TeamWox

BRIEF TRAINING COURSE

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1. About the Training Course

This brief training course is designed for studying functions and possibilities of the TeamWox groupware system within a short time period. After this curse you will know the most important details about the system, and will be able to work with it. Each section of the course is devoted to a separate module of the system. It describes the module functions and gives tips on working with it.

2. Introduction

TeamWox is designed for efficient organization of collaboration. To have the best effect of the system, all working activities must be preformed within the system. Here you can quickly exchange tasks with your colleagues, receive and send emails, organize team work on documents.

Besides that, you can keep a data base of all your contractors (clients, suppliers, partners, etc.) and contacts. For internal communications you can use protected chat and forum.

The TeamWox groupware system is a web-server application. It means that all you need to make the system work is install a server, while its clients (workplaces) do not require any separate software - they can work via a common Internet browser. System developers recommend using Mozilla Firefox 2, Opera 9.64, Chrome 1, Safari 3, Internet Explorer 7 or higher.

To enter the system, just enter the server address in your browser, and then enter your login and password. After that you can work in the system without any limitations. Its architecture provides the possibility to enter the system from any computer under the same login and password. This is very convenient allowing the remote work. For example, being on vacation you have access to working information and can work from any location in the world. At the same time, you can set up the security so that to allow access from the office computer only.

A login is analogous to a user's name. The system unambiguously defines the user by this login. A password protects the name and is a warrant that no one can perform actions in the system under the name of this specific user. That is why login and password are subject to confidentiality. Of course, taken separately login and password are of no use. They will work only when used together. And knowing the password of one user and login of another, you can't access the system.


So, let's start. Enter the server address XXXXXXXXXXX.COM in your browser, specify your login and password. Congratulations - you've entered the system.

3. TeamWox Interface

The program window can be divided into several functional blocks or parts. The upper part is its header (3). It contains the following elements:

- Name and logotype of your company are located in the left part (1).

- Toolbar is located in the right part of the header (2). The toolbar shows notifications of tasks, emails, chat conversations and Service Desk requests. A notification informs you about a new event, and a click on it will open the necessary element. For example, if an icon of a new task appears, the task will be opened as soon as you click on this icon. A button for enabling/disabling sound notifications is also located here. If it is enabled, a sound will be played as a notification comes. A link to your profile (your name) and the logout button are also located here.

Below is the module bar (4) that allows switching between modules. This bar is adjustable, and the number of tabs here differs depending on permissions given to a specific user. For example, the Accounting tab will not be visible for a HR specialist, while it will be available for accountants.
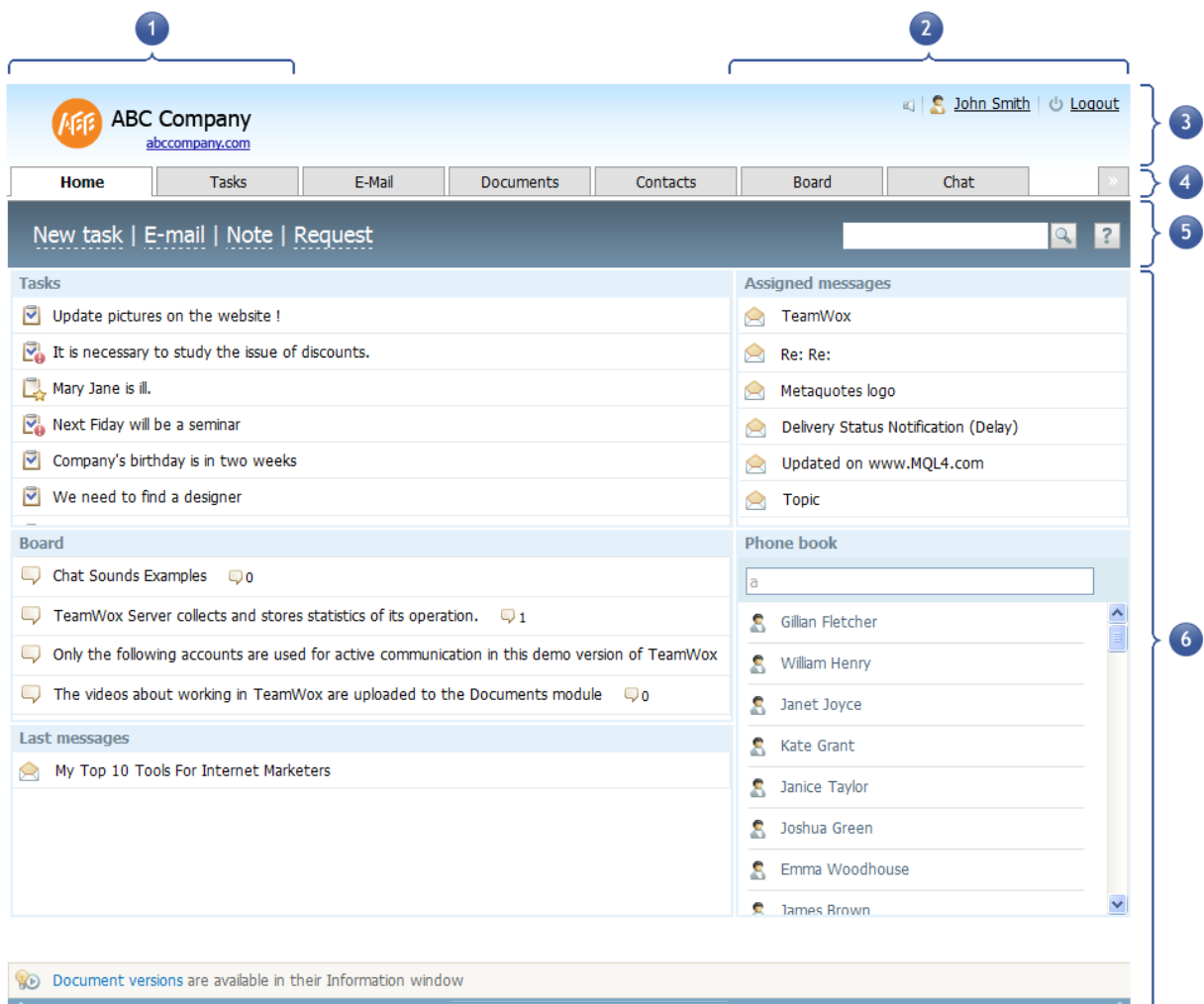
1 - Your company name and logo
2 - Toolbar
3 - Header
4 - Module bar
5 - Command bar
6 - Working area

Below is the command bar (5). The set of commands in this bar depends on the module currently open. For example, 'New task' and 'Reports' buttons are located in the Tasks module. These are the most often used commands, so they are displayed prominently.

Below the command bar comes the working area (6), where all elements of a module are displayed. For example, tasks are shown in the Tasks module, messages are displayed in E-Mail, etc. Additional area appears to the left of the main area in some modules. This area is used for quick navigation to make working in the module more convenient.

The header and module bar are always present on the screen. Notifications on new events appear in the toolbar. Your profile and modules are accessible at any moment of time. The working area and navigation bar change depending on the selected module.

4. Profile

A profile is a user's personal office that stores all the information about the user, which can be useful to colleagues or employer. Certain information is already added into your profile; some details are changeable. The entire information about a user is divided into several sections that can be selected in the navigation bar to the left of the working area.

Personal Details

These are common details of an employee: name, surname, birth day, date starting from which the employee has been working in the company, position and department - this is the main information.

- **Employee's location** - here information is added in a free form. E.g. 'Office 100, 3rd floor, 1 Franklin street, Boston', or just 'Boston office'.

- **Interface language** – this parameter sets the language of the program interface. TeamWox is a multilingual system, and you can select any of available languages. All commands and tabs will be displayed in the language selected in your profile.

- **Timezone** allows to correctly display time of various actions in the system, e.g. time of document uploading, task setting, etc. If this parameter is set correctly, all your or your colleagues' actions will be shown to you as per your timezone. And if this parameter is incorrect, it may appear that you communicate in chat at 2 a.m. on Sunday. It is recommended to select Auto Detection.

- **Status** shows the current state of your account. The normal status of a working employee is 'Working'. The status can be changed by certain persons only (usually directors, department heads and HR specialists.

- **Avatar.** Upload your photo to let your colleagues see whom they are working with. Your image will be shown in all your comments, messages, and in some other parts of the program. Thus the avatar is the best identification means. TeamWox allows you to upload even unprepared images and scale or trim them right in the system.

Contact Details

In this tab the following contact information can be specified: residence and registration address, phone numbers, emails and your accounts in various instant messengers (ICQ, MSN, Skype and others). With these details you can be easily found in case of emergency or when your participation is needed in the solution of a problem. The fields can be filled out in a free form.

Additional Details

This tab contains information that was not included into the previous two sections. Information about a user's marital status, education, as well as details of related documents (passport, health insurance, driving licence, and others) is displayed here. Common system users do not have access to this information - it is available only to the company management and HR.

Back to list | Prev | Next

John Smith (Age: 49, Position: CEO)

Documents

Employee ID:
OM-011

ITIN (tax id):
770957664532

SSN (insurance id):
012-345-065-64

Passport:
0102 №3464736 выдан 12.01.2005 РУВД г.Москва

Driver license:
-

Car numbers:

Health insurance:
77AB №27364703"RosMed", 10.363

Other identifications:

Family

Marital status:
Divorced

Number of children:
1

Near relatives:

HTML | Normal text | B U I A

Name			
Brather	Oleg Sokolov	1974	+7 (636) 846 646

Education

HTML | Normal text | B U I A

Security

In the Security tab you can change your password. In order to do this, enter your current password and enter twice the new one.

> **Attention:** The permanent control of password complicacy is enabled in the system. According to this control, your password must contain no less than 6 characters including lower-case, upper-case letters and digits. Any characters are allowed: spaces, quotation marks, etc.

My Groups

Here you can see the list of groups you are included to. Groups allow joining people (even from different departments or branches) and set certain permissions to them. Groups differ from departments in that they are not bound to the company structure and do not have a group head. For example, to work on a certain temporary project you are included into a certain group and granted certain permissions for working with tasks and documents. As soon as the project is completed, the group will be deleted as well as the entry about it in My Groups tab. Permissions given to you will be disabled together with the group.

Groups can be created on a permanent basis. Usually such groups join employees according to certain characteristics. E.g. middle managers, directors, shareholders, etc. This allows you to quickly work exactly with this group of users. Any groups according to any principles can be created in the system. However, only the administrator of TeamWox can create a group and add users to it.

Tabs Order

   Here you can set the order of modules displayed. Changing of this list entails corresponding changes on the module bar. The top position of the list corresponds to the left tab of the module bar. The only purpose of this function is customizing of the working area: arrange tabs in the way you like it. Change of the tabs order does not influence your permissions for separate modules.

Profile: Alena Grushova (Age: 35, Position: Manager)	?
Home	
Tasks	
Documents	
E-Mail	
Organizations	
Contacts	
Team	
Products	

To re-order Modules drag them using a mouse   Update

Sounds

Sound notifications of different events can also be changed. If you don't like standard sounds, upload your own file in mp3 format, and exactly this sound will be played as a notification appears. You can upload your own sounds for all notifications: new task, chat message, request in Service Desk and new email.

Profile: Alena Grushova (Age: 35, Position: Manager)

Tasks
Module for working with tasks

☑ ▶❙ New task or new comment   [   ] [Обзор...]

Documents
Module for working with documents

☑ ▶❙ Document information change   [   ] [Обзор...]

☑ ▶❙ Document work state change   [   ] [Обзор...]

E-Mail
Module for working with e-mails

☑ ▶❙ New e-mail   [   ] [Обзор...]

Chat
Module for communication with clients

☑ ▶❙ Public chat incoming   [   ] [Обзор...]

☑ ▶❙ Chat assigning   [   ] [Обзор...]

☑ ▶❙ Chat updating   [   ] [Обзор...]

Service Desk
Service Desk

☑ ▶❙ New request or comment   [   ] [Обзор...]

[Update]

Payments

This tab contains information on all payments to the employee. Salary, company's taxes, totally paid sum - all this is shown in this tab. Information can be changed only by accountants or company management.

Profile: Alena Grushova (Age: 35, Position: Manager)

◄ 2010 ►	Accrued	Paid	Company taxes	Total
January	4 200	4 200	1 134	5 334
February				
March				
April				
May				
June	3 120	3 120	842	3 962
July	3 120	3 120	842	3 962
August	4 200	4 200	1 134	5 334
September	4 200	4 200	1 134	5 334
October	4 200	4 200	1 134	5 334
November	4 500	4 500	1 215	5 715
December	5 300	5 300	1 431	6 731
Total EUR	32 840	32 840	8 866	41 706

Worktime

This section shows how much time you spend at your work place. As soon as you enter the system, you are considered to start working. Your workday is considered over as soon as you log out of the system and your total work time for the day is fixed in the corresponding cell.

With TeamWox you have access to the month- or year old info on your working time. Bad news: this information is also available to your boss, so certain measures can be taken if your attendance needs much to be desired.

Profile: Alena Grushova (Age: 35, Position: Manager)

◀ January, 2010 ▶

Mon	Tue	Wed	Thu	Fri	Sat	Sun
28 8:49	29 4:29	30	31	1	2	3
4 10:20	5 8:57	6 10:00	7 10:26	8 9:48	9	10
11 5:21	12 10:28	13 8:35	14 8:32	15 6:58	16	17 1:47
18 9:50	19 6:43	20	21	22	23	24
25	26	27	28	29	30	31

5. Tasks

Tasks represent one of the most important functions of the system. They allow fast data exchange with any employee. Usually tasks are used for solving everyday problems, but also can be used as a personal organizer.

Apart from operational efficiency, tasks provide a number of other advantages. First, with tasks you can overcome lack of coordination - concentrate solution of one problem in one task. If you need to refer to its details in future, you can easily find the task in the history. Thus you don't have to search through various documents or emails, or to recall phone communications. Besides that, information from tasks (as well as the whole system) is available to you at any location in the world. Being in the office, at home or on vacation you always can access Tasks and keep the track of events.

In this module you can assign various tasks to certain users, groups or departments. Thus you can quickly communicate your problems to competent specialists. If you don't need the help of a user anymore, you can detach him/her from the task, so that this certain specialist can focus on solution of other tasks.

Tasks in TeamWox allow not only exchanging messages. While solving various tasks, you can attach necessary files. Moreover, sounds, video or graphical files can be played right in your Internet browser. Documents stored in the corresponding system module can also be attached to the task, and they will be available to all the assigned users. With all this features you can quickly and efficiently solve everyday problems that appear in your company.

5.1. Tasks Module

Any operations with tasks can be performed only in this module. If someone puts a task to you, it will appear exactly here.
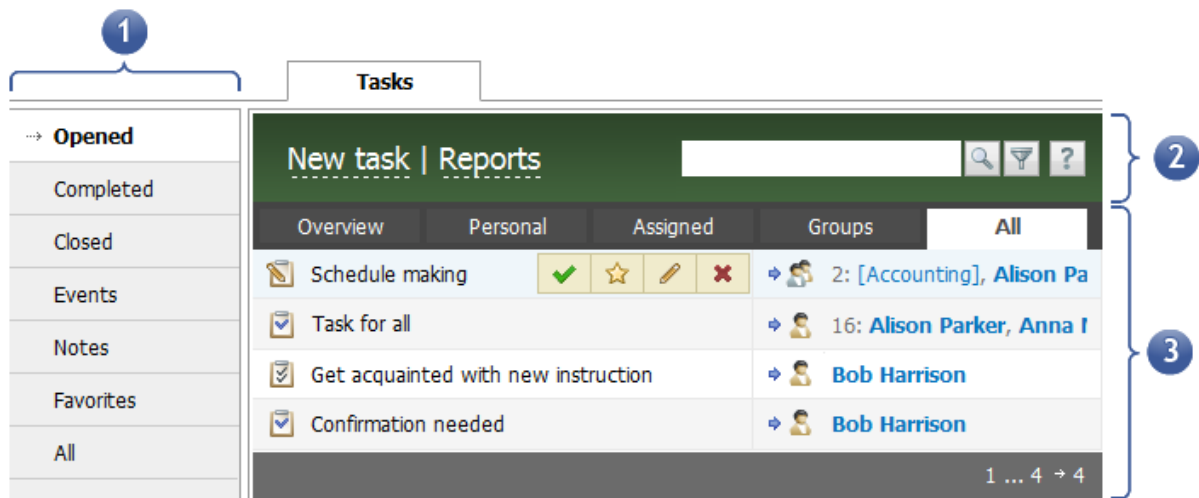
The window of the Tasks module is divided into three parts: navigation, command bar and working area.

1. Navigation

Navigation of the Tasks module simplifies working with numerous tasks, events and notifications. It allows to sort out tasks of certain types. If you select Events, only events will be displayed in the working area - thus it will be easier for you to find necessary tasks. All other tasks are still available in the system; but they are not shown at the moment. Thus with the navigation working with tasks is much easier. Plus to the filtering by the types of tasks, the navigation offers filtering by the status. You can select all completed, closed or favorite tasks.

2. Command Bar

The most often used commands are located in this bar: 'New task' and 'Report' (if you have permission for it). The 'New task' command is clear. Report displays statistics on tasks: the number of tasks placed and received by an employee.

3. Working Area

This is the most important part of the module. It shows the list of available tasks, depending on what filter is selected in the navigation (e.g. notes will be displayed if you select 'Notes'). However, sometimes the module can contain too many tasks, so additional filtering system is offered here. These filters are located in the upper part of the working area and are applied to each status of tasks depending on the navigation tab currently selected.
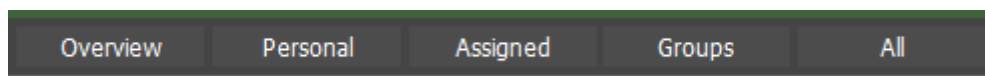
Using filters, the following types of tasks can be selected:

- **Personal** - tasks created by you. Tasks not assigned to anyone are also included into this group. So, Personal contains tasks created for planning your work, and those assigned to other employees;

- **Assigned** - these are tasks created by other employees and assigned personally to you;

- **Groups** - these are tasks assigned to groups or departments you are included to.

By default, the 'Overview' filter is selected. This means that you see personal, assigned and group tasks. On the overview page 10 latest tasks from each status are displayed. To view all tasks as a single list without any divisions, select 'All' - in this filter tasks are sorted according to the last modification date.

5.2. Working with Tasks

So, you see the list of tasks. The first column shows subjects of tasks that help you to distinguish them. It is recommended to give short subjects to tasks; still they should reflect the meaning. Subjects like "I have a problem" or "Help" are not recommended - this will complicate working with tasks. On the other hand you shouldn't describe all the details in the subject.
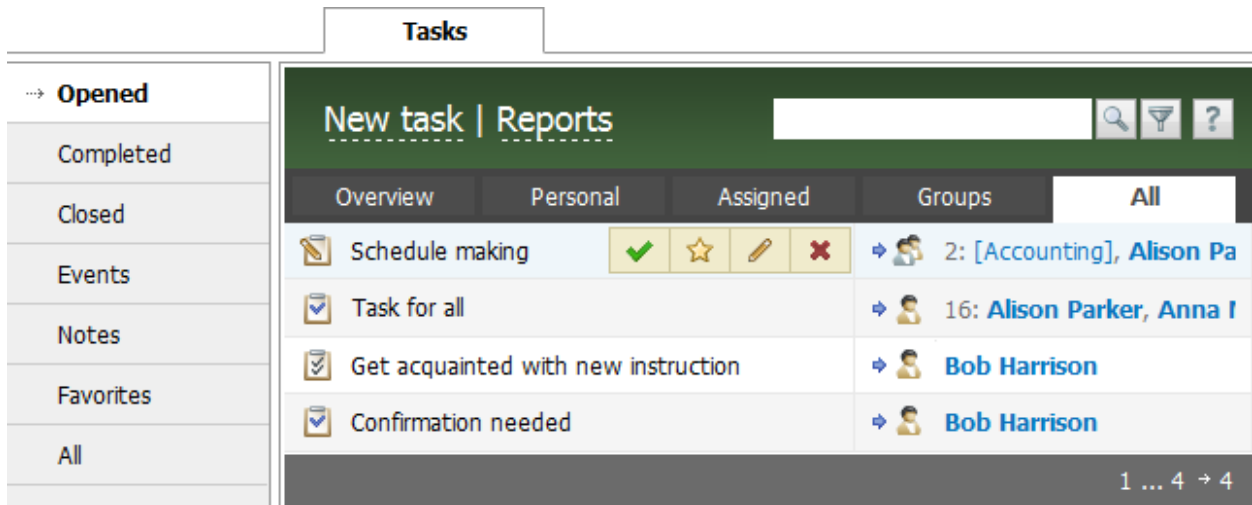
The right column shows names of task authors or persons assigned. If you are the author of the tasks, the right column will show whom you have assigned the task to. If a tasks is assigned to you, you'll see the name of the task author in this field. Assigned tasks are marked with certain icons. If this filed is empty, then the task isn't assigned to anyone and is visible only to you. Tasks created for planning personal work do not have persons assigned.

