

# 20 Minute Guide

Version 4.9



This guide has been created using officeatwork Advanced.  
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# About this guide

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## For whom is the guide intended

This guide is intended for users who use officeatwork on a daily basis.

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## What is covered in this guide

The guide briefly illustrates how you can benefit from using officeatwork everyday at the office.

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Important: The templates, contents and masks illustrated in this guide may differ from the specific solution in your company. They are based on our Sample Soutlion «Contoso».

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## Knowledge required

To understand this guide, a basic knowledge of Microsoft Windows and Microsoft Office is necessary.

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## Typographic conventions

Before reading this guide, you should be familiar with the typographic conventions used.

The following graphic descriptions highlight sections of text with particular significance.

Formatting Convention	Type of Information
Triangle ➤	Step-by-step procedure. You can follow these instructions to perform a specific task.
<b>Bold Typeface</b>	Objects needed for selection, such as menus, buttons, items in a list or table headers.
CAPITAL LETTERS	Key legends on the keyboard. For example <code>SHIFT</code> , <code>CTRL</code> or <code>ALT</code> .
KEY+KEY	Key combinations which must be pressed at the same time are marked with <code>+</code> . Examples: <code>CTRL+P</code> or <code>ALT+F4</code> .



## CHAPTER 1

# Why officeatwork

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## What is officeatwork

officeatwork is especially designed for the needs of enterprises. It is based on Microsoft Office and explicitly presents all relevant business functions to the business user. Existing Office functions are more easily accessible, complemented and automated. The ordinary Microsoft Office designed for everybody herewith becomes a powerful business solution for your enterprise. officeatwork is the preferred optimisation platform for Office processes. It is therefore the perfect link for maximum efficiency between the business user und Microsoft Office.

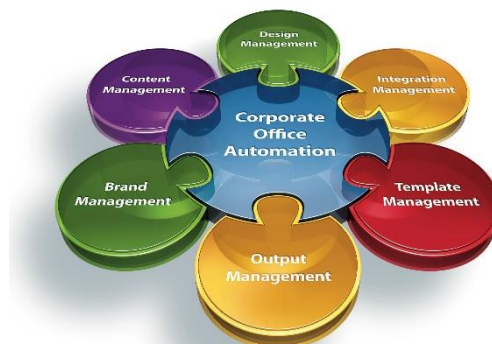


*Figure 1: The position of officeatwork*

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## What officeatwork offers

officeatwork automates essential enterprise-specific office functions and accordingly standardises areas like Design Management, Template Management, Content Management, etc. for the entire enterprise. officeatwork therefore creates common and efficient processes for all employees.



*Figure 2: The officeatwork modules*

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## What officeatwork provides

- Uniform appearance of internal and external correspondence, offers and presentations.
- Corporate identity – quality features of the organisation easily recognisable in all documents.
- Reduced printing costs as a result of fewer variations of pre-printed letterheads.
- Universal compliance with corporate design.
- Easy and efficient handling of Office documents which benefit the user.
- Simple and central administration of templates and content.
- Fewer mistakes in documents due to the use of updated and centrally maintained content.
- Time saving through instant access to updated content, dispensing with the need for time-consuming searches, subsequent copying, and manual insertions.







## CHAPTER 2

# Using officeatwork

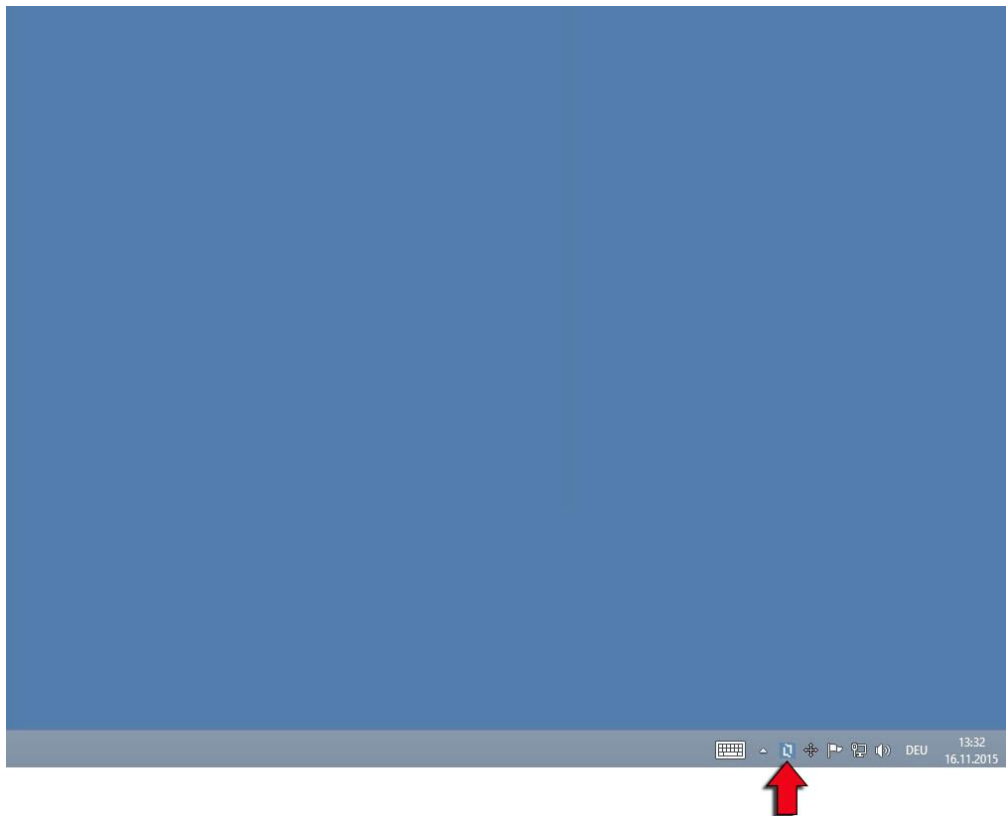
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## Introduction

officeatwork is seamlessly integrated into Microsoft Windows and Microsoft Office.

