PTS Chat Quick Start Guide

Installation

- Open the following link in your internet browser. Download the zip file and extract the contents to your local computer.

  http://www.doculogix.com/doculogix/downloads/PTSChat.zip

- Right click on the extracted file and choose "Run as Administrator". *Failure to perform this step will result in a malfunction while attempting to use PTS Chat on some operating systems, including Windows 7.*

- Follow the steps in the setup wizard to complete your installation.

How to log in

Navigate to the directory where you installed the application and double click on the PTS Chat icon. The default installation directory is "C:\Program Files\PTSChat".

The following login screen will appear. Your current PTS username and password also provide you access to PTS Chat. *If you are unsure of your user name and password please contact your local provider to obtain.*
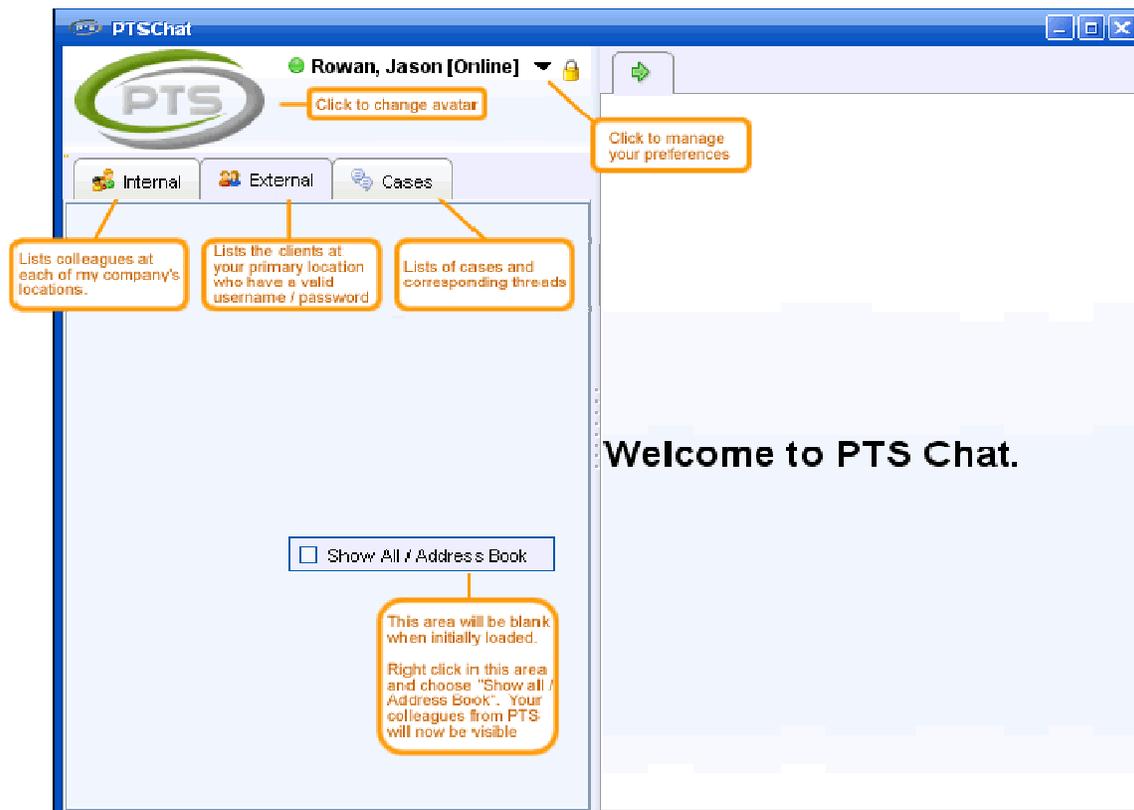
The server field should be "pts.doculogix.com" (without the quotes).

Click "Login". Please be patient while the application loads your data.

Using PTS Chat

When started for the first time, the application will contain a blank window with the message "Welcome to PTS Chat". Not to worry – this is by design!