Each new task is marked bold in the list and is positioned on the top of the list to attract your attention. As soon as you open the task, it is considered to be read, and its font is changed to plain. Names of users in the right column can also be bold - this means that they haven't viewed the updated task (the new comment or the modified task body). As soon as they view the tasks, the font also changes to plain.

Task Priority

All tasks are positioned in the list according to the date of their last modification. For example, if you create two tasks, the second one will be positioned on the first line, because it is created later, than the first one. Any comment in a task is considered modification, and therefore influences the task position in the list. So if someone comments on your first task, it will take the top position in the list. Besides that the task subject will become bold informing you that the task has been modified.

The system also allows creating important tasks. They are intended for quick solution of important problems. For example, you have found a new client, who wants the deal to be completed asap, but you don't have a ready agreement for this client. This is the case when you can put an important task to responsible employees asking them to prepare the new agreement. The importance mark will inform them on the high priority of the task.

Important tasks are always positioned on top of the list and are marked by a special icon with a red exclamation mark. All other tasks are located below important ones.
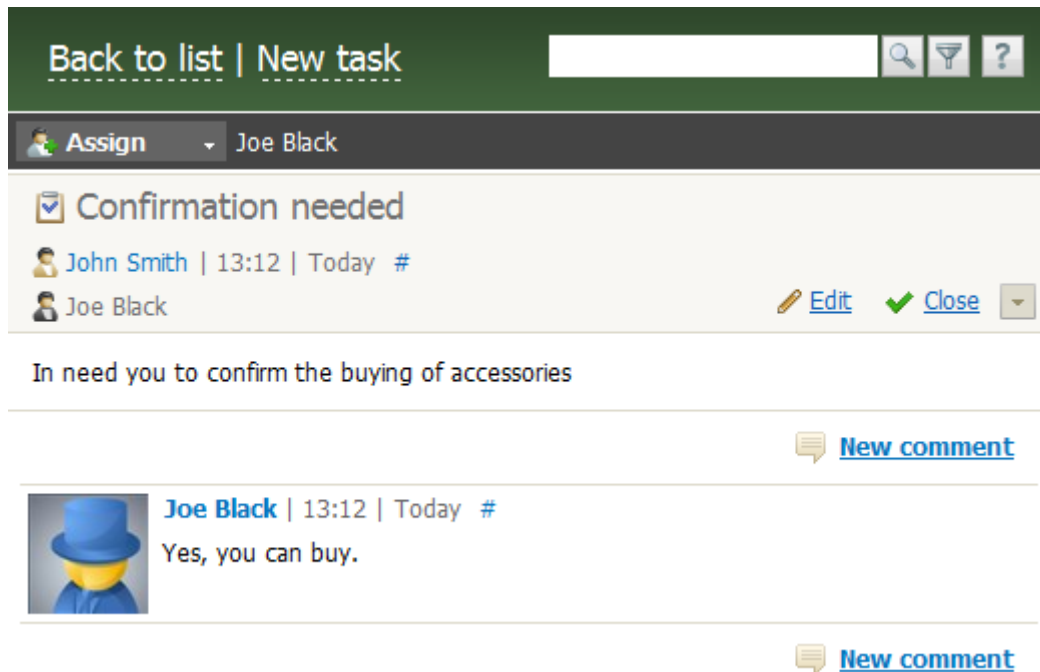
Pop-Up Buttons

When you put the mouse cursor on the task subject, pop-up buttons appear at the end of the line. These buttons are used for executing different actions. For example, you can close a task, add it to favorites, edit or delete it.

Attention: The set of buttons is different for different types of tasks. E.g. you don't have permissions for editing assigned and group tasks. You can only complete them or move to favorites.

Task Viewing

You have studied the list and want to view the task put by your chief. That's easy: a single left click on the task subject will open it.
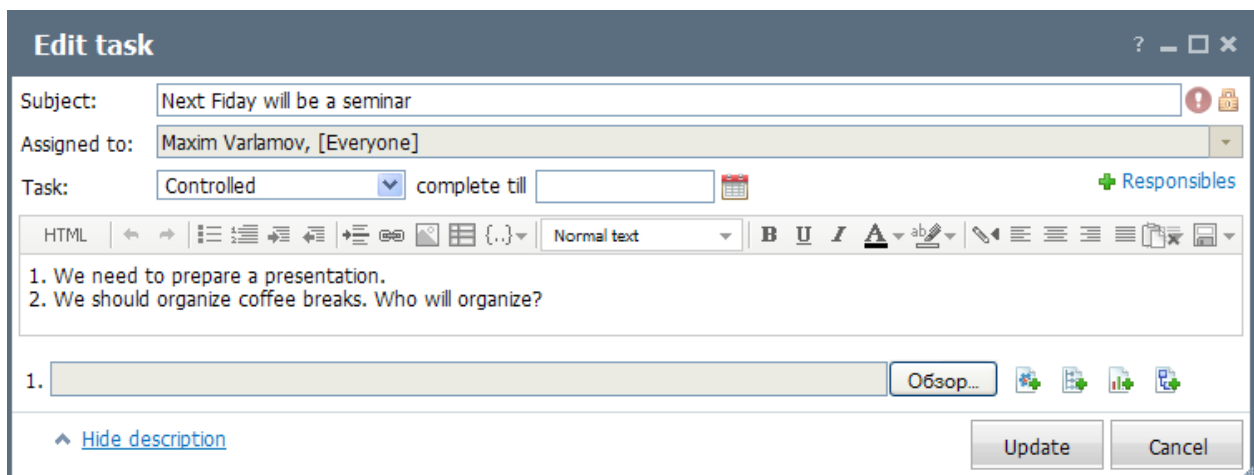
The working area is different in the mode of task viewing. A header appears that shows information on the task - subject, author and creation time in the left part of the header, and Complete/Close commands in its right part.

Below the header comes the task body where the task is described. If there are any comments, they are located below the body. The 'New comment' button is located below the last comment. Click it to open the editor and comment on the task.

5.3. New Task

Creating a new task is easy. In order to do this, click on the corresponding button in the command bar of the Tasks module. The task editor will be opened after that.

Subject, Priority and Privacy

First you should define the subject of the task in the 'Subject' field. It should contain important information and be of a reasonable length. If you write "I have a problem" or "I need help", it will be difficult for your colleagues to identify such tasks. On the other hand, the subject shouldn't contain more than one sentences or paragraphs. This should be a short sentence describing the main point of your task, so that persons assigned can easily identify your task.

If necessary, set Priority and Privacy flags. The flag of high priority is set in a limited number of cases, when you need the problem to be solved maximally quick. Persons assigned will see this task in the top of the list in the Tasks module. In the corresponding widget it will be displayed marked with the special icon.

Set the privacy flag when you don't want your bosses to see the task. Department heads may have the permission to see tasks of juniors and subordinate departments, thus being able to control work of employees. So if the privacy flag is set, the task will not be visible to them.

Assigning a Task

Now we need to assign employees, to whom the task is addressed. If you create a task for organizing your own working time, you don't need to select users to assign the task to, and it will be available only to you. But if you create a task to solve it together with some of your colleagues, click on the 'Assigned to' field. A window with two lists will be opened.
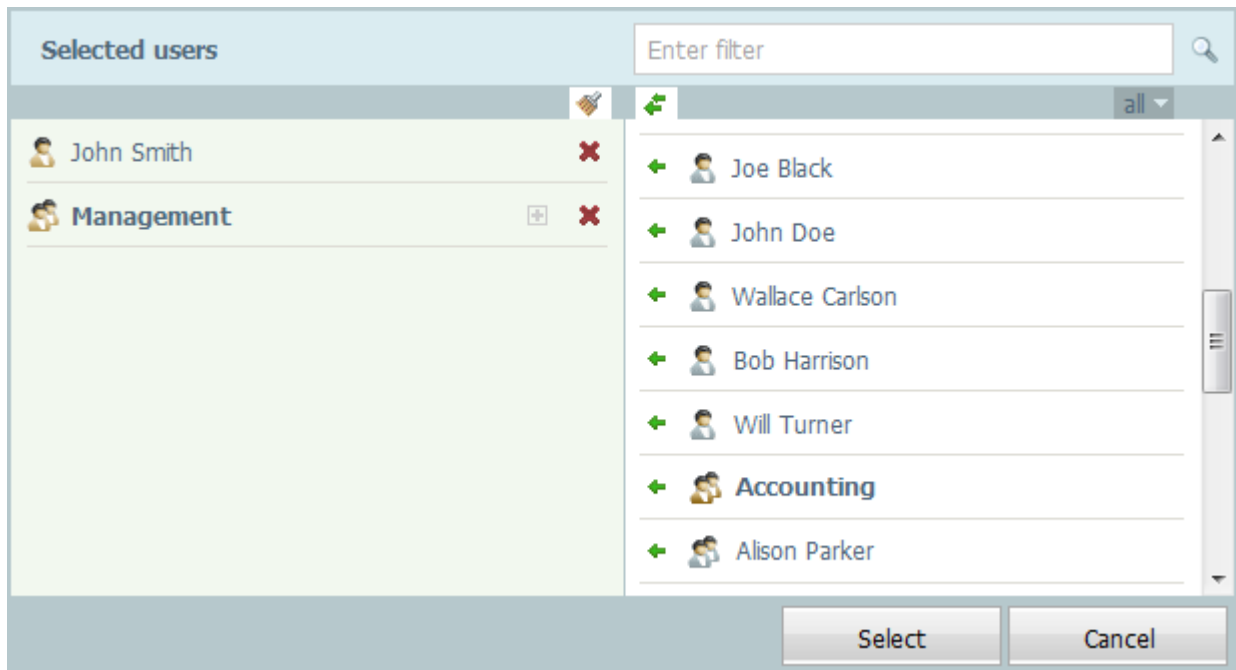
The left one is the list of users to whom the task is assigned; the right one shows users to whom you can assign the task. In order to select a user, click on his/her name in the right list or move it to the left list using Drag'n'Drop. If you need to delete a user from the assigned list, click on the name in the left field and it will appear again in the list at the right part of the window.

By default the list of available users (right list) displays only 10 last names that you used. If it does not contain the name of a necessary employee, just enter his/her name (surname) and results meeting the request will be shown in this list. For example, enter Stanley and the list of all users with the name Stanley will be shown to you, so you can select the right one.

The second method: a drop-down list is available between the search line and the list of available users. It filters the list of all available users. By default 'last 10' is selected. You can choose 'all' to search through the full list of users. However, this may be a complicated tasks in large companies. Select 'users' to see the list of employees with the status of system user (groups and departments are not included into this list). You can also select 'Departments' and 'Groups'.

The 'Responsibles' button is available in the right part of the area below the assigned field. Users added in this list can change the list of assigned employees. The process of adding responsible users is similar to that with assigned users. Exception: departments or groups cannot be set responsible.

Types of Tasks

The TeamWox groupware system offers different types of tasks that can be selected for the most efficient solution of problems. In the 'Tasks' field you can select one of the following types:

1. **Simple**
   A task in a free form. Such a task can be closed by any assigned user, irrespective of whether the author considers the task completed or not. Such tasks can be used for simple informing.

2. **Controlled**
   By placing this type of tasks you can control their implementation. Assigned employees can't close the controlled task. They can press the 'Complete' button to inform you that the task is completed. After that the task is listed in 'Completed tasks'. If you are satisfied with the result, you can close the task. Otherwise you can return it with corresponding comments.

3. **With notification**
   This type is similar to controlled tasks - assigned employees can't close it. Besides that, a notification that a user has read the task automatically appears in the task.

4. **Collaboration**
   This is the task intended for joint work of several employees. All assigned users can change the assigned list and the task body.

5. **Event - Once**
   This is a convenient reminder about one-time events. You can create an event that will attract your attention in a couple of weeks and forget about it. The task is included in the 'Events' section and is moved to the list of open tasks as soon as the appointed time comes. As soon as the event is no more urgent, you can close it.

6. **Event - Periodically**
   These are reminders about regular events (holidays, birthdays, etc.) or things to do (prepare a report, systematic calling to clients and others). As the appointed time comes, periodic events turn into open tasks.

7. **Note**
   This type of tasks is intended for storing important information. Such tasks are located in the 'Notes' section.

Due Date

For some types of tasks you can set due days. These are the following types: simple task, controlled task, task with notification, one-time event and periodic event. Date is specified to the right of the task type field. Using dates helps to plan future activities, while working only with urgent tasks at the current moment of time.

The due date performs the function of informing you that the time for task completion is coming soon. When one day is left till the due date, the task will be highlighted green in the list. On the due day the task is highlighted red. Due day for events set time when the event should trigger and turn into an open task. For periodic events this is also a point, starting from which creation of periodic events will be counted.

5.4. Message Editor

The message editor is often used in the operation of the TeamWox system. It is used for writing tasks and comments to them. the same editor is used for writing emails, forum messages and comments, editing some fields of profiles, organizations and contacts, and in Service Desk. In all this cases editor using rules are the same, and you can use all its features. With the editor you can emphasize some text parts, insert images, video files, tables and links.
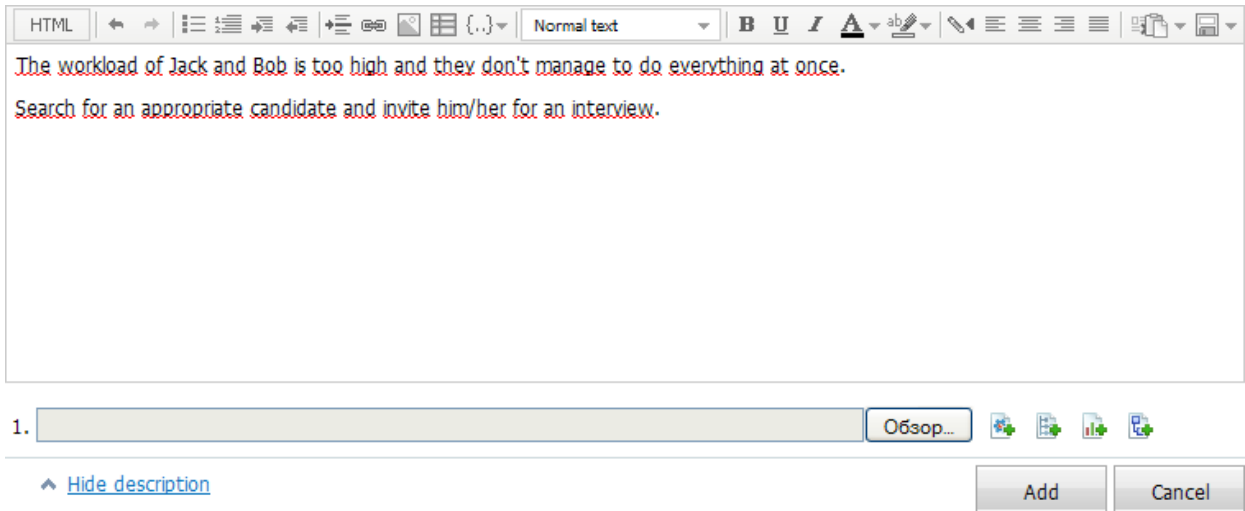
The editor allows working with a text like in MS Word, so you don't have to study much of it. The editor consists of two parts - toolbar and the working area. The editor has a user-friendly interface, so we'll skip its description.

Attaching Files

The 'Browse' button and a field are located in the bottom part of the editor. Using them you can attach files from your computer or local network. Such attached files are available to all users who can see your task. You can attach any file with any extension.

In order to attach a file into your message press the 'Browse' button. The standard window for searching files on your computer will be opened. Select a file from your HD or local network and press open. After that the file name will appear in the lower part of the editor. Besides, one more field and the 'Browse' button will appear for attaching more files. You can attach up to 32 files to one message.

- **Documents.** The editor allows attaching files that are stored in the [Documents module](#). Press button located to the right of the 'Browse' button. After you press it, a window will appear, in which a necessary file should be selected:
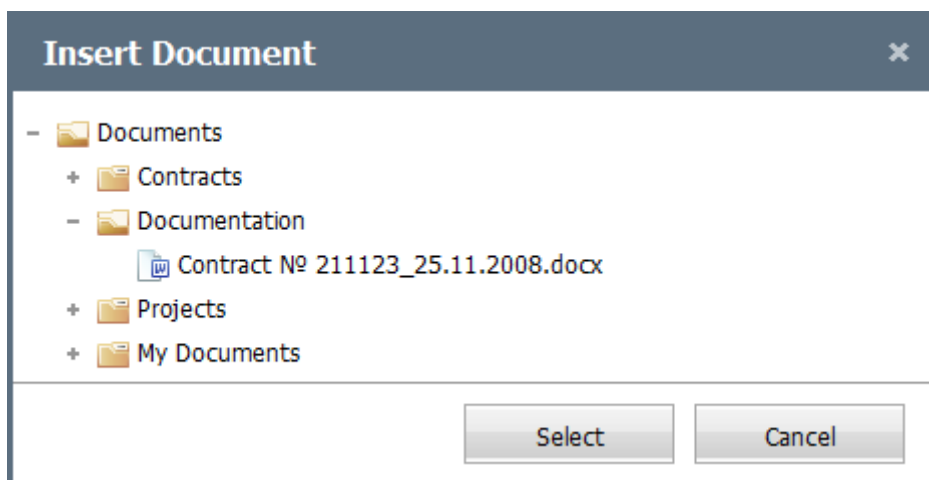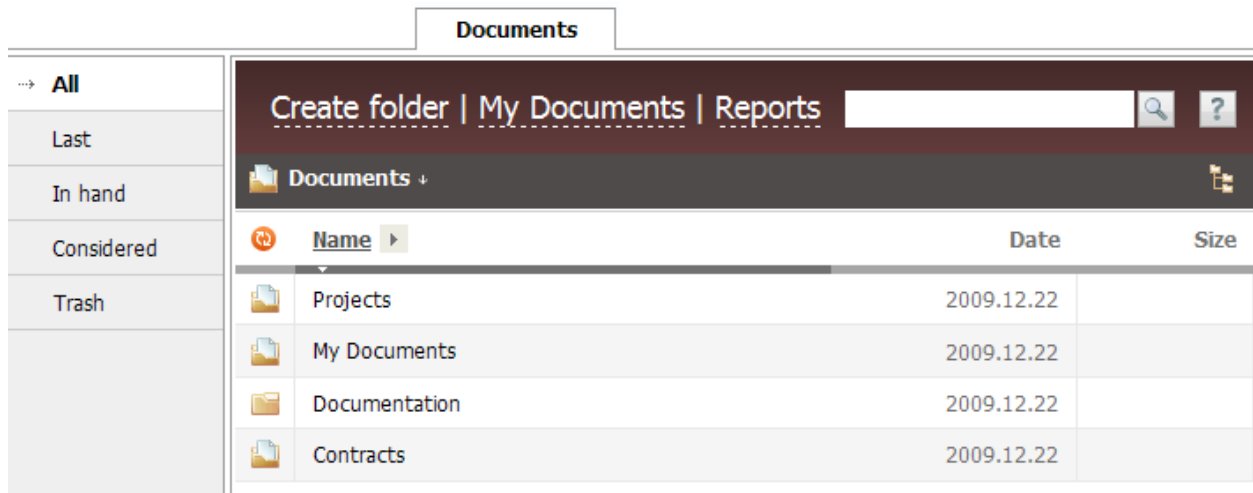
After the file is chosen, press 'Select'. You can attach several files at once.

