

# TAMALE BASICS

## Help! Contacting Tamale

Email: [tamalesupport@advent.com](mailto: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.



## Starting / Stopping Tamale

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 the icon > select **Exit**.

## Tamale Anywhere

Access Tamale securely via the web or mobile device!



TWeb  
<https://TamaleIP>



### iPad Access

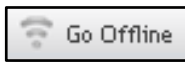
Our **Native app** is in the apple.com App Store; download and connect:  
 • via VPN or company WiFi  
 • or via proxy server

To use our **HTML5 app**, connect over the same methods:  
<https://TamaleIP/mobile/5/>

\* Contact Tamale for help / set-up



Tweb Mobile  
<https://TamaleIP/mobile>



### Offline Access

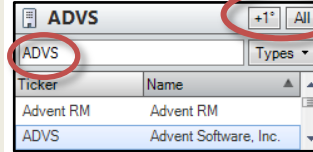
Click this button to save data to your laptop for offline access.

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

## Navigate

Type an entity in the top left.

An entity can be a ticker, contact, topic, industry, etc.

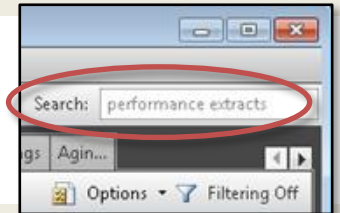


**+1°, All Views**  
**Default** – View content deposited to the selected entity.  
**+1°** – View content related to the selected entity.  
**All** – View all content in Tamale.

## Search

Type search criteria in the top right.

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



## Find

Enter text into the Find box at the bottom of the view / module. Only entries containing that text will be displayed (matching text will be highlighted).

Type **Ctrl + F** to insert **Find** in a Tamale module.



## Research View Central location for all entries in Tamale

**Sort content** by Date, Entity, Type, source, etc by clicking on any of the column headers. Right-click to add or remove columns. Drag column headers left or right to re-order.

**Tabs** – View any of your modules with a single click. Right-click to rename or remove a current tab, or add a new tab to your layout. Note that you can also **Enable Focus Control** to keep that module focused on a specific entity.

**Filter** the displayed research by adding one or multiple filters to limit the entries based on entity, date, type, etc.

The Research View interface includes a top navigation bar with tabs like 'Research', 'Manager Call', 'Manager Financials', etc. Below is a table with columns: Entities, Type, Submitter, Source, Subject, Date. A 'Filtering On' dialog box is open, showing options to filter by Date (Last 2 days), Type (Multiple), and Source. A 'Preview Pane' is also visible, showing details for a selected note.

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.

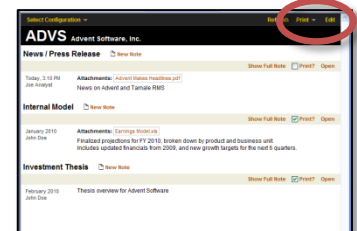
Click the **Options** button to further configure your Research View.

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

## KEY TAMALE MODULES

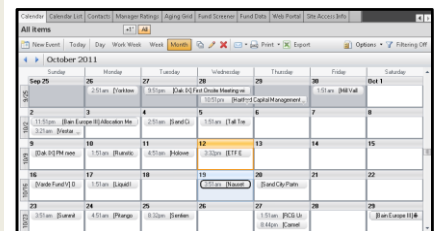
### Summary View

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



### Calendar

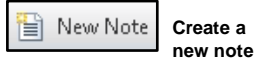
Create, import, and view events in the Tamale calendar. Right-click to add an event, or right-click an existing event to edit (update with meeting notes, participants, etc).



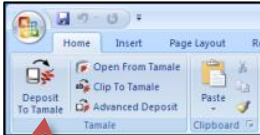
Sync events one-way to your Outlook calendar by selecting this option in the **Tools > Options > Advanced** menu.

# DEPOSITING TO TAMALE

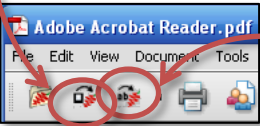
## Depositing Content



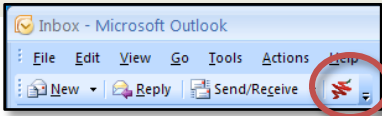
**Create a new note** by clicking this button from the Tamale toolbar, or with the keyboard shortcut **CTRL + N**.



