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# Basics of Using Day-Timer Organizer

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## Scheduling with the Planner Views

*Day-Timer Organizer* has three planner views which display your schedule, things to do, upcoming activities, and a diary of completed tasks, calls, and expenses:



Daily Planner View - shows entries for a particular date



Weekly Planner View - shows all information for a week



Monthly Planner View - shows all information for an entire month

Unlike a paper planner, *Day-Timer Organizer* allows you to switch easily between daily, weekly, monthly and list views of your meetings and tasks. You can switch instantly from big picture planning where you need to see a complete month display reviewing today's schedule, simply by clicking on the button for the desired view.

When you switch from one view to another, all of your data is displayed in the new format, as appropriate.

[Displaying Different Dates in Planner Views](#)

[Customizing the Display in the Planner Views](#)

[Adding Schedule Entries](#)

[Using Search Options](#)

[Scheduling Shortcuts](#)

[Printing](#)

## Managing To Do Lists

One of the handiest features of *Day-Timer Organizer* is its ability to help manage your list of to do items:

- current and overdue tasks,
- multi-day schedules,
- scheduled entries without times,
- follow-ups,
- etc.

In a paper system, for example, uncompleted tasks must be manually rewritten on the next day's schedule page. With *Day-Timer Organizer*, uncompleted tasks are automatically carried forward, ensuring that no task is overlooked. In addition, you can request that advance notice be provided at specified advance intervals to ensure that deadlines don't take you by surprise.

### Tasks:

[Adding a Task](#)

[Modifying a Task](#)

[Completing a Task](#)

[Advanced Task Management Features](#)

### Other To-Do List Entries:

In addition to tasks, [multi-day entries](#), [schedule entries without times](#) and entries with followups will be displayed on the To-Do pane of the planner window.

### Viewing the To-Do List

[Viewing To Do List Items](#)

[Understanding the Display of To Do Items](#)

[Shortcuts for Managing To Do List Entries](#)

### Managing the To-Do List

[Rescheduling with the Mouse](#)


[Using Search Options](#)

[Using the Task List View](#)

[Totalling Time and Expenses](#)

## Maintaining Your Address Book

*Day-Timer Organizer* is a powerful yet easy to use contact manager. For each contact, it accommodates 2 addresses, up to 6 phone numbers, 4 e-mail/Web addresses, 35 pages of notes, up to 12 custom fields, and an unlimited number of related meetings, tasks, and phone calls.

To view your address book, click on the **Address Book** button .

[Adding an Address](#)

[Modifying an Address](#)

[Deleting an Address](#)

[Copying an Address to your Word Processor](#)

[Finding a Name](#)

[Organizing Your Address Book](#)

[Internet Access](#)

[Copying an Address to your Word Processor](#)

[Using Search Options](#)

[Printing](#)

[Sharing Entries With Others](#)

[Using the WinFax Interface](#)

## **Making and Tracking Phone Calls**

*Day-Timer Organizer* helps you manage phone calls more effectively. You can use the phone log to track important information on calls including date, time, duration and notes. If you have a modem, *Day-Timer Organizer* can also dial phone numbers for you.

[Setting Up to Make Calls](#)

[Dialing from your Address Book](#)

[Logging a Call](#)

[Viewing Phone Calls](#)

[Dialing Phone Numbers Embedded in Notes Text](#)

# Taking Notes

Notes can be created in two ways:

- the Notes field of entries can be used to type notes as you work on an entry
- a Note entry can be created in the Notebook view

[Adding New Entries](#)

[Updating Entries](#)

[Deleting Unwanted Entries](#)

[Copying Entries to the Clipboard](#)

[Copying Text from the Clipboard into \*Day-Timer Organizer\*](#)

[Viewing Your Notes Entries as a List](#)

[Sorting Notes](#)

[Controlling Entry Display](#)

[Viewing the Full Text of Notes](#)

[Editing Note Text](#)

[Accessing Web Addresses Embedded in Notes Text](#)

[Dialing Phone Numbers Embedded in Notes Text](#)



## Tracking Expenses

Expenses are displayed on the planner views as well as on the *ExpenseOrganizer* view. Expenses are shown in the **Diary & Work Record** pane of the daily planner view.

You can record travel expenses, entertainment expenses, and a wide variety of other expense types. You can group expenses by project or client, and instantly add up expenses for any project or time period you choose.

You can also tally time you spent on meetings, tasks, and phone calls for any project or client. When you provide an hourly rate, *Day-Timer Organizer* will multiply the time you spent by this rate to compute costs for any project or client.

*Day-Timer Organizer* tracks two major types of expense items:

- unsubmitted expenses
- submitted expenses

This allows you to easily manage current and outdated expense records.

[Recording an Expense](#)

[Marking Expenses as Submitted](#)

[Viewing Your Expenses](#)

[Modifying an Expense Entry](#)

[Deleting an Expense Entry](#)

[Search and Repositioning](#)

[Totaling Time and Expenses](#)

[Printing Expense Reports](#)

## Viewing Timelines and Global Lists

*Day-Timer Organizer* has two views that display multiple entry types in a single unbroken list format—Timeline and Global views.

The Timeline view shows all date-related entries in chronological order. It displays every occurrence of recurring activities, providing a complete picture as you scroll through time. It presents an unbroken, easy-to-read list of activities, and is therefore sometimes more convenient than the Daily, Weekly, or Monthly planner views.

The Global view shows all entries (schedule, tasks, addresses, notes, phone calls, expenses, and messages), with recently added or modified entries at the top of the list. Unlike the Timeline view, the Global view includes non-dated items (such as addresses, notes, and tasks). This makes it ideal for finding everything which applies to a topic.

[Viewing Timelines](#)

[Global View](#)

[Adding New Entries](#)

[Updating Entries](#)

[Deleting Unwanted Entries](#)

[Finishing Entries](#)

[Searching for Entries](#)

[Copying Entries to the Clipboard](#)

[Attaching Files to Entries](#)

# Personalizing Day-Timer Organizer

*Day-Timer Organizer* allows you to customize your software in a variety of ways.

## Using the Setup Menu

Many of the commands that allow you to personalize the features of *Day-Timer Organizer* are grouped in the **Setup** menu. Customization options are listed below:

<u>User Preferences</u>	lets you control week display format, alarm snooze behavior, business hours, conflict checking, category display, password security, screen fonts, button bar layouts, and notification messages for schedule & task entries (multi-user database only).
<u>Startup Screen</u>	lets you set the way <i>Day-Timer Organizer</i> looks when you start it ( <i>Day-Timer Organizer's</i> size and position, views you want open, and size, position, and search settings for each view).
<u>Telephone</u>	lets you adjust local area code, communications port, modem settings, frequently used dial codes, and DDE (dynamic data exchange) links to selected telephone systems.
<u>Categories</u>	lets you create and maintain a list of categories for cross-referencing related information; allows you to set up default assignments and searches.
<u>Assignees/Users</u>	lets you create and maintain a list of names, groups, and resources to whom entries may be assigned; allows you to set up default assignments and searches.
<u>Expense Types</u>	lets you customize the list of expense types which applies to the current database.
<u>Custom Fields</u>	lets you select names for custom database fields ( <i>Day-Timer Organizer</i> allows up to twelve custom fields per entry type).
<u>Holidays</u>	lets you select one or more countries whose holidays you wish to display, and customize the holiday list for any country.
<u>Database</u>	lets you set passwords and adjust the start of your fiscal or calendar quarter. In a multi-user database (workgroup system), this command also lets the Supervisor control database access and privilege levels.

## Other Personalizing Commands

Turning On/Off Help Balloons

Saving View Settings

Saving Your Printing Settings

# Printing

## Before you Print:

[Choosing Paper](#)

[Printer Setup](#)

[Handling Paper for Double Sided Printing](#)

## Printing:

To print from *Day-Timer Organizer*, click on the  button on the button bar at the top of the window or select **Print** from the **File** menu. The **Printing Options** dialog box will appear.

**Important:** Unless you have previously saved the settings, the default values displayed on the **Printing Options** dialog box reflect the settings within the **Printing Options** window, not the view that was displayed before starting to print.

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[Choosing the Print Style](#)

[Setting Planner Page Options](#)

[Setting Address and Phone Book Options](#)

[Printing Mailing Labels](#)

[Printing Envelopes](#)

[Printing Rotary Cards](#)

[Printing Lists](#)

[Choosing the Data to Print](#)

[Setting Paper Options](#)

[Printing Double Sided Forms](#)

[Choosing an Alternate Font](#)

[Making It Print: Using the Button Controls](#)

[Saving Your Printing Settings](#)

## Exchanging Data with Other Systems

This topic describes how to exchange data between your *Day-Timer Organizer* system and other systems (e.g. other *Day-Timer Organizer* users, other organizer software programs, word processors, and external e-mail systems). You can import information from other systems into *Day-Timer Organizer* or export your data to other systems for use with mailings or other purposes.

[How Data is Stored and Exchanged](#)

[Exchanging Data with Other External Systems](#)

[ASCII File Formats](#)

[Exchanging Data Through the Clipboard](#)

[Converting Data from other Day-Timer Databases](#)

[Connecting to External E-mail](#)

[Coordinating Data Between a Portable Computer and the Central Database](#)

## What Does *Day-Timer Organizer* Do?

*Day-Timer Organizer* is an integrated software program that complements your paper organizer, helping you to

- schedule your time
- maintain contact information
- coordinate projects
- review the progress and completion of tasks, and
- track expenses.

Developed by Day-Timers, the leader in paper-based organizers, *Day-Timer Organizer* combines the ease and take-it-with-you convenience of your paper-based organizer with the power of your computer. At your computer or away, you've never been so organized, so easily!

*Day-Timer Organizer for Workgroups* includes additional features to

- schedule meetings and allocate tasks between several individuals
- send messages between users, and
- share key data such as contact information or notes.

Note that *Day-Timer Organizer for Workgroups* allows Macintosh and Windows workstations to share a common multi-user database over a network.