### Windows integration

officeatwork extends the system tray of the Windows task bar by adding a symbol, enabling the various officeatwork functions to be opened at any time, for example, the «Template Chooser».



*Figure 3: officeatwork symbol in system tray of Windows task bar*

## Integration with Microsoft Office

officeatwork extends your Office applications by additional «tabs» to the Office ribbon containing the key functions for the relevant Office applications. Our example shows the officeatwork tab in Microsoft Word.

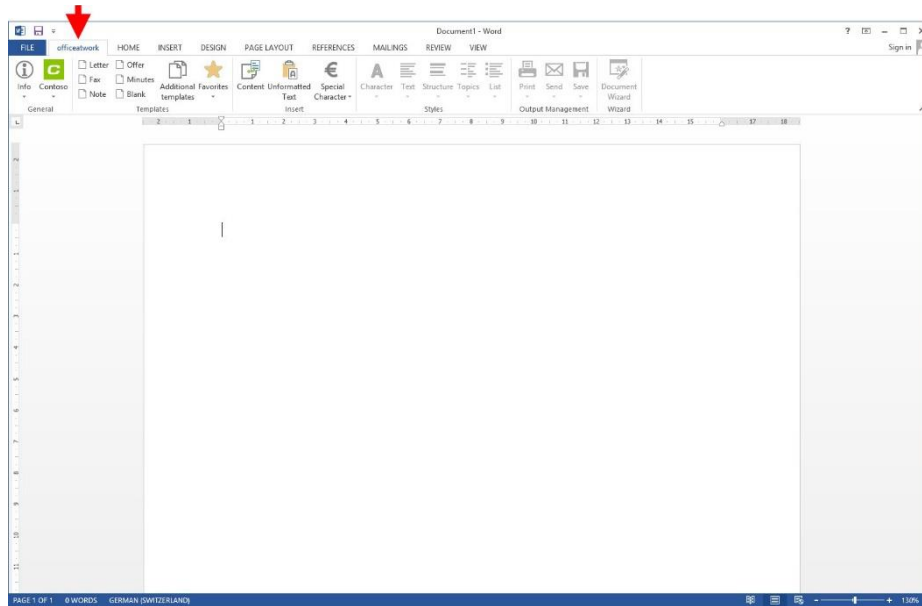


Figure 4: officeatwork tab in Microsoft Word

## Welcome Wizard

The «Welcome Wizard» appears automatically as soon as you click on one of the officeatwork tab or buttons for the first time. If you do not wish to use the Assistant at this time or you prefer to use it next time, you can cancel it (select **Cancel**). The Assistant can be reactivated manually at any time.

The Assistant will take you step by step through all the relevant officeatwork settings. After this process has been completed, you can resume your work immediately and benefit from the efficient support provided by officeatwork at all times.

### ➤ Welcome Wizard

- ✔ Click on the **officeatwork symbol** in the system tray of the Windows task bar.

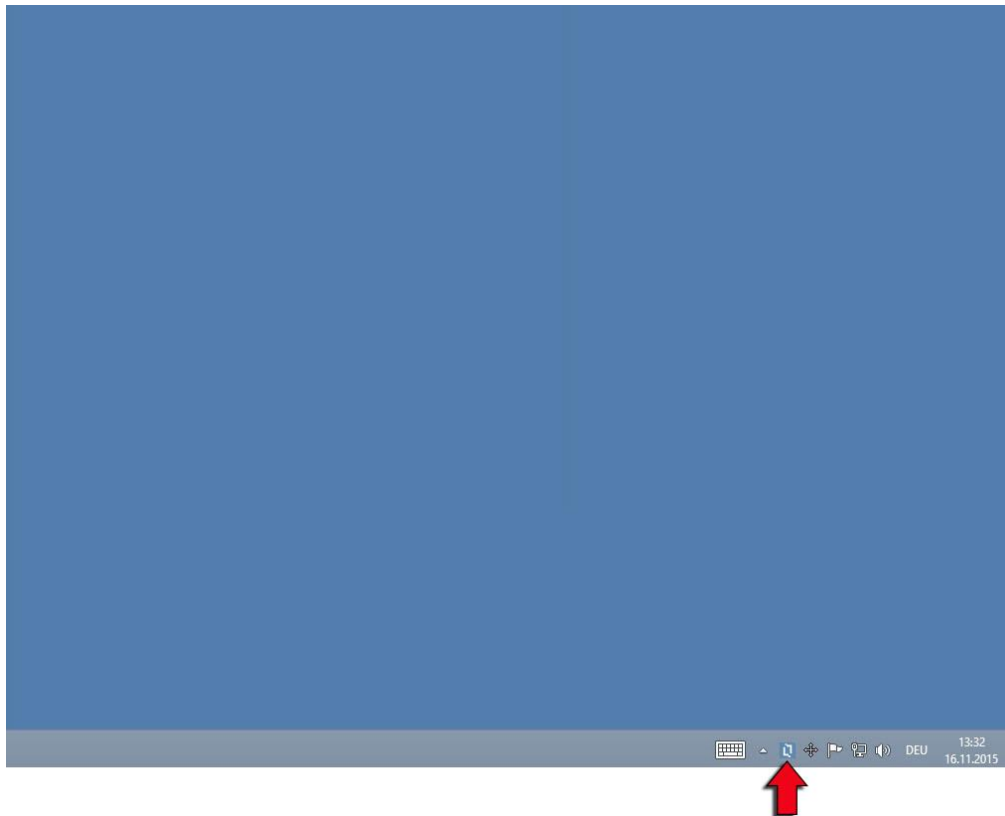


Figure 5: officeatwork symbol in system tray of Windows task bar

- ✓ The Welcome Wizard appears.
- ✓ Select your **Language** for officeatwork windows, dialogues and buttons.

