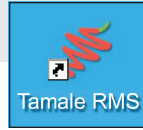# ADVENT TAMALE RMS

Tamale Basics

Help! Contacting Tamale

Email: tamalesupport@advent.com
U.S.: 877.3.TAMALE [877.382.6253]
EMEA: +44 (0)800.368.0907 x2

Click **Contact Tamale** in your layout for live online help.

[?] Contact Tamale

Starting / Stopping Tamale

Tamale RMS

To launch Tamale, double-click the icon on your Desktop.
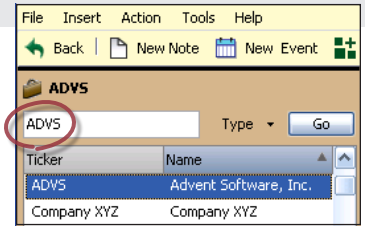
Quickly re-launch Tamale while logged in by double-clicking the icon in the system tray, in the lower right corner of your screen.

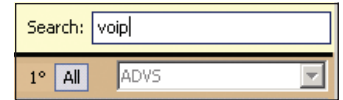To exit completely, right-click this icon and select **Exit**.

4:07 PM

Navigate

Type an entity in the top left. An entity can be a ticker, contact, topic, industry, etc.
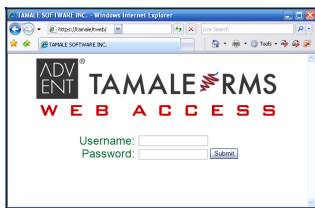

Tamale Anywhere

Access Tamale securely via the web or mobile device!

TWeb
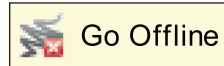https://TamaleIP

**TWeb Mobile**
https://TamaleIP/mobile

Offline Access

Click this button to save data to your laptop for offline access.

Go Offline

** *Some of these features may not be available, depending on your firm's policies.*

Search

Type search criteria in the top right.

Search scans all information in Tamale, including notes, files, emails, and more.

Search: voip

Find

Enter text into the Find box. Only entries containing that text will be displayed (matching text will be highlighted).

Find: Clear

Research View | Contact List | Calendar | Web Portal
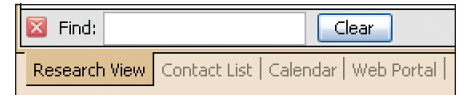
Type **Ctrl+F** to insert **Find** in a Tamale module.


Key Tamale Modules

Research View

**Central location for all entries in Tamale.**

Sort content by Date, Entity, Type, Source, etc by single-clicking on any of the column headers.

Customize your view by right-clicking any column header to add or remove columns. Drag column headers left or right to re-order columns.

1, 1°, All Views Choose **'1'** to view content deposited to the selected entity, **'1°'** to view content related to the selected entity, or **'All'** to view all content in Tamale.
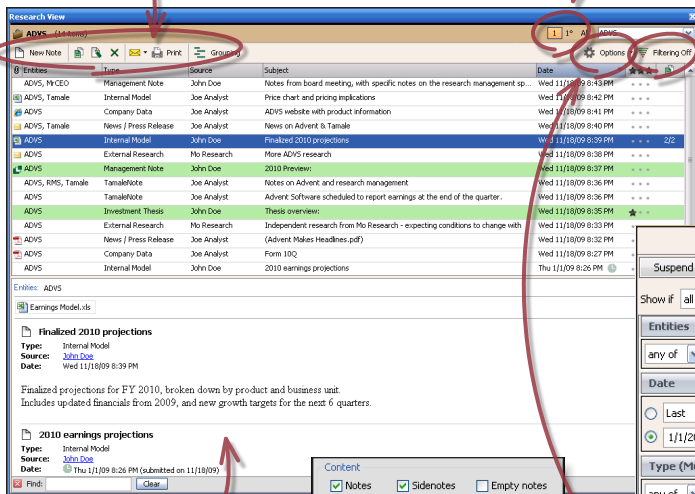
Filter the displayed research by adding one or multiple filters to limit the entries based on entity, date, type, etc.
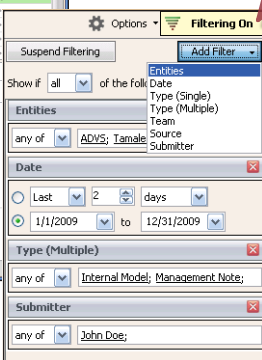
The **Preview Pane** displays the full body of the note highlighted in the Research View. If there are sidenotes, the preview pane will display the original notes and all side notes, with any attached files.
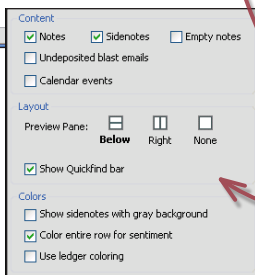
Click the **Options** button to further configure your Research View.