The Cases tab will also display a progress meter. Please wait while your case list is completely loaded. When it loads, right click and choose "Show All / Address Book" (see graphic above). This will display your contacts from PTS. Create a custom address book by right clicking on a name (or multiple names via shift-click) and choosing "Add to Address Book". Then use the same "Show All / Address Book" option to display only your address book, as seen in the graphic below.
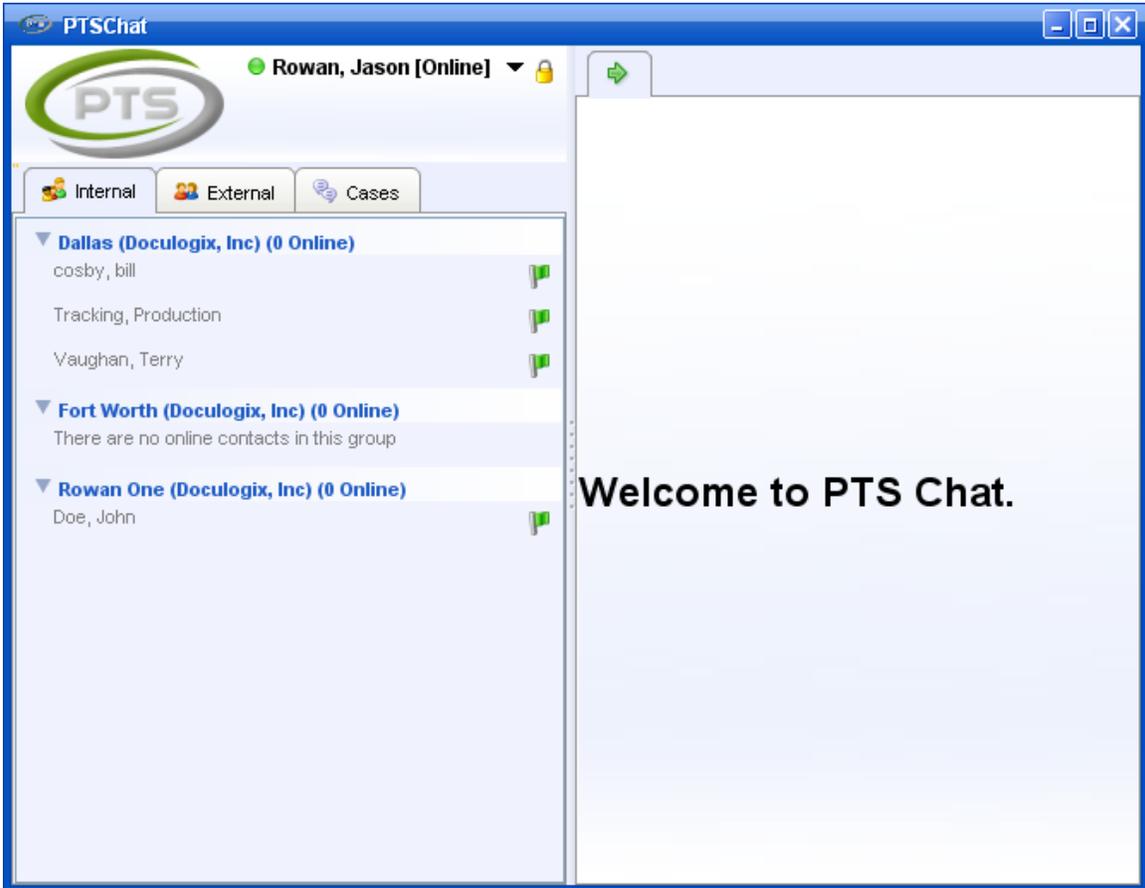