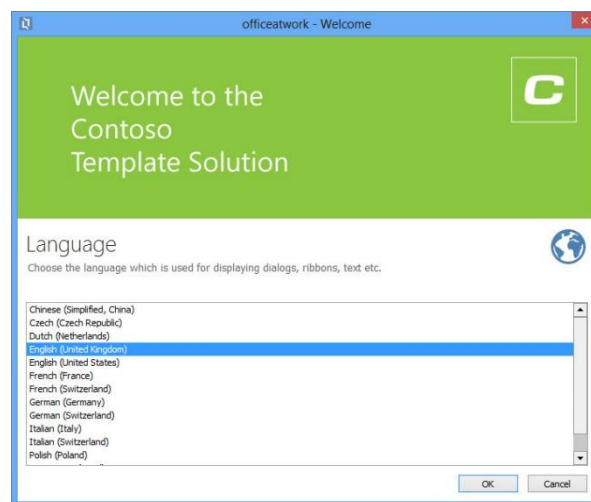


Figure 6: officeatwork «Welcome Wizard», selecting language

- ✓ Click on **OK**.
- ✓ Select your **Organisation**.

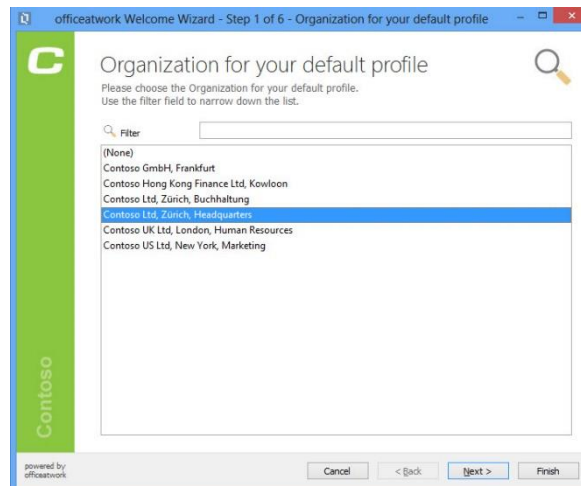


Figure 7: officeatwork «Welcome Wizard», selecting company

- ✔ Click on **Next**.
- ✔ Choose your **Contact person**.

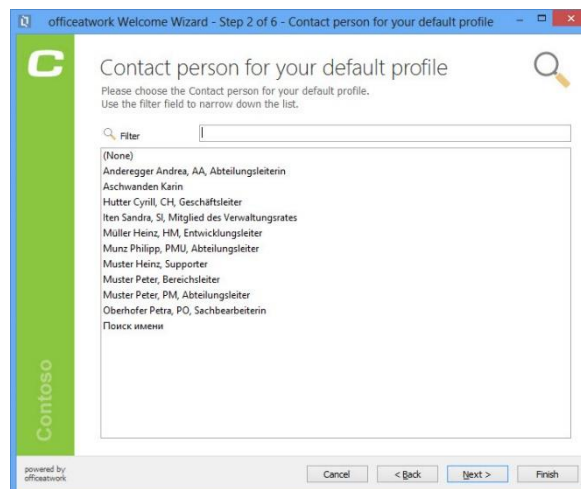


Figure 8: officeatwork «Welcome Wizard», selecting contact person

- ✔ Click on **Next**.
- ✔ Select your **Author**.

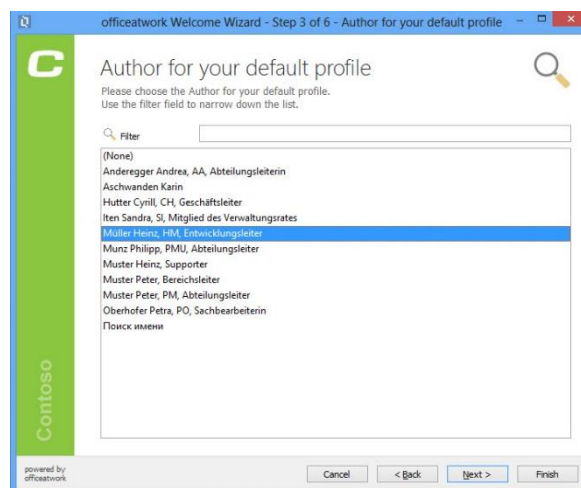


Figure 9: officeatwork «Welcome Wizard», selecting author

- ✔ Click on **Next**.
- ✔ Select the person signing.

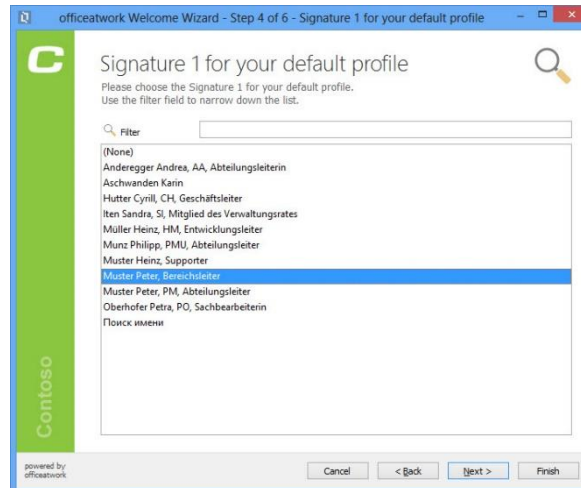


Figure 10: officeatwork «Welcome Wizard», selecting signatory

- ✔ Click on **Next**.