** *Save your preferences! File menu and Save Layout to Server*.

Summary View

Display the most recent note(s) of specified types in a single view, and **print** a tear sheet. **Edit** (then **Save**) to modify the types and number of notes displayed.
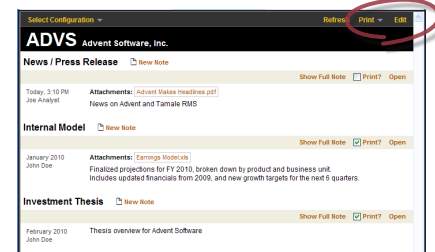
Calendar

Create, import, and view events in the Tamale calendar. Right-click to add an event, or right-click an existing event to edit (update with meeting notes, participants, etc).
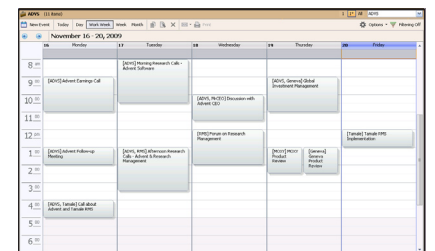
Synch events one-way to your Outlook calendar by selecting this option in the **Tools > Options > Advanced** menu.

Depositing Content

New Note

Create a new note by clicking this button from the Tamale toolbar, or with the keyboard shortcut **Ctrl+N**.

Open an email and click this button to **save the email**, including all its attachments.

Inbox - Microsoft Outlook
File Edit View Go Tools Actions Help
New ▾ | Reply | Send/Receive ⚡

Save emails and clips from Outlook. From the main Outlook window, select one or many items and click the Tamale button. Items can be emails, contacts, and calendar events.
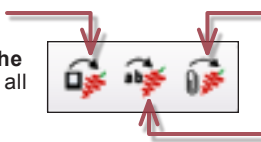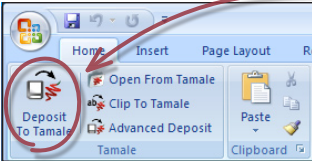
Click this button to **save only the attachments** to Tamale.

Click on this button to **clip highlighted text** from the email to Tamale.

Home Insert Page Layout
Open From Tamale
Clip To Tamale
Deposit To Tamale
Advanced Deposit
Paste
Tamale Clipboard

Deposit files to Tamale from any of these applications: Excel, Word, Powerpoint, Internet Explorer, and Adobe.

File not open? Depositing multiple files?
Drag-and-drop into the Research View, or right-click and "Send to" Tamale!

Clip selected text to Tamale with the highlight button.

Adobe Acrobat Reader.pdf
File Edit View Document Tools
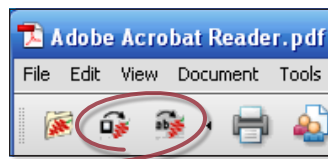
Deposit Dialog

Depositing any item to Tamale will bring up this dialog box.

Submit your note or file to one or more entities. Tab through as you type to auto-complete. If the triangle error message appears, that entity or source does not yet exist in Tamale – click to create the entity or contact on the fly.
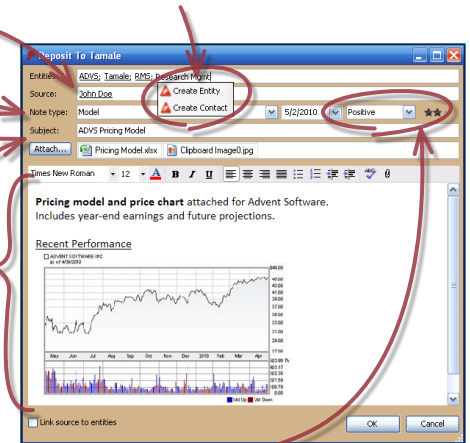
Source the note to the appropriate contact.

Choose a **Note Type** and verify the date.

Add a **Subject** as the title of your note.

Enter the text of your note.

Optionally, add **Sentiment** (Positive or Negative), or designate **Priority** by adding stars.

Deposit To Tamale dialog
Entities: ADVS; Tamale; RMS; Research Mgmt
Source: John Doe   Create Entity
Note type: Model   Create Contact   5/2/2010 Positive ★★
Subject: ADVS Pricing Model
Attach... Pricing Model.xlsx Clipboard Image0.jpg
Times New Roman ▾ 12 ▾ A B I U

Pricing model and price chart attached for Advent Software.
Includes year-end earnings and future projections.