- **MindMap.** You can create a mind map and attach it to your message. To do this press button located to the right of the 'Browse' button, which will open the MindMap editor. After a map is saved, it can be edited again.

- **Charts.** Right in TeamWox you can create a chart and attach it to your message. Press button located to the right of the 'Browse' button. This will open the chart editor. Create a chart and press 'Save'.

- **Diagrams.** You can create a diagram and attach it to your message. Press button located to the right of the 'Browse' button. Create a diagram in the appeared editor and save it. A saved diagram can then be edited again.

6. Documents

The 'Documents' module is designed to help companies implement efficient flow of documents. Here you can store any documents in electronic form: agreements, statements, scanned images, and many other documents. With the version support and flexible system of access permissions, you can work on documents together with your colleagues. The team work on documents in TeamWox is maximally convenient - you don't have to go to your colleagues and compare different document versions. They see all the changes right in the system and always work with the latest version, while earlier versions are still stored in the system.

Besides, documents stored in this module are used in other parts of the system. All documents received by email, attached to a task or a board message can be saved in this module. And vice versa, documents stored in this module can be sent by email, attached to a task or posted on board. Besides, documents can be associated with any client or contact via the Organizations module. Whenever you need a document, you can easily find it in the system. Documents with TeamWox is a perfect possibility to get rid of piles of papers and numerous document versions on different computers.

Plus to that, 'My Documents' folder is created in this module for each user. Like in MS Windows, this folder is intended for storing personal documents; only you have access to it. It cannot be used for joint work, so you'll have to create a new folder and set corresponding permissions.

6.1. Documents Module

The window of the Documents module is divided into three parts: navigation, command bar and working area.
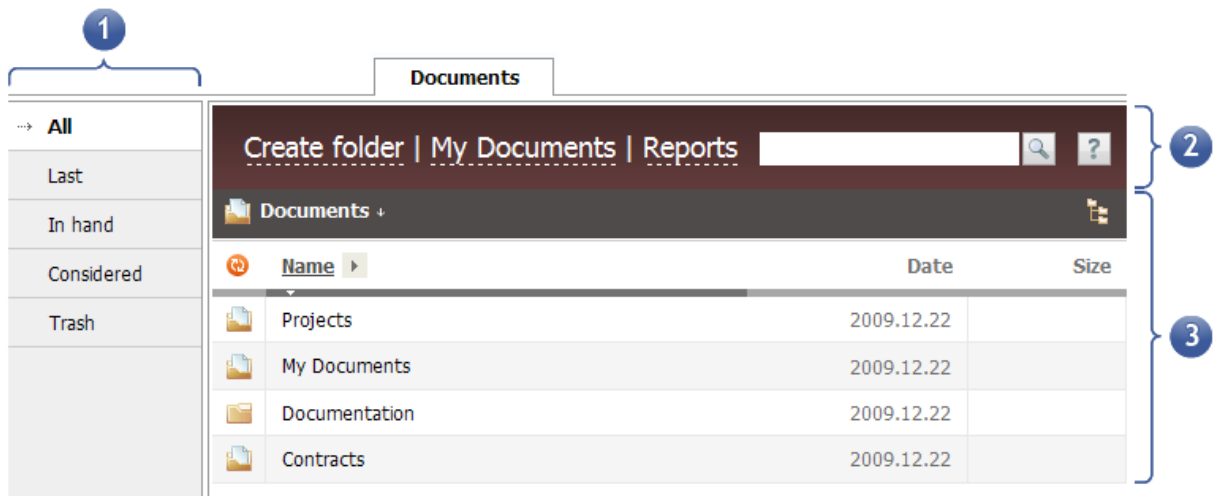
1. **Navigation**

   Navigation of the Documents module allows to easily navigate through documents stored here. You can select statuses to show documents: last, in hand, considered, trash and all. With these statuses search of documents is as easy as never before.

2. **Command Bar**
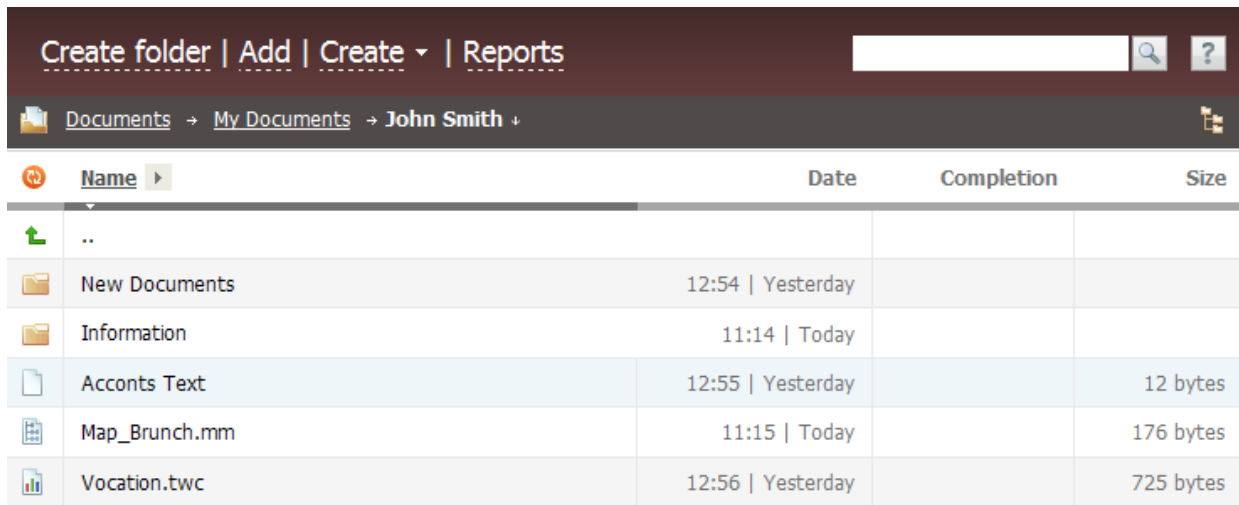
   The most often used commands are located here: Create folder, Add document and Create document. These commands are similar to commands of the same name in MS Windows. The exception is the last command - Create document, which allows to create text documents right in the TeamWox system.

3. **Working Area**

   This is the most important part of the module. It shows the list of all folders and documents, to which you have access. The window contents depend on what status is selected in the navigation. For example, if 'In hand' is selected, documents in hand will be shown. All objects (folders and documents) are represented as a table with adjustable fields. If you don't need any of fields, disable them. To do this, press on the arrow to the right of the 'name' column. In the appeared list check columns that should be displayed. You can also manage objects from the working area using pop-up buttons, using which you can view information about an object, download it, modify, move to another folder or to trash. To view a document contents, click on its name in the list.

6.2. Working with Documents

Let's start working with documents. In the navigation bar you can filter documents by their statuses: last, in hand, considered, trash and all. The list of documents is presented in the form of a table with adjustable fields.

Customize the table appearance according to your needs. To do this, click on the arrow located to the right of the 'Name' field. In the appeared list check fields that should be displayed and press 'Apply'. After that the table in the working area will be changed - selected fields will appear in it.

Attention: Field of Name, Date and Size cannot be hidden. They are always shown in the table.

Click on the document name to view its contents. Using pop-up buttons that appear to the right of the document name when you put the mouse cursor over it, you can perform various operations with documents and folders. You can view information about the document, download a file, edit it, and move to another folder or to trash. Note that you can modify only documents to which you have corresponding permissions. For other folders/documents this button will be unavailable.

Information about a Document

Press the pop-up 'Information' button to view information about the document: its author, creation date, size, manager of the document and organization the document is associated with. Besides you will see the brief description, access permissions and state. Access permissions will show who can view the document and who can modify it. The state shows who should view the document or sign it.

When the window of information viewing is open, the navigation bar contains three sections: Information (you are here now), Versions and History. In Versions you can view information about the current version, which is represented in the form of a table. If a document was modified and several versions of it were uploaded, these details are reflected in this table. And you can not only download the current version, but also restore any of its previous versions.

Attention: In order to add a new file version into the system, upload a file with the same name. If the file name differs, a new document will be added.

In History you can see the journal of operations with the document. You can see who and when updated the file, changed permissions or signed it. Besides, you can read comments to the document added by responsible employees - this can be, for example, a note to an agreement.

Moving Documents

Any documents and folders can be moved to other folders. In order to do this, press the corresponding button and select the new directory in the appeared window.
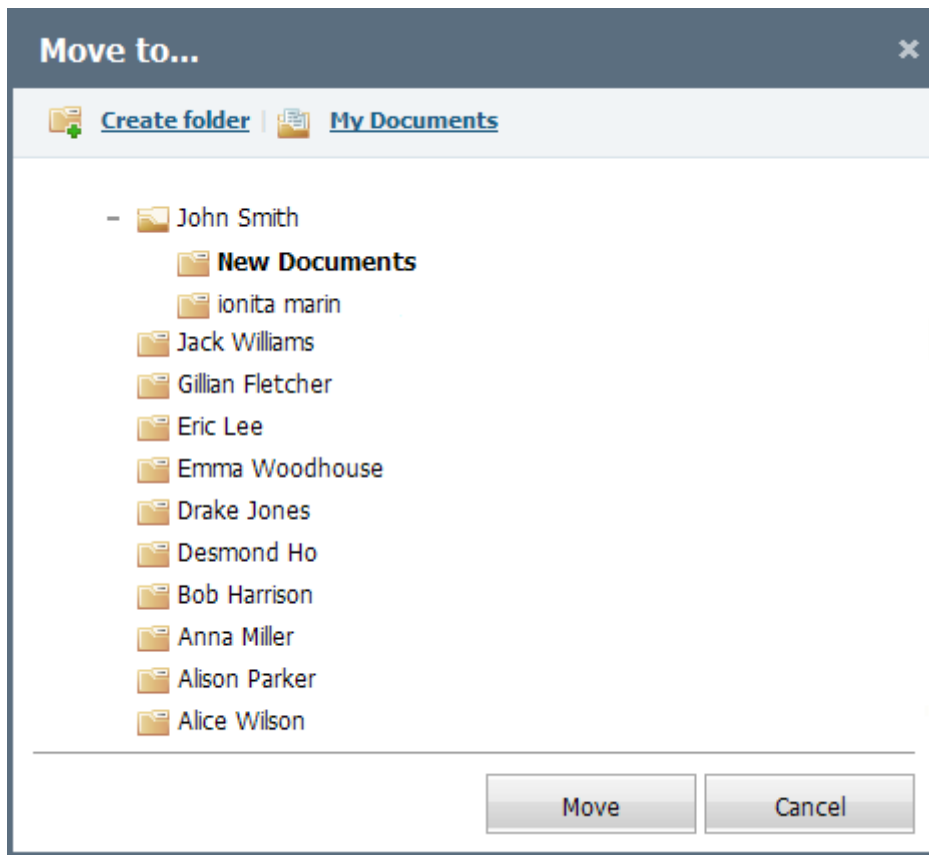
As soon as you press the "Move" button, your document will be moved to the selected directory.

6.3. New Document

Now let's add a new document. Note that you can't add documents to the root directory. This is done to prevent accumulation of too many files in the main folder. You can add only a folder in the root folder. In the newly created folder functions of adding/creation of a document will be enabled in the command bar.

New Folder

If you have permissions, you can create a folder right in the root directory. If you don't have corresponding rights, open any directory available to you and press the 'Create folder' button. The following window will appear:
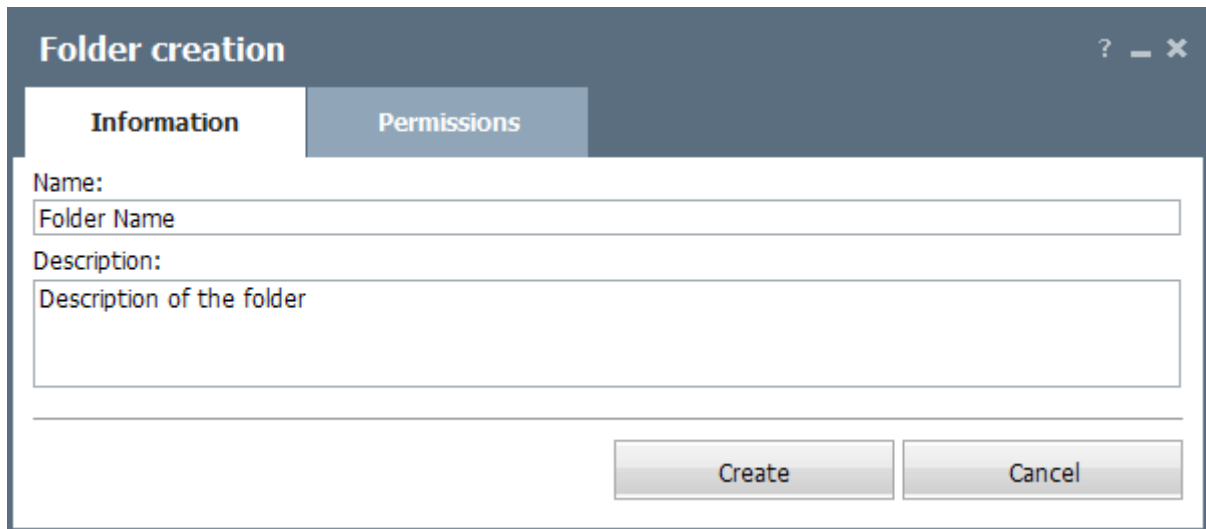
Here you should set the folder name and its description. Then you should set permissions on the corresponding tab:
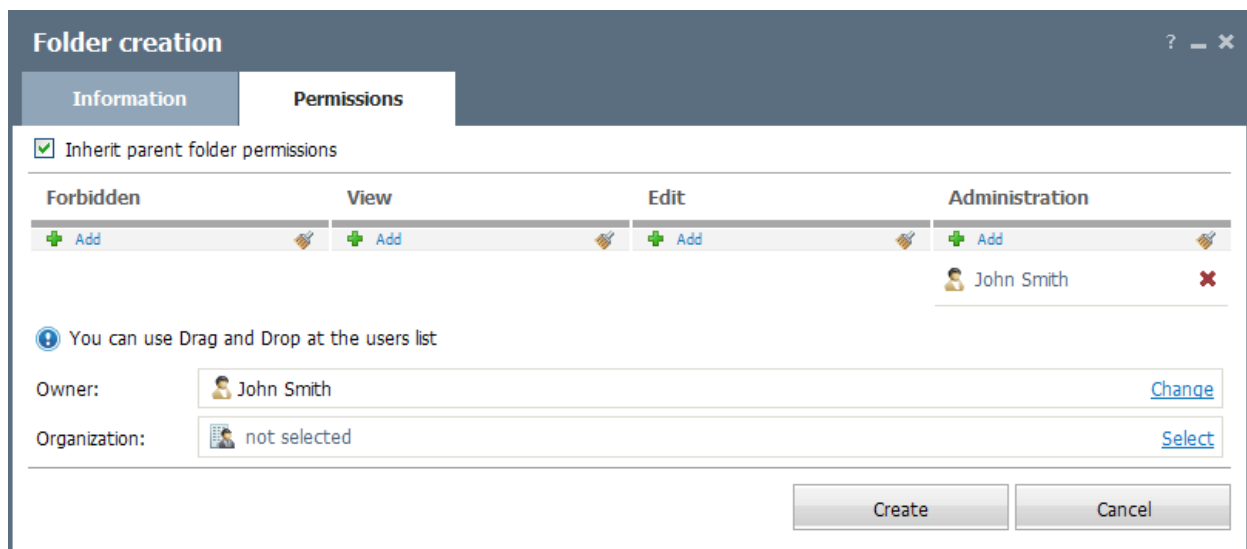
Be default, the option 'Inherit parent folder permissions' is selected. This means the folder will be available to users who have rights for the parent folder. If you want to change permissions, uncheck this field. Note that users who have no permissions for the higher folder can't be added to the permission list. Actually, you can either cut some of permissions, or expand permissions of allowed users. For example, if a user has permissions for viewing the parent folder, you can prohibit access to the folder you are creating, or give additional permissions to edit it.

In order to add certain permissions to a user, add him or her into the corresponding list:

- **Forbidden** - the user doesn't have access to this folder;

- **View** - the user can view the folder, but can't perform any actions. For example, a user with such permissions can't add a new document;

- **Edit** - the user can view the folder, add and delete documents in it;
- **Administration** - the widest permissions. These users have administration rights for the folder, including setting up of access permissions.

In order to create the folder, press the 'Create' button at the bottom of the window.

Adding a Document

So, you have created a new folder and now can add documents. Press the 'Add' command in the command bar. The following window will appear:
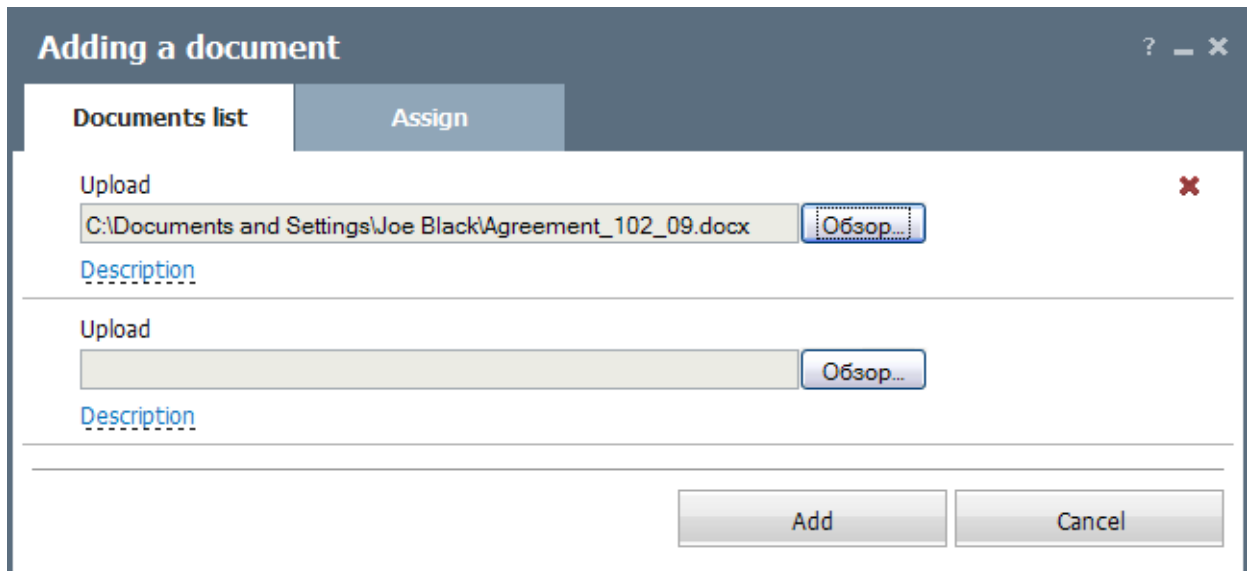
Use the 'Add' command to select necessary files, that will be added to the system. As soon as you press on it, a standard window will be opened, where you can select any file from a hard disk or a network storage.
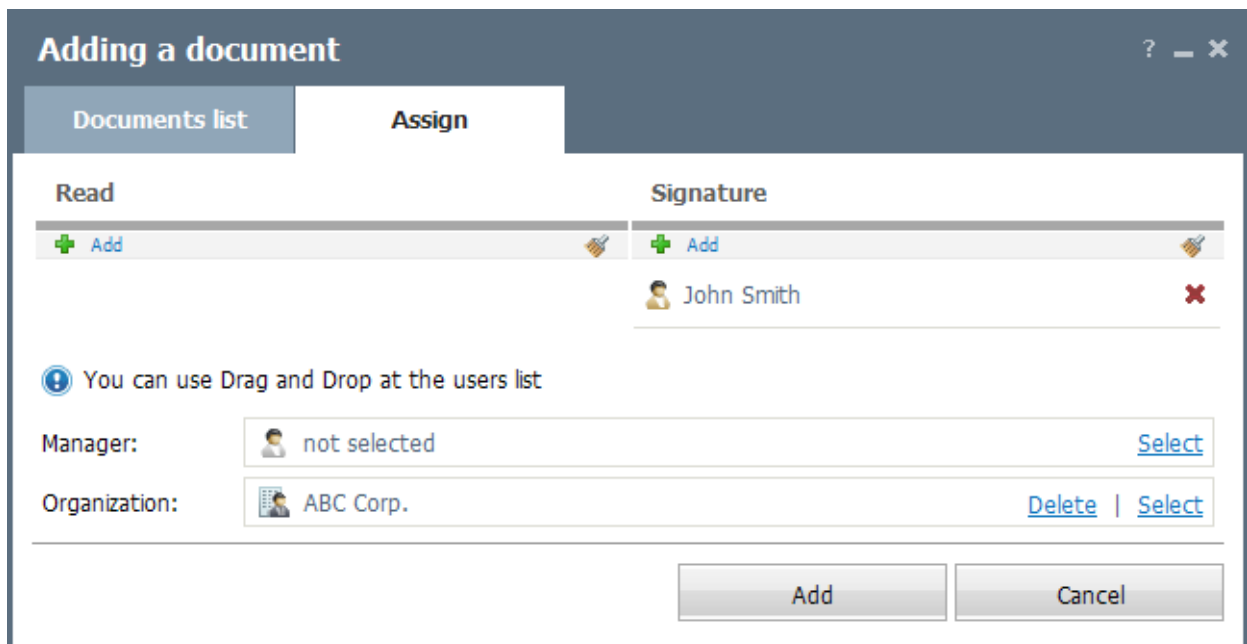
On the 'Assign' tab select users to assign the documents to. If you want a user to read the document, add him or her into the 'Read' list. If you want the document to be signed, add corresponding users into the 'Signature' list. For a user to be able to read or sign the document, he or she should have view permissions for this directory.