# About the Online Help

This online help system is a complete manual for *Day-Timer Organizer*. It describes how to use all of the features of *Day-Timer Organizer*. For installation instructions and a quick introduction to *Day-Timer Organizer*, consult the *Getting Started Guide*.

## Related Topics:

[Common Technical Questions](#)

[Technical Notes](#)

[Technical Support](#)

# Using the *Day-Timer Organizer* Help System

There are three main methods for receiving information about the features of *Day-Timer Organizer*:

- Balloon help - When you move your mouse pointer onto a button, a balloon will appear describing the function of that button. By default, when *Day-Timer Organizer* is installed, the balloon help feature is enabled. If balloon help is not displayed, you can turn this feature back on by issuing the **Help...Show Help Balloons** command. If balloon help is enabled, you can turn the feature off by choosing the **Help...Hide Help Balloons** command.
- Online help - A complete electronic version of this manual is available through the **Help** menu and can be referenced at any time. The **Help...Index** command displays the main table of contents for the online help. You can also press the **F1** key to display the help system. The help system follows the standard Windows conventions for finding information. For more information about using the help system, you can choose the **Help...How to Use Help** command from the Windows Program Manager.
- Status Bar - When you click on a pull-down menu item or press the mouse button down while the pointer is on a button, a brief description of the function appears in the status bar at the bottom of the screen. To learn what each menu item does, hold down the mouse button as you drag the highlight across menu items. Help text will appear on the status bar at the bottom of the *Day-Timer Organizer* window. For information about button functions, you may click on the button and view help text on the status bar at the bottom of the *Day-Timer Organizer* window. If the status bar is not visible, you can turn it on with the **Window...Status** command.
- Time Management Tips - A collection of helpful time management tips from the experts are available for display in a popup window that will appear each time you start *Day-Timer Organizer*. To disable the popup display, use the **Help...Display Pop-up** command and deselect the **Show popup at startup** selection box.



# Navigating

[Selecting and Moving Between Views](#)

[Choosing Actions](#)

[Using the Menus](#)

[The Status Bar](#)

[Drag and Drop Shortcuts](#)

[Keyboard Commands](#)

# Selecting Dates and Times

[Setting Dates and Times in \*Day-Timer Organizer\*](#)

[Selecting Dates](#)

[Setting the Date Format](#)

[Selecting Time Intervals](#)

[Adjusting a Time by a Time Interval](#)








# Views

The button bar at the top of the main screen allows you to display any view at any time.

- ◆ **Daily Planner** - shows items related to the selected date (including your schedule, to do list, upcoming activities and deadlines, and a work diary and record of completed tasks, phone calls and expenses).
- ◆ **Weekly Planner** - shows information related to the selected week (your schedule, tasks, contacts and notes with follow-up dates).
- ◆ **Monthly Planner** - shows all information related to the selected month (schedule, tasks, contacts with follow-up dates, and notes with follow-up dates).
- ◆ **Group Scheduler** - shows time blocked out for individuals, groups, or shared resources (such as a vehicle or conference room).
- ◆ **Task List** - shows jobs which must be completed by you or other individuals or groups.
- ◆ **Address Book** - shows names, addresses, telephone numbers, and supplementary notes about your personal and business contacts.
- ◆ **Phone Calls** - shows the date, time, and duration of calls you have made and received
- ◆ **Notebook** - shows free-form text items, such as notes, facts, ideas, plans, lists, and reports.
- ◆ **Expenses** - displays and tallies expenses you have recorded by project or by time period.
- ◆ **Timeline** - shows all date or time-related activities in chronological order, regardless of entry type.
- ◆ **Global List** - shows all dated and undated entries, regardless of type. This makes it ideal for gathering all information about a subject.
- ◆ **Messages** (network version only) - shows messages between network users, including automatic **Schedule/Task notification**.

## Choosing Actions

The buttons on the **Actions** button bar vary according to the currently active view.

- ◆  - creates a new entry of any type
- ◆  - changes the currently selected entry(s)
- ◆  - removes the currently selected entry(s)
- ◆  - completes the currently selected entry(s)
- ◆  - copies the current entry to the clipboard
- ◆  - prints planner pages, address and phone books, forms (mailing labels, envelopes, rotary cards) and lists
- ◆  - dials, times and logs a phone call

You can customize the buttons that are available on the **Actions** button bar. This is particularly important if you have a smaller size of screen and not all of the default buttons can be displayed at once. To adjust the button display, use the **Setup...User Preferences** command and choose the **Button Bar** option.

## Using the Menus

To pull down (or retract) a menu, click on the menu title. To select a menu item, click on that item. Menu commands are shown in bold in the on-line help with the menu name followed by an ellipsis (...) followed by the command. For example, the Print command on the File menu is described as **File...Print**.

# The Status Bar


The status bar shows:


- ◆ Current date and time
- ◆ Incoming message indicator (multi-user database only)
- ◆ Number of entries selected (e.g. for a modify operation)
- ◆ Database name (and user name if multi-user database)
- ◆ Name of current user (multi-user database only)
- ◆ Text editor (if active) line, column, and insert/overstrike settings
- ◆ Read-only indicator, **RO** (you can view but not modify this multi-user database entry)

When making menu selections, the status bar changes to display a description of the currently selected command.

## Drag and Drop Shortcuts

*Day-Timer Organizer* makes extensive use of drag and drop shortcuts to simplify a variety of tasks.

For example, to delete an item, you can drag it onto the  button.

To mark a task as completed, simply drag it onto the  button.

To reschedule an event, drag it to a new day or time.

To remove a column from the display, drag it off the window. For example, when displaying the Expenses view, you might remove the date column by clicking on it and then dragging it to the side, off the edge of the window.

As you work with *Day-Timer Organizer*, you will discover that these shortcuts make it simpler to quickly accomplish routine chores.

# Keyboard Commands

*Day-Timer Organizer* provides keyboard equivalents for most of its commands.

Keyboard commands follow the standard Windows convention whereby the **Alt** key activates the menus. Underlined letters on buttons indicate that the button can be selected by holding down **Alt** and tapping the underlined letter.

For more information about using the keyboard to work in Windows, consult your system documentation.

Pulldown menu	Alt + underlined letter
Select menu item	Underlined letter
Exit	Alt + F4
Close view	Ctrl + F4

## Entries:

Copy	Ctrl + C
New entry	Ctrl + N
Modify	Ctrl + M
Phone dialer	Ctrl + P
Delete entry	Del

## Searching:

by word	Ctrl + W
by assignee	Ctrl + A
by category	Ctrl + Y
Clear search	Ctrl + S
Custom search	Ctrl + Z
Find date or address	Ctrl + F
Apply last search	Ctrl + L
TimeScan	Ctrl + T

## Text Editing:

Cut	Ctrl + X
Copy	Ctrl + C
Paste	Ctrl + V
Find text	Ctrl + F



Replace	Ctrl + R
Delete word	Ctrl + Del or Ctrl + Backspace
Delete line	Ctrl + L
Insert date	Ctrl + D
Insert time	Ctrl + T
Insert indent	Ctrl + I
Phone dialer	Ctrl + P
Grow/shrink text window	Ctrl + G
Save entry	Ctrl + Enter

# Working with View Windows

*Day-Timer Organizer* displays information in various views. There are views for each of the information entry types listed below, plus integrated views (daily planner, weekly planner, monthly planner, timeline, and global list) where multiple information types are presented together.

*Day-Timer Organizer* views display the seven distinct types of entries that you can create:

- ◆ **Schedule** items for individuals, groups, or shared resources (e.g. appointments, meetings, etc.)
- ◆ **Tasks** to be completed by you or others (e.g. events, chores, projects)
- ◆ **Addresses**, with names, phone numbers, and extensive notes
- ◆ **Notes**, which store facts, ideas, plans, lists, or reports
- ◆ **Phone Calls**, which record information about incoming and outgoing calls
- ◆ **Expenses**, which keep track of your expenditures
- ◆ **Messages** between users (multi-user database only)

## Related Topics:

[Opening a View Window](#)

[Saving View Settings](#)

[Controlling the Contents of List Views](#)

[Opening Multiple View Windows](#)

[Tiling Windows](#)

[Cascading Windows](#)

[Drag and Drop Between Views](#)

[Moving a View Window](#)

[Resizing a View Window](#)

[Changing Window Sizes with the Minimize/Maximize Buttons](#)

[Closing a Single View Window](#)

[Closing All Windows](#)

## Opening a View Window

To open a view, click on the desired view's button on the **View** button bar. You can open multiple views at the same time without losing your place (you can have the Address Book, Task/To-Do List, and Daily Planner open simultaneously). You can also drag and drop information between views to create new schedule or task entries.

To open a second copy of any view, hold down the **Shift** key while you open the second copy. You can, for example, open one daily planner showing your activities, and another showing others' activities.

## **Saving Viewing Settings**

To save viewing settings, including window size and position and entry size, select the **Save Settings** command on the **View** menu.

## Controlling the Contents of List Views


Several of the *Day-Timer Organizer* views list specific types of entries: task list, address list, phone log, notebook, expense list, timeline and global lists. You can control which fields are displayed on the list and adjust the size allowed for each column.

To remove a column from the display, click and hold on the header at the top of the column and drag the column above the view window. The cursor will change to a trash can to indicate that the column will be removed. You can then release the mouse button.

**Note that removing the column from the display does not delete the data or change the information stored in your database. Rather, it simply adjusts what is currently displayed on this view.**

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To change the width of a column, move the cursor to the boundary mark on the header line. The cursor will change to indicate that you are in resizing mode. You can then drag the boundary to the desired new location.

To add a column to the display, click on the  icon in the upper right corner to display a pull-down menu of available items. You can display any of the fields from the template for the entry type as well as any of the custom fields for that entry type.

To move a column, simply click on the column title and drag the column to a new location.

Note that you can also print lists with your selected columns in any order. This is discussed in [Printing](#).

## Opening Multiple View Windows

Each time you open a view in *Day-Timer Organizer*, a new sub-window will appear in the main *Day-Timer Organizer* window. If you open several views, there may be several windows open.