Recent Performance

Link source to entities   OK   Cancel

Tamale Hot Key

Use the Tamale Hot Key to quickly paste items into a Tamale note. Copy or cut the item from any application to your clipboard, and press:

CTRL + **F10**
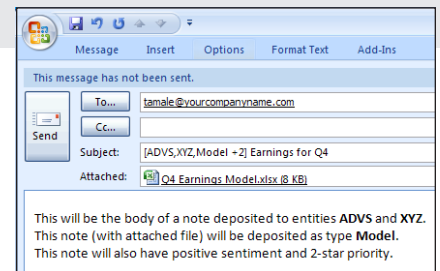
Formatting and images will be preserved.

Email into Tamale

Send notes and files to Tamale by email.

Address to your organization's Tamale email (usually tamale@yourcompanyname.com)

Format the subject line by placing the ticker(s) in brackets, separated by commas. Optionally, include the note type, sentiment, and priority.

example: **[ADVS,XYZ] Title of note**

Message Insert Options Format Text Add-Ins
This message has not been sent.
Send To... tamale@yourcompanyname.com
Cc...
Subject: [ADVS,XYZ,Model +2] Earnings for Q4
Attached: Q4 Earnings Model.xlsx (8 KB)

This will be the body of a note deposited to entities **ADVS** and **XYZ**.
This note (with attached file) will be deposited as type **Model**.
This note will also have positive sentiment and 2-star priority.

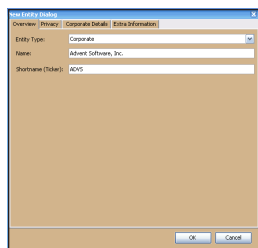# Creating Entities & Relationships

Adding New Entities

New Entity

Create a new entity by clicking this button from the Tamale toolbar, or with the keyboard shortcut **Ctrl+E**.

Select the entity type, then add the entity's full name, and then a shortname or ticker. To create an alias (nickname), click the **Extra Information** tab.

Optionally, limit access to research deposited to this entity to specific Tamale users on the **Privacy** tab.
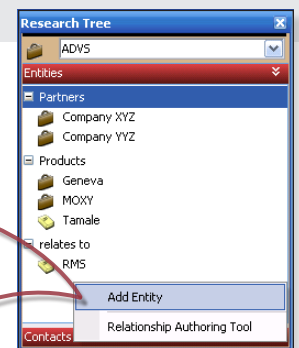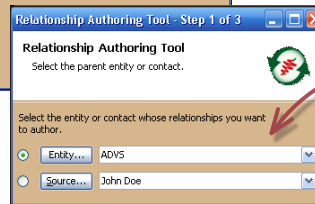
New Entity Dialog
Overview Privacy Corporate Details Extra Information
Entity Type: Corporate
Name: Advent Software, Inc.
Shortname (Ticker): ADVS
OK Cancel

Creating Relationships

Right-click inside the Research Tree to create new relationships.

Add Relationship
Add a relationship to ADVS:
Entity... Tamale
Relationship type: Products
☑ Create reciprocal relationship
☐ Leave dialog open after clicking OK

Add a single relationship by selecting **"Add Entity."**

Relationship Authoring Tool - Step 1 of 3
Relationship Authoring Tool
Select the parent entity or contact.
Select the entity or contact whose relationships you want to author.
● Entity... ADVS
○ Source... John Doe

Research Tree
ADVS
Entities
Partners
  Company XYZ
  Company YYZ
Products
  Geneva
  MOXY
  Tamale
relates to
  RMS
Add Entity
Relationship Authoring Tool
Contacts

Add multiple relationships with the **Relationship Authoring Tool**.

Printing & Emailing from Tamale

Print Research

Select a note or multiple notes in the Research View and use the toolbar icons to Print, Email, Edit, etc.

Right-clicking in the Research View will bring up a similar list of options.

Open
Edit
Email Note
Email Thread
Print
Open File ▸
Save File ▸
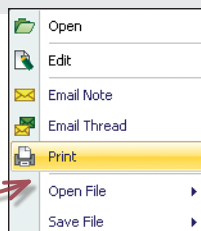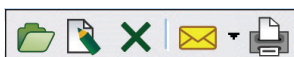
Generate Research Reports

Each **Print** button (as well as **CTRL+P**) includes additional options for creating research reports in HTML.

Print

TamalePage — Print a specific number of notes for a single entity.

Date Report — Print all notes for a specified date range.

Once in HTML, use the browser buttons to print to a physical printer.