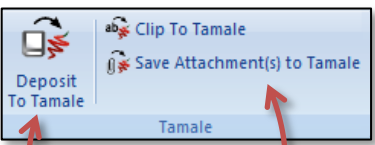
**Deposit files to Tamale** from any of these applications: Excel, Word, PowerPoint, Internet Explorer, and Acrobat.



**Deposit selected text** to Tamale with the clip button.



**Save email 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.



Open an email and click this button to **save the email**, including all its attachments. Click one of these buttons to only save attachments or selected text.

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

## Deposit Dialog

Depositing any item to Tamale will bring up dialog box (template).

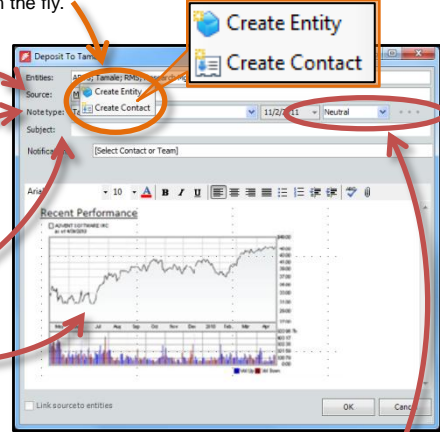
**Submit your note or file to one or more entities.** Tab through as you type to auto-complete. If the triangle error message appears, that entity or source does not yet exist in Tamale – click to create the entity or contact on the fly.

**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.**



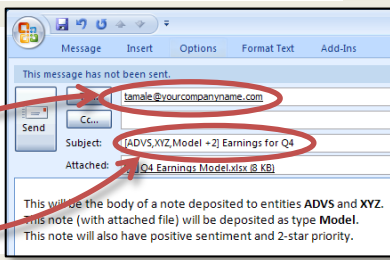
## Email into Tamale

**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.

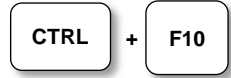
*Example: [ADVS,XYZ] Title of note*



## Tamale Hot Key

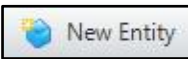
Use the Tamale Hot Key to quickly paste items into a Tamale note. Copy or cut the item from any application to your clipboard, and press: **CTRL + F10** keys.

Formatting and images will be preserved.



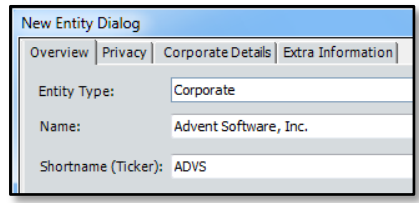
Optionally, add **Sentiment** (Positive or Negative), or designate **Priority** by adding stars.

## Adding New Entities



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

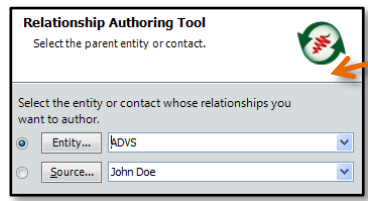
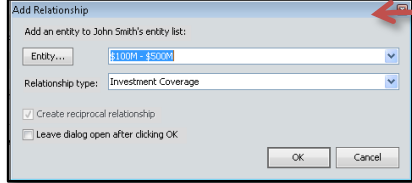
Select the entity type, then add the entity's full name, and then a shortname or ticker. To create an alias (nickname), click the **Extra Information** tab.



Optionally, limit access to research deposited to this entity to specific Tamale users on the **Privacy** tab.

# CREATING ENTITIES & RELATIONSHIPS

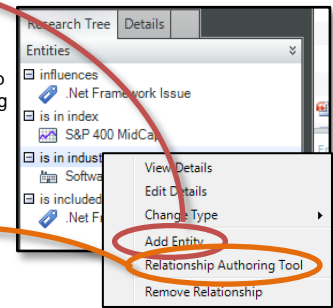
## Creating Relationships



Add a single relationship by selecting "Add Entity."

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

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



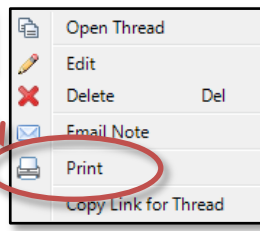
# PRINTING & EMAILING FROM TAMALE

## 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.



## Generate Research Reports

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



**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.