If you click on a view and there is already a window open for that view, that view window will be moved to the front of your display. You can then make changes in any of the view windows and the changes will be saved correctly. If you wish to have **two** copies of a view window at once, hold down the **Shift** key while you click on the view button, and a second window will be opened.

You can move to a different view window by clicking on the edge of the desired window or use the **Window** menu to choose another open view window. The active window will have the title bar highlighted.

## Tiling Windows

When you have multiple windows open, the windows usually cascade over each other. You can choose the **Window...Tile** command to request that the windows appear beside each other, as side by side tiles.

## Cascading Windows

When you have multiple windows open, the default is that the windows cascade over each other. If you arranged the windows some other way, you can choose the **Window...Cascade** command to request that the windows revert to the cascaded display.



## **Drag and Drop Between Views**

If you have more than one view open at once, you can transfer information between them by simply dragging an entry to the desired location. For example, if you click on a contact name in the address book and drag it onto your schedule, a new schedule entry will be created for a meeting with that contact. Dragging that address to the To Do list will create a follow-up within that entry.

## **Moving a View Window**

To move a view, click on the title bar at the top of the view window and hold down the mouse button while you drag it to the desired location.

## **Resizing a View Window**

To resize a view, position the mouse cursor over a corner or side of the window and hold down the mouse button while you drag it to the desired size.

## **Changing Window Sizes with the Minimize/Maximize Buttons**

Minimize and Maximize buttons on the upper right corner of each view window let you shrink or grow the window. Maximizing a *Day-Timer Organizer* window increases the amount of information it can display. Minimizing a window changes it to an icon.

## **Closing a Single View Window**

To close the active view window (or any window),

Windows 3.x: double click on the Control Box in the upper left corner of that window.

Windows 95: click in the close box in the upper right corner of that window.

## Closing All Windows

When you have multiple windows open, you can close them all with the **Window...Close All** command to request that all of the sub-windows be closed.

# Working with Entries

You can create seven types of entries in *Day-Timer Organizer*:

- schedule items (meetings, time allocated to specific projects, appointments, etc.)
- tasks
- names and addresses in the address book
- expense items
- phone call log entries
- personal notes providing additional free-form details about your schedule or projects
- messages (multi-user database only)

Creating and managing any of these entries is very similar. To work with entries, you will usually use the **Actions** button bar.

## **Related Topics:**

[Adding New Entries](#)

[Updating Entries](#)


[Finishing Entries](#)


[Deleting Unwanted Entries](#)

[Copying Entries to the Clipboard](#)

[Attaching Files to Entries](#)

## Adding New Entries

To add an entry, click on the  button or press Ctrl N on the keyboard. You do not need to be displaying the view for the entry that you wish to add. For example, you can create entries in the address book while viewing the daily planner.

After you click on the  button, a pull-down menu will appear that will allow you to select the type of entry that you wish to create.

Once you have selected an entry type, a template for that entry will appear so that you can type the details.

From any view (except global view), you can double click on an empty entry and an adding template for that entry type will appear. So for example, you can add tasks from the To Do list, or make address book entries from the address book.


### **Related Topics:**

[Editing Note Text](#)



## Updating Entries

To change an existing entry, you can simply double click on that entry. Alternately, if you have an entry


highlighted, you can click on the  button.

You will then be given a template similar to the one that you used to add the entry and you can change any of the values that you wish.

When you click on **OK**, the updates will be saved.


## Finishing Entries

*Day-Timer Organizer* keeps entries on your screen and carries them forward until you have marked them as finished. For example, to do items will be carried forward to the next day until you indicate that they

have been completed. To finish an entry, click on the entry on any View screen, then click on the  button. Next, click on **Yes** to confirm that you want to mark the entry as finished.

To finish multiple entries at the same time, press the **Ctrl** key while you click on each entry (to select a range of adjacent entries, click on the first entry, then press the **Shift** key while you click on the last entry).

## Deleting Unwanted Entries


To delete an existing entry, click on the unwanted entry, then click on the  button or press the **Del** key on the keyboard.

You will be prompted to confirm that you wish to delete the entry.

**Once an entry is deleted, it cannot be retrieved in any way. If you later change your mind, you must create the entry again.**

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## Copying Entries to the Clipboard

You may want to use the data from a *Day-Timer Organizer* entry (e.g. a contact's address information) in another application. To do this, click on the entry to select it and click on the  button to copy the entry to the system clipboard. You can then retrieve the information in another application by using the **Edit...Paste** command.

## Attaching Files to Entries

You can attach files created in other applications (e.g. word processing documents or spreadsheets) to any entry. This makes it easy to view and access files related to a schedule entry, address entry, etc.

To attach a file to an entry, open the entry template, then click on the **Attachments** tab. Click on the **Attach** button to specify the file name to attach. The next dialog box allows you to specify a file name using the standard Windows conventions. If you need help choosing the file, consult your Windows documentation.

When you click on **OK**, the file name will appear in the **Attached Files** box. For example, there might be two files attached, an Excel spreadsheet and a Word document.

In global list view, entries with attachments will be displayed with the



icon.

**Related Topics:**

[Viewing Attachment Files](#)

[Removing Attached Files](#)

## ***Viewing Attachment Files***

When an attached file name is highlighted, the icon for the program will appear at the right to indicate that this file was made in the corresponding application. You can click on the **Launch** button to run the application and view the document.

If no icon is displayed, there is no associated application for that file type. Associated applications are set in Windows, and you should consult the Windows documentation to learn how to associate a file with a particular application.

## ***Removing Attached Files***

When a filename is highlighted, you can click on **Detach** and the file name will be removed from the attachments list.

Detaching a file does not delete the file. Rather, it simply removes the link to the file in *Day-Timer Organizer*.

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## Setting Dates and Times in *Day-Timer Organizer*

The date and time displayed on the status bar is taken from the system time. To change the system time, consult your Windows documentation. By default when you open a planner view, the current date is displayed and if your system clock has an incorrect date, you will not see the correct date displayed.

Throughout *Day-Timer Organizer*, you will need to specify dates and times for scheduled events, follow ups, etc. *Day-Timer Organizer* has several flexible methods for quickly specifying dates and times.

As an example, consider the process of creating a schedule entry. If you are displaying the Daily Planner view and the appropriate date is displayed, you can simply double click on the desired time in the **Schedule** pane. When the schedule entry is created, it will have the correct date and start time. However, you will probably need to set the ending time. And if you did not have the appropriate date displayed, you would also need to reset the date.


You can simply type a new date and start/end times, or you can use the  and  icons to the right of the date and time fields to choose the date and time.

# Selecting Dates

[Setting Dates from the Calendar](#)

[Setting the Date Format](#)

## Setting Dates from the Calendar

Click on the  icon next to the date field in the entry template, then click on the desired calendar date from the resulting window.



Alternately, you can simply type a new value into the date field. If you type a date instead of clicking on the calendar, *Day-Timer Organizer's* smart date recognition logic (described below) can accept a wide variety of date formats.

### Related Topics:

[Typing the Date](#)

[Weekday](#)

[Time Interval](#)

## ***Typing the Date***

As an alternative to selecting the date from the calendar, you can type the date into the appropriate field. Simply enter the date in your standard format—month, day and year is the standard format in the United States; day, month, year is more common in Europe. Dates with no year are assumed to be in the future unless they fall 90 days or less before the current date. Month, day, and year may be separated by blanks, dashes, slashes, or commas.

*Day-Timer Organizer* has smart date recognition and recognizes most typed formats such **tu** for Tuesday or **2w** for 2 weeks from today.

## ***Weekday***

A date may also be entered as a weekday. If a weekday is not preceded by "**this**", "**next**", or "**last**", the next occurrence is assumed. Weekdays may be represented by a single letter unless there is ambiguity (Tuesday/ Thursday, Saturday/Sunday), in which case two letters are needed. Weeks start on Sunday (this can be set to Monday if desired, as described in [Setting User Preferences](#)).

### ***Time Interval***

You may enter a time as the time remaining until its occurrence. For example, "**2h**" means 2 hours from the current time.

To adjust an existing time, type a time interval preceded by a **Plus (+)** or **Minus (-)** sign to designate whether incrementing or decrementing. This adjustment feature, coupled with the ability to modify multiple entries at once, makes it easy to reschedule large projects.

## Setting the Date Format

You may choose between month/day format and day/month format. This is a setting that you specify through the operating system. Consult your computer operating manual for more instructions.

You may also wish to specify whether the week is to begin on Sunday (as in the U.S.) or on Monday (as is done in Europe). This is described in [Setting User Preferences](#).


# Selecting Time Intervals

[Setting the Time](#)

[Setting the Time Formats](#)



## Setting the Time

To set the time in an entry, click on the  icon , then click on the desired time, then click on **OK**. For greater precision, hold down the mouse button while you drag to the desired time. To move through time, click on the left and right scroll arrows. The ending time may be set in the same way. Alternately, you can simply type a new time into the desired field. *Day-Timer Organizer* recognizes a wide range of time formats. If **am** or **pm** is not specified, *Day-Timer Organizer* will assume the time falls between 7:00am and 7:00pm.

## **Setting the Time Formats**

*Day-Timer Organizer* can interpret and display time in either standard or 24-hour formats. This is a setting that you specify through the operating system. Consult your computer operating manual for more instructions.

## Adjusting a Time by a Time Interval

You may adjust an existing time of day by typing a time interval preceded by a **Plus (+)** or **Minus (-)** sign (e.g. **+20m** means 20 minutes).

## Closing *Day-Timer Organizer*

To terminate the *Day-Timer Organizer* program,

- Windows 3.1: double click on the Control Box in the upper left corner of the window.
- Windows 95: click in the Close box in the upper right corner of the window.

Alternately, you can select the **File...Exit** command from the pull-down menus.

## A Note on Data Storage

As you become more familiar with *Day-Timer Organizer*, you will entrust it with more important information. An important feature of *Day-Timer Organizer* is its automatic saving feature. When you enter data and click on **OK**, that data is automatically saved. If your computer crashes while you are entering data, only the last entry will be lost.

