



OpenHand™ User Guide (Windows)

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1. GETTING STARTED

1.1 Overview

Welcome to OpenHand.

OpenHand allows you to dial in to your network remotely via a laptop or PocketPC, to access and update your email, calendar, contacts and tasks. OpenHand gives you the option of working in real-time, or downloading the information to your device and working offline.

If you choose to work in real-time, the information is not stored on the mobile device – it is held only on your organisation's server. This means there is no risk to your information if your device is lost or stolen, and that the information is updated in real-time on your servers.

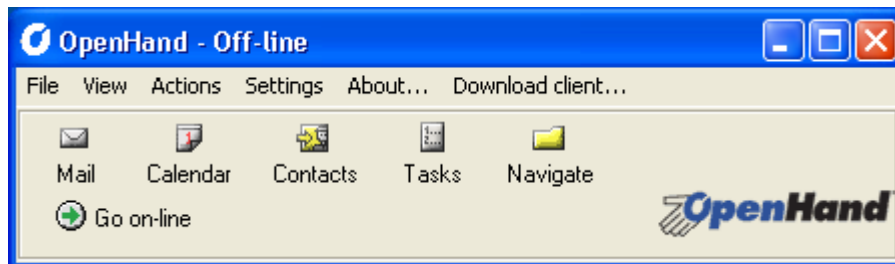
Alternatively, OpenHand allows you to store emails, calendar items, contacts and tasks locally on the device. These files can then be accessed and edited when you are offline (they are also accessible when working online), and uploaded when you next connect. Unlike synchronisation, which transfers all files, OpenHand allows you to save only the required files.

This user guide is aimed at PC users, a separate guide is provided for PocketPC, Palm, Clié, Sony Ericsson P800/P900 users.

1.2 Starting OpenHand



1. Double-click the **OpenHand** icon.
2. The OpenHand Main Menu screen is displayed.










OpenHand Main Menu Screen – Not On-Line

1.3 OpenHand Screen Layout and Navigation

















From the main window, use the **View** menu or click one of the following icons on the *Main Menu*:









1.3.1 Main Menu and Toolbar

	Allows you to read, reply to and create new emails.
	Shows your calendar and appointments, which you can add and edit.
	Shows a list of your contacts – from here you can add and edit appointments.
	Allows you to view, add and edit tasks.
	Navigate your folders.
	Log in to OpenHand.
	Log out from OpenHand.

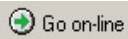
Tip: Hold your mouse over an icon to see an explanation of its function.

1.3.2 Other Icons

	Go to a different folder.
	Create a new item.
	View the selected item; from here the edit facility is normally available.
	Delete the selected item.
	Copy selected email(s) to the local mail folder.
	Recover emails saved in the local drafts folder.
	Find emails
<div style="border: 1px solid gray; padding: 2px;"><small>Sort By</small> Received, descending</div> Sort email list	
	Purge emails
	Edit
	Refresh the list and show any new items.
	Attach a file to an email
	Compose new email
	Send the email
	Reply to the sender of the email
	Reply to sender and all recipients of the email
	Forward the email to another recipient

	Saves a copy of selected folder (mail, calendar, etc.) to local drafts folder
	Select "To" email recipients
	Select "Cc" email recipients
	Select "Bcc" email recipients
	Find contact
	Change time interval displayed on your calendar
	Move list view up one page.
	Move list view down one page.

1.4 Log in to OpenHand

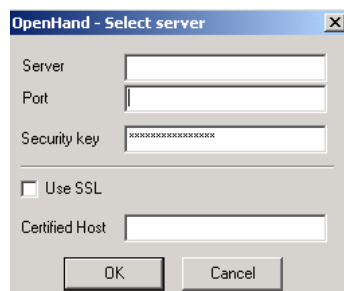
1. Create an active network connection (see your manufacturer's hand book for details).
2. Click on the green arrow on the OpenHand [Main Menu](#) to go on line. 
3. The *Login Menu* will be displayed.




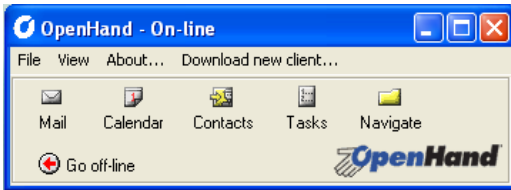
OpenHand Login Screen

4. Type in your **Username** for the server you are connecting to. The format depends on the type of server:
For Microsoft Exchange : <DOMAINNAME> \ <USERNAME>
5. Type in your **Password** for the server you are connecting to:
For Microsoft Exchange : Use your LAN Account password

N.B. The 'Connection' button should only be used when directed by your support personnel. For reference, this shows the 'IP' address of the OpenHand server and the connection port number. The Security Key box should **never** be changed without the prior approval of your IT support department.




6. Click  in the Login Menu (see 1.4.3 above).
7. The *Main Menu* will be displayed. The connection status arrow and text change to red and "Go off line" respectively.



