

Organize!

Version 1.5 User's Manual

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The Power of the Simple Tool

There are a dozen or so Personal Information Managers (PIMs) on the market. Many are quite expensive. All are useful, to some degree or another. Why should you choose this one?

Consider the typewriter and the pencil. The typewriter, at first glance, seems the more powerful. It's certainly more complex. For some uses (business correspondence, novels) it is indispensable. It is also cumbersome, expensive, and demanding to operate.

The pencil, on the other hand, is a simple tool. It works on almost any solid surface. It's convenient; you can carry a dozen of them in your pocket. It's flexible, useful for everything from shopping lists to artwork. Chances are, you have already used it many more times than you will ever use a typewriter.

In point of fact, the pencil -- like many simple tools -- is the one that's really powerful.

Organize! is another simple tool. You can use it, in ways we haven't yet thought of, ourselves, to make yourself more productive, to use time more efficiently, and to keep track of details. It can grow with you as your requirements change and as you gain experience.

Getting Set Up

What You Need

An IBM AT, IBM PS/2, or compatible
EGA or VGA/SuperVGA monitor

We recommend, as a minimum, a 12Mhz 286 PC. We also recommend a mouse, for easier use.

MS/PC-DOS 3.1 or later
Windows 3.0 or later

Installing Organize!

Create a directory on your hard disk, \ORGANIZE, for example. Consult your DOS user's guide if you need help with this.

Use the DOS "Copy" command to transfer all the **Organize!** files into this directory. **Organize!** allows you to access this user's manual on-line, through the HELP menu. If you expect to use this feature, we recommend that you copy the file "manual.wri" to your Windows directory. If **Organize!** cannot find this file, it will ask you to insert it into drive A:.

Getting Loaded

From Windows' Program Manager

You can load **Organize!** just as you would any other Windows application, by using the RUN command under the File menu, or by installing it as an icon in one of the program groups. Refer to your Windows manual if you need help with this.

From the Command line

Make sure you are in the directory where you've stored your **Organize!** program files. Then type the following at the DOS prompt:

```
win organize
```

Command line options

Organize! records your data in one or more personal data files, each with a name of your choosing and the file suffix ".dn". You can load one of these data files simultaneously with the program. Simply type the file's name after the load cue. For example:

```
win organize myfile
```

Organize! will load with the data file "myfile.dn," and resize to an icon.

You can also provide a command line option when preparing Organize! to run from an icon in a Program Manager folder.

Password Protection

Access to **Organize!** and its data is protected by a password, so your data is secure from any "snoopers" who may have access to your computer. You select your password when you register the software. The registered version allows you to change your password, if you want. You can change it to a blank entry, which effectively removes the password feature.

For the unregistered version, the permanent password is *share*. Please note that it is lower case.

Getting Started

Searching for Your Keys

When it comes to *your* information, needs, and work habits, you are the only expert, so you impose your own structure on **Organize!**, not the other way around. You can enter whatever data you like, in any order, any format -- paragraphs, lists, freeform sentences, or "bullets." You can take up as much space as you want, inserting blank pages wherever you need them. Text entry and editing commands are very similar to those in the Windows Notepad.

The Search menu is the gateway to the program's power. There are only two entries under it, FIND and VIEW. These commands retrieve and display your entries. They work with any and all text you may have entered. To keep things simple, we recommend that you use *keywords*.

What is a *keyword*? Absolutely any word you decide to call a keyword.

By prefixing all your entries with your own keywords, you'll begin to transform random, unrelated bits of data into a system of personal data management.

Using a Mouse

If you move the mouse cursor between the pages, over the binder's spine, it becomes a hand icon. Clicking the left button will then insert a blank page.

Pointing and clicking on the "dog-ears" at lower left and lower right will cause paging to the previous or next page.

A "Jump-start"

Here's a simple exercise to get you familiar with **Organize!** in about ten minutes. Load the program, then use the File menu's OPEN command to load the file

"example.dn." Now use the Search menu's FIND to find the following keywords:

- 1 .DO: (include the colon)
- 2 .APP:
- 3 .APP*: (notice the difference the asterisk makes)
- 4 .02 APP:
- 5 .02 APP*:
- 6 .WEEK #
- 7 .YR:
- 8 .YR*:
- 9 .PrjTape:

Note that you can press **Shift F9** to see the Keywords page.