In general, you should close *Day-Timer Organizer* correctly. But if you forget or if your computer crashes, no data will be lost and the integrity of your existing data will always be protected.

**We strongly recommend that you back up your database regularly as described in [Backing Up Your Data](#).**

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### Related Topics:

[Setting Up the Day-Timer Organizer Database](#)

[Characteristics of Single-User Databases](#)

[Additional Features of Multi-User Databases](#)

[Managing Database Files](#)

## Setting Up the *Day-Timer Organizer* Database

When *Day-Timer Organizer* is installed, a set of data files, called a *database* is automatically created.

*Day-Timer Organizer* can work with two different types of databases:

- single-user            Can be accessed by only one user at a time; this is the default type of database created when you install a single-user copy of *Day-Timer Organizer* on a computer system.
  
- multi-user            Can be accessed by many users simultaneously. This is the standard type of database for network access.

## Characteristics of Single-User Databases

While you are accessing a single-user database, no other user can access that data. Because only one user is permitted, single user databases do not track user names and privileges. In a single user database, you can still create assignees and assign tasks to them. However there is only one schedule and one set of data that is accessible to anyone who accesses the database.

You can protect the database with a password to prevent unauthorized use. Once the database is accessed, however, all of the data is accessible.

## **Additional Features of Multi-User Databases**

Multi-user databases maintain user names and privileges and acknowledge two special users, the Supervisor and Guest. The user Guest is provided to allow non-members to access any data you want them to. The database manager is a special privilege that is assigned to a user.

Multi-user databases also offer

- individual data areas for each user (schedule, address book, phone log, notes, expenses, etc.); users' data is private unless explicitly shared with other users
- the ability to send messages to other users
- the ability to arrange events that fit with several users' schedules

### **Related Topics:**

[Sharing Entries With Others](#)

[Sending Internal Messages](#)

[Coordinating Tasks with Notification Messages](#)

[Proxying for Other Network Users](#)

[Assigning Entries to Others](#)

[Group Scheduling](#)

## Managing Database Files

In general, you will use the database that was created at installation. You should be sure to back up the data regularly as described in [Backing Up Your Data](#). If you have special requirements, you may want to have multiple databases or work with single-user databases that are owned by individuals on standalone computer systems. Creating new databases and switching between databases is described in [Working with Databases](#).



# Categorizing Your Information

Categories help you cross-reference related information. A category may be a grouping of entries related to a project, event, or any topic you choose. Any entry may be filed under as many categories as you wish. The Category Search option lets you view all entries assigned to a category.

Groups of categories make it easy to sort and view your choices. A law firm, for example, might create a category for each of its clients, letting users click on a category group called Clients to retrieve the client list quickly.

## **Related Topics:**

[Setting Up a Category List](#)

[Modifying a Category](#)

[Deleting a Category](#)

[Assigning an Entry to a Category](#)

[Searching by Category](#)

[Setting a Default Category Assignment](#)

[Setting Default Category Search](#)

[Printing a List of Categories](#)

## Assigning an Entry to a Category

When you are creating or editing an entry, you can assign an entry to one or more categories by clicking on the **Category** button. *Day-Timer Organizer* will show a list of categories, with a check mark by each category to which the entry is currently assigned.

To select or deselect a category, simply click on it. When selection is complete, then click on **OK**.


To clear the current category assignment, click on the **None** button. To add a category at assignment time, click on the **Add** button.

### Related Topics:

[Categories in the Single User Version](#)

[Categories in the Workgroup Version](#)

## ***Assigning Categories in the Single User Version***

The single user version of *Day-Timer Organizer* allows you to create a list of up to 240 categories and 16 category groups. Groups appear at the top of your list and are marked with a  symbol.

## ***Assigning Categories in the Workgroup Version***

*Day-Timer Organizer for Workgroups* provides a shared category list (visible to all users) of up to 700 categories and 48 category groups. In addition, each network user has a personal category list (visible only to them) of up to 240 categories and 16 groups. Groups appear at the top of shared and personal lists.

## Setting Up a Category List

To create or modify a list of categories, pull down the **Setup** menu and select **Categories**. *Day-Timer Organizer* will display your current category list (which initially is empty).

The category list contains both individual categories and groups of categories. For example, you might have categories for mutual fund information, real estate and 17th century drawings, as well as a category group called investments which included the three categories.

### Related Topics:

[Adding a Category](#)

[Adding Category Groups](#)

[Shared vs. Private Categories \(multi-user database only\)](#)

[Printing a List of Categories](#)

## ***Adding a Category***

To add a category, begin by select the **Setup...Categories** command. Alternately, you can simply click on the **Category** button when adding or editing another entry (e.g. an address or task). In either case, click on the **Add** button. You must then choose from the pull-down menu whether this is a category or a category group. Click on **Category** to create a new category.


Type a name (up to 20 characters). You may also type a description, which will be displayed whenever you move the mouse cursor over this category (this field helps users remember what categories mean). If this category is to be a member of an existing category group, click on the **Assign to Groups** button and choose the group(s) of which it is a member.

When finished, click on **OK**.

## ***Adding Category Groups***

A category group allows you to collect several individual categories. For example, if you work on several projects for two different departments, you might have a category for each project and a category group for each department.

To add a category group, begin by select the **Setup...Categories** command. Alternately, you can simply click on the **Category** button when adding or editing another entry (e.g. an address or task). In either case, click on the **Add** button. Choose **Category Group** from the pull-down when you are adding, then click on the **Choose Members** button and click on each category you want to make a member of this group (you may change membership at any time). When finished, click on **OK**.

Category groups appear at the top of your list and are marked with a  symbol. Any category you add will be automatically included in your default search (entries you see when no search is set - see [Setting Default Category Search](#)). If you prefer not to view entries for this category unless you search for them, click on the **Default Search Show** button, deselect the new name, and then click on the **Default Search Set** button.

### ***Shared vs. Private Categories (multi-user database only)***


*Day-Timer Organizer for Workgroups* lets you designate the new category or group as personal or shared. Shared categories are visible to all users, but personal categories are private to each user. The adding process is the same except that you must select whether the category is personal or shared when you create it.

Any user may add or delete their own personal categories, but only the supervisor or the database manager (or designated alternate) may add or delete shared categories.




## Modifying a Category or Category Group

To change the characteristics of a category or category group (e.g. name, description, or membership settings), begin by select the **Setup...Categories** command.


To modify a category, click on that category or group in the **Category Setup** dialog box. Next, click on the  button, and make desired changes.

To change a category group's name, description, or membership settings, click on the group in the **Category Setup** dialog box. Another dialog which will allow you to click on the group check box to select

the group itself (rather than members), and click on **OK**. Next, click on the  button, and make the desired changes.

To change an item from a category to a group (or vice versa), or from **Personal** to **Shared** (or vice versa), delete the item and re-add it.

## Deleting a Category

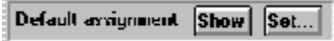
To delete a category, click on that category in the Category Setup dialog box, then click on the  button.

In order to delete a category:

- ◆ there must be no entries assigned to that category
- ◆ it must not be part of your (or any other network user's) default assignment (see [Setting a Default Category Assignment](#)); you will be warned if you try to delete such a category

To find out whether there are entries assigned to a category you wish to delete, open the Global view and search by that category. (Searching is described in detail in [Searching](#).) If you find entries, you may either delete them or reassign them (the **Select All** option on the **Edit** menu selects and then **Edit...Modify Entry** lets you reassign or delete multiple entries).

## Setting a Category Default Assignment



When you add a *Day-Timer Organizer* entry, it will have no category assignment unless you click on the **Category** button and assign it to a category. If you wish, however, you may set a default category assignment for new entries.

To begin, select the **Setup...Categories** command. Then to view your default assignment, click on **Default Assignment Show** in the Category Setup dialog box. *Day-Timer Organizer* will show selection check marks next to each category in your default assignment.

To set your default assignment, click on categories or groups you wish to select (or deselect) for default assignment, and then click on the **Default Assignment Set** button.

## Printing a List of Categories

From the Category Setup dialog box, simply click on the **Print** button to print a list of categories. You will see a standard print dialog box and when you click on **OK**, the list will be printed on the selected printer.

# Assigning Entries to Others

*Day-Timer Organizer* lets you schedule meetings for others, delegate tasks, or assign addresses and notes to different users. You may assign any entry to as many individuals, groups, or resources (e.g. conference rooms) as you wish, and you can search for entries by assignee.

*Day-Timer Organizer* is available in both single user and workgroup versions. If you are using the single-user version of *Day-Timer Organizer*, this is useful for helping you keep track of who has been assigned to work on specific tasks.

You can assign entries to:

- |                   |   |
|-------------------|---|
| An Assignee       | Other people; if you have a multi-user system, these assignees will be notified that you have assigned something to them.   |
| An Assignee Group | A group of people; for example, you might create a note item for minutes of a QA meeting and assign it to the QA task team (a group consisting of several assignees). Assignees can be members of as many groups as you like. |

## **Additional Assignees for Workgroup Users**

*Day-Timer Organizer for Workgroups* allows multiple users to share a database. Anyone you schedule for a meeting or assign a task with the network version will be automatically notified of the assignment, and will see the meeting or task on their *Day-Timer Organizer* screens.

An activity assigned to a group need be entered only once, yet it will appear on the agenda of each group member if you are using *Day-Timer Organizer for Workgroups*. You can assign entries to assignees and assignee groups as for the single user version, but also to the following:

- |                  |   |
|------------------|---|
| A Resource       | Some resource that you wish to schedule; for example, you might be able to schedule a conference room, a special projector, company vehicles, portable computers that are loaned to individuals, etc.   |
| A Resource Group | A group of resources; for example, you might schedule an in-house workshop and allocate all of the conference rooms for that use.   |
| A User           | Another network user; if you have a multi-user system, these assignees will be notified that you have assigned something to them. Only the Supervisor can create users because they are visible to all <i>Day-Timer Organizer</i> users that are sharing a multi-user database. |
| A User Group     | A group of people, similar to assignee groups. Only the Supervisor can create user groups because they are visible to all <i>Day-Timer Organizer</i> users that are sharing a multi-user database.  |

## **Related Topics:**

[Assigning an Entry to Someone Else](#)

[Assignee Lists in the Single User Version](#)

[Assignee Lists in the Network Version](#)

[Setting Up an Assignee List](#)

[Adding a Name or Group](#)

[Changing a Name](#)

[Deleting a Name](#)

[Setting Default Assignment](#)

## Assigning an Entry to Someone Else

When you create a new entry, the **Assign To** value is initially set to your user name. To assign an entry to someone else, click on the **Assign To** button on the entry template. *Day-Timer Organizer* will show a list of names, with a check mark by each current assignee.