OpenHand Main Menu Screen – On-Line


Notes:

- a. To simplify the login procedure you can check the box next to **Save Password**. The device will store both your **Username** and **Password** so you will just need to click **Connect** in future. This feature is controlled by your IT manager, if you cannot save your password it may be that you do not have permission to do so. You should consider the security implications before using this feature.
- b. If you are unable to log in:
 1. Check your **Username** and **Password** are correct and are in the right format for the type of server you are connecting to.
 2. Check that Caps Lock is not on.
 3. Click  to check your connection settings. Your network administrator will advise you of the correct settings.

1.5 Log out of OpenHand

1. Click on the red arrow in the [Main Menu](#). This will change to green and the text will read, "Go on-line".
2. To exit the Main Menu click on File then Exit.
3. Close your Active Network Connection.

1.6 OpenHand client information


1. Select 'About...' from the [Main Menu](#). The version and copyright information will be displayed. Press  to close the 'About' box.

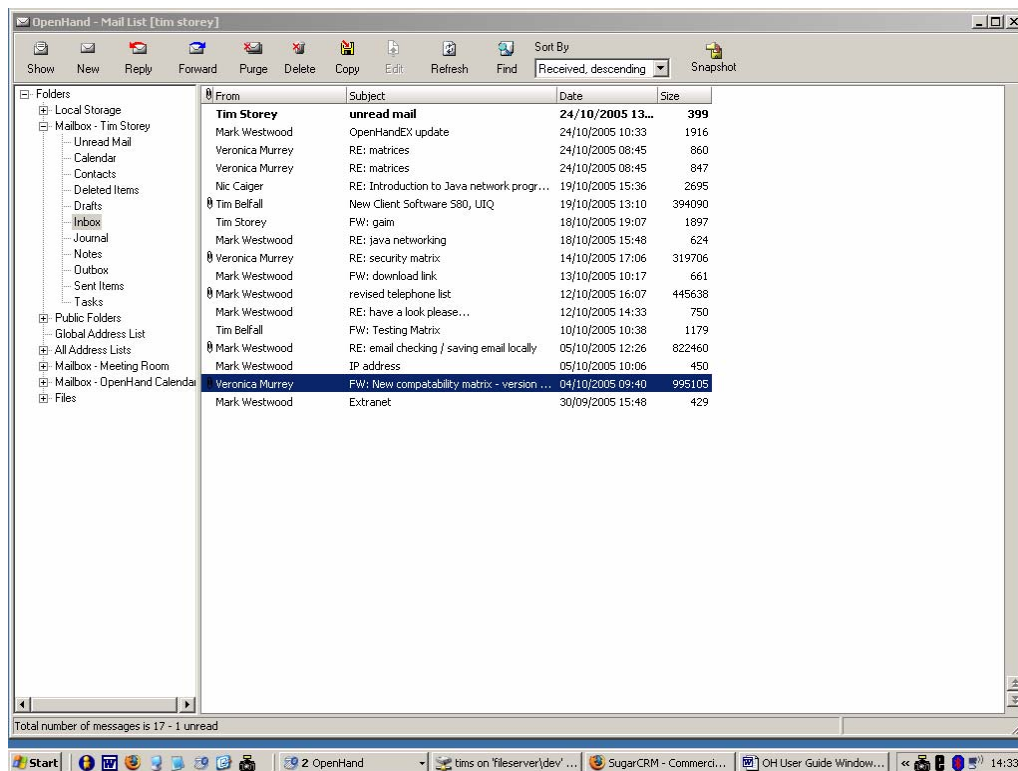


OpenHand "About" Screen

2. MAIL

2.1 View mail

1. Click  on the [Main Menu](#).
2. The *Mail List* is displayed. The screen is divided into the folder list and the emails in the current folder, displayed in descending order of date received. Unread emails are shown in bold.



Initial Mail List screen

Tip: On the [Main Menu](#) you can also click **View** and then click **Mail** to view your mail.


2.1.1 Access another Email folder

On the *Mail List*, click the required folder from the folder list. N.B. Clicking on the + or – next to a folder will expand or contract the folder structure. Clicking on the folder name will list the emails within the folder.


2.1.2 Check for new Emails



On the Mail List, click  to see new emails.

2.2 Read an Email

1. Click  on the [Main Menu](#).

2. On the *Folder List*, click the required folder.

3. On the Mail List, double-click the required email, or highlight the email and click  Show.

Tip: You can reply to the email by clicking  Reply on the main toolbar, or use  Forward to send it on to different recipients.

2.3 Reply to an Email

1. On the *Mail List*, click the required email.





2. Click  Reply

3. The reply page is displayed with the sender pre-filled as the recipient and the subject pre-filled.

4. Type in your reply.

5. Click .

Notes:

- You can add additional recipients by specifying their email address in the To, Cc or Bcc fields. Either click  To... to select recipients from your contacts list or type in the email addresses separated by a semicolon (;). Click  Cc... and  Bcc... to pick up contacts for those fields.
- You can click  to add any attachments to the email. This opens a browse window: select the directory and double-click on the required file.