In this next step you indicate the standard printers you wish to use.

- ✔ Activate the required printers by clicking on the **Printer checkbox**.

Important: Printer drivers such as «Adobe PDF» or «Microsoft Office Document Image Writer» should not be activated.

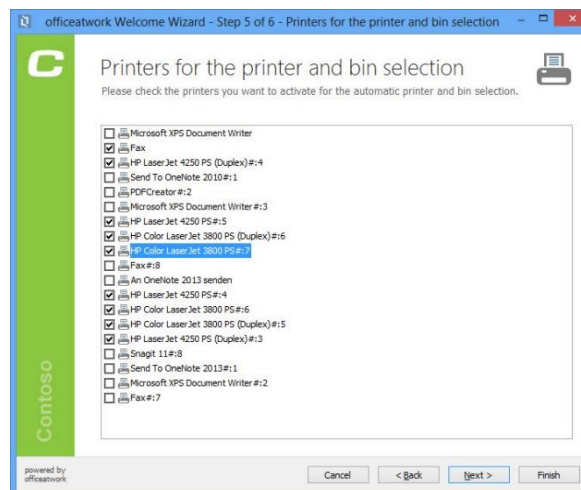


Figure 11: officeatwork «Welcome Wizard», activating printer

- ✔ Click on **Next**.

To conclude, you allocate each paper type to a specific printer tray.

- ✔ Select **Paper type** on the left.
- ✔ Select corresponding **Tray** on the right.
- ✔ Repeat the procedure for each paper type.

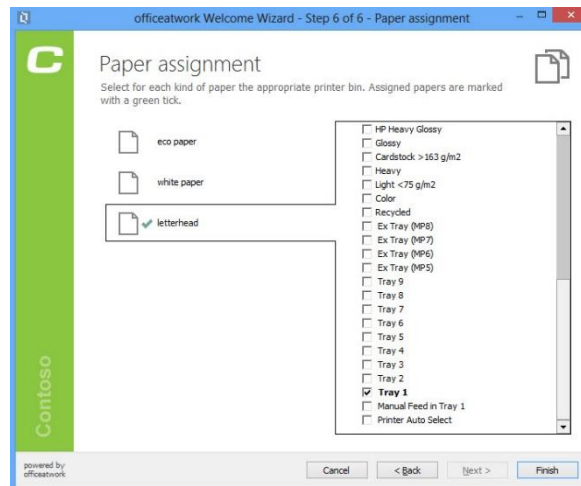


Figure 12: officeatwork «Welcome Wizard», allocating paper

- ✓ Click on **Finish**.

Based on the above steps, your standard officeatwork profile will now automatically be set up. This will always be available to you when preparing new documents. Provided you have entered all the necessary printer tray settings, you can now use and profit from the automatic printer tray control.

## Opening templates

Templates may be opened either by using the officeatwork tabs in the various Office applications or by using the «Template Chooser».

### officeatwork tab

Templates can be opened by simply clicking on the officeatwork tab. Selecting a letter template using the officeatwork tab in the Microsoft Word ribbon.

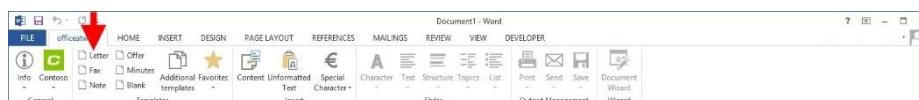


Figure 13: officeatwork tab in Microsoft Word ribbon, Letter button

## Template Chooser

The «Template Chooser» allows you to easily find your templates. There are two methods of using the «Template Chooser».

### ➤ Method 1: Select «Template Chooser» via Windows Task Bar.

- ✓ Click on the **officeatwork** symbol in the system tray of the Windows task bar.