> **Attention:** You can't set access rights to a separate document. Permissions are set only for the folder the documents are in.

Press the 'Update" button and the document will appear in the system.

Creating a Document

This function is similar to document adding. The only difference is that you don't select a document on the HD, but create it right in the system using the [built-in editor](). Name the new document, write a short description to it, and add persons to read and sign it.

7. E-Mail

E-mails are widely used: we use them to send private messages, files and photos to our friends, as well as to communicate with our corporate partners.

TeamWox allows managing e-mailing of all personal and corporate mailboxes from one window. You can receive and send e-mails to several addresses at the same time. The convenient setup of filters in the E-Mail module will automatically sort your e-mails. The search system will enable you to quickly find e-mails by their subjects, address, recipient's/sender's name, word or phrase in the e-mail text.
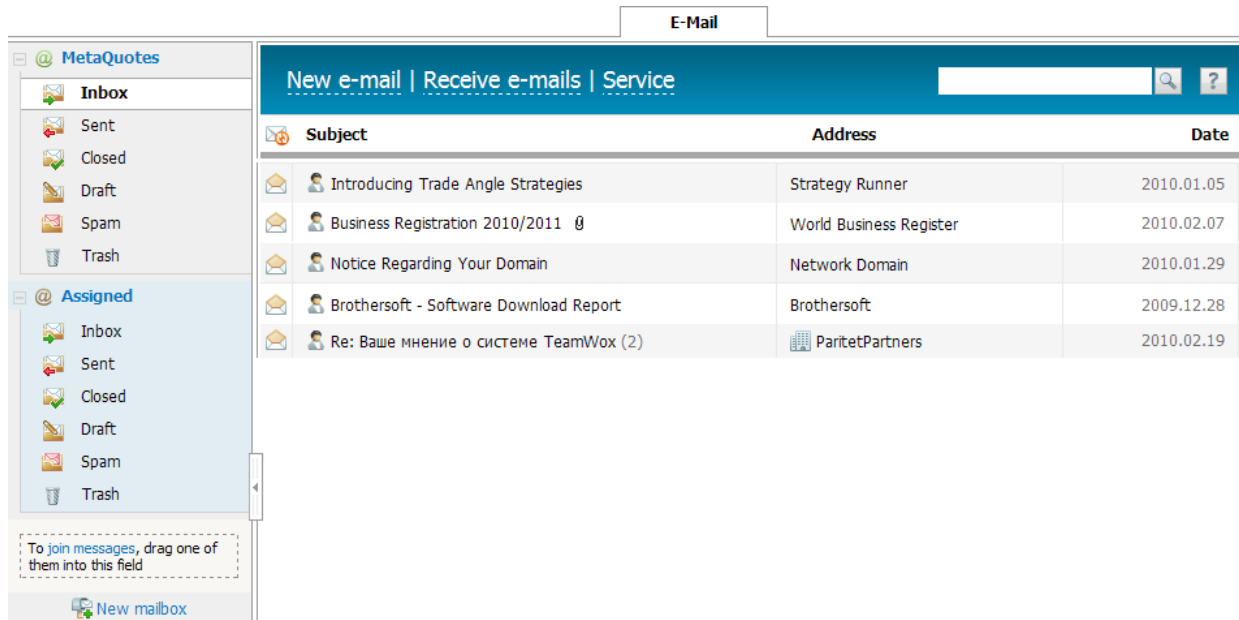

Each TeamWox user has the service mailbox of Assigned e-mails. In this mailbox a user can see e-mails assigned by other employees. For example, you need advice of your colleague in solving your client's problem. Now you don't need to forward the client's e-mail, but simply assign it like a task. And you can see what your colleague replies to the client. If necessary, you can assign the the same e-mail to other specialists or departments. Moreover, this will be stored in a single location - as a conversation in TeamWox.

Joining of a mail agent and the groupware system provides you with more advantages. Right from the system you can attach any file stored in the Documents module to your e-mails. And the mailing system being bound with modules of Organizations and Contacts, the history of your communications with clients and their contact persons will be automatically saved in these databases. E-mail in TeamWox is the new stage of your communications with clients.

7.1. E-Mail Module

All operations with external and internal correspondence are performed in the 'E-Mail' module. Incoming mails with all attachments, as well as assigned correspondence are stored here.
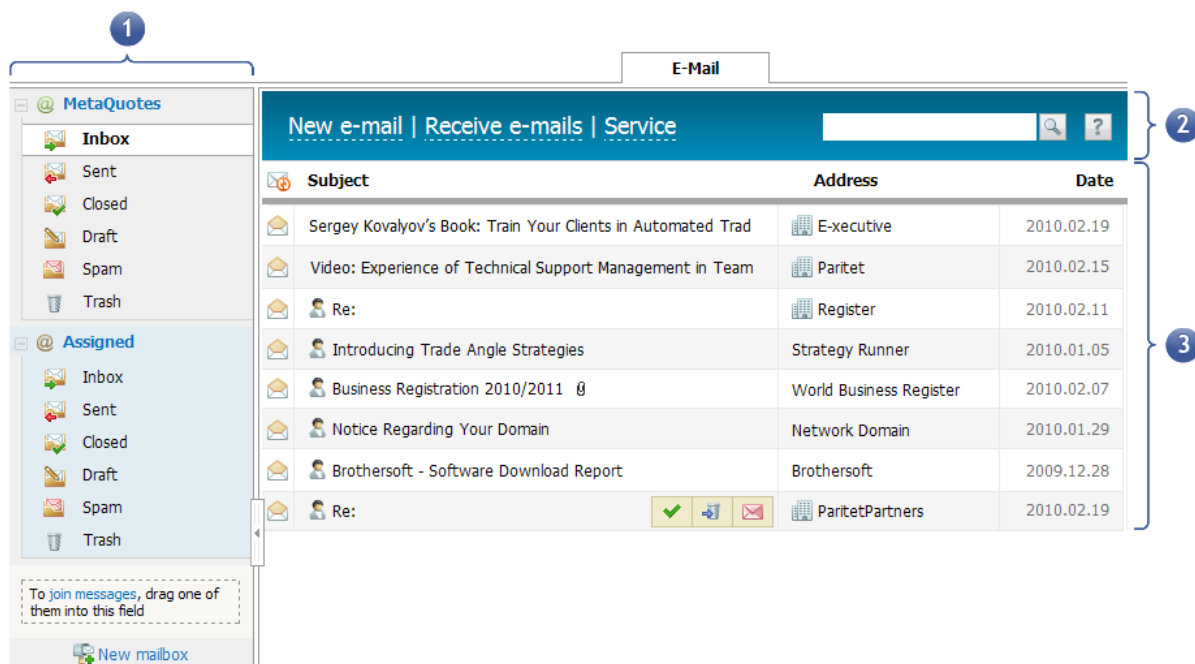
E-mail consists of three working areas:

1. **Navigation**

    This is the list of all your mailboxes (including the assigned one), created folders and filters. For example, if you have to deal with a lot of e-mails, you can create a filter of incoming mails by VIP clients. Thus you will be able to quicker reply e-mails of your key clients. From this area you can also manage your mailboxes: create/delete them, set up connection to the mail server, adjust access rights and filters, edit templates of signatures and auto-reply. From this bar you can also navigate through your mailboxes and folders inside them.

2. **Command Bar**

    From this bar you can work with e-mails in a certain folder of a selected mailbox. The following functional buttons are located here: New e-mail, Receive e-mails, Clear, Reports and Service. New e-mail allows creating messages, while Receive e-mails allows receiving messages from the server. 'Clear' deletes all messages from folders 'Spam' and 'Trash'. Reports allow you to monitor how active mail correspondence is. With 'Service' you can manage functions of group processing of e-mails. In the e-mail viewing mode these buttons are substituted by the 'Back to list' command that will return you to the list of e-mails.

3. **Working Area**

    This is the main area of the 'E-Mail' module, from which you work with e-mails. Here you can view the list of all e-mails in your mailbox, read the incoming mail or write an answer. Reports on correspondence are also displayed in the working area if you press the 'Reports' button on the command bar.
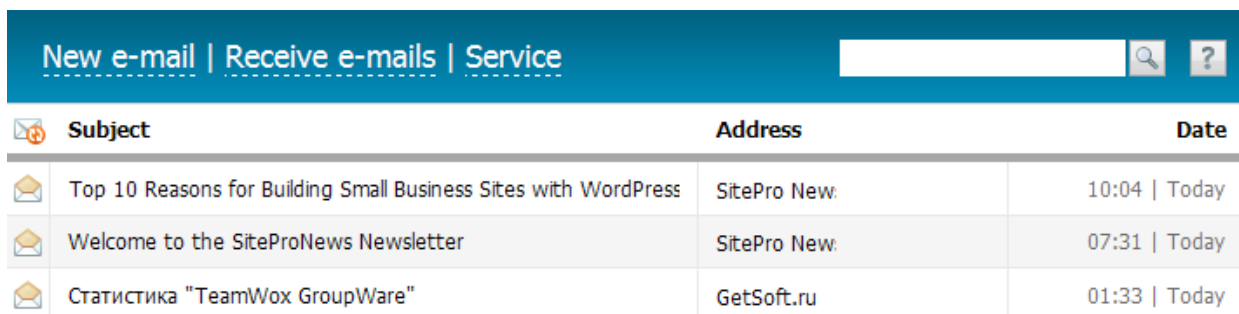
7.2. Working with E-Mails

We've studied the general interface of the E-Mail module. Now let's see how to work with mailboxes and correspondence. Before you start working, please check connection of your mailbox to the mail server. Indication of connection is the icon '@' to the left of the mailbox name. If the mailbox is connected to the mail server, the icon is green, otherwise it is red. If connection to the server is not set up, refer to the administrator of your TeamWox.

Select a mailbox from the navigation bar by clicking on its name. The list of the following folders will be opened: Inbox, Sent, Closed, Draft, Spam (optional) and Trash. All mails inside the folders are represented as a list. If any of folders contain unread e-mails, the number of such e-mails is shown to the right of a folder name.

Depending on a selected folder and permissions, the following commands can be shown in the command bar:

- **New e-mail** - open the editor to create a new e-mail;

- **Receive e-mails** - connect to a trade server for receiving e-mails;

- **Reports** - view reports on your mailboxes to monitor how active mail correspondence is;

- **Service** - functions of group processing of e-mails;

- **Clear** - delete all e-mails from Spam and Trash;

- **Back to list** - return to the list of e-mails;

- **New mailbox** - create a new mailbox.

After connection of your mailbox with the mail server is established, TeamWox will download all e-mails present on the server. They will be shown as a list in the working area.

The table of the list of e-mails is divided into four columns:

1. The icon in the first column shows the status of an e-mail and its priority. As you put the mouse cursor on this icon, a tooltip with the e-mail ID will be shown.

2. The second column contains the e-mail subject. If the e-mail is assigned to anyone, this will be marked by the corresponding icon in this column. If an e-mail contains an attachment, a clip icon will be shown to the right of the e-mail subject. The subject of an unread e-mail is shown in bold font. Such an e-mail is marked by the 'Unread e-mail' icon in the first column.

   When you put the mouse cursor over the e-mail subject, the following buttons will appear to the right of it: Close, Move to trash, Move to spam (or Delete for trash). As soon as you press the Close button, the e-mail will be moved to the 'Closed' folder. In this case the e-mails are separated from the current correspondence in Inbox or Sent, while still being saved in the system.

> **Attention**: All e-mails from the 'Trash' folder are automatically deleted at night in 7 days after they are moved there.

3. The third column shows the address (e-mail address or name of organization) of a sender or recipient (for incoming or outgoing e-mails, respectively).

Connection of the 'E-Mail' module with 'Organizations' provides a useful feature. If the address of the sender belongs to one of organizations, the name of this organization will be shown in the 'Address' field. In this case the e-mail of the sender/recipient will be shown in a tooltip. A left click on this field will open the profile of the organization (if you have permission to view it).

4. The fourth column shows the date when the e-mail was sent/received.

Viewing an E-Mail

In order to read an e-mail, click on its subject in the list of e-mails. The working area will change at that.
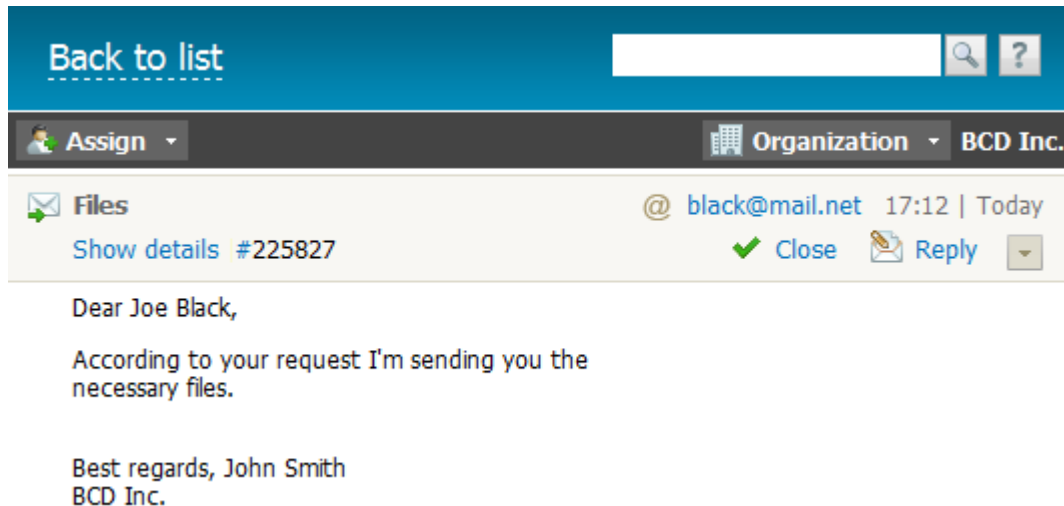
In the command bar, the 'Assign' button is locate below the 'Back to list' button. Using this button, you can assign e-mails to other employees, department or group. The 'Assigned' icon will appear if an e-mail is assigned to someone.

The e-mail header contains details of the e-mail. The left part of it shows the subject. The header also contains the 'Show details' link, a click on which will open the 'E-mail Details' window. It shows the e-mail subject, sender, recipient, size and header content. It also has the 'Download' button, using which you can download the email to your computer in the *.eml format.

The e-mail header also contains the permanent link to it - character # with the unique ID given to every e-mail. The ID can be used for searching necessary e-mails - enter the ID together with the # symbol (for example, #259799). The search by identifiers can be performed only when you are in the 'E-Mail' module.

The e-mail of the sender/recipient and the date are shown in the right part of the header. For outgoing e-mails the header also shows the sending status: '(sent)' or '(failed to send)'.

There are also functional buttons of 'Reply' and 'Close' available. As soon as you press 'Close', the e-mail will be moved to the 'Closed' folder. In this case the e-mails are separated from the current correspondence in Inbox or Sent, while still being saved in the system.

> **Attention**: In the e-mail viewing mode, Edit appears instead of Close. Using this button you can edit the message in the [Editor](#).

The main area here is occupied by the e-mail body. In order to return to the list of e-mails, press the button of the same name in the command bar.

Reply/Forward an E-Mail

Functions of replying and forwarding a message are available in the viewing mode. In order to view an e-mail, click on its subject in the list of e-mails. Commands of 'Reply' and 'Forward' will be available in the right part of the header. If you press the 'Reply' button, the editor for writing a reply will be opened:
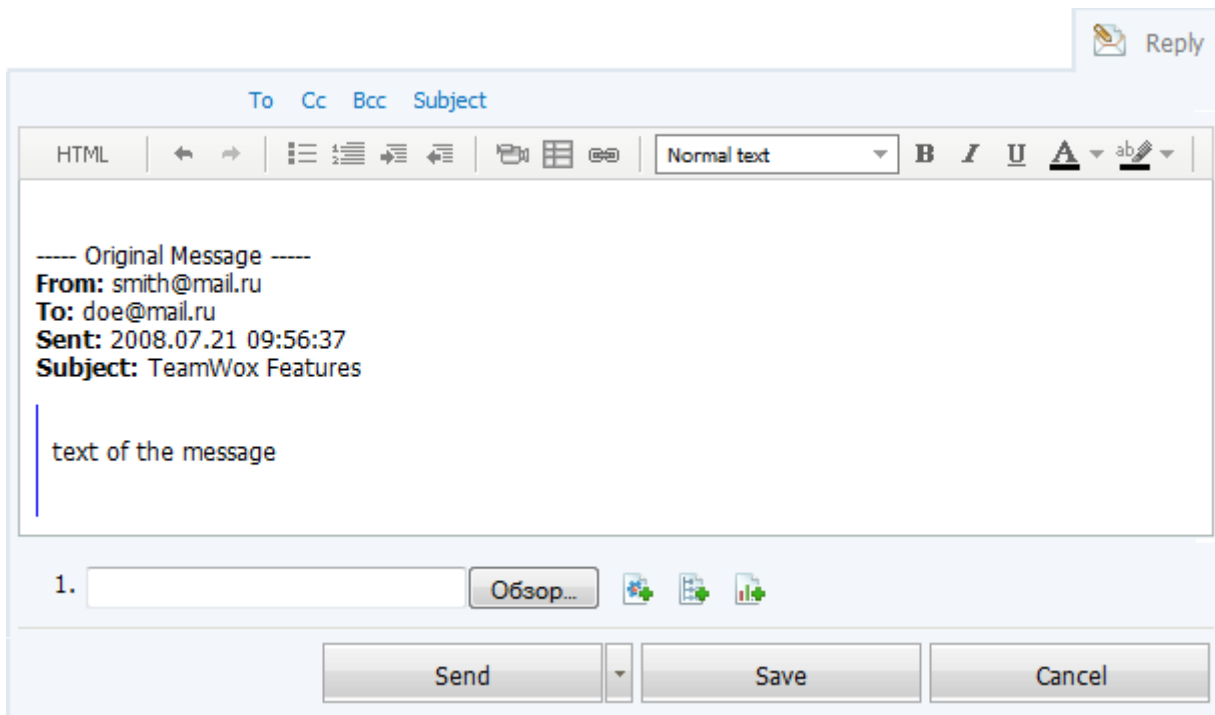
The body of the e-mail your are replying to, will be automatically inserted into your message. Work with the editor is the same for all TeamWox modules - it is described in the 'Tasks' section.

If you have several mailboxes in the TeamWox system, the additional 'From' field will appear at the top of the window. In this field select the necessary mailbox from a drop-down list.

Fields 'To', 'Cc', 'Bcc' and 'Subject' are hidden on default. They can be opened by pressing on the corresponding buttons in the reply window. In the 'To' field the address of the e-mail you are replying to is specified. The subject of the e-mail is generated automatically as "Re: [subject of the incoming e-mail]".