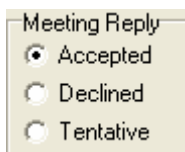
2.4 Accepting a Meeting Invitation

1. On the *Mail List*, click the required email.

2. Click  Reply

3. The reply page is displayed with the sender pre-filled as the recipient and the subject pre-filled.

4. Below the Subject line is the meeting reply selection box. Click on the required response.



5. Type in your reply.

6. Click .


2.5 Forward an Email

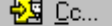

1. Click on the required email.



2. Click **Forward**

3. The *Forward Page* is displayed with the subject pre-filled.

4. Enter the recipient(s) of the email in the **To** field, either by typing their email address or by clicking  to select from the *Contacts List*. Use a semicolon (;) to separate recipients.

5. Enter any recipients in the **Cc** and **Bcc** fields either by typing or clicking  and .


6. Type in your covering email.

7. Click .

2.6 Create a new Email


1. On the *Mail List*, click .

2. The new mail page is displayed.

3. Enter the recipient(s) of the email in the **To** field, either by typing their email address or by clicking  to select from the *Contacts List*. Use a semicolon (;) to separate recipients.

4. Enter any recipients in the **Cc** and **Bcc** fields either by typing or clicking  and .

5. Type in your email.

6. Click  to add any attachments to the email. This opens a browse window, select the directory and double-click on the required file.

7. Click .

2.7 Delete an Email

All deleted items are moved to the deleted items folder and may be recovered at a later stage.

1. On the email list, click the email(s) to be deleted holding the 'Ctrl' key to select multiple emails.



2. Click **Delete**

3. Click **Yes** to confirm.

2.8 Purge an Email

When a mail is purged it will be **permanently** deleted and cannot be recovered.

1. On the email list, click the email(s) to be purged holding the 'Ctrl' key to select multiple emails.



2. Click **Purge**.
3. Click **Yes** to confirm.

2.9 Save a local copy of an Email



1. Highlight the email(s) in the list view, and then click **Copy**.
2. An acknowledgement is displayed to confirm that your email(s) have been saved locally.

2.9.1 Access a local copy of an Email

Local copies of Emails are saved in two places, either the **Mail** or the **Drafts** sub-folder of the **Local Storage** folder on your device:

- The **Mail** folder is where emails are saved when you have simply selected them and saved a local copy.
- The **Drafts** folder is similar to an "outbox", storing the emails that have not been sent for some reason:
 - e.g. If you enter part of an address, OpenHand will attempt to resolve the recipient for you. If the email address is not recognised, the email is closed and saved to the **Drafts** sub-folder in the **Local Storage** folder.
 - e.g. If you are working on an email and your connection fails, your email will be saved in the **Drafts** folder.



1. Click **Navigate** from the [Main Menu](#), or select the Local Mail sub-folder from the Local Storage folder from the email list view.
2. The screen will refresh and you will see a list of locally stored emails.



3. On the Mail List, double-click the required email, or highlight the email and click **Show**.
4. You can view an attachment by double clicking on the file icon under the email.

2.10 Printing an Email



1. Show the email by either double-clicking the email, or highlight it and click **Show**.



2. To print the email, press **Print**. The print dialogue box will be displayed, where upon select 'OK' to print the email.

2.11 Sorting an Email List

To make working with large numbers of emails easier, OpenHand can sort emails by either data received or by from or to whom messages were received or sent. This can be in either ascending (A...Z, earliest to most recent) or descending (Z...A, most recent to earliest) orders.

1. On the [Mail List page](#), click on the Sort By criteria.
2. Select the order the emails are to be displayed by.
3. The OpenHand server will sort the emails refreshing the mail list page in the order selected.



Sort by dialogue box

Also From and Descending orders.

2.12 Finding Email(s) from within an Email folder

OpenHand's Find facility refines the Email list to show only emails that meet certain key criteria. These are:

1. From (Email address)
2. To (Email address)
3. Subject heading
4. Message text (not attachment text)
5. Read or unread messages
6. Message received or sent after, before or between selected dates.

Any combination can be used to further reduce the resulting email list.

