

PhoneVu 1.1

Thank you for trying *PhoneVu*. My desk used to be covered with hastily recorded phone calls on yellow Post-it Notes, something I always felt was ridiculous given the power of the PCs gathered round my work space. Although several Windows-based personal information management (PIM) programs have features that will track phone contacts, none has a call logging facility that meets my needs (although PackRat, my current PIM, comes the closest). *PhoneVu* is a phone call tracking utility I wrote to record phone call conversations on screen, organize the information after hanging up, and later recall conversation details by searching a call database. Having call histories available is very useful since I'm heavily involved with testing new hardware and software products for my employer. This application is actually the first module of a home grown PIM project.

Release 1.1 adds some new features to *PhoneVu*, and also alters a few existing features for better usability. Please continue to send me your comments and criticisms, and of course, bug reports. CompuServe is the best way to reach me since I'm online 3-4 times a week (send email to 70401,546). I can also be contacted via office email at: John_White%NIHCR31.BITNET@CU.NIH.GOV.

As a disclaimer, the author takes no responsibility for *PhoneVu*'s use by others, or the results of *PhoneVu*'s use.

PhoneVu is freeware but keep all the files together if you want to distribute the application elsewhere—this just ensures the program runs properly. Enjoy.

John White

Installation

PhoneVu consists of 2 executable files and 3 support libraries:

PHONEVU.EXE	Main program file
PCCONV.EXE	Conversion utility for <i>PhoneVu</i> 1.0 and 1.0a files
MHEN200.VBX	Function library
SS3D.VBX	Function library
SS3D2.VBX	Function library

Since *PhoneVu* is a Visual Basic 2.0 application, the runtime library VBRUN200.DLL is also necessary and is available elsewhere on CompuServe.

Windows design conventions suggest that all *.VBX files go into the Windows SYSTEM subdirectory. The files can go elsewhere, as long as they are located in a subdirectory listed in your path statement. I suggest, however, that you install them in the SYSTEM subdirectory to avoid duplication of libraries at later dates.

The executables can go anywhere but for convenience I suggest creating a new subdirectory (I store them in "C:\VUWARE"). *PhoneVu* 1.1 should not *need* to have the executables in a subdirectory listed in the path statement but I strongly encourage you to do so anyhow. Please let me know if you don't include them in the path and *PhoneVu* has difficulty finding the data files.

When you first start *PhoneVu*, two files are created: PVCALL.LOG (the call database) and PVNAME.LOG (the phone book database). These files will be empty until you add records. You will also be prompted to input the location of the EXE files, the path of which is stored in PHONEVU.INI.

Conversion Utility

If you've never used a previous version of *PhoneVu*, you may skip this section.

NOTICE!!! *PhoneVu* 1.1 will not read and write to data files created with the earlier 1.0 or 1.0a versions. The PVCONV.EXE file translates the PVCALL.LOG and PVNAME.LOG data files from version 1.0 (or 1.0a) to version 1.1. Follow these instructions:

1. Backup your original data files! The conversion utility has been tested on several machines without mishap but better safe than sorry.
2. Start the program. The opening screen uses directory and file list controls to help you locate the files. Select either PVCALL.LOG or PVNAME.LOG. Choose the Convert button.
3. A second windows asks for confirmation before proceeding. If you've chosen the proper file, click the Begin button. A status bar indicates the translation process is under way.
4. A dialog box will indicate whether the translation was successful. If yes, choose the other data file and repeat the above process. Please do NOT run *PhoneVu* 1.1 until you have converted both data files.
5. Try running *PhoneVu* 1.1. The phone book list box should be filled with names properly. Double click a few at random to check for field integrity. Do the same for the call history list.
6. If you run into problems, note that your data files were copied to PVCALL.BAK and PVNAME.BAK. Just rename them back to the original format and contact me immediately.

Quick Tutorial

The Call Entry Screen

PhoneVu opens to a call entry screen. The top left portion is for taking notes on a call and entering a one line summary. Specifics about a call's direction and status are recorded using radio buttons beneath the Call Details/Summary area.

The right hand part of the screen is a listbox with phone book entries. A name or company associated with a call is selected here—a text box allows you to dynamically search for phone book entries. The lower portion of the phone book area contains two buttons for adding new names or deleting old name entries. Phone book entries can be listed by personal name or company by checking the appropriate radio button in the "Sort Phone Book" area located below the Modify Phone Book label.

The rest of the entry screen is occupied by command buttons and a status bar on the lower edge of the window. The time and date shown are saved when the phone call is recorded. A count of the calls still pending is displayed as a handy reminder. The About button displays a dialog box with information about the program. The Clear button removes any entry information you've started to enter but decide not to use, and Exit unloads the program from Windows. The Save and two Search buttons are discussed in the following paragraphs.