After the e-mail body has been created, press 'Send' to send the message or 'Cancel' to close the editor window. If you want to save a message in drafts, press 'Save'.

7.3. New E-Mail

Now let's try to create a new e-mail. Press 'New e-mail' in the command bar. The following window will appear:

In the 'To' field specify the e-mail address of the recipient.

Attention: If you have several mailboxes, the 'From' filed will be shown above 'To'. In this field select the necessary address from the drop-down list.

Clicking on 'Cc' and 'Bcc' will open additional fields for adding e-mail addresses. The 'Contact list' button is available at the end of 'To' field (as well as 'Cc' and Bcc' if they are open). From this list you can select e-mail recipients who are added in the Contacts module.

Enter the e-mail subject in the 'Subject' field. To the right of this field you can see the 'Templates' button. This button allows creating and using templates in e-mail creation.

For e-mail creation the built-in message editor is used. In this editor, you can work with a text, images, create schemes, charts, tables and diagrams. You can also attach files of any formats from your computer or the Documents module.

As soon as you complete creating the e-mail, press 'Send' at the bottom of the page to send it. To save the e-mail in drafts, press 'Save'. To cancel, press 'Cancel' or 'Back to list' in the command bar.

7.4. Assigned

One of the main advantages of the mailing system in TeamWox is the possibility to assign e-mails. Every user of TeamWox has the default mailbox 'Assigned', where all messages assigned are displayed. After an e-mail is assigned to someone, the possibility to control the correspondence is till preserved. This can be useful if you need help of competent specialists.
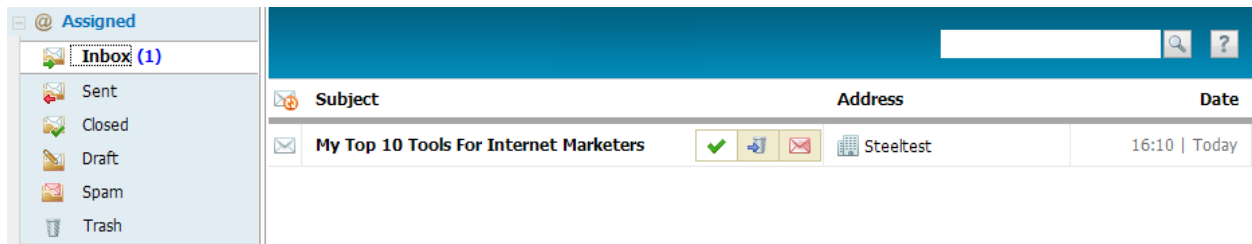
> **Attention**: The 'Assigned' section is always present in the 'E-Mail' module, even if there isn't any mailbox set.

In order to assign an e-mail, open it. Then press the 'Assign' button and select a user in the drop-down list. The e-mail will be assigned and marked as 'Assigned'. All replies and correspondence within the e-mail will be shown as a chain, so you will be able to see answers of your colleagues.

An e-mail assigned to you will appear in the 'Assigned' folder. The subject of the unread e-mail is in bold font. If you put the mouse cursor over the e-mail subject, buttons appear: 'Close' or 'Delete'.

8. Organizations

The important part of any company's operation is the client base that includes information on current and potential clients, suppliers, contractors and partners. Contact details, like phone numbers, address, e-mails and others should be within easy reach. Besides that, it would be great to have access to all documents and information connected with your clients. This possibility is implemented in TeamWox through the Organizations module.

	Name	Phone	E-mail	Manager
	ABC Broker	1 312 500 45 85	support@abcbroker.com	John Smith
	BCD inc.	1 252 255 25 25	support@bcd.net	John Smith
	Financial News	+7 495 702 155 155	mailing@fnr.com	John Smith
	Internet Provider	2392323	support@iprovider.com	John Smith
	INVT Bank	711 899 444	bank@invt.com	John Smith

Organizations | Potentials | All | Deleted | New filter | Settings

New organization | Reports | Import

1 ... 5 → 5

In this module you can keep your detailed client base with their contact information, rank them according to their types and statuses, build up your own rating of financial soundness and attractiveness from the point of view of business prospects. The TeamWox system keeps all documents, e-mails and discussions linked to a certain client. Even if the client contacted your colleague via chat from your company website, you will be able to see the entire dialog. You can find it in the profile of the organization or using the built-in search system of TeamWox.

Of course, the client base has the system of adjustable access rights. Thus, you can appoint experienced specialists to working with VIP clients. All other employees may know nothing about the existence of such VIP clients. With the TeamWox groupware, you can stop worrying that clients can be lost if one of your managers quits. Moreover, the history of all clients will be still kept in the system.

What's more important, all employees of your company will work with the single client base. This allows accumulating the entire information on your clients in a single location and thus improving the company's efficiency. Now you can see who and when contacted clients, what offers were made and what the current state of your partnership is. With TeamWox this information is always at your fingertips.

Automatic reports on clients can show the current state of affairs. From the reports, you get to know about your new clients, about most active employees, about clients who decided to discontinue working with your company and who is responsible for that. Now you don't have to set tasks to different departments for accumulating this information. All this is done automatically and immediately appears on your PC screen.

8.1. Organizations Module

Work with clients is kept in the Organizations module. The module window is divided into three parts: navigation, command bar and working area.
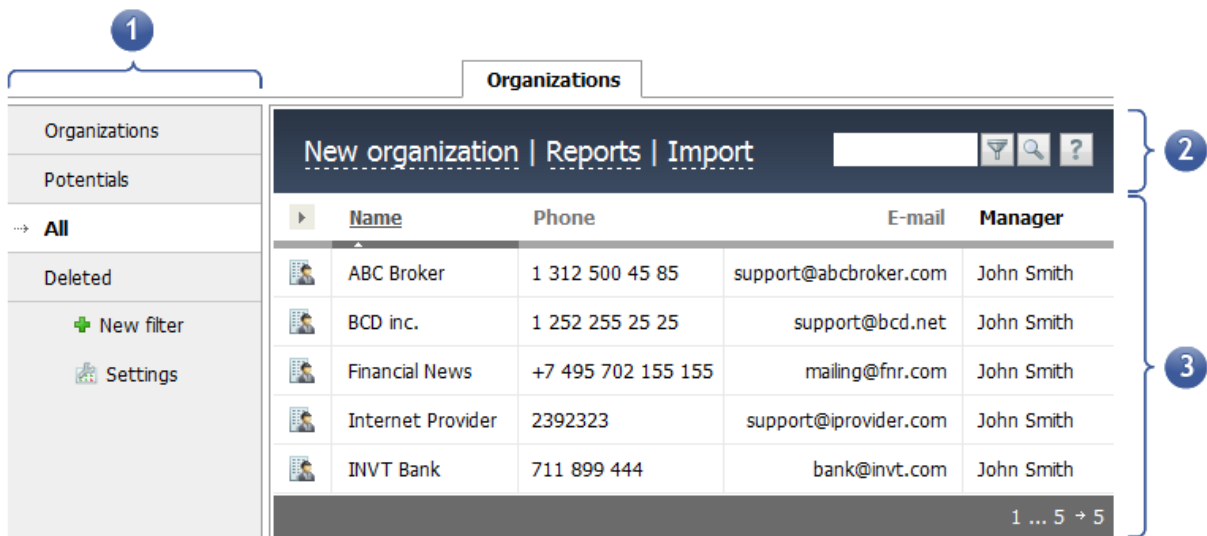
1. **Navigation**
   The navigation bar contains adjustable filters for sorting all companies added in the system. As distinct from other modules, in the navigation bar of Organizations you can set up your own list of filters. This will make working with clients easier. For example, logistics manager can create a filter that shows companies with the status of 'Supplier' and work with them only. Besides, there are two permanent filters: 'All' and 'Deleted'. Plus to the possibility to create and adjust filters, the 'Settings' button is available on this bar. Using it you can create additional fields in the organization profile and adjust service level settings (SLA). These functions are available to TeamWox administrators only.
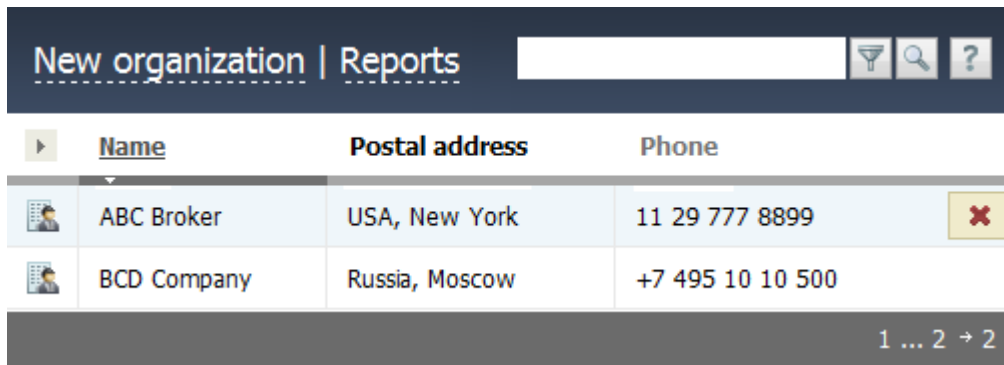
2. **Command Bar**
   It contains most often used commands: New organization, Reports, Import, Export, Back to list, Delete all. The Report command shows different reports on organizations. Import allows adding to the system the whole list of organizations from a CSV file.

3. **Working Area**
   This is the main part of the module, form which all operations with details of organizations are performed. Here you can view the list of organizations, delete, add or edit any companies. The list of organizations is shown as a table with customizable fields.

8.2. Working with Organizations

Now let's learn how to work in the Organizations module. With this knowledge you'll be able to easily navigate in this module. All organizations available in this module are presented in the form of a table. Twenty organizations are shown on one page. If more than 20 organizations are available in the list, a page selector appears at the end of the table.
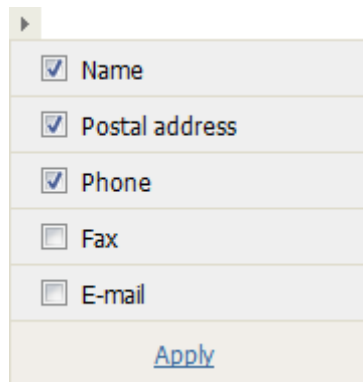

Several functional buttons are located in the command bar:

- **New organization** - using this button you can add a new organization to the system;

- **Reports** - go to viewing reports on organizations;

- **Import** - import a ready list of organizations with the entire information about them;

- **Export** - export organizations available in TeamWox into a separate file;

- **Delete all** - delete all organizations form the current filter. This command is unavailable in the 'All' filter.

In TeamWox you can temporarily filter organizations in the list without creating a permanent filter. To do this, enter the necessary combination of symbols in the search field and press 'Filter'. Besides filtering, you can also sort organizations by columns: Name, E-mail, Website, Rating, Type, Status and others.

The table that represents the list of organizations is adjustable. In order to customize it, click on the arrow above the first column, check required fields and press 'Apply'.


When putting the mouse cursor over an organization, the 'Delete' button appears at the end of the line. It is used for deleting the organization. Deleted companies can be restored only by the administrator of the TeamWox system.

If you press on the e-mail address of the company, you will be moved to the e-mail creation window in the 'E-Mail' module. The e-mail address of the company will be automatically added to the 'To' field.

If you keep the mouse cursor over the organization name a little longer, a pop-up tooltip with its details will be shown:
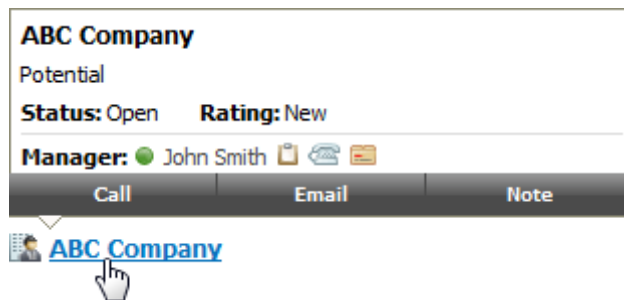
Several commands are available in this tooltip:

- ⬜ - create a task to the responsible employee who manages this organization;

- ☎ - call the manager to the office phone;

- 📧 - call the manager for internal Chat dialog;

- **Call** - call to the company, to the number specified in its contact information;

- **E-mail** - write an e-mail to the company. If you press on this button, you will be moved to the 'E-Mail module for creating a new e-mail. The e-mail address specified in the company's contact details will be automatically added to the 'To' field;

- **Note** - add a comment to the history of the organization.

In order to view information about the organization, click on its name in the field. Its profile with the company details will be opened. In the 'Edit' tab (analogous to the window of new organization creation) you can edit these details. Information about all changes made by you will be saved in the History tab.

One of the key advantages of the TeamWox system is the interconnection of all its modules. As for Organizations, you can link any data stored in the system to any company. And you can view these data right from the company's profile. The profile has several tabs: Documents, E-Mail, Contacts, Chat. If you open, for example, the E-Mail tab, you can see the history of your communications. If you or your colleague has sent an e-mail to any of contact persons of the organization, it will be available in this field.

8.3. New Organization

Now let's proceed to practice and add a new organization. In order to add a company press the 'New organization' button located in the upper part of the Organizations tab. The profile of the new organization will be opened in the working area.

The organization adding/editing window information is divided into blocks: main, postal address, registered address, contact details, additional information and permissions. Corresponding information should be entered in these blocks. As for 'Permissions', set here rights to view and edit details of the organization ('Manager' field). Besides, users that can view the organization are also set here ('Assigned' field). To add users in this field, select them from the list opened at a click in this fields.

> **Attention:** If an organization with the same name already exists in the system, error 403 will be generated at the attempt to create the second company with this name. This is done to prevent appearance of many organizations with the same name with odd bits of information. Instead, you will have one organization with all its details in one location.

To save the organization press 'Save' at the bottom of the working area. The profile of the organization will be create, from which all details about the company will be available. Thus if you need to bind contacts, documents, e-mails and other data with a certain organization, its profile must be created first.

8.4. Reports

TeamWox generates automatic reports based on information about organizations. But you can view these reports only if you have certain permissions. Press 'Reports' in the command bar. A map will be opened in the working area. Besides that, the following reports will also become available in the navigation: Manager, Growth and Overview.

Please note that reports displayed depend on the filter, from which you are pressing the 'Reports' button. For example, if you are in the 'Potentials' filter, the report will be generated on these organizations only. Thus, using the 'Filter-Report' binding you can get report on any category of organizations.

Map

Here you can view location of organizations on a world map:
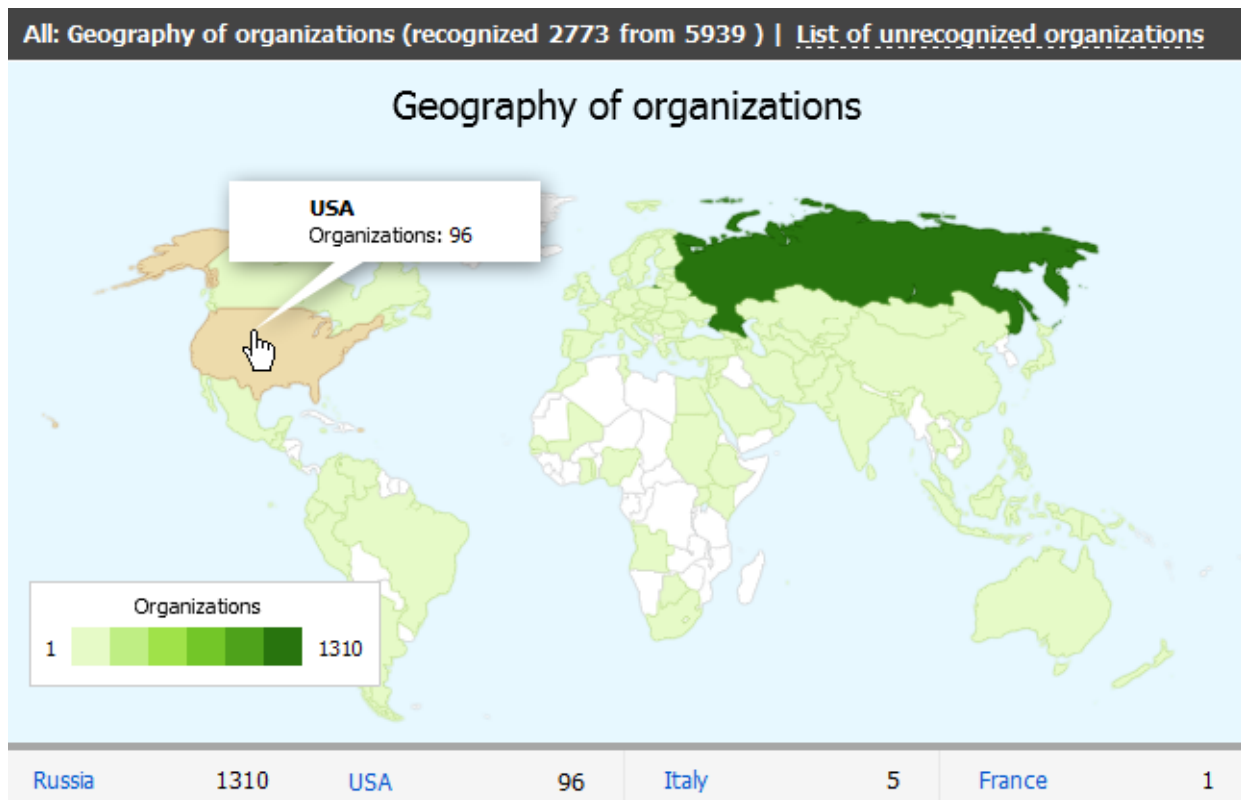
A single left click on a map (including an icon of organization) will zoom in this fragment. Another click will return the map into its previous state. The upper part of the window shows the name of the report and filter it is generate for.
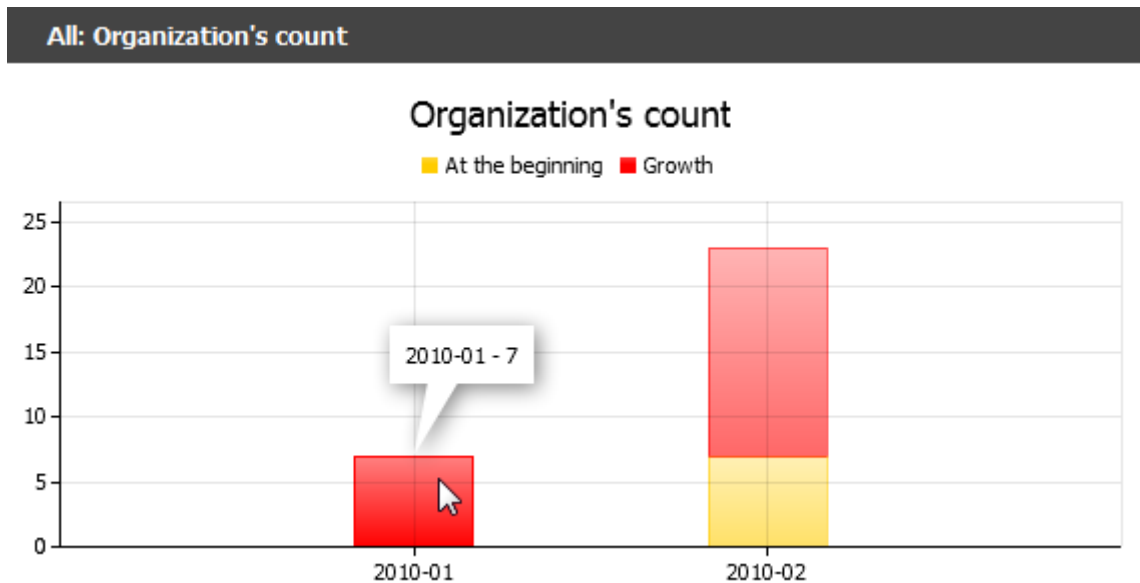
Managers

This report shows distribution of organizations by managers of your company:
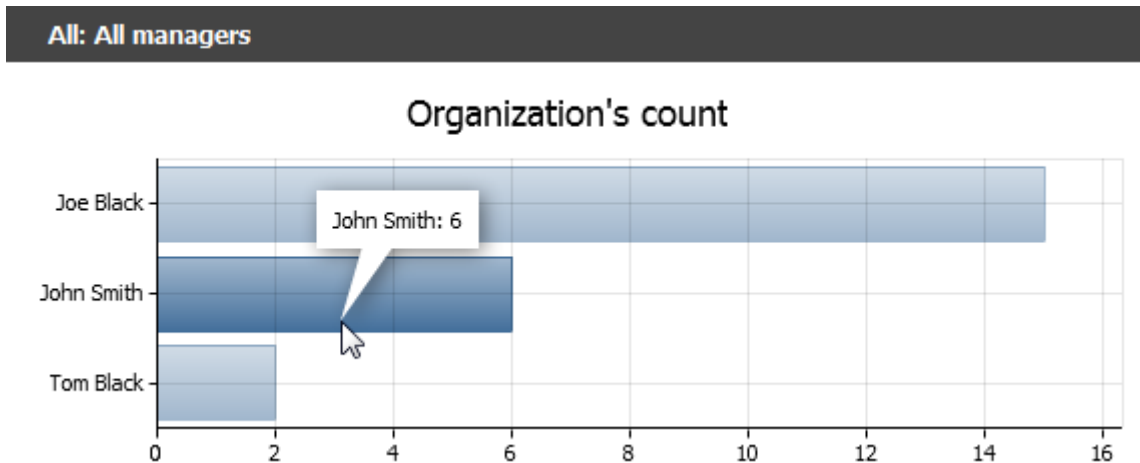
When putting the mouse cursor over one of the histogram columns, a tooltip will appear that shows the manager's name and number of organizations. The upper part of the window shows the name of the report and filter it is generate for.