1. On the [Mail List page](#), click on **Find**.



Find button

2. The Email selection screen will appear.




Selection page

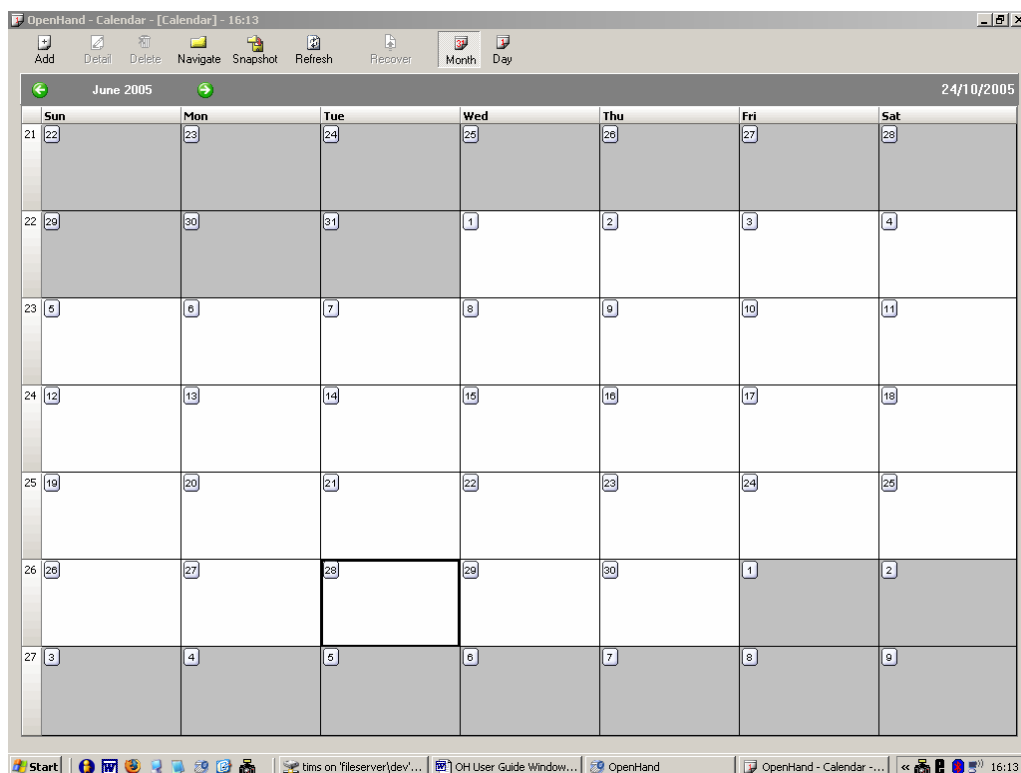
3. Enter the key words that pertain to the email(s) to be found, and/or select the email status.
4. One or both dates can be used to further narrow the resulting Email list.
5. Click on **OK** to start the search or **Clear** to remove all the criteria data to start afresh.

The OpenHand server will search for the relevant Email(s) and will display the result in the Email list view.

3. CALENDAR


3.1 View Calendar

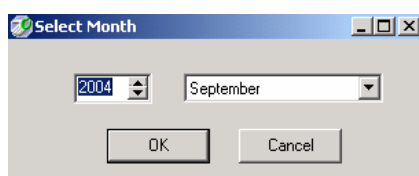
1. Click the calendar icon  on the [Main Menu](#).
2. The *Calendar Page* is displayed showing the currently selected month and the schedule for the currently selected date. Days with appointments are shown in bold on the monthly view.



Initial Calendar Screen

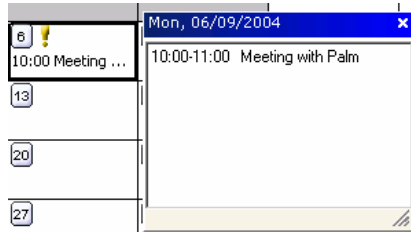
3.2 Navigating the Calendar

To change the selected date within the currently selected month, simply click on the desired date. This also works for visible dates in the next and previous months. To select a new month or year, click on the month and select the appropriate month and year.  To move one month forward or backwards click on the appropriate green arrow. To move to the current date, click on the button near the window's title bar that is labelled with the current date.



Month and year selection

Additional views can be shown in a number of ways. By clicking on a day, a mini day view window is displayed showing that days appointment list.




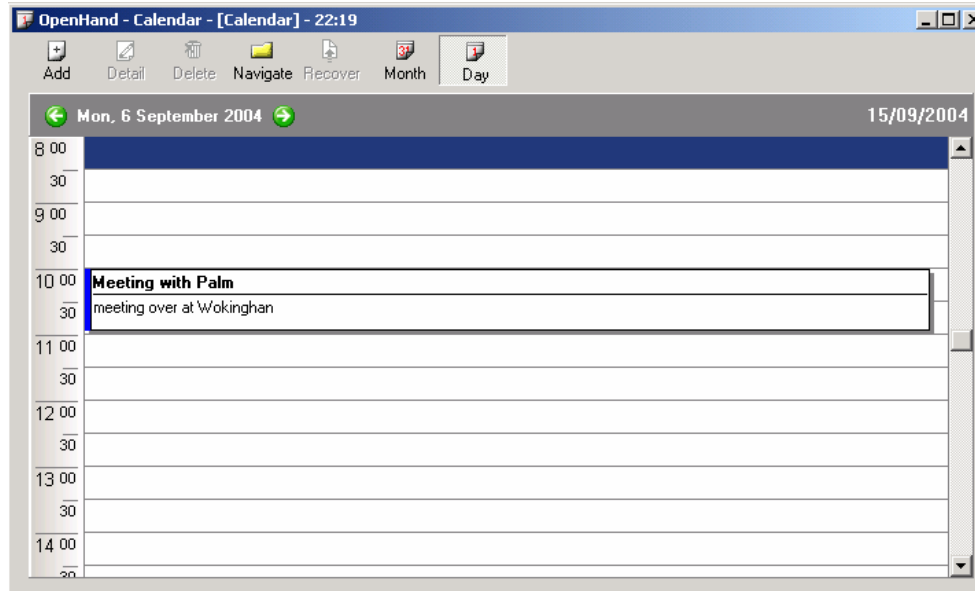
Pop up day view

To remove the view click on the X on the top right hand corner of the day view box.