One-on-One Chat
To chat with a colleague, simply double-click on his or her name and a chat window will appear in place of the welcome banner. The window is very user friendly and looks similar to the following graphic. You may send messages, files or screenshots from this window.
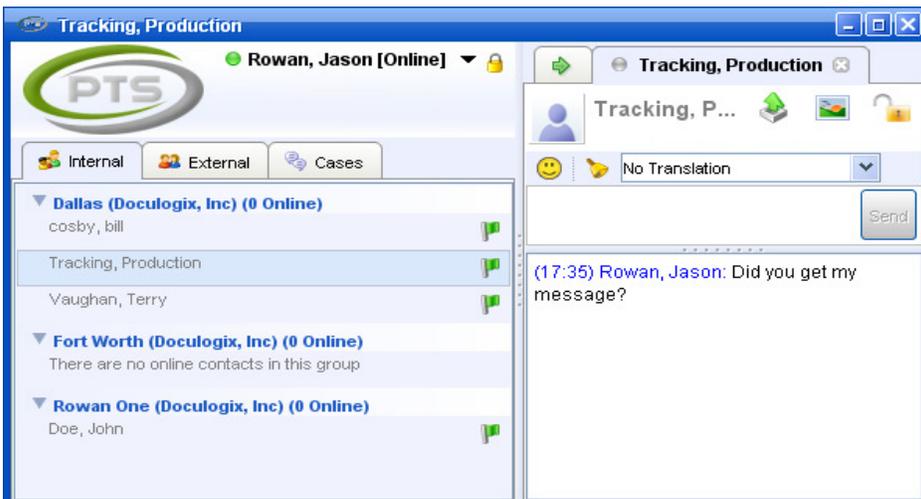
Group / Case Specific Chat
Subject based chat provides the capability to have a conversation with more than one individual at a time. Additionally, you can create customized discussion topics and assign them to a particular case. The graphic below shows the steps to create a new subject based group chat.
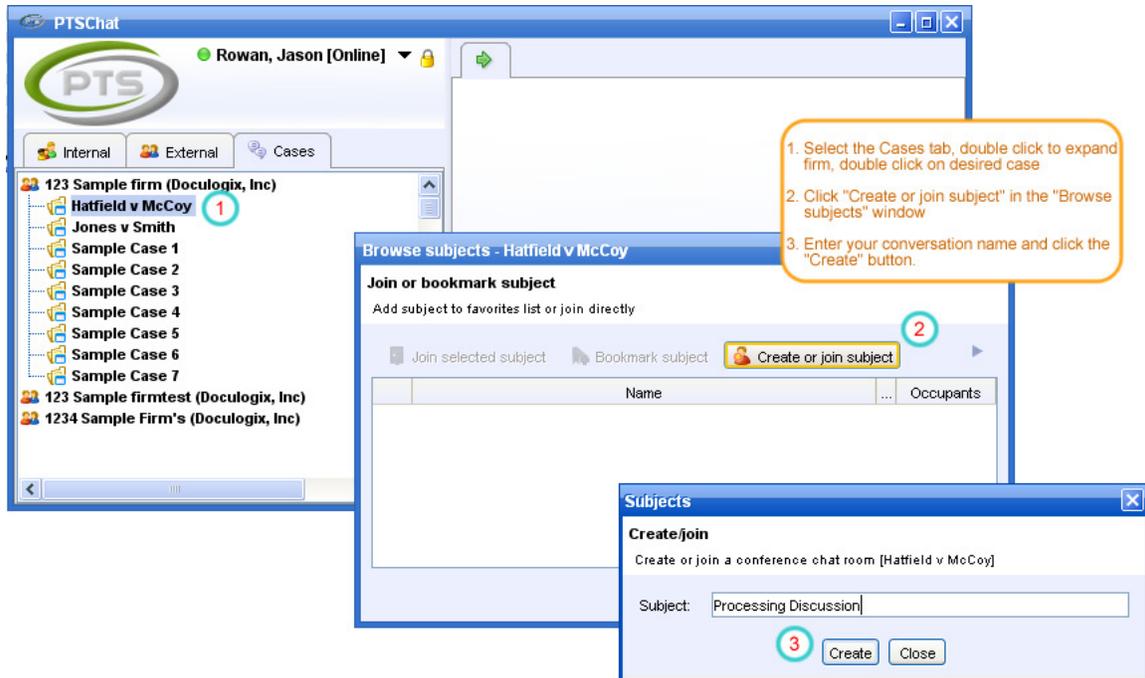
After clicking the create button, the new conversation thread will appear in the main PTS Chat window and you can close the remaining popup window. Now you can invite other online users to your discussion by right-clicking below your name in the body of the chat window, click the "users" button, and selecting one or more colleagues from the list. Now you are ready to begin your group chat. The window should look similar to the following:
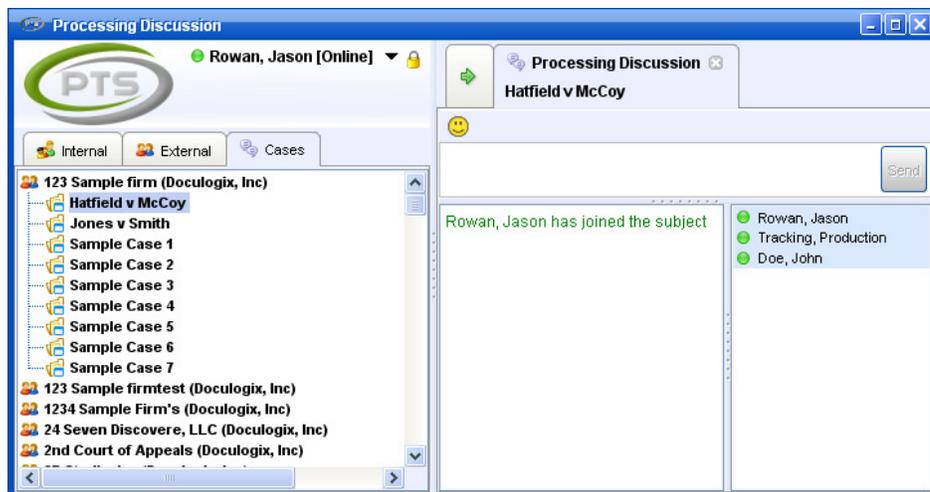
Preferences