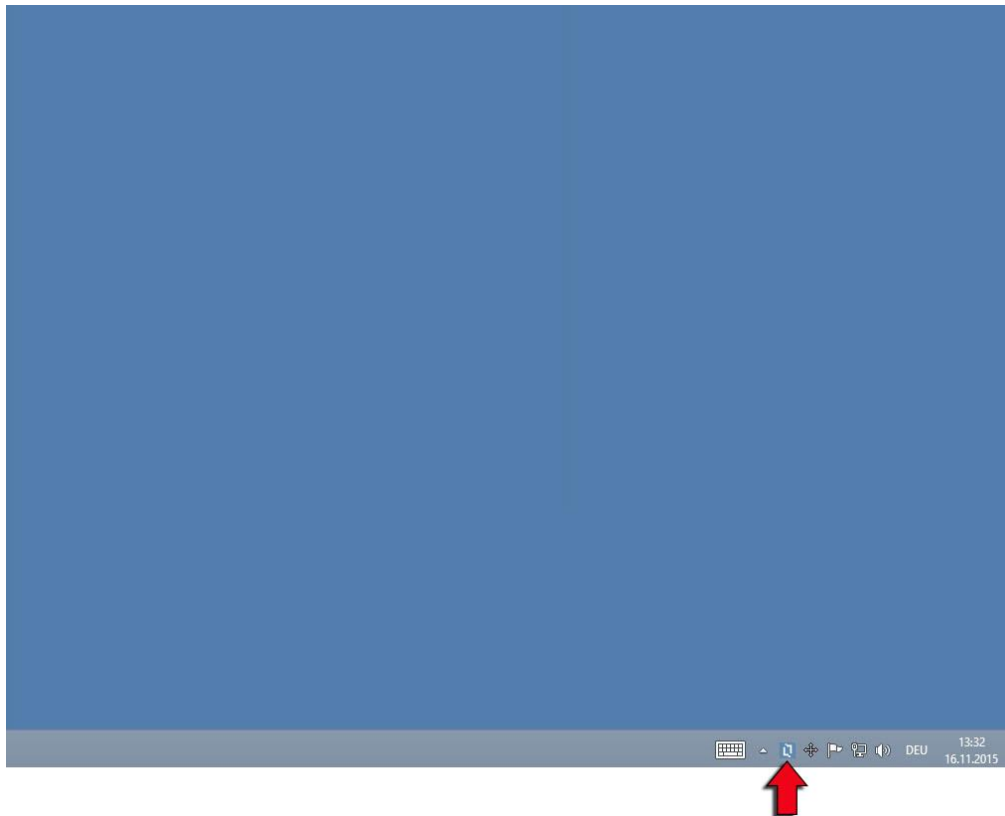


Figure 14: officeatwork symbol in system tray of Windows task bar

- ✔ Click on **Contoso Templates**.

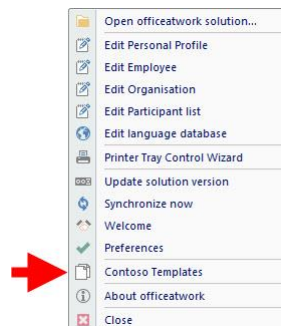


Figure 15: officeatwork menu in system tray of Windows task bar - Contoso Templates button

### ➤ Method 2: Select «Template Chooser» via officeatwork tab.

- ✔ Click on the **Additional Templates** button in the officeatwork tab in Word.



Figure 16: officeatwork tab in Microsoft Word ribbon - Additional Templates button

Templates can be searched for and found by name or by filing structure (hierarchically) in the «Template Chooser».

### ➤ Search for templates by filing structure

- ✔ Click on the **Folder** button to change to the filing structure view.
- ✔ Click on the relevant folder and subdirectory until you have found your template.
- ✔ Select **the required template**.

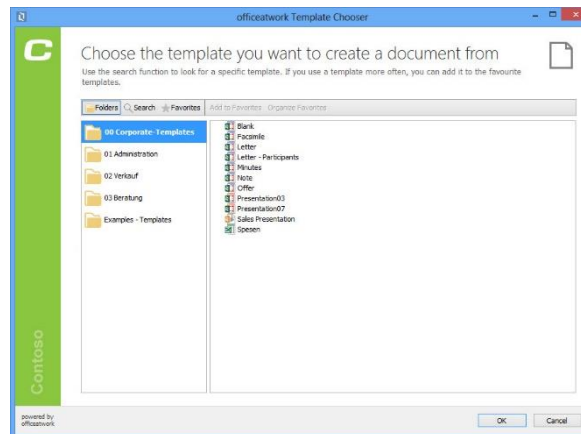


Figure 17: officeatwork «Template Chooser» - folder view

- ✔ Click on **OK** to prepare a document based on the selected template.
- **Search for templates by name**
  - ✔ Click on the **Search** button to change to the search view.
  - ✔ Enter your search criteria in the **Search for** field.
  - ✔ Click on the **Search now** button.
  - ✔ Select **your required template** from the list of found templates.

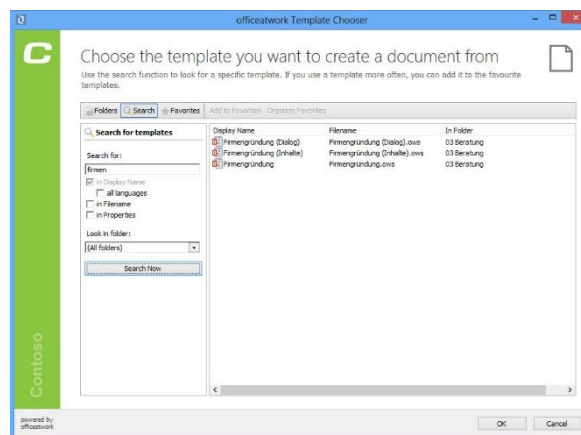


Figure 18: officeatwork «Template Chooser» - search view

- ✔ Click on **OK** to prepare a document based on the selected template.

## Document Wizard

Whenever you prepare a new document based on an officeatwork template, the relevant «Document Wizard» appears automatically. Using a letter as an example, we will explain the various steps of the «Document Wizard».

### ➤ Preparing a new letter

- ✔ On the officeatwork tab, click on the **Letter** button.

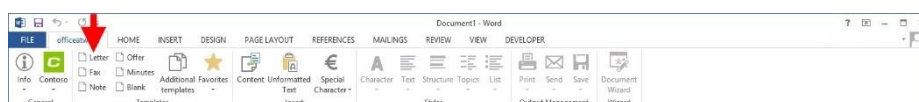


Figure 19: officeatwork tab in Microsoft Word ribbon, Letter button

- ✔ The first step of the «Document Wizard» appears.

- ✔ Select the desired **Page Setup** for your document.

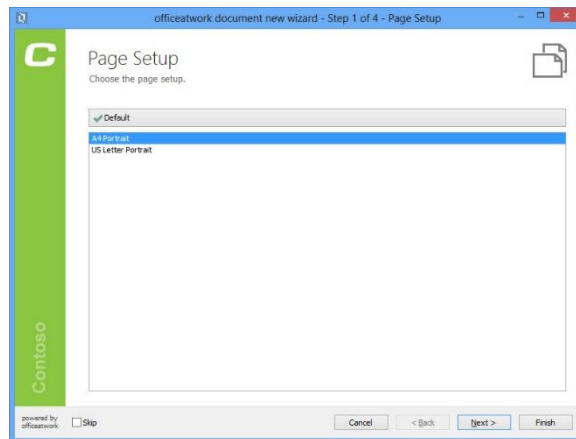


Figure 20: officeatwork «Document Wizard» - Page setup

- ✔ Click on **Next**.
- ✔ Select the desired **Language** for your document.