To view an appointment, double click on the item or select it then press the Detail button.

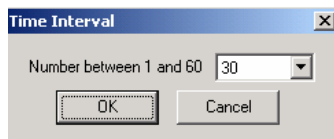


An alternate day view can be displayed by pressing  which will change the Month view to the more detailed Day view.



Day view

To change the time interval, 'right' click in the Day view. Select the required time interval.





Time interval

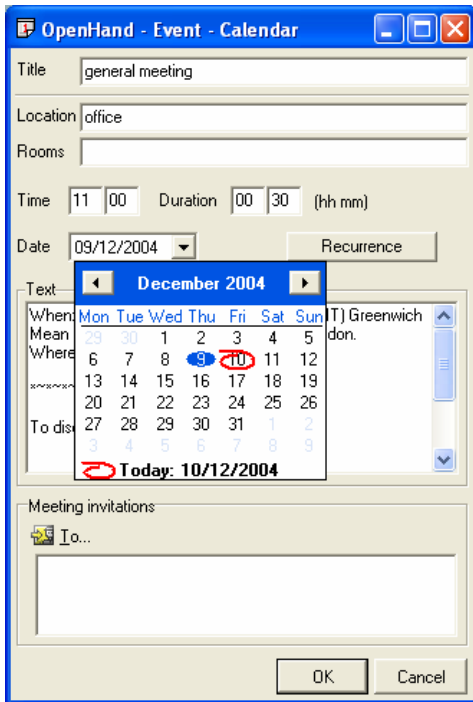
Note: Dates are displayed in the short date format specified on your PC. This can be changed as follows:

1. Double-click on **My Computer**.
2. Double-click on **Control Panel**.
3. Double-click on **Regional Options**.


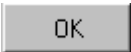
4. Select the **Date** tab and change the short date format.

3.3 Schedule an Appointment


1. Click  on the [Main Menu](#).
2. Select the date of the appointment by clicking the required date in the calendar window; use the month or year button to change the display, if required (see [section 3.2](#)).
3. Double-click an empty time slot in the schedule window or click on the start time of the appointment and click .
4. The *OpenHand Event* page is displayed with the date and start time of the appointment pre-filled.





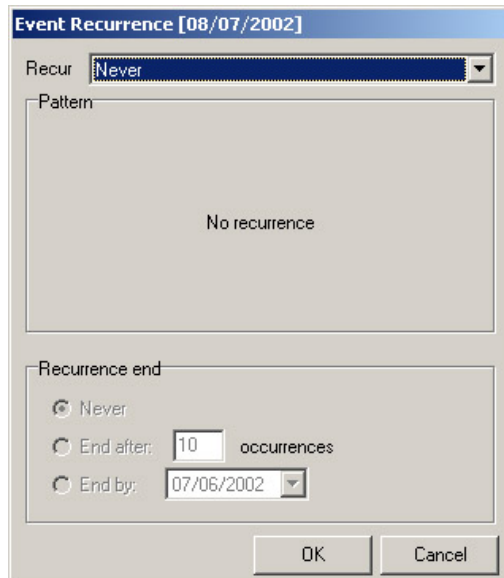
Selecting a date when creating or editing an event

5. Fill the title, location and duration of the meeting and any additional information in the Text area.
6. To invite other people to a meeting enter the recipient(s) of the invitation in the **To** field, either by typing their email address or by clicking  **I.o...** to select from the Contacts List. Use a semicolon (;) to separate recipients.
7. Click  to save.

3.4 Schedule a recurring Appointment

1. Click  on the [Main Menu](#).
2. Select the date of the appointment by clicking the required date in the calendar window; use the month or year button to change the display, if required (see [section 3.2](#)).

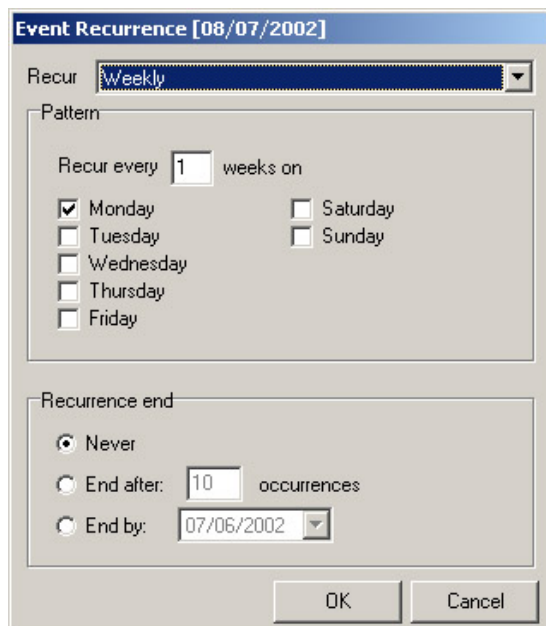
3. Double-click an empty time slot in the schedule window or click on the start time of the appointment and click .
4. The *OpenHand Event* page is displayed with the date and start time of the appointment pre-filled.
5. Fill the title and duration of the meeting and any additional information in the text field.
6. Click the  icon.
7. The Event Recurrence page is displayed:



The screenshot shows the 'Event Recurrence' dialog box for the date 08/07/2002. The 'Recur' dropdown menu is set to 'Never'. The 'Pattern' section is empty and contains the text 'No recurrence'. The 'Recurrence end' section has three radio buttons: 'Never' (selected), 'End after: 10 occurrences', and 'End by: 07/06/2002'. There are 'OK' and 'Cancel' buttons at the bottom.