That's it! You've now seen the program in action. All that's left is for you to enter your own data.

Getting Organized

Three Suggestions

1. Keep a list of your keywords.

The more data you enter, the more keywords you need. It can be hard to remember them all, so make the program keep the list for you. Enter any explanatory notes you think you might need; remember, you want the program to simplify your life, not complicate it!

2. Store your keyword list on *Organize!*'s first page.

This is the one dated Jan 1st, 1989.

Why? So that, after a search for a keyword, your display will list your entries in chronological order, with your explanation of the keyword at the top.

The optional list box that pops up when you select the SEARCH FIND command, by the way, comes from the page dated Monday, 2 January, 1989. If you want to "click and go" from a list of selected keywords, just enter them there. You can, of course, use the EDIT menu's COPY and PASTE commands for this.

3. Use many small files, not a single large one.

The personal data files are like spreadsheets; they load into memory and use as much as they need.

Keeping all your records in a single file won't do any harm, but it isn't an efficient use of your machine's memory and, depending on how much you have, it might impair your ability to run other programs with ***Organize!***

If you ever want to access two or three data files at the same time, you can always load two or three copies of ***Organize!***, though this also is an inefficient way to use memory.

Here are a few tips for smart management of your files (and memory):

Don't use a single file for the whole year. Use one per quarter or even one per month. When you start a new file, you don't have to abandon all the data in the old one. Just use the PHOTOCOPY and INSERT commands to transfer any entries you want to carry-over.

Use different files for different functions -- one for project planning, one for personal

information, another for appointment scheduling, and so on. Data that you access occasionally, like telephone numbers, can all go into one file reserved for such purposes.

You'll find yourself entering some keywords more often than you now expect, others less so. Occasionally, one of your data files might get large enough to slow the program noticeably. If this happens, you can use the PHOTOCOPY and INSERT commands to cull-out one or several of these "high-use" keywords and insert them into a separate file.

Similarly, entries that appear only once or twice can be broken-out and consolidated.

Sample Applications

Here are a few sample uses for **Organize!** Given a little time, you can probably invent far more of your own!

"To-do" lists

Start with a basic keyword such as *DO:*. You can then list all "To-Do" items by using the FIND command to search for *DO:*

Consider adding extensions to the basic keyword, for example, *DO:1* and *DO:2*, where 1 and 2 indicate priorities. Now you can see only top-priority items by searching for *DO:1*.

Another possibility is a date, such as *DO:5/1*, where 5/1 indicates your deadline or your start date. Now you can run a search and see a list of all "To-do" items with a specific date.

You can further manage your "To-do" list by:

Deleting the note after the task is completed. Or, instead,

Inserting an asterisk, as in *DO*:1*. This way, you can search for *DO** and have a record of finished tasks.

Telephone numbers

A suggested keyword: *TEL:*

You can divide your telephone list into subsets by entering, say, *TEL:B* for business contacts, *TEL:P* for personal, or another such scheme.

Set yourself a standard format, and then stick with it. Examples:

TEL: (name) (number)
TEL: (company) (number)

You can then list your entries alphabetically. For example, using FIND to search for "*TEL: A*" would generate a list of phone numbers for all persons or companies beginning with A.

If you enter telephone numbers along with your other data, you can use PHOTOCOPY and INSERT to retrieve them all and consolidate them into a single file. You could even use the REPORT command to send them to your word processor and print your own personal telephone book!

A Business Calendar

Suggested keyword: *APP:* You can list all your appointments chronologically, by using

the FIND command to search for "APP:."

You can "fine-tune" your appointment management by any of the following methods, singly or in combination:

Add a date prefix: *01 APP:* for January, *02 APP:* for February, etc. Then you can FIND and VIEW appointments by month.

Add a suffix for type of appointment: *APP:CI* for classes, *APP:SMR* for seminars, *APP:B* for business meetings, etc. This lets you FIND and VIEW different categories of upcoming appointments.

Delete past appointments or, better yet, mark them with an asterisk and write a quick summary on the same page. This can be a far better reminder system than writing yourself a note by hand.