PTS Chat can be customized to meet your preferences by clicking on your name at the top of the application window and choosing "Preferences" from the menu. Feel free to explore the various options, however we wanted to point out two important sections.

The "Sounds" section will allow you to customize the audio experience in PTS Chat. For example, if you would like a customized sound to play when a new message arrives, this is the section for you.

The "Notifications" section in preferences is where you can tell PTS Chat whether you would like to be notified when new users come online, when new messages arrive, or when users go offline.

Lastly, and probably most important, the "Login" section will allow you to setup PTS Chat to automatically launch when you turn on your computer. We have this turned off by default during install, but highly recommend all users set this to automatically launch.

And Finally…

This is a quick-start guide, and by design does not cover all aspects of the application. We invite you to explore PTS Chat and its capabilities, and always welcome feedback. If you have any questions or issues, feel free to contact support@doculogix.com and we will respond within 24 hours.

FAQ:
I'm getting an error when I log in…
In the event you receive a "Cases not loaded" error on the screen when logging in, please File →
Exit from the application and then log in again. It is important that you not try to click on the
application until the progress meter on the Cases tab loads.

Do I have to pay to use PTS Chat?
No!! PTS Chat is offered free as part of your subscription to the PTS software.

Can I see the group based chat inside PTS?
We will be adding a section to each case profile that will provide thread history. Check back soon!

How do I change my username / password?
The login credentials for PTS Chat are the same credentials you use to access PTS. Therefore, your PTS administrator can change your username or password via PTS User Maintenance.

I want to close the application, do I "Log Out" or "Exit"?
Choose "Exit' if you want to completely close the application.