Growth

This report shows growth of the number of organizations in the data base. These can be your clients, suppliers or partners:

Red columns show growth of the number of companies for the current month; yellow ones mean number of companies as of the beginning of the current month. When putting the mouse cursor over one of the histogram columns, a tooltip will appear that shows date and number of organizations. The upper part of the window shows the name of the report and filter it is generate for.

Overview

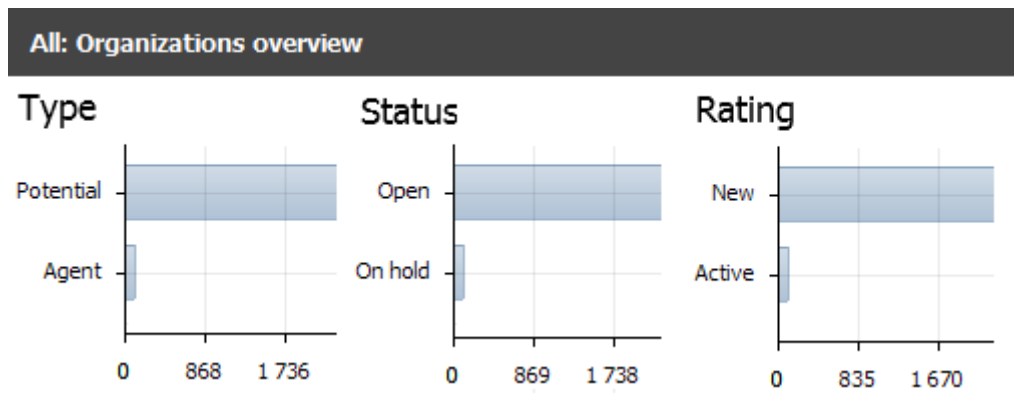This report is the general overview of distribution of organizations according to their types, statuses and rating.

When putting the mouse cursor over one of the histogram columns, a tooltip will appear that shows the number of organizations belonging to this category.

9. Contacts

The Contacts module is very similar to Organizations; but instead of companies it is the data base of contact persons. This module is designed for processing information about all persons whom you or your colleagues contact. Here you can keep information about contact persons, history of your cooperation and correspondence.
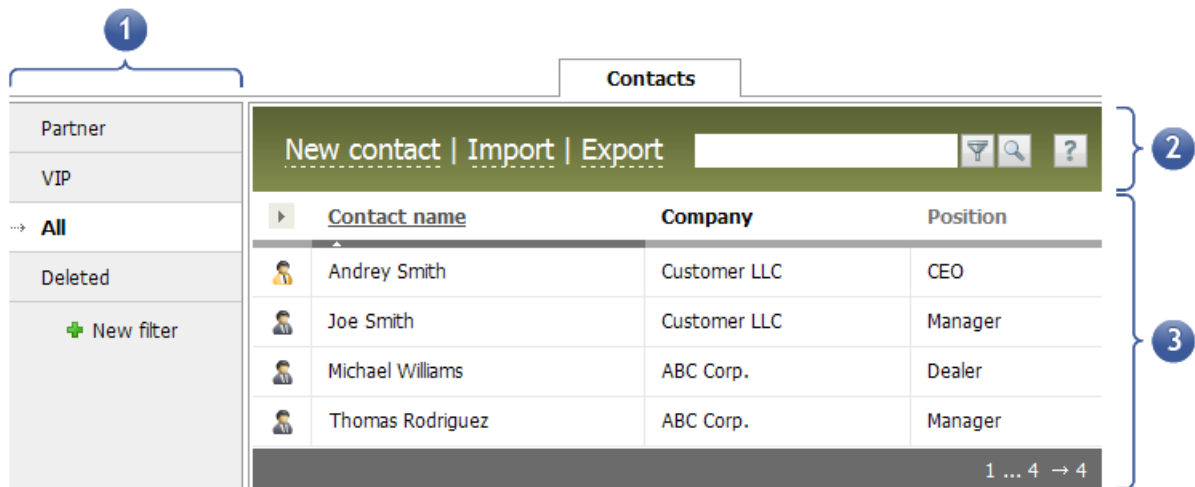
Contacts		

	Contact name	Company	Position
Andrey Smith		Customer LLC	CEO
Joe Smith		Customer LLC	Manager
Michael Williams		ABC Corp.	Dealer
Thomas Rodriguez		ABC Corp.	Manager

New contact | Import | Export

Partner
VIP
All
Deleted
New filter

1 ... 4 → 4

Use of the data base of contacts makes working with individual persons and legal entities much easier. First, all the details and contacts are always within easy reach. Secondly, all your e-mail and chat dialogs are automatically bound to contacts. Thirdly, this information can be available from Organizations if the contact is bound to a company. Besides that, the client base is single for all employees of your company. Information about all contacts is saved in this single location and can be easily found whenever you need it.

The Contacts module is a convenient tool to help you manage contacts and keep all related data in a single location.

9.1. Contacts Module

Information on contacts can be managed in the Contacts module, and part of it can be managed in Organizations. The module window is divided into three parts: navigation, command bar and working area.

1. **Navigation**

   Navigation of Contacts is the system of filters that allows the quick search of necessary contacts. Like in Organizations, these are custom filters, except for default filters 'All' and 'Deleted'. These filters are always available in the system. All contacts created in the system (except deleted ones) are shown in the 'All' filter. The 'Deleted' filter is available only for users who have administration rights. When a contact is deleted from the list, it is moved to the 'Deleted' filter and can be restored if necessary by the corresponding command. When a contact is removed from 'Deleted', it will be impossible to restore it.

2. **Command Bar**

   In the command bar of Contacts you can see 'New contact' and, in case you have appropriate rights, 'Export' and 'Import'. 'New contact' is used for adding contacts to the system. By 'Export' you can export contacts into a separate file, while 'Import' allows importing a CSV file with contacts to the system.

3. **Working Area**

   The main part of the module window is occupied by the working area. Here you can add, edit and view contacts. The contents of the window depend on what filter is currently selected. The way contacts are represented can be customized.

9.2. Working with Contacts

All contacts available in TeamWox are displayed as a list. Up to twenty contacts are displayed on one page. If the list contains more than twenty contacts, a page selector appears at the end of the table.


Several functional buttons are located in the command bar:

- **New contact** - using this command you can add a contact to the system;

- **Import/Export** - these buttons allow importing/exporting contacts;

- **Delete all** - if necessary, you can delete all contacts from the current filter. This command is unavailable in the 'All' filter.

In the system you can also filter contacts temporarily, not having to create permanent filters. To do this, enter the required combination of symbols in the search line and press 'Filter'. To make working with clients more convenient, you can use their sorting by the following columns: 'Name', 'Position', 'Department', 'E-mail', 'Website', 'Creation date' and others. You can also add more columns to the table. In order to do this, click on the arrow above the first column, check required fields and press 'Apply'.

When putting the mouse cursor over the line with the contact, the 'Delete' button used for deleting separate contacts appears at the end of the line. Deleted contacts can be restored only by TeamWox administrator. If you press on the e-mail address of a contact, the editor for writing an e-mail will be opened.

If you keep the mouse cursor over the contact name a little longer, a pop-up tooltip with details will be shown:
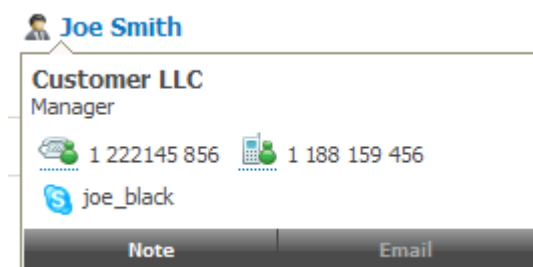
From the tooltip you can call the contact using one of the corresponding buttons. If you press on this button, you will be moved to the 'E-Mail module for creating a new e-mail. The e-mail address specified in the contact details will be automatically added to the 'To' field. Using the 'Note' button you can add a comment to the contact's history.

In order to view information about a contact person, click on his/her name in the list. The contact's profile with all the available details will be opened. Four tabs will appear in the navigation bar: Overview, Edit, History and E-Mail.

'Overview' contains all details about the contact. Character # and the unique identifier are located to the right of the contact name in the upper part of the working area. This is the permanent link to the contact. It can be copied through a context menu and pasted in your messages. Using 'Print preview' you can prepare the information about the contact for printing. If you press on it, data for printing will be opened in the preview mode. It can be printed then by standard means of your Internet browser.

In tab 'Edit' (analogous to the window of [new contact creation](#)) you can edit information about the contact person. Information about all changes will be saved in the History tab.

In tab [E-Mail](#) you can see the entire history of your communications with the contact person. If you or any of your colleagues have sent e-mails to this person, they will be available through this tab.

9.3. New Contact

Now let's see how we can add new contacts. In order to add a new contact, press 'New contact' in the command bar of module Contacts. The following window will be opened:

Here you should enter details about the contact person added. For your convenience, the window is divided into blocks: Main, Contact information and Address. Fill out the fields and press 'Create' in the lower part of the working area. The contact will be added to TeamWox.

If you have linked the contact to an organization (filled out the corresponding field), it will appear in the profile of a selected organization. All access rights will be inherited in this case. For example, if new employees don't have permission for viewing a certain organization, contacts linked to this company will also be unavailable to them.
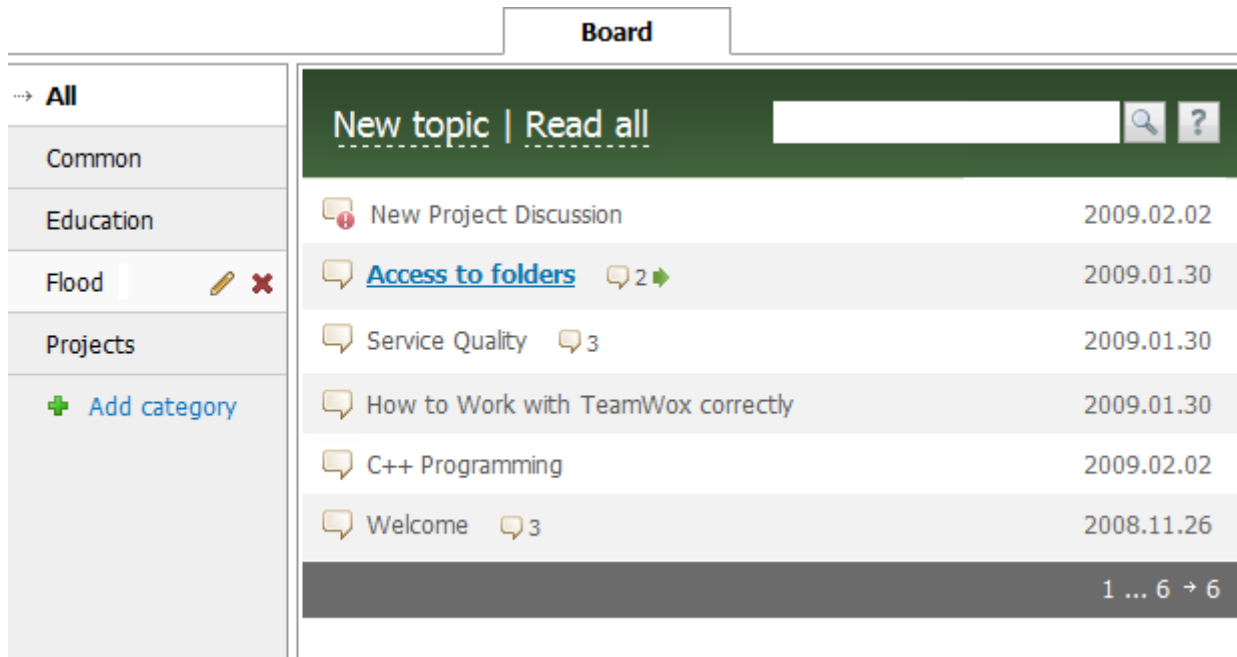
Attention: If contacts aren't bound to organizations, they are marked by a corresponding icon and are considered Private. They will be unavailable to other employees.

You can edit information about the contact at the 'Edit' tab which is in the navigation bar in the contact viewing mode. The editing window is analogous to the contact creation window.

10. Board

The TeamWox Board is intended for organizing discussions and publishing messages by all company employees. This is the most convenient place for the in-house PR allowing to share news and company policy, communicating the company's goals to every employee. Another important aspect is knowing more about the people you are working with - their likings, hobbies, their ideas. It is Board where you can get to know your colleagues better.

The TeamWox Board can become a perfect substitute for hours-long meetings. You can create a closed category and lead discussions with those, whose opinion is necessary for solving the problem. Other employees will know nothing about such hidden meetings. And you won't have to distract them from their daily work.


The convenient advantage of Board is its close interaction with other modules of TeamWox. Besides the standard possibility to insert graphical, audio and video files, you can attach documents from the Documents module. Using the built-in editor you can draw a scheme, diagram or chart right in the message body. Due to the extended possibilities of TeamWox, you can also insert links to e-mails, organizations, tasks or discussion of a similar topic.

10.1. Board Module

The page of Board can be divided into three areas:
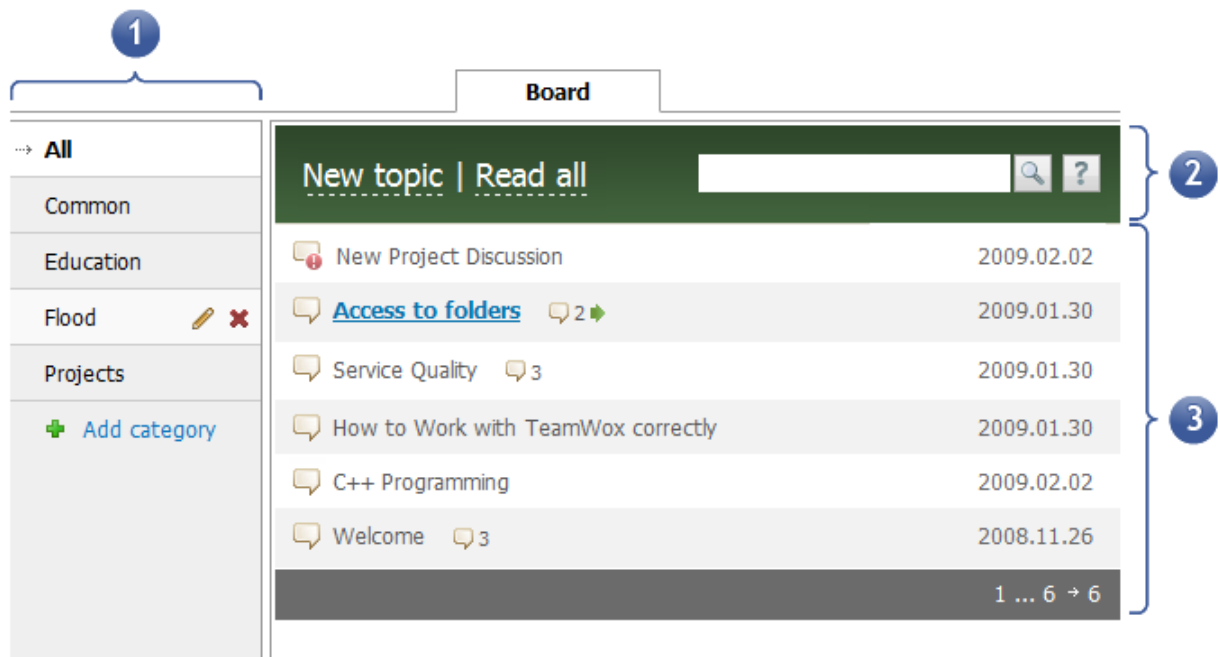
1. **Navigation**
   Here you can see all categories available to you according to access permissions given to you. You can select a category by a click on its name. From this field you can create or delete categories and set permissions to them using corresponding buttons. They can be available to you only if you have corresponding permissions. Be default, category 'All' is opened as you enter the Board. It is always available to you and unites all Board topics available to you.

2. **Command Bar**
   Here you can create a 'New topic', mark all topics as read (command Read All) or go 'Back to list' if you are viewing any of discussions. The right part of the command bar contains the search line and the Help button.

3. **Working Area**
   This is the main area of the Board module. It contains the list of all topics of the category selected in the navigation. They are displayed as a list and sorted out by the date of their last modification. If you press on a topic, it will be opened in this area.

10.2. Working with Board

Now let's learn how to work in the Board module. After you have entered the Board, select the necessary category in the navigation bar. In the working area the list of topics from this category will be displayed.
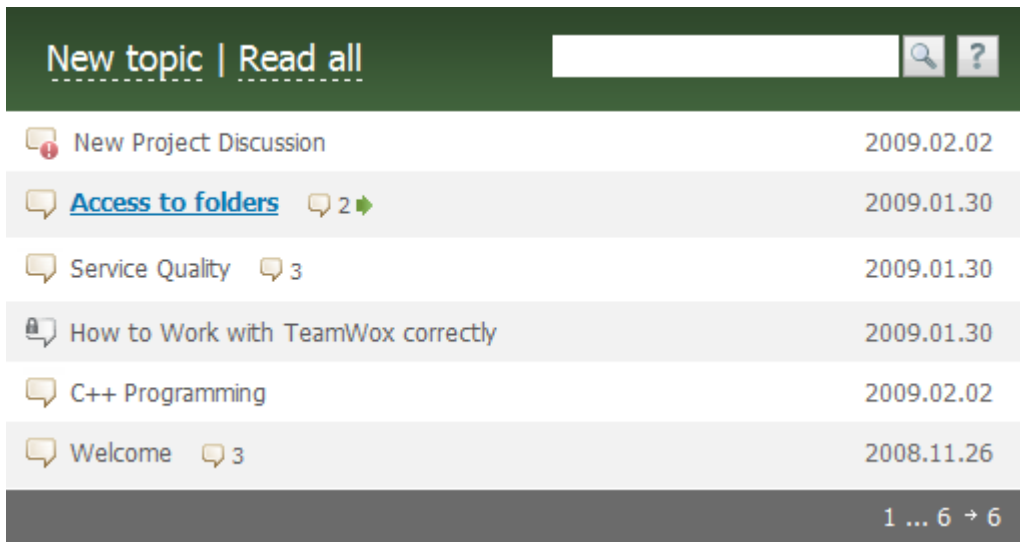
If you keep the mouse cursor over the topic a little longer, a tooltip appears. The tooltip contains the name of the category, to which the topic belongs, and first lines of its text. To the right of the topic subject, the number of comments is displayed. If you press on it, the topic and its last comment will be opened. If you haven't read the topic yet or new comments appeared in this topic, its subject appears in bold blue font.