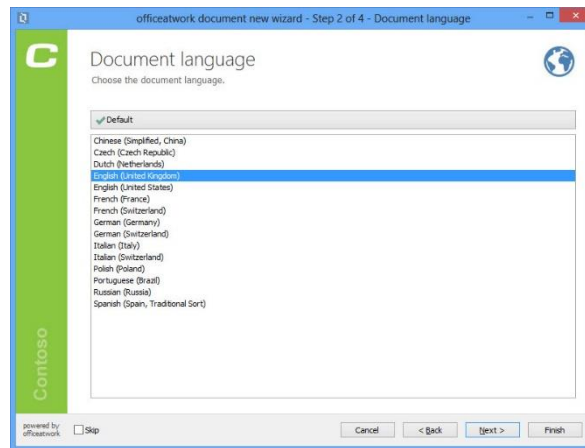


Figure 21: officeatwork «Document Wizard» - selecting language

Tip: With the **Default** button, you can define the chosen language as your default language. This means that the next time you use the «Document Wizard», the language is already predefined.

Tip: If, for example, your documents are almost always prepared in English, you can select the box **Skip**. This means that when the «Document Wizard» is opened again, the «Select Language» step will be skipped. You can at any time go back a step with the **Back** button in order to change the required language for your document.

- ✔ Click on **Next**.
- ✔ Select your officeatwork profile for the document. Your standard officeatwork profile has already been set up and selected by means of the «Welcome Wizard».

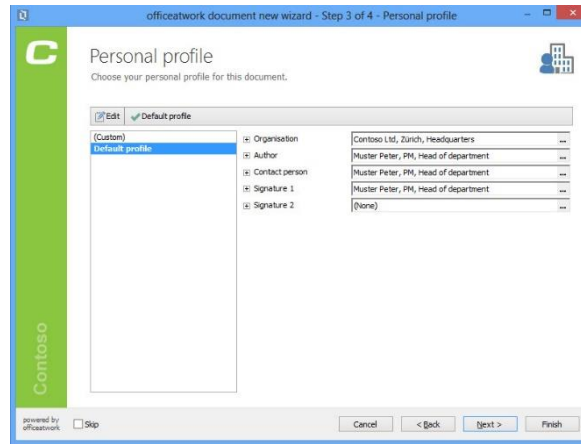


Figure 22: officeatwork «Document Wizard» - selecting «Default profile»

Tip: If you regularly prepare documents for different people, you can set up additional officeatwork profiles. You then decide - with just one click - which officeatwork profile is to be used for each document.

- ✓ Click on **Next**.
- ✓ Enter the **details of addressee**.

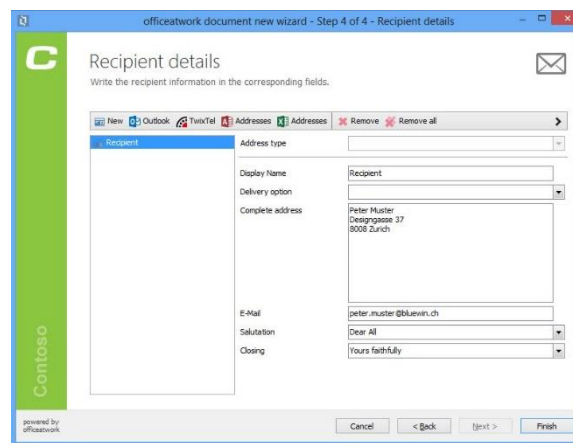


Figure 23: officeatwork «Document Wizard» - addressee completed

- ✓ Click on **Finish** button.
- ✓ The document will be prepared using the data you have selected or entered.

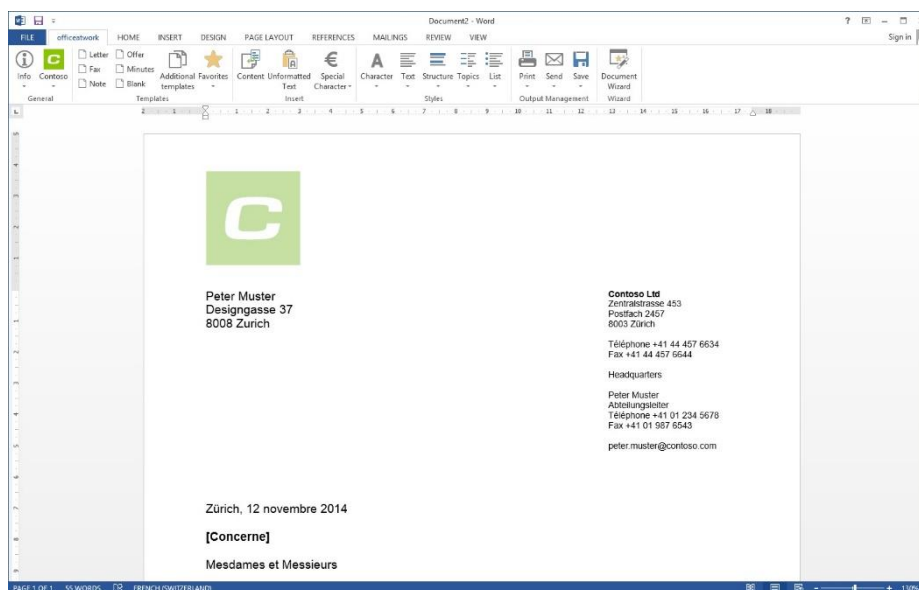


Figure 24: document prepared in Microsoft Word using officeatwork

Tip: If you wish to make any subsequent changes to the data or settings, you can reopen the «Document Wizard» at any time.