Appointment recurrence screen – Recurrence not selected

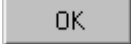
8. Select the frequency of the meetings from the drop down list.
9. The pattern section will be refreshed depending on the frequency selected: Daily, Weekly, Monthly, and Yearly.






The screenshot shows the 'Event Recurrence' dialog box for the date 08/07/2002. The 'Recur' dropdown menu is set to 'Weekly'. The 'Pattern' section shows 'Recur every 1 weeks on' and a list of days with checkboxes: Monday (checked), Tuesday, Wednesday, Thursday, Friday, Saturday, and Sunday. The 'Recurrence end' section has three radio buttons: 'Never' (selected), 'End after: 10 occurrences', and 'End by: 07/06/2002'. There are 'OK' and 'Cancel' buttons at the bottom.

Appointment recurrence screen – Weekly recurrence chosen

10. Complete the Pattern information and when the recurrence should end. Putting an 'End by' date is useful for project management.

11. Click  to save.


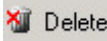
3.5 Reschedule an Appointment

1. Click  on the [Main Menu](#).
2. Select the date of the appointment by clicking the required date in the calendar window; use the month or year button to change the display, if required (see [section 3.2](#)).
3. Double-click on the appointment in the schedule window or click on the appointment and click .
4. The *OpenHand Event* page is displayed with the existing information pre-filled.
5. Amend the required information.
6. Click  to save.

NB: An appointment can also be dragged and dropped to a new time on the same day.


3.6 Delete an Appointment

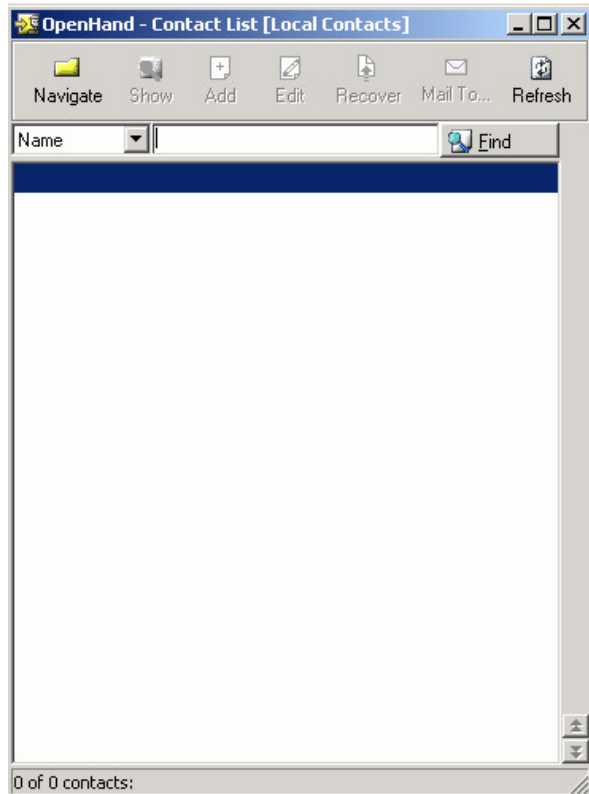
Note: If you delete the first occurrence of a recurring appointment all future occurrences will be deleted also.

1. Click  on the [Main Menu](#).
2. Select the date of the appointment by clicking the required date in the calendar window; use the month or year button to change the display, if required (see [section 3.2](#)).
3. Click on the start time of the appointment and click .
4. Click **Yes** to confirm when the dialogue box appears.

4. CONTACTS

4.1 Contact List


1. Click  on the [Main Menu](#).
2. The *Contact List* page is displayed.



Initial Contact List Screen (no contacts entered)

Tip: On the [Main Menu](#) you can also click **View** and then **Contacts**.