Short, middle and long-term planning

Suggested keywords: *WEEK #* for weekly plans, *MONTH #* for monthly plans. *YR:* for the year in overview.

Enter "*WEEK #*" and a number on the monday of every new week. Follow with a one-line synopsis of the week's activity. Then, by searching for "WEEK," you'll have a list of weeks, in order, with your notes.

Likewise for "*MONTH #.*"

If you enter *PH:* for public holidays, you can use FIND to search for this keyword and display a chronological list of holidays.

You can enter any distant-future commitments (next year's stockholder's meeting, a silver anniversary, etc.) into a single file, keyworded *JAN:*, *FEB:*, *MAR:*, etc. Then, as you begin, say, March, just open your long-term planning file and FIND all your entries keyworded *MAR:*. Now use PHOTOCOPY and INSERT to copy these entries to your current file. In seconds, every reminder you've entered for March is in your current file!

Project management

Suggested keyword: *Prj:*

You can manage your projects by any combination of the following:

Prefixes to designate priorities or simply different projects. *1Prj:*, *2Prj:*, and so on.

Suffixes to indicate workers, type of project, or anything else you want. For example, *PrjJim:* might identify a task assigned to James. *PrjMkt:* could signify a marketing project. Or *PrjMkt!*, where the exclamation mark indicates that you've written yourself an important note beside this entry.

Insert asterisks after past entries. *PrjMkt**: could indicate completed milestones in the project.

You can keep a separate file for each worker: "*Jim.dn*" has his milestones and notes, "*Mktg.dn*" has the marketing group's etc. You can document any reassignments and personnel changes by using the PHOTOCOPY and INSERT commands to move any entries between data files.

Note: the PHOTOCOPY and INSERT commands create files (file suffix ".dni") that are readable by all **Organize!** users. If the new user imports one of these .dni files and then saves it, the new .dn file is now password-protected, according to the new user's setup.

The Idea Locker

How many times have you come across an idea or a piece of information that might be significant, but you can't take the time to think about it just now? If you're busy, chances are, this happens to you every day.

What do you do? Write yourself a note? Ask someone to remind you later? Ignore it and trust that it will arise again? Here's another suggestion:

Enter it into **Organize!** with a keyword like NOTE: or IDEA:. Later, when you have time to ponder them, you can bring up a list of your ideas and notes.

The keyword LOIS: might indicate something you want to remember to tell Lois the next time you speak to her on the telephone.

With a little planning, you can adapt this very-flexible system to your activities, profession and lifestyle. You can probably invent more creative ways to use **Organize!**, and we are very interested to learn from you about these.

Registration and Password

To register, fill-in the form in the file "*order.txt*" and mail it to the address on the form. Don't forget to specify a password. This can be any string of 4 to 10 characters, from *A to Z* and/or *a to z*. Please note that the password is case-sensitive, and *share* is not available; the unregistered version uses it.

The registered version allows you to change your password if you wish. Before you choose the CHANGE PASSWORD command, make sure only one copy of **Organize!** is running, then follow the cues. If, when the program prompts you for your new password, you simply hit the *Enter* key, the password feature is disabled. The program will close and, after you re-start it, you (and anyone else, for that matter) will have ready access your data.

IMPORTANT NOTE:

Before you enter your registration data, ensure that you have a backup copy of **Organize!** in case you make any mistakes, because the registration process is irreversible.

The Commands

The Control Menu

Organize! adds two commands to the usual Windows commands in the Control Menu:

Book Size.

This is useful for returning the program to the useful workable size and position after move or resize operations.

Password On/Off

The default, whenever you start a fresh copy of the program, is password ON. You can toggle it off for your convenience.

If you've disabled the password feature with the CHANGE PASSWORD command, under the File menu, then this toggle is set to OFF and cannot be re-set.

File Menu

The first four commands on the File menu are similar to those of standard Microsoft Windows applications. After these, **Organize!** has the following commands:

Photocopy

This command allows you to make copies of specific data entries, which you can then insert into another **Organize!** data file. There are two ways to access this command, and they work differently.

The first way is by selecting PHOTOCOPY from the File menu. This brings up a dialog box, asking you to select a range of pages by date. The pages you specify will be written to an interim file (*photopg.dni* is the default filename).