### ➤ Opening the Document Wizard

- ✔ Select the **Document Wizard** button on the officeatwork tab.



Figure 25: officeatwork tab in Microsoft Word ribbon - Document Wizard button

- ✔ Make your **changes** at the appropriate stage.

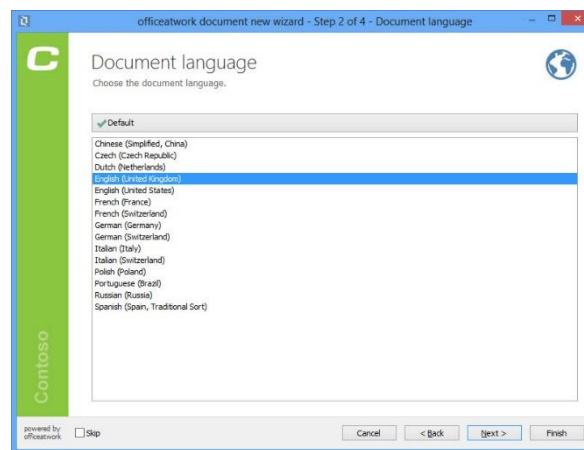


Figure 26: officeatwork «Document Wizard» - selecting language

- ✔ Click on **Finish**.

Tip: You can select **Finish** at any stage in order to close the «Document Wizard» directly.

## Editing documents

officeatwork offers various shortcuts for editing documents.

### F11 placeholders

The Word templates are provided with F11 placeholders, which allow you to jump from one entry place to another using the F11 key.

#### ➤ Completing letters.

- ✔ The placeholder is selected for the subject of the letter.
- ✔ Type in the subject of the letter.
- ✔ Press **F11**.
- ✔ The placeholder is selected for the text of the letter.
- ✔ Type in the text of the letter.

## Styles menu

To facilitate the standard formatting of your texts, officeatwork provides a series of specific styles (text formats) per template.

### ➤ Using styles

- ✓ Select the **Text Passage** to be formatted.
- ✓ Click on the **Styles** button on the officeatwork tab.



Figure 27: officeatwork tab in Microsoft Word ribbon - Styles button

- ✓ Select the required **style**.



Figure 28: officeatwork styles menu for letter templates in Microsoft Word

- ✓ The selected text passage will be formatted according to the style.

## Inserting content

With officeatwork, company communications such as product presentations, agreement and contract clauses, offer modules, etc. can easily be inserted into documents.

### ➤ Inserting content

- ✓ Click on the **Content** button on the officeatwork tab.



Figure 29: officeatwork tab in Microsoft Word ribbon – insert content button

- ✓ This opens the «Content Chooser».
- ✓ In the Content-Groups column, select the content group **Beratung**.
- ✓ In the Content column, select the **Firmengründung** folder
- ✓ Click on the **Arrow to right** button in order to copy the content elements into the «selected content» area.

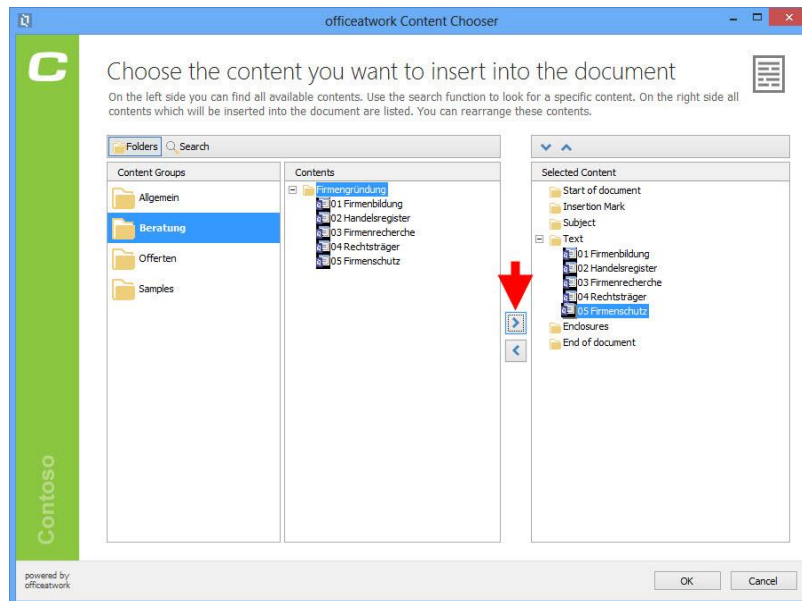


Figure 30: officeatwork «Content Chooser» in Microsoft Word

- ✔ Click on the **OK** button.
- ✔ The selected content will automatically be inserted into your document.

## Printing

Documents that are prepared using officeatwork can be printed in various ways. Our example shows the procedure for printing an original (on preprinted letterhead paper).

### ➤ **Printing**

- ✔ Prepare a letter using officeatwork.
- ✔ Press the CTRL+P keys.
- ✔ Select the printer profile **Original**

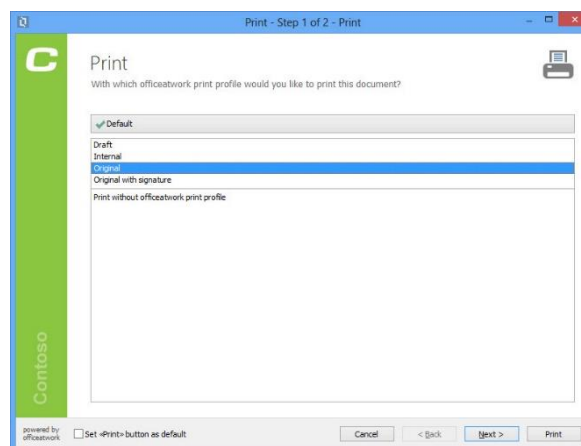


Figure 31: officeatwork output management in Microsoft Word

**Tip:** The function **Set «Print» button as default** activates the standard button **Print** within this print-assistant window. This allows a faster print finishing as the print job is executed directly by only hitting the return-button.