4.1.1 Access another Contacts Folder


1. On the *Contacts List* page, click  at the top.
2. Click on the required folder.
3. Click **OK**.

4.2 View an existing Contact


1. On the *Contacts List* page, highlight the required contact.

2. Click  Show

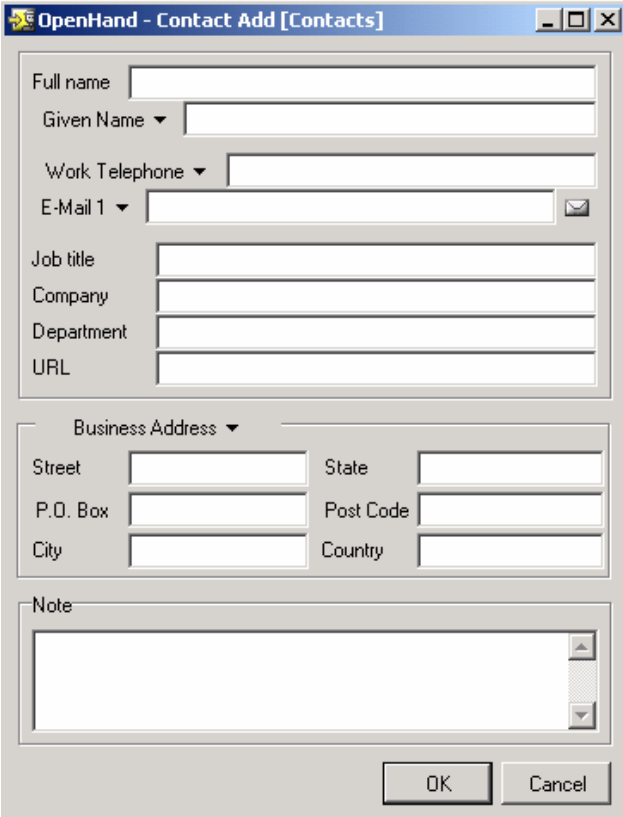
3. The *Show Contacts* page is displayed.

4. Click  to return to the *Contacts List*.

4.3 Add a new Contact

1. On the Contact List toolbar, click  Add


2. The *Add Contact* page is displayed.





Add new contact form

3. Fill in the required information. (Click on the down arrows to populate additional fields e.g. to add a mobile number click the down arrow next to **Work Telephone** and select **Mobile** from the list.)

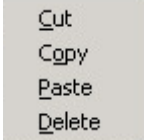
4. Click  to save.

Tip: To compose an email to the new contact click 

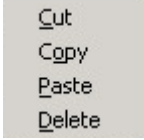
4.4 Edit an existing Contact

1. On the Contact List page, double-click on the name of the contact to be displayed (or highlight name and click  Edit)
2. The *Edit Contact* page is displayed.
3. Edit the required information.
5. Click  to save.

4.5 Delete a Contact

1. On the Contact List page, right click on the name of the contact to be deleted.

2. The *Edit Menu* pop-up is displayed.
3. Click delete.
4. A confirmation message is displayed with the name of the contact. Click 'Yes' to delete the contact or 'No' to return to the contact list.

4.6 Copy a Contact

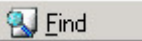
1. On the Contact List page, right click on the name of the contact to be copied.

2. The *Edit Menu* pop-up is displayed.
3. Click copy.
4. Right click on the contact again, and then click Paste.
5. Finally, edit the contact with the new details.

4.7 Find a Contact by Name

1. On the *Contact List* page, in the Input Box, type the name (or part of the name) you wish to find.




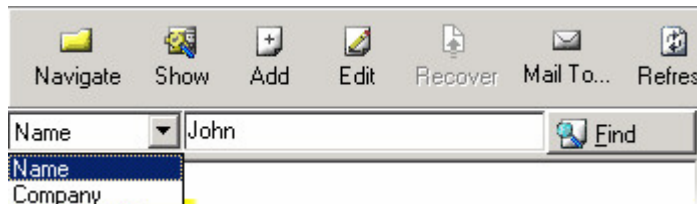
Entering a name to find a contact by name

2. Click  Find
3. A list of contacts is displayed which satisfy the selection criteria.

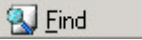
Tip: To compose an email to the contact, click on the name and then click 

4.8 Find a Contact by Company

1. On the *Contact List* page, click the down-arrow next to **Name** to open the drop-down list. 
2. Click **Company** on the drop-down list.



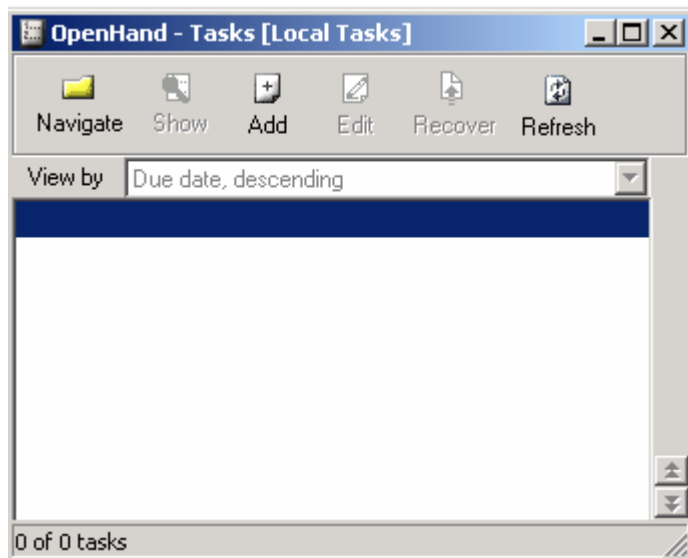
Selecting between finding a contact by name or by company

3. In the Input Box, type the name of the company you wish to find.
4. Click  Find

5. TASKS

5.1 List Tasks

1. Click the task icon  on the standard toolbar.
2. The *Task List* is displayed:





Initial Tasks Screen (No tasks entered)

To change the order of tasks click the down arrow to select the required criteria.


