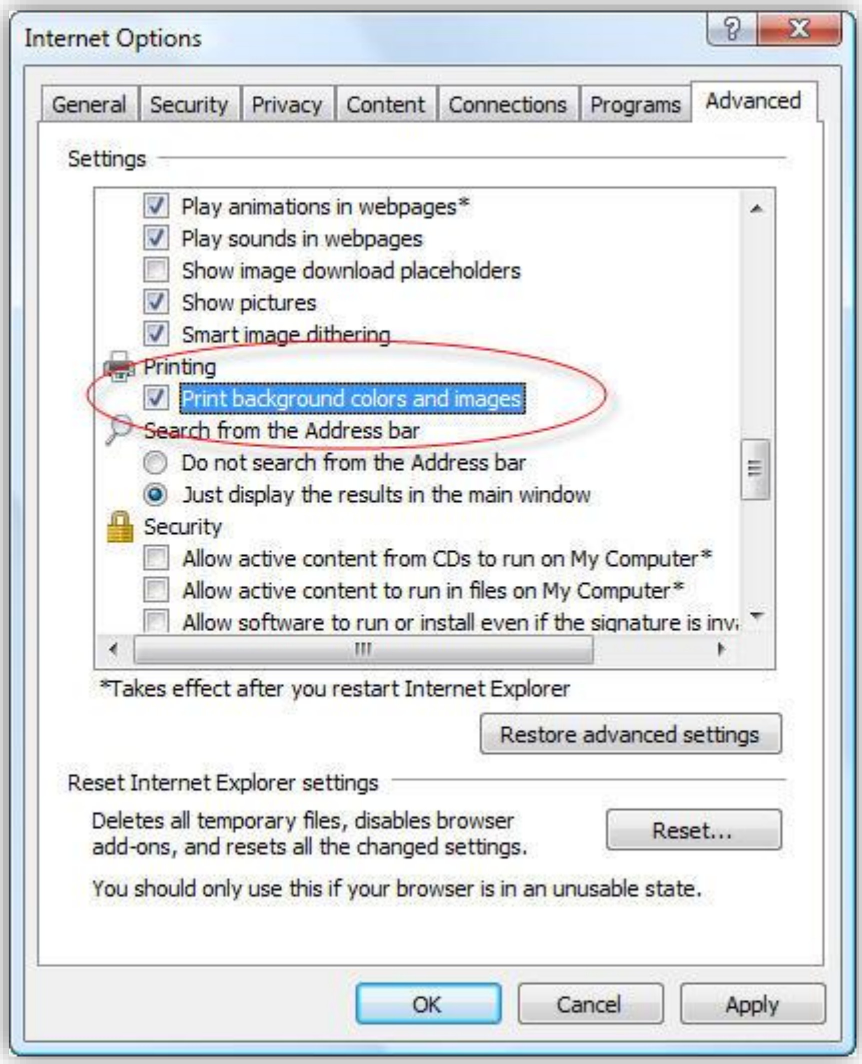


Figure 51. Category colors in the main page