Attention: If you press 'Read all', all topics of the forum will be marked as read. This function is convenient if a user has long been absent in the system.

If the topic icon is marked by ❶, this means that the topic is of high priority. The high priority can be set to a topic when creating or editing it. Topics with high priority are always listed on the top of the list, all other topics are listed below them according to the date of their last modification. If a board topic is marked by 🔒, this means that it is closed, and no comments can be added to it anymore.

In order to view messages in a Board category click on its name. The following topic viewing window will be opened:

Below the topic name its details are shown: its author, day it was created and category. When putting the mouse cursor over the author's name, a tooltip with the information about the author and his/her image appears. If you press on the category name, the list of topics in this category will be opened. To the right of the number of comments and to the right of each comment symbol # is displayed. This is the permanent link to the topic or a certain comment in it. This link can be copied through a context menu and then inserted in your messages.

If you are the author of a topic, you'll see buttons 'Edit', 'Close' and 'Delete'. Click 'Edit' to go to the topic editing window, which is similar to the topic creation window. 'Close' allows closing discussions in this topic. After this button is pressed, users can't add comments anymore. You can delete a topic by pressing 'Delete'. A window with question 'Do you want to delete the topic?' will appear. Press 'Ok' to confirm.

If you want to add a comment to a topic, press the 'New comment' button located at the end of the selected topic. The message editor window will appear. As soon as you have written the comment text, press 'Add' and you comment will be saved.

Here you can also reply to other users' comments. To do this, click on the pop-up button 'Reply' in the comment you are replying to. This comment will be automatically quoted in your message.

Binding of Board with the Documents module provides additional possibilities. You can attach any file to your message, as well as copy attached files to Documents right from the topic viewing mode. This function is available only if you have corresponding permissions for the 'Documents' module.

You can also edit or delete your comments using corresponding pop-up buttons. To go back to the list of board topics press 'Back to list' in the command bar.

10.3. New Topic

Now let's try to create a new topic, for example to congratulate one of your colleagues on his/her birthday. In order to create a topic, click on 'New topic' in the command bar. The following window will appear:
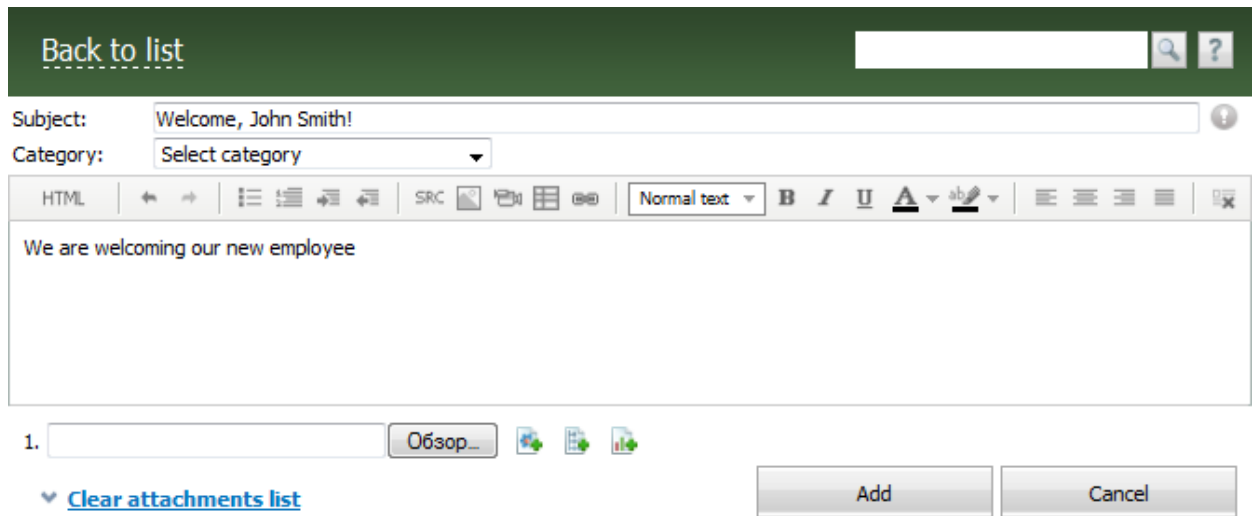
In the 'Subject' field specify the subject of the topic, e.g. "Welcome, John Smith!" The priority setting button is located to the right of 'Subject'. Click on it to set higher importance to the topic, and it will be displayed at the top of the list of topics.

In 'Category' select a corresponding category from the drop-down list. It contains all categories that are available to you. If you press 'New topic' while being inside any of the Board categories (except for 'All'), this category will be automatically selected in the 'Category' field.

Below is the message editor, using which you can add a text and attach any files. The editor is the same for all the modules of the TeamWox system. It was described in 'Tasks' section.

As soon as all the above fields are filled out, press 'Add' and the topic will be created. If you press 'Cancel' or 'Back to list', you will be moved back to the previous window, while the topic won't be saved.

11. Chat

Using the Chat you can communicate with your colleagues and company's clients over a protected network. This will prevent information leak. For exchanging messages with colleagues, each user has a separate group 'Personal', where all incoming and outgoing messages are stored.
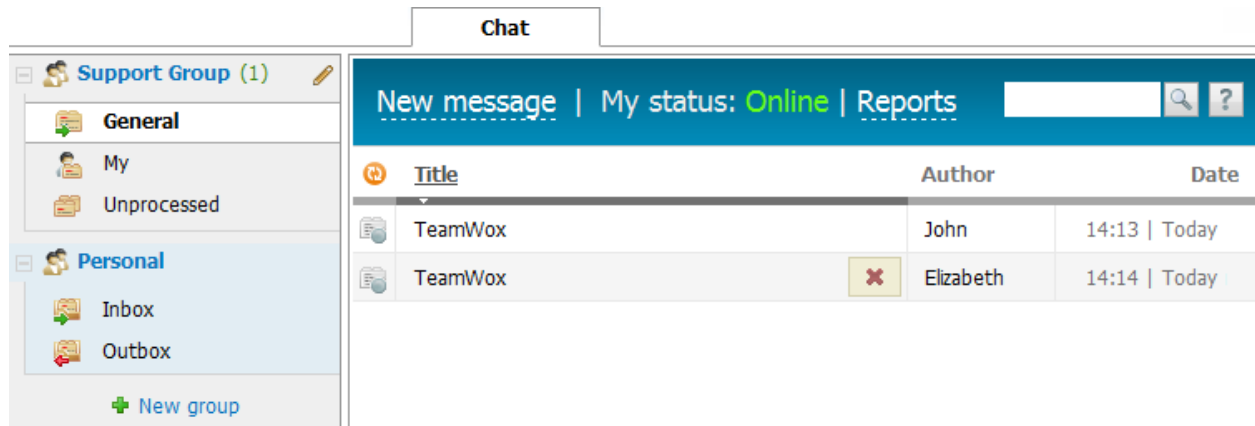

Other groups in Chat are intended for online communications with your clients and other companies. The number of your company's employees who can participate in such a dialog with your client is unlimited. This is possible due to the fact that the Chat module can be connected with your website and specialized service groups can be added. Such groups can differ, for example, in service languages, binding to different websites or product categories.

Chat being connected with Organizations, any dialog with your website visitor can be linked to a certain organization. All chat messages are written in logs, so information is automatically saved in the organization history. Later you will be able to easily find this information to recall the details of your dialog.

11.1. Chat Module

The window of the Chat module is divided into three parts: navigation, command bar and working area.
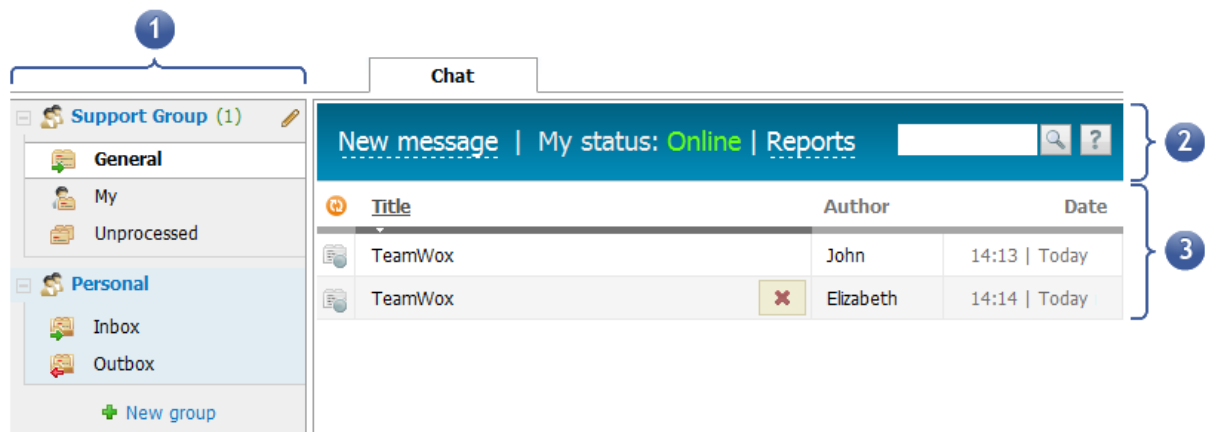
1. Navigation
This area allows working with all the service groups. The 'Personal' group is always available in this bar. All dialogs with you colleagues inside the TeamWox system are stored here. Creation and deletion of groups as well as their setup can be performed from this bar. However, this requires corresponding permissions given to you by the administrator of your TeamWox.
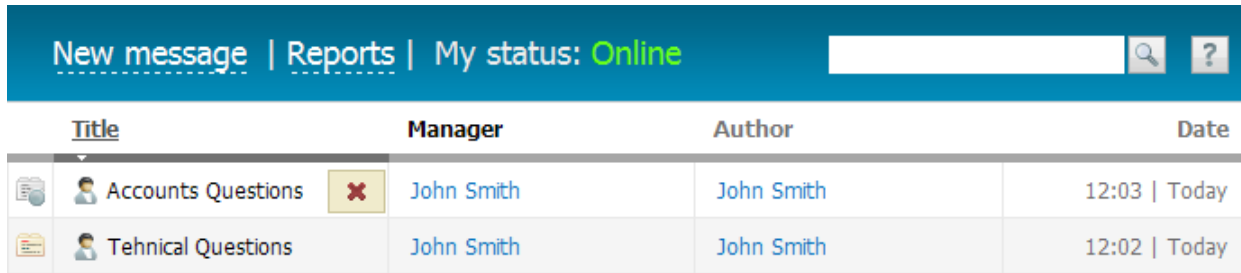
2. Command Bar
The following commands are available in this module: New message (initiate a new dialog), Reports (monitoring of users' activity in Chat) and My status: Online/Offline (your status denotes possibility to accept messages from the website visitors). 'Back to list' appears when viewing reports on Chat, and allows returning to the list of Chat messages. Button '?' for opening Help is located in the right part of the command bar. It is standard for all the modules of TeamWox.

3. Working area
This part of the module window contains the list of dialogs of a selected service group. If you choose viewing reports, they will be opened in the same working area. The characteristic feature of Chat that distinguishes it from other modules is that messages are viewed in a separate window. This window is standard both for viewing dialogs and creating messages. Your website visitors see the same window.

11.2. List of Dialogs

All dialogs in the Chat module appear as a list:

Information about dialogs is represented in five columns in this list:

1. The first column indicates the condition and status of the dialog:

   - If the dialog does not contain answers of your company employees, a red circle blinks on the dialog icon;

   - If the page was not updated on the client's side for more than 1 minute (e.g. if the client has closed the dialog page and moved to another page of the website), an orange circle appears on the dialog icon;

   - Active dialogs that contain at least one reply of the company employees, are marked by an icon with a green circle on it;

   - The icon becomes gray for completed dialogs;

   - Messages received from clients while there were no active specialists of the service group are marked by a gray icon with a slashed circle.

2. **Title**
   This column shows discussion topics selected by the website visitors before starting the dialog. This list of topics should be pre-set at the stage of setting up service groups. If a dialog is assigned to certain users, the 'Assigned' icon is shown before the name of such a dialog. When putting the mouse cursor over the dialog title, a tooltip with several first phrases of the dialog appears.

3. **Manager**
   The name of a user who added the first reply in the chat. When putting the mouse cursor over the name, a tooltip with brief information about this employee appears. If you click on the user's name, you will be moved to viewing his or her profile in the 'Team' module.

4. **Author**
   Name of a client or company, if a dialog is assigned to an organization. For internal chats this can be the name of your colleagues.

5. **Date**
   The time when the dialog was initiated.

> **Attention:** The client part of a group has the Online status if at least one user with permissions to dialog in the group is currently connected.

The list of dialogs can be sorted by any of the columns. In order to sort the list, left-click on the column header. Irrespective of a selected sorting, active dialogs are always listed first, those waiting for replies will be listed then.

Dialogs in service groups cannot be deleted. users can only delete personal dialogs in the 'Personal' group. After a dialog is deleted, it cannot be restored.

11.3. New Dialog

Now let's try to initiate a dialog. In order to create a message, press 'New message' in the command bar. As soon as you press it, a window for selecting employees with whom you are going to communicate will be opened. The unified dialog window will appear for each user added in the list. They can join the dialog by pressing 'Join'. You can join only to active dialogs. If you select a completed or unprocessed dialog, you will be moved to viewing it. The chat dialog window appears as follows:
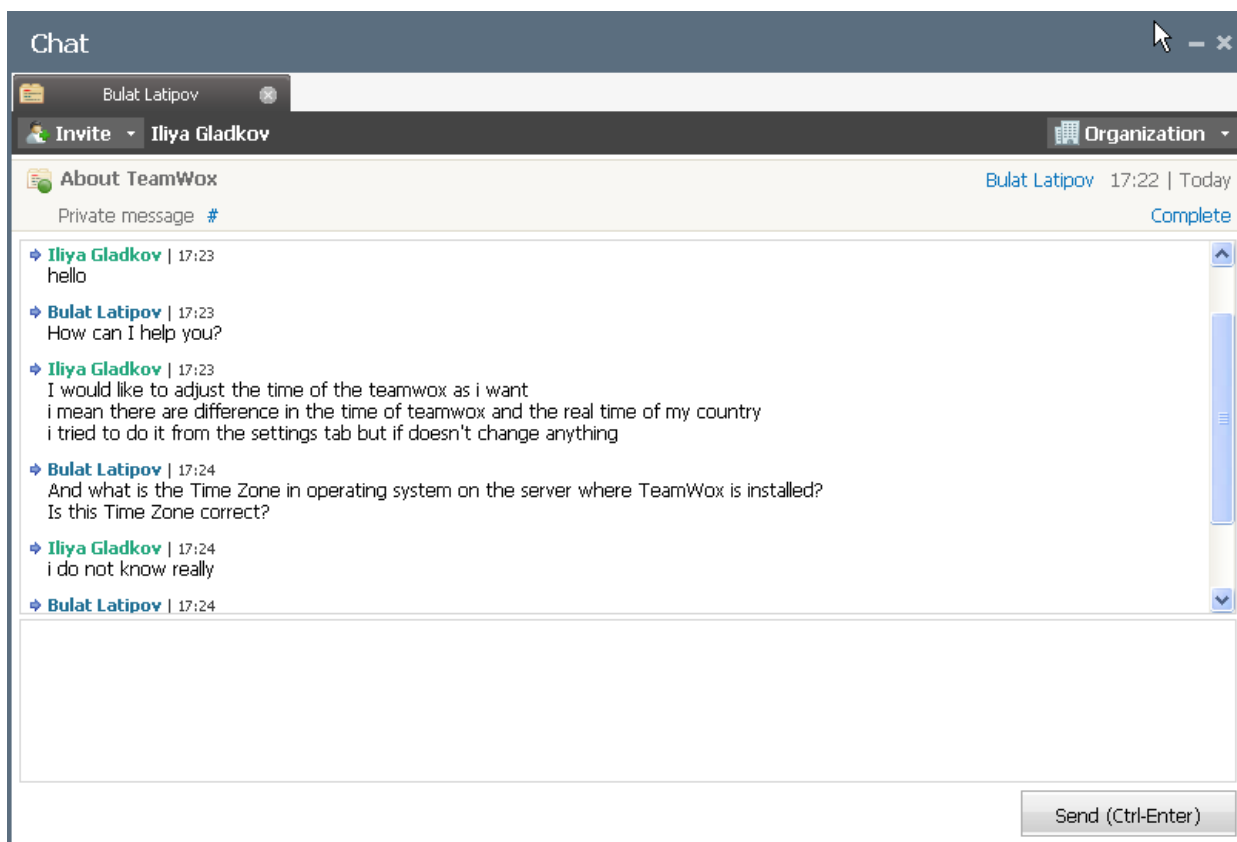
The dialog window can be minimized, maximized or hidden using the corresponding buttons in the upper right part of the header. These buttons do not close the dialog - they will remain available from the list of dialogs in the Chat module. To make working with chats more convenient, you can resize dialog windows. To do this, press and hold the button in the bottom right corner of the window and move the cursor till the necessary window size.

In the upper part of the window tabs of dialogs are displayed. The tab header shows the name of a person who has created the first message. If you lead simultaneously several dialogs, a single window with several tabs (a separate tab for each dialog) will be open. To move to a dialog press on the corresponding tab. To close a dialog press on the red cross in the right upper part of the tab. In this case the dialog will not be completed, so you will be able to open it again from the list.

Below the tab titles two buttons are located:

1. **Invite** - using this button you can invite your company specialists to take part in the dialog. As soon as you invite a user, he or she will see a blinking invitation to the dialog in the upper right part of TeamWox header.

2. **Organization** - using this button you can link a dialog to a selected organization from the corresponding client base. As soon as you press the button a list of organizations appears, where you can choose a necessary company. After that the name of this company will be shown in the 'Author' field of this dialog and the chat will be bound to the organization and stored in its history.

Below appears information about the dialog. The dialog icon displaying its status and the dialog topic are located below the 'Invite' button. Possible statuses are described in the previous section. You can edit the topic of any dialog. To do this, put the mouse cursor over the topic area and click in the appeared field. After that enter the new topic and click in any location outside the editing area.

Then comes the organization that was specified by a client before the dialog was initiated and the IP address of the computer, from which the request has come. To the right of IP the # sign is located. This is the permanent link to this dialog. The link can be copied using the context menu and then inserted to your messages.

The dialog initiator's name and dialog start date are shown below the 'Organizations' button.

Attention: If you press on the client's name, a window for writing an e-mail to this client will be opened in the [corresponding module](). The e-mail address specified by the client before the dialog start, will be automatically inserted in the 'To' field.

A dialog can be completed using the 'Complete' button. As soon as you press it, window for writing a replay will disappear and the header will become gray. The reply field will also be hidden on the client's side, and the entry that the employee has closed the chat will appear in the dialog history.

The central block of the dialog window is its history. Client's name is red-colored, while yours is blue-colored. The bottom block of the window is intended for writing messages. Enter the message text and press 'Send'. Messages can also be sent using the key shortcut 'CTRL+Enter'. Button 'Select frequently used phrases' is visible to company employees only. It is intended for quick reply by inserting a phrase from a pre-set list (the list can be added at the stage of service group creation).

12. Search

The search system of TeamWox allows to quickly find necessary information. Using this system you can easily find a year-old agreement, task, chat and other materials. All you need to do is specify a key phrase, and the system will show all results satisfying this request.