Tip: On the [Main Menu](#) you can also click **View** and then click **Tasks** to list your tasks.

5.2 View a Task

1. Click  on the [Main Menu](#).
2. On the Task list, click the required task and click  **Show**.

5.3 Add a new Task

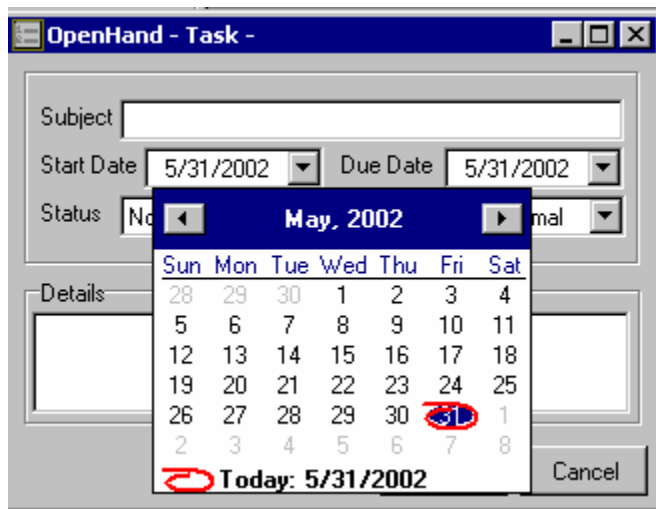


1. On the Task list toolbar, click the Add Icon .
2. The *Add Task* page is displayed.




Adding a new task form


3. Put a heading for the task in subject.
4. Use the downward arrows to select start date, due date, status and priority of the task.

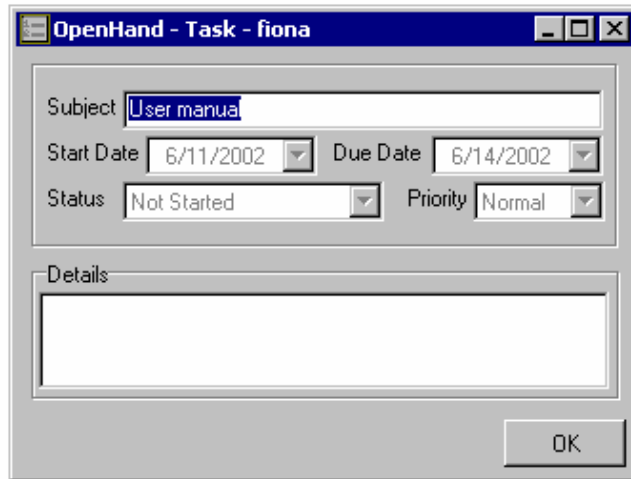


Selecting a date when adding or editing a task


5. Input a description of the task, if required.
6. Click  to save.

5.4 Edit an existing Task

1. On the *Task List* toolbar, double-click the task, or highlight the task and click .
2. The *Edit Task* page is displayed.

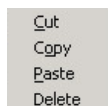


Editing an existing task

3. Change the required information, using the downward arrows to show the drop-down lists, where required.
4. Use the downward arrows to select start date, due date, status and priority of the task.
5. Click  to save.

5.5 Delete a Task

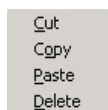
1. On the Task List page, right click on the name of the task to be deleted.



2. The *Edit Menu* pop-up is displayed.
3. Click delete.
4. A confirmation message is displayed with the name of the contact. Click 'Yes' to delete the contact or 'No' to return to the task list.

5.6 Copy a Task

1. On the Contact List page, right click on the name of the task to be copied.




2. The *Edit Menu* pop-up is displayed.
3. Click Copy.
4. Right click on the task again, and then click Paste.
5. Finally, edit the task with the new details.

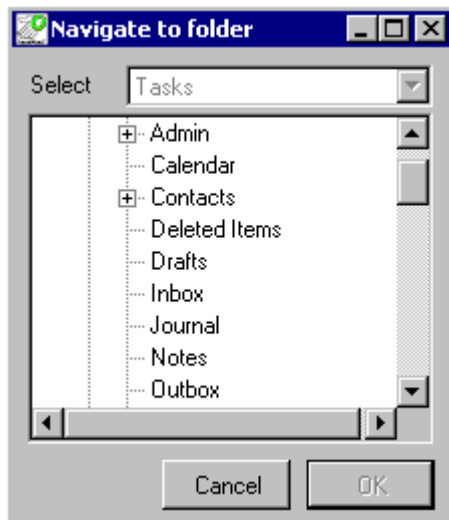
6. FOLDERS

Folders provide another method of navigation.

6.1 List Folders

Click the  icon on the main toolbar.

Tip: On the [Main Menu](#) you can also click **View** and then click **Folders** to list your folders.




Initial Folder Screen

To open a folder, click 

To close a folder click 

Tip: Use the dropdown list to select folders of a specific type (e.g. mail or contacts folders).

6.2 Move to a Folder

1. Click the  icon on the main toolbar.
2. Double-click on the required folder.