Entering a Call

An example of a typical call should be sufficient to describe the features available in the entry window. Let's say you want to call me about a bug found in the program. Enter some call details describing the nature of the call (the cursor defaults here anyway). Press tab and the cursor is moved to the Call Summary entry box. A one line summary can be entered here to aid in searching calls at later dates. I like to put the person's name at the beginning of the line so you might type my name here. However, it's easier to select my name from the phone book list and drag it from the phone list to the Summary (or Details) area using the right mouse button. Here's how:

I'll assume my personal information is not yet recorded so click on the button with a plus sign (+) located on the left of the "Phone Book" label. This new window contains a number of fields for entering information. Please note that you do not have to enter a name—a company will suffice. However, one or the other must be entered. For now, just put my first and last name in the appropriate fields (if no name is entered the company name will be shown in the listbox on the main entry screen). Note that clicking the Close button disregards any entries and closes the window, and clicking the Print button prints hard copy of the record. The Save button saves the entry so select this button. Notice how it clears the fields to prepare the form for another name record. Enter another name or press Close to exit.

My name is now showing in the phone book list. Click the name with the left mouse button, then click and hold the highlighted name in the listbox with the right mouse button. Notice how the mouse cursor has changed to a hand pointing to the left. Move the cursor over the Summary area and release the right mouse button. The highlighted name in the phone book list is now in the summary line. Now add a few words about the call.

Finally, select the appropriate call direction (Outgoing) and call status (choose I Left Message) from the two radio button groups. Click on the OK command button and the call is saved and associated with my name. You've entered your first call.

Another feature found in the phone book is the dynamic search engine, something very useful if you have a very long phone list. Tab to or click in the text box located immediately above the phone book list. Start typing my *last* name. Notice how letters are matched to entries as you type. If the selection is correct, hit the return button and the full name is copied to the text box.

You can also delete phone book entries. Highlight a name entry and click the button with the minus sign (-) located to the right of the "Phone Book" label found below the phone list. A dialog box asks you if you're sure you want to delete this record. Answer yes to delete or no if you change your mind.

After you've entered a number of names or companies into the phone book you'll often find that sorting by company shows duplicates. This is not a bug. I purposely did not want to eliminate duplicates because I often enter a company name differently as in "Dell" or "Dell Computers", or worse, enter the name incorrectly. You might also have multiple contacts at a given company—eliminating duplicate companies from the list would have forced you to link a call with the first name associated with that company record entry. Unfortunately, it may or may not be the person you wish to contact. To get around this in *PhoneVu* you simply sort by company, select a company name with the left mouse button (it doesn't matter which one of the duplicates), then right click the highlighted company name. A dialog box pops up with a complete list of contacts at that company (actually, the search engine just checks the first four letters of the company name and lists all the hits). Double click the appropriate name entry and the dialog box closes, resorts the phone book by name, and automatically highlights and selects the contact for you.

With time your phone book will grow in size and the searching text box will be handy for finding last names or company names. However, you can also search the notes field of phone book entries by selecting the Search Book command button. This reveals the Search Phone Book Notes window. Simply type in a text string and press return (sorry, no wild cards supported yet). Any phone book entry with that string recorded in the notes field will be shown as a name entry (or company name) in the list box. Select one with the left mouse button, then right click the same entry. The notes text is revealed in the inset panel on the left side of the window. Alternately, you can double-click the the entry in the list box to see the entire phone book record.

Searching Calls

The entry screen has a command button labeled Search Calls. After you have entered a few call records, click this button. A new window appears. The top of the screen is a listbox containing the one line summary information, and is sorted in descending order by time and date (also shown). Pending calls are listed by default. On the left side of the window are two radio button groups for filtering types of calls, and to search by string or person's name. The list box on the lower right is activated when searching calls associated with an individual contact.

Try selecting the four radio buttons under Call Display Filter. Each time you select a radio button, the call list is searched, filtered, and sorted, and fills the listbox appropriately. The radio buttons in the Search group work a bit differently. If you select the Call Summary/Details radio button, the cursor jumps to the text box located above the phone book list. Enter any string to search (sorry, no wild cards are allowed yet). Click on the Start String Search button and calls containing that string in either the call's Summary or Details field will be listed. If you select the Phone Book radio button, the phone book can be searched dynamically as in the entry screen, or you can select a name with the mouse cursor. When a name is selected (either by double mouse click or hitting return in the search box), the listbox shows all calls associated with that individual.

To see details of a call, double click on a summary line in the listbox. You can edit the summary and detail sections here. When the call is pending, the current time and date are placed at the end of the call details section to note the time you followed up on the call. To save a pending call as completed, click the check box labeled "Pending call now completed?" and select the OK command button to save your changes. The Print button prints this record, and the Cancel button closes the window. To delete a call record highlight one record and click on the delete button found below the call list.