To clear the current assignment (normally your name), click on the **None** button.

To select or deselect a name, click on it. Names that have check marks displayed beside them are currently selected.

To add a name to the list, click on the **Add** button.

When selection is complete, click on **OK**.

## **Assignee Lists in the Single User Version**

The single user version of *Day-Timer Organizer* allows you to create a list of up to 64 names and 16 groups to which entries may be assigned. Groups appear at the top of your assignee list.



## **Assignee Lists in the Workgroup Version**

*Day-Timer Organizer for Workgroups* provides a shared assignee list (visible to all users) of up to 720 individuals and 48 groups. In addition, each network user may have a personal assignee list (visible only to them) of up to 64 names and 16 groups (such as family members or friends). Groups appear at the top of shared and personal assignee lists.

## Setting Up an Assignee List

To create or modify a list of individuals and groups to whom entries may be assigned, pull down the **Setup** menu and select **Assignees/Users**. *Day-Timer Organizer* will display your current assignee list (which initially will include only you). You may then [add a name or group](#).

## Adding a Name or Group



To add a name, group, or resource, click on the  button in the Assignee Setup dialog box.

From the pull-down menu, select **Assignee** or **Assignee Group**.

Type a name (up to 12 characters). You may also type a **Description**, which will be displayed whenever you click on this item.

If adding a group, click on the **Assignee Group** selection from the pull-down menu when beginning to add the entry, then click on the **Choose Members** button and click on each person who will be a member of the new group (you may easily change this later). When a member is selected, a check mark will appear beside their name. When finished, click on **OK**.

Any name you add will be automatically included in your **Default Search** (entries you see when no search is set - see [Setting Default Assignee Search](#)). If you prefer not to view entries for this name unless you search for them, click on the **Default Search Show** button, deselect the new name, and then click on the **Default Search Set** button.

### ***Workgroup Version Differences***

*Day-Timer Organizer for Workgroups* lets you designate the new name as personal or shared. Shared assignees are visible to all users, but personal assignees (e.g. family members or friends) are private to each user.

Any user may add or delete personal assignees, but only the database manager (or other designated user) may add or delete shared names.

*Day-Timer Organizer for Workgroups* allows you to choose from

Personal Assignee

Personal Assignee Group

Resource

Resource Group

User

User Group

The last four are shared information. The Personal Assignee/Groups cannot be seen by other users, even if the entry itself is shared.

## Changing a Name

To change an individual's name, description, or membership settings, click on that name in the **Assignee Setup** dialog box. Next, click on the **Modify** button, and make desired changes.

To change a group's name, description, or membership settings, click on the group name in the **Assignee Setup** dialog box. Click on the group check box to select the group itself (rather than or in addition to members), and click on **OK**. Next, click on the **Modify** button, and make desired changes.

To change an item from a name to a group (or vice versa), or from personal to shared (or vice versa), delete the item and re-add it.

## Deleting a Name

To delete a name, click on that name in the **Assignee Setup** dialog box, then click on the **Delete** button.

In order to delete a name:

- ◆ there must be no entries assigned to that name
- ◆ it must not be part of your (or any other network user's) default assignment (see [Setting Default Assignment](#))
- ◆ it must not be associated with a network user.

To find out whether there are entries assigned to a name you wish to delete, open the Global view and search by that name. If you find entries, you may either delete them or reassign them (the Select All option on the Edit menu lets you reassign or delete multiple entries).

## Setting Default Assignment

When you add a *Day-Timer Organizer* entry, it will automatically be assigned to you unless you click on the **Assign To** button and assign it to someone else.

If you are a secretary or administrative assistant who normally works with another person's entries, you may wish to reset your default assignment option to that person or people.

To view your default assignment, click on **Default Assignment Show** in the **Assignee Setup** dialog box. *Day-Timer Organizer* will show selection arrows next to each name in your default assignment.



To reset your default assignment, click on names or groups you wish to select (or deselect), and then click on the **Default Assignment Set** button.

# Searching and Repositioning

*Day-Timer Organizer's* searching capabilities help you find data quickly. **Searching narrows your viewing focus, filtering out entries which do not conform to your search settings.** A complete list of search options is available on the **Search** menu. Not all searching options are available from all views, as appropriate.

In addition to search options, *Day-Timer Organizer* provides commands which let you reposition the display. Unlike search options, which filter out non-conforming data, **repositioning options move the display to the desired location.**

You may use any search option separately, or you may combine search options for pinpoint precision.

The scope of a search is limited to the active view window. This lets you have multiple windows open - each with a different search.

If there are entries which do not fit on screen, use the scroll bar to view them. To advance the daily, weekly, and monthly planner view to the next date which contains entries conforming to the current search, use the **TimeScan** option.

For the broadest possible search, select the global list view, which displays all *Day-Timer Organizer* entries (schedule, tasks, addresses, notes, expenses, phone calls, and messages), whether or not they are date-related.







## Related Topics:

[Clearing Search Settings](#)

[Copying Search Settings](#)

[Saving Search Settings](#)

[Using Boolean Operators](#)

Button	Search Type	Effect
	<a href="#">By Word or Word Beginning</a>	shows entries containing selected words (or word beginnings) in any note, address, or custom fields
	<a href="#">By Assignee</a>	shows entries assigned to selected users, individuals, groups, or resources; you can also specify a <a href="#">Default Assignee Search</a>
	<a href="#">By Category</a>	shows entries filed under selected categories; you can also specify a <a href="#">Default Category Search</a>
	<a href="#">By Priority</a>	shows tasks within selected range of priorities
	<a href="#">Custom</a>	shows entries that match the criteria set by the user (address list only)
	<a href="#">By Entry Type</a>	shows only entries of the selected type (schedule, task, address, note, expense, phone)



By Call Status

call, or message)  
shows phone log entries by status (such as all calls you did not complete)



By Expense Type

shows expenses of any selected type (such as Entertainment)



Clear Search Settings

clears all previous search settings

### Repositioning Options:

**Button**

**Option**

**Effect**



TimeScan

on daily, weekly, or monthly planner, scans for next (or previous) date with entries conforming to search settings.



Find Date

**In views sorted by date:**  
repositions view to selected date

Find Other (Name, Organization, Zip Code)


**In views sorted by other field:**  
repositions address book to the name, organization, or zip code (depending on sort setting) beginning with characters you type

## Clearing Search Settings


Search settings remain in effect until you either clear them or close the view to which they apply. When you activate a search, its button on the button bar looks as though it is pressed down. This serves as a reminder that the search is still active.

**Important:** If you forget to clear search settings, entries which would otherwise be displayed may appear to be missing.

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To clear all search settings for the active window, click on the  button on the **Search** button bar.

Alternately, you can select **Clear Search** from the **Search** menu.

If there are multiple search settings in place, you may clear one search setting without affecting others by selecting the setting you wish to clear and clicking on  in that search's dialog box.




## Copying Search Settings

Search settings in each view are independent of those in other views. This lets you open a new view without losing your place in the previous one. To copy your search settings from a previous view into the current view, select **Apply Last Search** from the **Search** menu.

## **Saving Search Settings**

To save your search settings, select the **Save Settings** command on the **View** menu and click on the **Include Search** button. This will save the search settings so that they are automatically applied when you start *Day-Timer Organizer*. You must then Clear Search Settings explicitly or re-save your settings when you no longer wish the search to be applied.

## Performing Custom Searches

In the Address List view, a simple way to search is to click on the  button on the **Search** button bar or choose the **Search...Custom Search** command. From the dialog box, fill in the value to be searched for, in the appropriate field.

When you click on **OK**, the screen will change to show only data that matches your search criterion.

The custom search feature is a very powerful way to search by any combination of values in any fields.

### **Related Topics:**


[Clearing Search Settings](#)

[Copying Search Settings](#)

[Using Boolean Operators](#)

[Saving Search Settings](#)

## Searching for Words

To find all entries containing words beginning with any characters you type, click on the  button, type the desired character(s), and click on **OK**. Note that you must type at least two characters or the search will assume that you are looking for whole words (e.g. the words "a" or "I").

*Day-Timer Organizer* will scan for all entries in the active view containing words beginning with these characters in the note, address, or custom fields. Keyword search is not case sensitive capital letters are not distinguished from small letters.

### Related Topics:

[Partial vs. Whole Words](#)

[Searching for Multiple Words](#)

[Changing a Word Search Setting](#)

[Finding Search Text in Entries](#)

[Speeding Up Word Search](#)

[Clearing Search Settings](#)

[Copying Search Settings](#)

[Using Boolean Operators](#)

[Saving Search Settings](#)

### ***Partial vs. Whole Words***

By default, *Day-Timer Organizer* scans for entries which contain any words beginning with characters you type. To search for whole words only (e.g. find "cat" but not "catastrophic"), click on the **Whole Word** check box.

### ***Searching for Multiple Words***

You can combine words using the **and**, **or**, and **not** operators. To search for entries containing either "attorney" or "lawyer" but not "patent", type "attorney or lawyer not patent". For grouping purposes, words on the left take precedence over those on the right. This means that "Alan and Bob or Chris" is interpreted as "Alan and Bob" or "Chris", rather than "Alan" and "Bob or Chris". To achieve the latter meaning, use parentheses to designate "Alan and (Bob or Chris)".