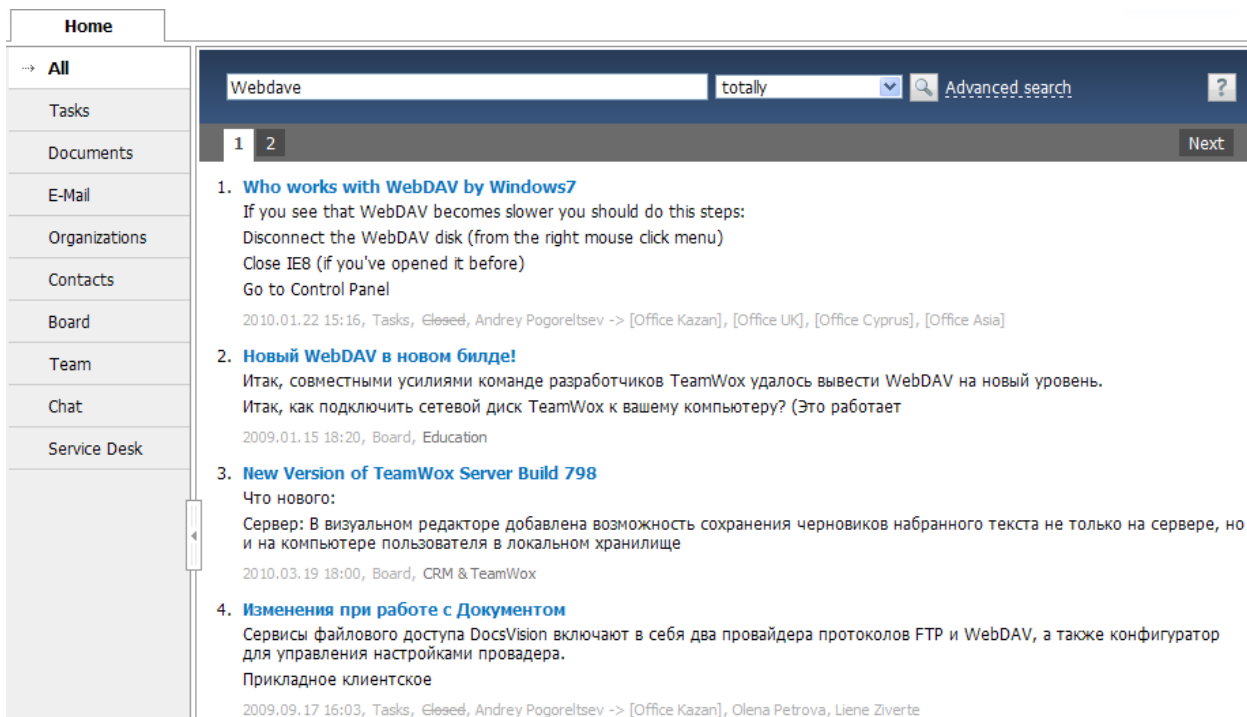**Attention:** For a quicker search you are recommended to specify as much information as possible.

TeamWox supports morphological search. It means you enter a word and the system will search by its variations. For example, if you request 'market' it will show 'markets', 'marketing', etc. With the morphological search finding necessary information is much easier.

How Does It Work?

The search line is always available in every module. It is located in the right part of the command bar.

All you need to do is specify a key phrase you want to find and press the 'Enter' key or click on the 'Search' button. All results satisfying this request will be shown in the working area.

Ten first results are shown on the first page. To view further, switch to the next page using the page selector.

Navigation of the search systems allows to quicker find wanted information. It offers a filter by all modules that are available to you. By switching between them you can apply different filtering to search results. For example, if you are looking for a document, switch to the corresponding section in the navigation bar. Documents that satisfy your request will be shown in the working area. To search in the total system, select 'All modules' in the navigation bar.

Advanced Search

If you need to narrow search results and quicker find information, use the advanced search - click 'Advanced search' to the right of the search line in the command bar. Additional fields will appear to make you search request more precise.

You can specify time period, author and assigned employees. You can fill out all these fields or only those that you can, leaving other ones empty. Information satisfying these fields and the key phrase will be shown in the working area. Thus you can faster find necessary information.

Attention: The link of 'Advanced search' appears only on the page of search results after you have chosen the simple search from any of modules.

13. Team

Team is one of the most important modules of the TeamWox groupware system. It contains information about your colleagues.

Here you can find personal data, address, contact details (IM, e-mails, phone numbers), information about how long the employee has been working in the company, his/her working hours. All user-related documents are also stored here: labor agreement, scanned copies of passports, insurance card, etc. With such a wide set of possibilities HR management becomes easier and collaboration work is much more efficient.

The window of Team is also divided into three areas. The navigation bar contains four tabs: Structure, Team, Birthdays and Hierarchy.

Structure

This is the default tab opened as you enter the Team module. It shows the structure of your company and allows quick navigation trough the information about employees.

The first column shows company departments. The first user who is shown to the right of a department name is its head, after whom all other employees are shown.

When putting the mouse cursor over a user's image, a tooltip appears. It contains brief information about your colleague and two buttons: Task and Chat. Using these buttons you can create a new task for this user or invite him/her into a chat. If you press on the user's image, a window with detailed information about the user will be opened.

Team

Select it in the navigation to change the way information about employees is represented. Now they are shown as an extended list. If you press on a user's name, his/her Profile will be opened. From the list of users, you can also see an employee's status (working/not working) and the last fixed time when the user was in the system.

Here you can temporarily filter employees by name and surname. To do this, enter the wanted combination of letters from a name or surname and press 'Filter' (don't confuse with the 'Search' button).

Birthdays

This tab shows information about your colleagues' birthdays. It can be viewed as a list of nearest birthdays or as a diagram.
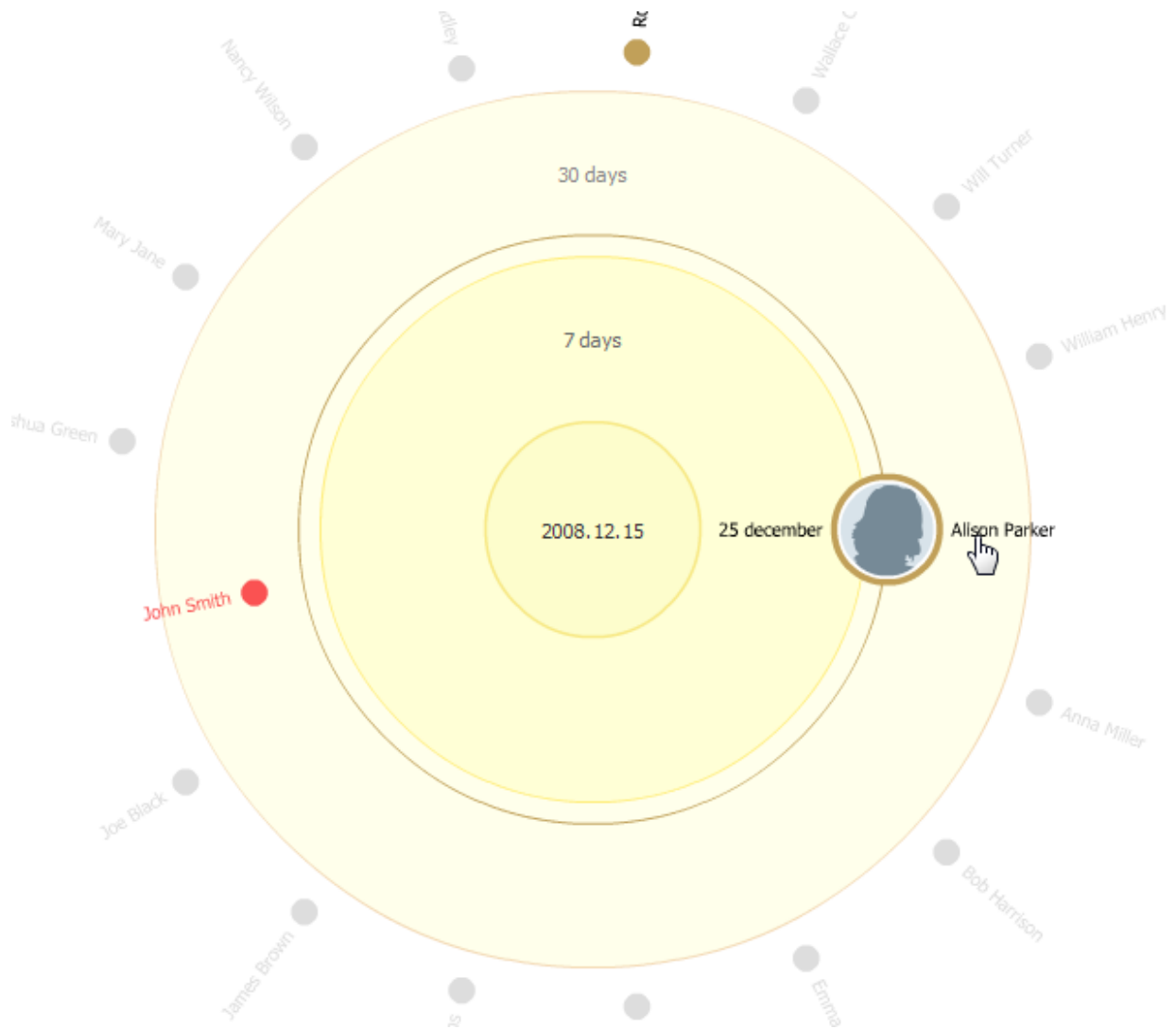
The list of nearest birthdays is opened by default. If you are viewing the circle diagram, you can return to the list by pressing the corresponding button in the command bar.

Hierarchy

This is the structure of your company in the form of a diagram: circle, tree and animation. You can switch between them using the buttons that are located in the command bar.
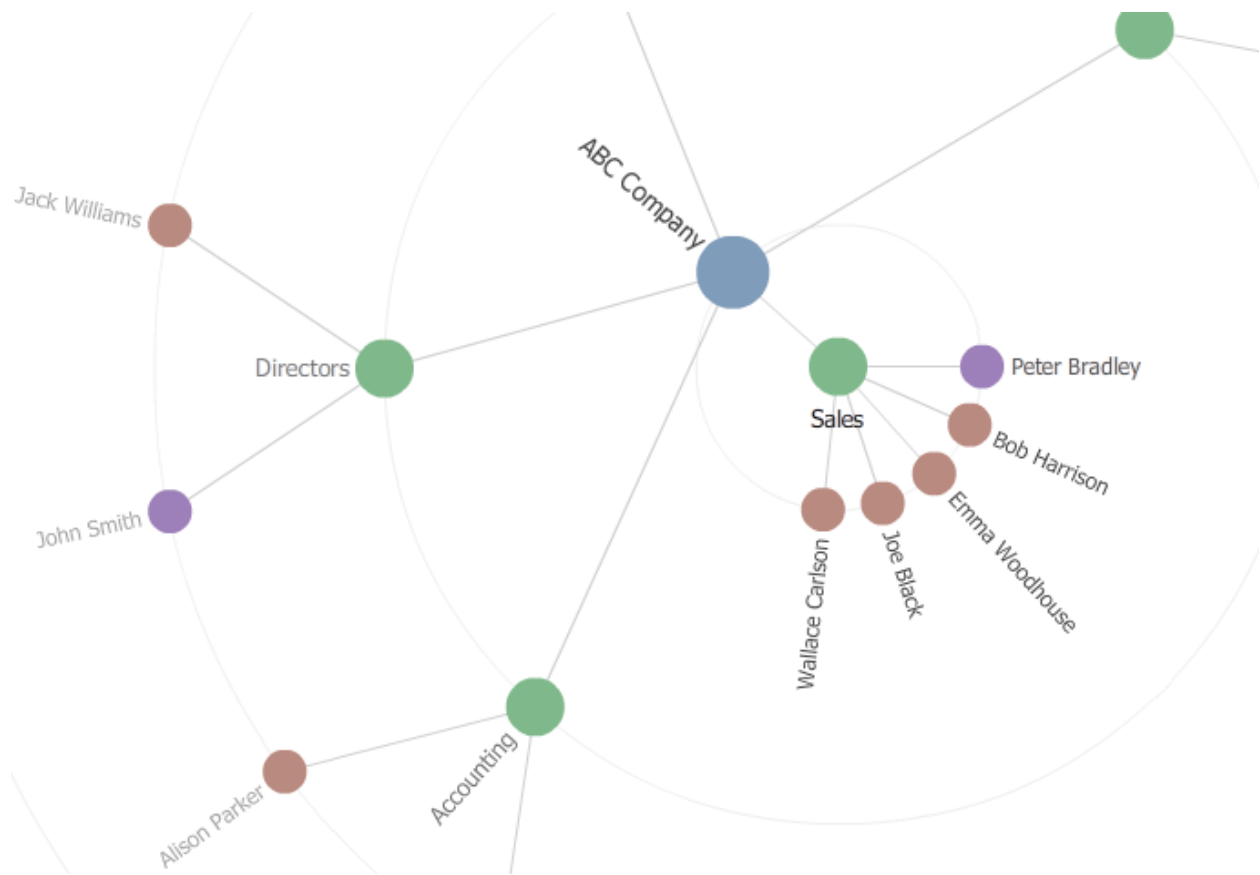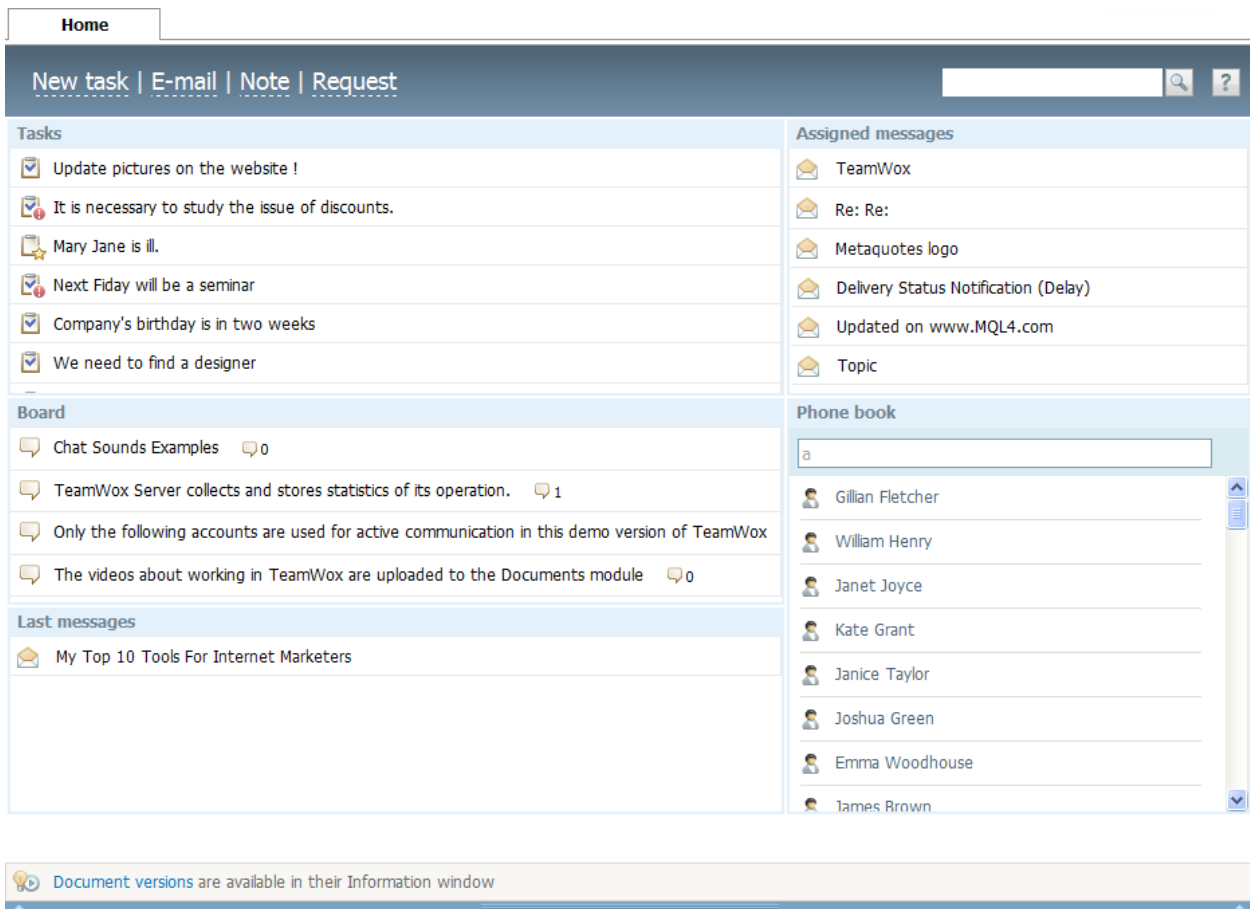

These tools can be useful when searching for a separate user or a department.

Attention: Only departments are shown in the hierarchy. It can't be used for searching for groups.

14. Home Page

The home page of the TeamWox system is designed for monitoring relevant information. In other words, this is your desktop where all the up-to-date information is gathered.

Here you can find links to documents that are in hand, board, open tasks, etc. To help you manage this information, TeamWox offers a number of widgets that are available to you in accordance with your access permissions.

A widget is a graphical element of a user interface that performs certain actions. It provides access to topical information from the module that is connected with the widget. By default, widgets are arranged in templates according to your position. If necessary, you can add or delete them, as well as arrange them on the home page of your TeamWox.

Several functional buttons are located in the command bar: New task, E-mail, Note, Request. Using them you can create corresponding elements. Button "?" for calling the TeamWox Help is always available in the command bar.

14.1. New Widget

Widgets are shown on the home page to speed up execution of certain actions for a user. They promptly reflect update of information in the system (e.g. appearance of a new task, board topic, e-mail, chat, etc.)

To add a new widget, click on any place of a stripe at the bottom of the Home page:
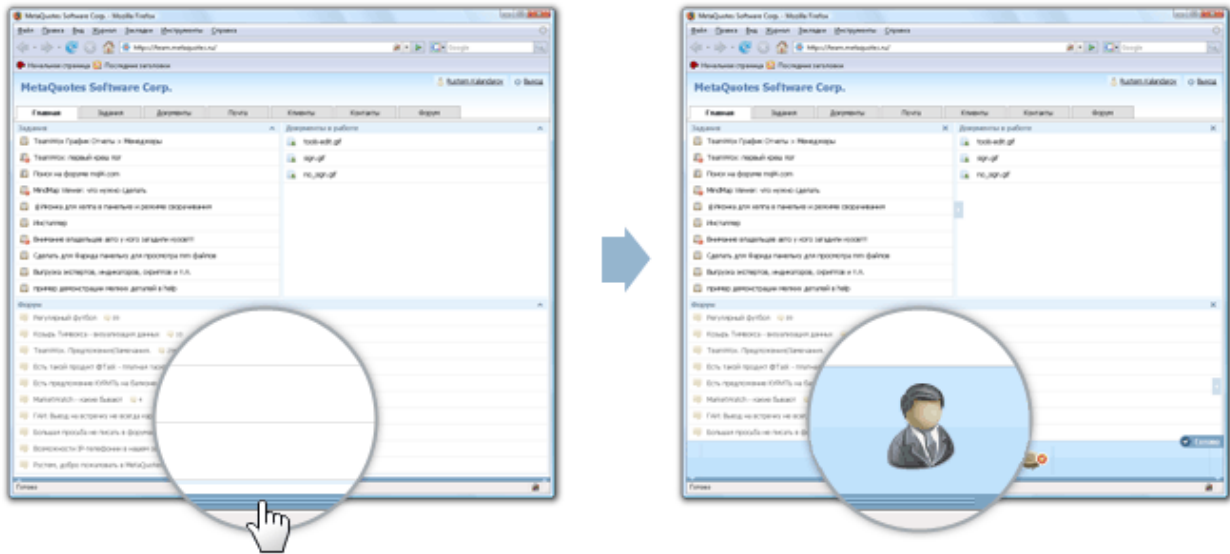
As soon as you do it, all widgets available to you will be shown. Purposes of the widgets are described in the TeamWox Help in sections devoted to corresponding modules. Widgets that are already selected are marked by 🗸.

How Does It Work?

To set a widget on the Home page, the Drag'n'Drop technology is used. It means you should left-click on a necessary widget and, holding the mouse button pressed, drag it to the necessary part of the window. Places where widgets can be positioned are marked by a red dotted frame. Widget size can be changed using arrows on the lower and right border of the widget.

A widget can be removed from the Home page by a left-click on its icon in the selection bar, or by pressing 'Close' in the widget header.

> **Attention**: For the convenience of setup, templates of widget positioning are offered in TeamWox. They are available using the button 'Widget presets' in the left part of the widget selection bar. You can select a template according to the specifics of your work. For example, HR specialists should use 'Directors, HR, Accounting'. After you select a widget preset, widgets most often used by these employees will be positioned in the standard order in the working area.

To save changes press 'Update' in the upper part of the widget selection bar.

15. Conclusion

   Now as you have studied this brief training course, you know all the key functions and possibilities of the TeamWox groupware system. Now you can use it in your daily work.