The second way to PHOTOCOPY lets you to copy all entries that have a particular keyword. To use the command this way, select the "Photocopy" button in the VIEW/REPORT window, after you've completed a search. All the entries in the window will be written to an interim file (*photo.dni* is the default filename).

The *.dni* files are not encrypted in any way, and can be read by any other **Organize!** user.

Insert

The INSERT command transfers all the data from a *.dni*-suffix file, generated by the PHOTOCOPY command, to the current file. In case there are two or more *.dni* files in the current file directory, **Organize!** presents a dialog box and asks you to specify one.

The program creates any new pages it might need to hold the inserted data.

Report

This command allows you to select a range of days in **Organize!** that you can print to a word processor or editor of your choice. You can change this word processor by modifying your WIN.INI file. Look for the section [Organize] and put in the full filename of the editor you want to use after *editor=*. For example:

```
[Organize]
editor= write.exe
```

In this case, the word processor is the default, the Windows Write program that comes bundled with Windows.

You can use your word processor to edit the report or print it.

NOTE: Avoid requesting a report that spans the ten-year period from 1989 to 1999. If you confine your report range to one or two years at the longest, it will dramatically shorten the time it takes to generate the report.

NOTE: *It is very important that you supply an "END NOTE" command after you have finished typing a note or topic so that Report knows where the note ends, Otherwise, the report will include extraneous text. The END NOTE command is under the Edit menu. The shortcut key is F2*

Change Password

The registered version allows you to change your password. Before you choose the CHANGE PASSWORD command, make sure only one copy of **Organize!** is running, then follow the cues.

If, when the program prompts you for your new password, you simply hit the *Enter* key, the password feature is disabled. The program will close and, after you re-start it, you (and anyone else, for that matter) will have ready access your data.

The Edit Menu

The EDIT commands mimic those of the Notepad program that comes with your copy of Microsoft Windows, with the following two additions:

End Note or F2

This command signifies an end to a text entry. If you do not use END NOTE after an entry, the REPORT command will generate extraneous text.

Other Page or F5

This command moves the editing cursor between the left and right pages. It is also useful for finding the edit cursor when you've "lost" it.

The Search Menu

Find or F3

Select the FIND command, then type the keyword you want to search for in the dialog box. If all the characters you enter are lower case, the program will disregard case during the search . If you enter any uppercase letters, the search is case-sensitive.

You can also click on the down-arrow, which brings up a list of keywords. This list comes from the page dated Monday, 2 January, 1989. If you want to "click and go" from a list of selected keywords, just enter them there.

The VIEW/REPORT window, which will appear with the search results, has four buttons: PHOTOCOPY and REPORT, which work with all the found entries, PAGE TO, which pages you to a particular text entry of your choice, and CANCEL.

View or F4

The VIEW command displays the VIEW/REPORT window. It is automatically activated once a FIND operation is completed. If you don't want to repeat the last FIND, you can still view its results with VIEW.

You can edit and print these results with your word processor by selecting the REPORT button from the dialog box. You can also send them to another **Organize!** data file with the PHOTOCOPY button.

NOTE: *It is very important that you supply an "END NOTE" command after you have finished typing a note or topic so that Report knows where the note ends, Otherwise, the report will include extraneous text. The END NOTE command is under the Edit menu. The shortcut key is F2*

The Page Menu

Page To or F6

This allows you to jump to a specific day. When you select the command, a calendar appears on your screen. Every day is a command button. Just select the date you

want with the mouse. The PREVIOUS and NEXT buttons scroll the calendar a month at a time.

Page Backward or F7

Moves one page backward.

Page Forward or F8

Moves one page forward.

Page Previous Day or Shift+F7

Moves one day back.

Page Next Day or Shift +F8

Moves one day forward.

Page Today or F9

Moves to the first page of the current day.

Page Keywords or Shift F9

Moves to the first page of 1989, the place for you to enter your keywords and their descriptions.

Page Insert or F10

Inserts a new page.

Page Deletions

Blank pages are automatically deleted when you use the File menu's SAVE command. The exception: blank pages "sandwiched" between those with text entries will not be deleted.