### ***Changing a Word Search Setting***

To revise an existing word search setting, reselect the **Word** search option and enter new text. Previous text will disappear as soon as you type the first character of its replacement (to edit the previous text, move the cursor prior to typing). To retrieve search text you typed earlier, click on the down arrow to the right of the text field and select text.

## ***Speeding Up Word Search***

As you accumulate text in your database, word search time may become unacceptably long. This happens because *Day-Timer Organizer* uses an index for searching which periodically should be updated to speed searching.

Whenever *Day-Timer Organizer* detects that your text search time could be shortened, it will notify you that you need to reindex your text in the **Word Search** dialog box. Reindexing can cut search time dramatically (to just a few seconds, no matter how large your database), and you may also choose to reindex periodically (without being prompted by *Day-Timer Organizer*) by selecting **Speedup Text Search** from the **Tools** menu.

Text indexing will increase the size of your database by approximately 20 percent, but is well worth it for most users (and nearly imperative for large network databases). An additional index file will also be created in the database files directory.

Text indexing is time-consuming, and should be done during a lunch hour or overnight. Although you can press **Esc** to interrupt indexing at any time without losing your progress, you will not notice a search speedup until indexing finishes. Do not turn your computer off while indexing is in progress.




### ***Finding Search Text in Entries***

To find your search text in any entry, double click on the entry, then press the right mouse button over the **Notes** field. Select **Find Text**, in the popup menu, then click on the **Find Next** button in the dialog box.

*Day-Timer Organizer* will show the first occurrence of the search text. If the search box obscures the text, click on the title bar and hold down the mouse button while you drag it to the desired location. To find the next occurrence, click on the **Find Next** button again.

## Searching by Category

Category search lets you view entries by topic. If, for example, you file sales-related entries under category **Sales**, searching by this category lets you view these entries quickly. A category may be a grouping of the entries associated with a project, event, or any topic you choose.

To search for entries assigned to one or more categories, click on the  button. *Day-Timer Organizer* will present a list of categories. If there are categories which do not fit in the window, you may click on the horizontal scroll bar to view them.

To select or deselect a category, click on that category. When selection is complete, click on **OK**.

### Related Topics:

[Selecting or Clearing All Categories](#)

[Viewing Current Search Settings](#)

[Groups of Categories](#)

[Using Boolean Operators](#)

[Clearing Search Settings](#)

[Copying Search Settings](#)

[Saving Search Settings](#)

### ***Selecting or Clearing All Categories***

To set selection check marks for all categories, click on the **All** button. To clear selection check marks for all categories, click on the **None** button.

### ***Viewing Current Search Settings***

To view current search settings, click on the **Show Search** button, and then on **OK**. This is useful if you have forgotten what search settings are currently in effect or if you are using saved settings that were set at a previous time.

## ***Groups of Categories***

Groups of categories are designated by a group icon. If you select a group, *Day-Timer Organizer* will present a list of member categories.

To select any member of a category group, click on it. To select all member categories, click on the **All** button. To search for entries assigned to the group itself, click on the group check box in the upper left corner.

### ***Using Boolean Operators***

When you search by multiple values, *Day-Timer Organizer* finds entries assigned to any of the specified values. To find entries assigned to **every** value, click on the **Boolean** button and select **All of selected items**. To find entries not assigned to any selected category, click on the **Boolean** button and select **None of the selected items**.

## Setting Default Category Search




**Default Search** is the combination of categories whose entries you normally wish to view. If a category is excluded from your default search, entries assigned only to this category will be filtered out until you request to view them with the **Search By Category** option.

To view your default search, click on the **Default Search Show** button in the Category Setup dialog box. *Day-Timer Organizer* will show selection arrows next to each category and group included in your default search.

To reset your default search, click on categories or groups you wish to select (or deselect), and then click on the **Default Search Set** button. To set or clear selection arrows for all categories, click on **All** or **None** buttons. When you click on a group, *Day-Timer Organizer* will present a list of members (to select the group itself, click on the group check box at the upper left corner of the members box).

## Searching by Assignee/User

When you search by assignee, *Day-Timer Organizer* displays entries assigned to the individual(s) or groups you select.

To search by assignee, click on the  search button, or select **Search By Assignee/User** from the Search menu. *Day-Timer Organizer* will present a list of individuals, groups, and resources. If there are items which do not fit in the window, you may click on the horizontal scroll bar to view them. To select or deselect a name, click on that name. When selection is complete, click on **OK**.

### **Related Topics:**

[Selecting or Clearing All Assignees](#)

[Viewing Current Search Settings](#)

[Selecting a Group](#)

[Using Boolean Operators](#)

[Clearing Search Settings](#)

[Copying Search Settings](#)

[Saving Search Settings](#)




### ***Selecting or Clearing All Assignees***

To set selection arrows for all names, click on the **All** button. To clear selection arrows for all names, click on the **None** button.

### ***Viewing Current Search Settings***

To view current search settings, click on the **Show Search** button, and then on **OK**. This is useful if you have forgotten what search settings are currently in effect or if you are using saved settings that were set at a previous time.

## **Selecting a Group**

If you select a group (designated by a  icon), *Day-Timer Organizer* will present a list of members. To find entries assigned to any member (including entries assigned to any group to which they belong), click on that member. To select all members, click on the **All** button.

To find entries assigned to the group itself, click on the group check box in the upper left corner.

### ***Using Boolean Operators***

When you search by multiple names, *Day-Timer Organizer* finds entries assigned to **Any of the selected items**. To find entries assigned to every selected name, click on the **Boolean** button and select **All of the selected items**. To find entries not assigned to any selected name, click on the **Boolean** button and select **None of the selected items**.

## Setting Default Assignee Search

Until you specify otherwise, searching works on the *default search*, which is initially set to search for all individuals and groups. If you are using *Day-Timer Organizer* for both your own activities and those of others, you might set the default search to display only your own entries, filtering out everyone else's entries until you request to view them with **Search By Assignee/User**.

To view your default search, click on the **Default Search Show** button in the **Assignee Setup** dialog box. *Day-Timer Organizer* will show selection arrows next to each name and group included in your default search.

To reset your default search, click on names or groups you wish to select (or deselect), and then click on the **Default Search Set** button. To set or clear selection arrows for **All** individuals and groups, click on **All** or **None** buttons. When you click on a group, *Day-Timer Organizer* will present a list of members (to select the group itself, click on the group check box at the upper left corner of the members box).

## Searching by Priority

Searching by priority lets you view tasks with selected priorities. To search by task priority, click on the



button. *Day-Timer Organizer* will prompt you first for the highest priority desired, and then for the lowest.

You may use **Number Based** (1-9), **Letter Based** (A-I), or **Hybrid** (A1-I9) priorities. If you use hybrid priorities and type a letter without a number, *Day-Timer Organizer* will find **All** priorities beginning with that letter.

To view tasks which have no priorities, select **None** for both ends of the range.

### **Related Topics:**

[Clearing Search Settings](#)


[Copying Search Settings](#)

[Using Boolean Operators](#)

[Saving Search Settings](#)

## Searching by Entry Type

In views which can display more than one entry type (daily, weekly, monthly, messages, timeline, and global), searching by entry type lets you restrict display to the desired entry types.

To search by entry type, click on the  search button, then click on undesired check boxes, then click on **OK**.

### **Related Topics:**

[Searching by Call Status](#)

[Searching by Expense Type](#)


[Clearing Search Settings](#)

[Copying Search Settings](#)

[Using Boolean Operators](#)

[Saving Search Settings](#)

## ***Searching by Call Status***

When searching by entry type, you can further refine your search to view phone log entries on the basis of call status. To do this, click on the  search button, then click on desired call status check boxes. In the example below, *Day-Timer Organizer* will display phone log entries that may require additional action on your part.

### **Related Topics:**

[Clearing Search Settings](#)

[Copying Search Settings](#)


[Using Boolean Operators](#)

[Saving Search Settings](#)



## ***Searching by Expense Type***

Another alternative when searching by entry type is to refine the search to view expense entries by type.

To do this, click on the  search button, then click on undesired expense type check boxes. In the example below, *Day-Timer Organizer* will display only entertainment expenses.

### **Related Topics:**


[Clearing Search Settings](#)

[Copying Search Settings](#)


[Using Boolean Operators](#)

[Saving Search Settings](#)

## ***TimeScan***

TimeScan advances the daily, weekly, or monthly planner to the next date containing entries conforming to current search settings. This allows you to set a search filter (e.g. a project name), and then step forward or backward through time to find each page which contains conforming entries. To use this feature, set desired search (to find when the PCExpo conference starts, for example, use a **Word** search for **PCExpo**). Then click on  or select **TimeScan** from the Search menu. To scan forward through time, click on **Forward**. To scan backward, click on **Backward**. As a result of this command, you will be brought to the next day/week/month where an entry occurs. Note that this simply moves you to the requested time; it does not set a search filter or exclude any data.


## ***Find Date***

This option, which is available in all views which are sorted by date, repositions the view to the date you choose. To select this option, click on  or choose **Find Date** from the **Search** menu. You may either type the desired date, or click on the date icon and select the date from the calendar with the mouse.

As a result of this command, you will be brought to the next day/week/month where an entry occurs. Note that this simply moves you to the requested time; it does not set a search filter or exclude any data.

### ***Find Name (Organization, Zip Code)***

This option (available only in the address book), repositions to the name, organization, or zip code (depending on how your address book is sorted) which begins with the characters you type.

To select this option, click on  or choose the **Find** command from the **Search** menu and type the first few characters of the name, organization, or zip code you want to find. Whether this command operates on **Name**, **Organization**, or **Zip Code**, depends on how the address book is sorted. As a result of this command, you will be brought to the next day/week/month where an entry occurs. Note that this simply moves you to the requested time; it does not set a search filter or exclude any data.

# Linking Entries

*Day-Timer Organizer* makes it easy to create links between entries, allowing you to view related entries and quickly move between.

**Note:** In addition to the direct links discussed here, you may create indirect links between related entries by filing them under the same category.

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Links between entries may be created either automatically or manually.