- ✔ Click on **Next**.
- ✔ officeatwork automatically changes to the printer and tray containing the appropriate letterheads and shows the Word print dialogue.

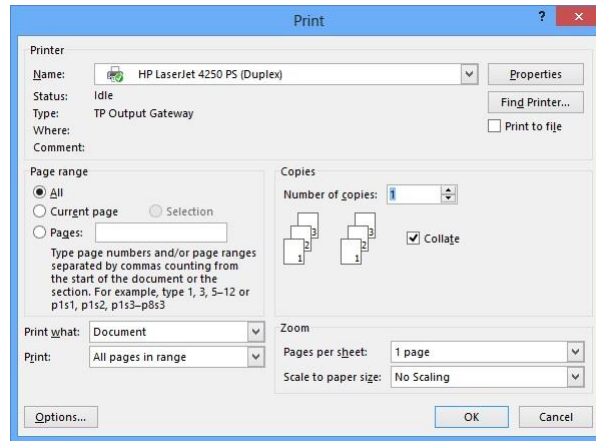


Figure 32: Word print dialogue

- ✓ Select the number of copies required and then click on **Print**.
- ✓ The letter will now automatically be printed on a letterhead. The masking of the logo and the changing to the correct printer and/or tray are automatic procedures triggered by the data that was selected in the «Welcome Assistant».

Tip: The printer profile can be selected by using the button **Print** in the Ribbon tab «officeatwork» too.

## Sending

Documents that were prepared using officeatwork can be sent in various ways. Our example shows how to send a letter as an original (with signature).

### ➤ Sending

- ✓ Prepare a letter using officeatwork.
- ✓ Select the **Send** button on the officeatwork tab.

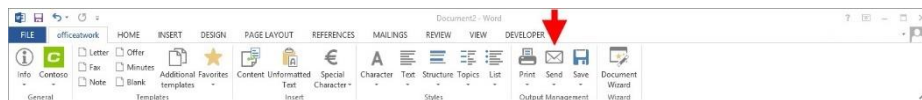


Figure 33: officeatwork tab in Microsoft Word ribbon – Send button

- ✓ A range of Send profiles appear.



Figure 34: officeatwork Send profiles for letter templates in Microsoft Word

- ✓ Select the Send profile **Original with Signature (PDF)**.
- ✓ A message will be prepared with a PDF file as attachment. All settings such as addressee, subject, form of address, etc. are implemented automatically. Even the cover note of the e-mail message is written for you. In addition, a PDF file is attached with the appropriate company logo in high quality and the signatures are placed in the correct position.



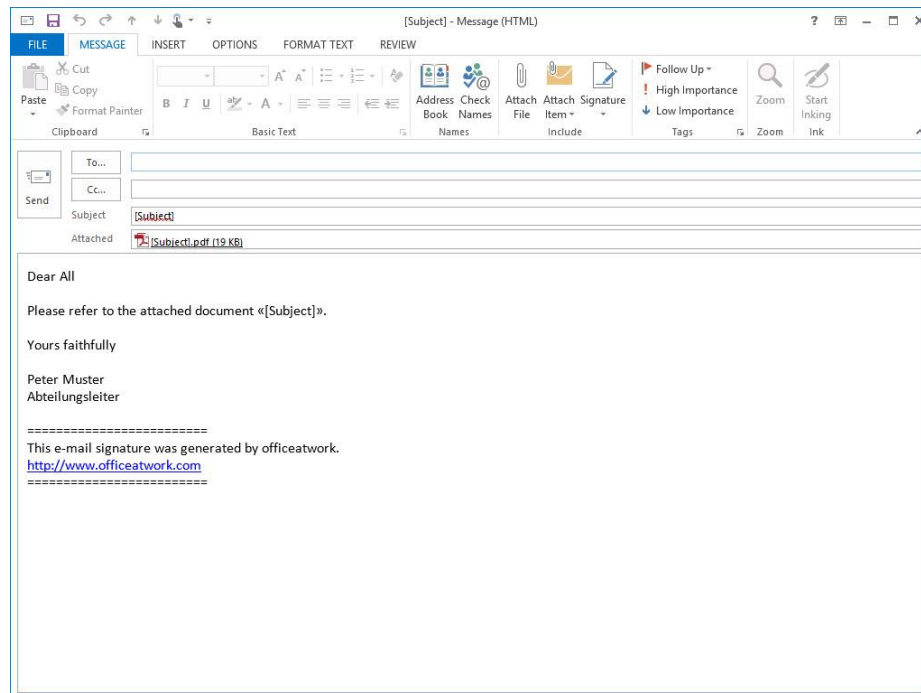


Figure 35: E-mail message prepared by officeatwork in Outlook

- ✓ Click on **Send** in order to send the message.



## CHAPTER 3

# Support

Get access to a wide range of support resources on officeatwork Connect ([connect.officeatwork.com](http://connect.officeatwork.com)) such as:

- Knowledge Base
- Q & A
- Download Center
- Installers
- Manuals
- Video guides
- Forum
- Glossary
- etc.

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To access officeatwork Connect you need to register your Microsoft-Account at [www.officeatwork.com](http://www.officeatwork.com) → [Connect](http://connect.officeatwork.com)

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All support options and resources can be found on the website [www.officeatwork.com](http://www.officeatwork.com) → [Support](#)

More services offered by officeatwork such as Education and Consulting can be found on the website [www.officeatwork.com](http://www.officeatwork.com) → [Services](#)

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