**Automatic** links between entries are created whenever you add an entry via *Day-Timer Organizer's* drag and drop capabilities. If, for example, you create a meeting by dragging an address to the daily planner's schedule pane, the address and meeting will be automatically linked (for more information about drag and drop, see *Scheduling Shortcuts*). Automatic links are also created when you add an entry from within the **Meetings** or **Phone Calls** sections of an address entry template (see below).

You may also link two entries **Manually**. To do so, proceed as follows:

- ◆ Click on the first entry to select it on any view screen.
- ◆ Select **Link Entry** from the **Edit Menu**.
- ◆ Click on the second entry (which need not be on the same view).

To **View** a list of entries which are linked to a particular entry, double click on the entry, and then click on the **Linked Entries** tab. To add a new linked entry, click on the **New Item** button. To modify or view details for any linked entry on the list, click on that entry, then click on the **Modify Item** button.

To delete any linked entry, click on that entry, then click on the  button.

To sever the link between the current entry and any linked entry, click on that entry, then click on the **Break Link** button.

In the global list view, entries that have links will be displayed with the



icon.


**Related Topics:**

[Displaying Multiple Linked Entries](#)


## **Displaying Multiple Linked Entries**

When working with linked entries, you may need to display more than one view at a time. Working with multiple windows is discussed in [Working with View Windows](#).

# Daily Planner View

To display the Daily Planner view, click on the  button.

There are four panes on the Daily Planner window (Schedule, To Do, Upcoming and Diary&Work Record). If there are too many entries to fit in a pane, a scroll bar will appear next to the pane. To view

the additional entries, either click on the scroll bar or expand the pane with the **Maximize** button  at the top of the pane. To restore it to its normal size, click on the **Restore** button



In addition, you can remove the display of the current month's calendar at the left of the window by selecting the **View...Hide Calendar** command from the menu. To restore the calendar display, use the **View...Show Calendar** command.

## Related Topics:

[Schedule Pane](#)

[To Do Pane](#)

[Upcoming Pane](#)

[Diary & Work Record Pane](#)

[Adding New Entries](#)

[Updating Entries](#)

[Finishing Entries](#)

[Deleting Unwanted Entries](#)

[Displaying Different Dates in Planner Views](#)

[Customizing the Display in the Planner Views](#)

[Using Search Options](#)

[Printing](#)

[Scheduling Shortcuts](#)

[Saving View Settings](#)



## Schedule Pane

The Schedule pane shows entries you have scheduled on the calendar date. Entries must have a beginning and ending time before they will be displayed on this pane and this pane automatically moves through time as the day progresses. To move forward or backward through time, click on the scroll bar next to the timeline. As you drag the thumb on the scroll bar, *Day-Timer Organizer* will show the time of day corresponding to the thumb position.

Note that the time scale on the schedule pane is adjustable and removable (see [Adjusting Schedule Time Scale](#)).

Note that the time and time format displayed on the schedule pane are shown according to the system settings (i.e. a 12-hour format or a 24-hour format). Consult your system documentation for additional information.

## To Do Pane

The To Do pane shows:

- ◆ Tasks which are due on the selected calendar date
- ◆ Address or note entries with **Follow-Up** set for the selected calendar date
- ◆ Schedule entries without times (e.g. birthdays)
- ◆ Any overdue tasks

For more information, see Managing To Do Lists.

If there are too many entries for the space, a scroll bar will appear to allow you to move through the list. To enlarge the size of the pane, click on the heading bar of the **Diary & Work Record** pane and drag it down the page. This will enlarge the **To Do** pane and shrink the **Diary and Work Record** pane.

## Upcoming Pane

The Upcoming pane shows upcoming activities or deadlines for which Advance Notice has been set. For example, a task due October 15 with advance notice set to one week will appear as an upcoming activity between October 8 and October 14.

Advance notice may be set for schedule entries, tasks with due dates, and address or note entries which have follow-up dates.

To enlarge the size of the pane, click on the heading bar of the **Upcoming** pane and drag it up the page. This will enlarge the **Upcoming** pane and shrink the **Schedule** pane.




## Diary & Work Record Pane

The Diary & Work Record pane shows things you accomplished during the day, including completed tasks, any phone calls you logged, and any expenses you recorded. Any event that is dragged to this pane is considered to be finished and will no longer be carried forward to future days' schedule displays. Double clicking on an entry in this pane allows you to adjust or specify the finish date.

All of the current day's expenses will appear on this pane, with submitted expenses marked with an asterisk (\*).

To enlarge the size of the pane, click on the heading bar of the **Diary & Work Record** pane and drag it up the page. This will enlarge the **Diary and Work Record** pane and shrink the **To Do** pane.

# Weekly Planner View

To display the Weekly Planner View, click on the  button. This display shows the current week. Each day of the week has a pane, similar to the separate panes on the daily planner view. To view additional entries for a specific day, either click on the scroll bar or expand the pane with the **Maximize** button  at the top of the pane. To restore it to its normal size, click on the **Restore** button .

In addition, you can remove the display of the current month's calendar at the left of the window by selecting the **View...Hide Calendar** command from the menu. To restore the calendar display, use the **View...Show Calendar** command.

[Adding New Entries](#)

[Updating Entries](#)

[Finishing Entries](#)

[Deleting Unwanted Entries](#)

[Displaying Different Dates in Planner Views](#)

[Customizing the Display in the Planner Views](#)

[Using Search Options](#)


[Printing](#)

[Scheduling Shortcuts](#)

[Saving View Settings](#)

# Monthly Planner View



To view the Monthly Planner view, click on the  button. This displays shows an entire month. The calendar can be displayed in 5-day or 7-day format, depending on how you have specified [Controlling the Display of the Calendar Week](#) .

[Adding New Entries](#)

[Updating Entries](#)

[Finishing Entries](#)

[Deleting Unwanted Entries](#)

[Displaying Different Dates in Planner Views](#)

[Customizing the Display in the Planner Views](#)


[Using Search Options](#)

[Printing](#)

[Scheduling Shortcuts](#)

[Saving View Settings](#)

# Adding Schedule Entries

To schedule a meeting or block out time for an activity, first click on the  button on the **Actions** button bar. A pull-down menu will appear that allows you to specify what you wish to add. Click on **Schedule**. *Day-Timer Organizer* will present a template. Alternatively, you may use the **Edit...New Entry** command and choose **Schedule** from the sub-menu. You can fill in as much or as little information as you wish. Typically the minimum required information is

- the correct date
- the start and end time, and
- a description of the activity that you are scheduling.

Once you have filled in all of the information, click on **OK** to save the entry.

**If you do not enter a time**, then the schedule entry will be displayed on the **To Do** pane of the currently selected date, rather than on the schedule. This is useful for events like birthdays, conferences, trips, vacations and project deadlines.

When all of the data has been entered, click on **OK** to save the entry.

## **Related Topics:**

[Editing Note Text](#)

[Setting the Date](#)

[Setting the Begin and End Time](#)

[Editing Note Text](#)

[Birthdays and Anniversaries](#)

[Trips, Conferences, and Vacations \(Multi-Day Events\)](#)

[Recurring Activities](#)

[Pop-Up Alarm](#)

[Advance Notice](#)

[Purge After 60 Days](#)

[Scheduling Activities for Someone Else](#)

[Categorizing Your Information](#)



[Checking for Schedule Conflicts](#)

[Custom Fields](#)

[Linking Entries](#)


[Shortcut Buttons](#)

## Describing the Activity

You can type up to 35 pages of description in the **Notes** section. To Expand the note window (or restore it to its normal size), click on the  button at the bottom of the scroll bar. For a menu of editing features, click on the right mouse button when the mouse pointer is positioned over the text or click on the  icon at the bottom of the scroll bar.




## Setting the Date

Click on the  icon next to the date field, then click on the desired calendar date from the resulting window.



Alternately, you can simply type a new value into the **Event Date** field. *Day-Timer Organizer's* smart date recognition accepts most typed formats, such as "tu" for Tuesday or "2w" for 2 weeks from today.


## Setting the Begin and End Time

To set the beginning time, click on the clock next to the **Begin Time** field  , then click on the desired time, then click on **OK**. For greater precision, hold down the mouse button while you drag to the desired time. To move through time, click on left and right scroll arrows. The ending time may be set in the same way.

Alternately, you can simply type a new time into the **Begin Time** and **End Time** fields. *Day-Timer Organizer* recognizes a wide range of time formats. If **am** or **pm** is not specified, *Day-Timer Organizer* will assume the time falls between 7:00am and 7:00pm. *Day-Timer Organizer's* smart time recognition accepts most typed formats, such as "1h" for one hour.


## Displaying Different Dates in Planner Views


By default, when you open a planner view, the current day/week/month will be displayed. You can easily change the display to show any day, month or year that you wish to see (the equivalent of flipping pages in your paper system).

You can move the display forward or back by one day (Daily Planner view) or one week (Weekly Planner view), by clicking on the upper right or upper left page corners  on the planner pages, as shown below.




On the Monthly Planner view, you can click on the scroll bar to display different months and years. Each click moves the display by one week.

To move forward or backward by months or years, click on the  or

 buttons respectively under the planner window. To return to today's date, click on the **Today** button.

To move through larger time intervals, click on the  button on the **Search** button bar and type the desired date.


## Trips, Conferences, and Vacations (Multi-Day Events)

To enter a multiple day event such as a trip or vacation, begin by clicking on the  button and selecting **Schedule**. From the template, click on the

 button. Next, set the **Start Date** and **End Date** fields.

Once you have scheduled the event, it will appear on your schedule on all of the days that you have requested. On the daily planner view, these will be displayed on the To Do pane. If you wish them to appear on the daily schedule, simply create a schedule entry and set it to be recurring.

## Recurring Activities

To schedule a recurring activity, when you are creating the entry, simply click on the  button. Next, click on the frequency of recurring activity you want.

- ◆ **Daily** events occur every day.
- ◆ **Weekly** events occur on one or more weekdays (e.g. Tuesday and Thursday).
- ◆ **Biweekly** events occur every other week on one or more weekdays (e.g. Tuesday and Thursday).
- ◆ **Monthly** events can be a date (e.g. the first of each month) or an occurrence of a weekday (e.g. the 2nd Tuesday of each month).
- ◆ **Quarterly** events are similar to monthly events (if your company operates on a fiscal year, you can change the quarterly start date as described in [Database Setup](#)).
- ◆ **Yearly** events can be a date (e.g. April 15) or an occurrence of a weekday in a particular month (2nd Tuesday in May).

To confine a recurring activity between **Starting** and **Ending Dates**, click on either field and select a date. You must specify the start date, but you can leave the end date open (to leave a date open, type "**none**").

To save your settings, click on **OK** to return to the entry dialog box.

### Birthdays and Anniversaries


Note that to set a birthday or anniversary, simply create a recurring task and set the **Interval** to be **Yearly/Date**. Then specify the date for the event. You may also wish to request a week's [advance notice](#).

### Related Topics:


[Modifying Recurring Events](#)

[Deleting Recurring Events](#)

## ***Modifying Recurring Events***


If you want to modify a recurring event on one of the planner views, you can select it and click on the  button. From there, you may choose whether you wish to modify all occurrences of the recurring event (e.g. to change a weekly staff meeting from Wednesday to Thursday on a permanent basis) or a single occurrence (e.g. change next week's meeting but leave the permanent schedule as it is). If you choose single occurrence, type the date of the occurrence you wish to modify.

## ***Deleting Recurring Events***

If you select a recurring event and click on the  button to delete it, you may choose between **All Occurrences** or a **Single Occurrence**. You may also delete a single occurrence different from the one you selected, by selecting the appropriate date.

The **Delete all future occurrences from selected date** allows you to set a date and delete all occurrences after that date. For example, if you are changing the weekly staff meeting, effective one month from now, you can set the date and delete schedule entries from that time forward.

## Pop-Up Alarm

To set a pop-up alarm with audio alert, click on the  button, then click on the desired time. You can set the alarm to happen any time that you like before an event, e.g. 5 minutes, 10 minutes, half an hour, or an hour. For example, you might set an alarm for two hours before a meeting that is in another town that requires a lengthy drive. For a meeting down the hall, you might set a 5 minute alarm.


If *Day-Timer Organizer* is running (even in a minimized or inactive window), alarm messages will pop up over any active program. Entries with alarms set will be displayed with an alarm icon on the planner and list views.

Note that if you are running a program that is making sounds, you may not hear the alarm. If your sound board is not connected properly, you may not hear the audio alarm, although you will still see the alarm window.



## Advance Notice

Any activity with Advance Notice set will appear in the **Upcoming** pane of the Daily Planner view during the notification period. For example, an October 15 event with 1 week's advance notice will appear as an upcoming activity between October 8 and October 14.

To set advance notice, open the entry and click on the  button, and select desired notification period from the pulldown menu.

Alternately, you can just type a specific period, for example **4 days**.

## **Purge After 60 Days**

Schedule entries normally remain in your database until you explicitly delete them. To automatically discard an entry 60 days after it occurs, click on **Purge After 60 Days** check box on the template when adding or editing schedule entries.

## Checking for Schedule Conflicts




*Day-Timer Organizer* automatically scans for conflicts whenever you save a schedule entry. If potential conflicts are found, they will be presented when you attempt to save the entry (to view conflicts before attempting to save the entry, click on the **Conflicts** tab).

To ignore displayed conflicts and save the entry, click on the **OK** button. To update the conflict display after changing the original entry, click on the **Update Conflicts** button. To reschedule a conflicting entry, click on the entry and then on the **Modify Conflict** button. To delete a conflicting entry, click on the entry and then on the **Delete Conflict** button. To discard the new event, click on the **Cancel** button.

You can disable conflict checking if you wish.

## Shortcut Buttons

For your convenience, *Day-Timer Organizer* provides the following shortcut buttons at the bottom of the schedule entry template.

Button	Function
	save the current entry and add another
	save the current entry and add a duplicate copy (which may be modified as needed)
	delete the current entry

## Customizing the Display in the Planner Views

[Adjusting the Time Scale](#)

[Adjusting Entry Display](#)

[Screen Font](#)

[Window Size and Position](#)

[Adjusting Pane Size](#)


[Hiding the Calendar](#)


[Saving View Settings](#)

[Selecting Entry Types](#)


[Zooming In on the Monthly Planner View](#)

## Adjusting the Time Scale

By default, the Daily Planner view presents your schedule in 30 minute intervals. To adjust this scale, click on the  buttons at the bottom of the window. For a compact schedule display with no time scale, keep clicking on the leftmost time scale button.

The Monthly Planner view displays a standard North American style 7-day month. The  buttons allow you to switch between this display and a display with only the five business days. Your computer operating system allows you to select whether you wish to use a 12-hour or 24-hour clock. Consult your system documentation for more information about customizing this setting.

## Adjusting Entry Display

To enlarge or shrink the screen space allotted for each entry, click on the  buttons under the window.

## **Window Size and Position**

To change the size of the Daily Planner window, position the mouse cursor over a side or corner of the window, then click with the left mouse button and drag to the desired size. To change the position of the Daily Planner window, click on the title bar at the top of the window, hold down the left mouse button while you drag the window to the desired position.

Note that the changed window size is not part of the saved settings and will revert back to the previous size the next time that you start *Day-Timer Organizer*.

## **Adjusting Pane Size**

To adjust the height of the Schedule, To-Do, Upcoming, or Diary & Work Record pane, click on the border between adjacent panes. Then hold down the left mouse button while you drag the border up or down.




## Hiding/Showing the Calendar

To hide the calendar panel on the Daily and Weekly Planner views, select the **Hide Calendar** option on the **View** menu. To view this panel again, select the **Show Calendar** option from the **View** menu.

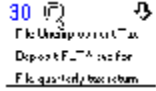
## Selecting Entry Types

By default, the planner views display all entry types (schedule, tasks, phone calls, expenses, and any address book or note entries with follow-up dates). To restrict display to one or more selected entry

types, click on the  button.

## Zooming In on the Monthly Planner View

To **Zoom** on any date to see missing entries or more text, move the mouse pointer to the top of the date pane and click when the magnifying glass icon appears.




The day will be enlarged to show more detail. From this subwindow, you can create, modify or delete entries, just as in the other planner views.

To close the zoom box, click on the upper left corner of the box or click somewhere else on the window.

## Scheduling Shortcuts

- ◆ **To quickly schedule a meeting:**  
position the mouse over any open schedule slot on the Daily or Weekly Planner view and double click. Alternatively, click on the desired **Begin Time**, then drag the cursor to the desired **End Time** and release the mouse button.
- ◆ **To reschedule a meeting:**  
click on the meeting, then hold down the mouse button while you **Drag** it to the desired time (e.g. on the Daily Planner view) or date (e.g. on the calendar).
- ◆ **To schedule a meeting with someone in your address book:**  
open both Address Book and Daily Planner views, use the **Window...Tile** command to display them side by side, click on the desired address, and drag it to the desired time on the schedule pane (the meeting will be automatically linked to your address entry).
- ◆ **To set a follow-up date for someone in your address book:**  
open both Address Book and Daily Planner views, click on the desired address, and drag it to the desired date on the calendar.
- ◆ **To change months on the Monthly Planner view:**  
click on the month tabs at the bottom of the window, or use the fast forward (and reverse) buttons at the bottom of the window to move by month or year. You may also use the scroll bar - as you drag the scroll bar's thumb, *Day-Timer Organizer* will display the month corresponding to the thumb position.

# Understanding the Display of To Do Items

To do items are displayed on the planner views. Click on  to switch to the Daily Planner view. Three of the four panes on the Daily Planner view display To Do items:

<b>Pane</b>	<b>Displays</b>
<b><u>To Do</u></b>	Tasks that are due or overdue on the currently displayed date.
<b><u>Upcoming</u></b>	Tasks that are due later, but for which advance notice was requested
<b><u>Diary &amp; Work Record</u></b>	Tasks that have been completed

Any task with a due date will appear on the planner view for that date. Tasks with advance notice set will appear in the **Upcoming** pane of the daily planner view before the due date. Overdue tasks will remain on the to do list until completed.

You may also assign tasks to others (e.g. to other workgroup users), and easily search by assignee to view delegated tasks. You may cross-reference tasks by **Category**, making it easy to view all information related to a project. You may also prioritize your tasks, which controls their presentation order on the daily and weekly planner.

# Adding a Task

To add a task, click on the  button on the **Actions** button bar. From the resulting pull-down menu, select **Task**.

*Day-Timer Organizer* will present a template.

You can fill in the fields as you wish. Typically the minimum information will be

- the due date
- a description of the task.

When all your data is entered, click on **OK** to save the entry.

## **Related Topics:**

[Editing Note Text](#)

[Setting the Due Date](#)

[Setting Task Priority](#)

[Specifying Recurring Activities](#)

[Setting a Pop-Up Alarm](#)

[Requesting Advance Notice](#)

[Stopwatch](#)

[Categorizing Your Information](#)

[Custom Fields](#)


[Linked Entries](#)

[Attaching Files to Entries](#)

[Assigning Entries to Others](#)

[Copying Entries to the Clipboard](#)

## Setting the Due Date

Entries with due dates appear on the daily, weekly, and monthly planners on that date. To set a due date, click on the  icon next to the due date field, then click on the desired date.



To **Clear** a due date, click on the date field and use the **Delete** key. *Day-Timer Organizer's* smart date recognition accepts most typed formats, such as

- **"tu"** for Tuesday
- **"2w"** for 2 weeks from today
- **"n w"** for next Wednesday
- **"l m"** for last Monday

## Setting Task Priority

Tasks with priorities set will be sorted by priority on the planner views. To set a priority, click on the

   field.

Use the pull-down menu to select a priority or type one that is familiar to you. You may use either numbers (1-9), letters (A-I), High to Low, or a hybrid style (A1-A9, B1-B9 etc.) for assigning priorities. *Day-Timer Organizer* assumes that priority 1 is more important than priority 3 and priority B is more important than priority F.









## Shortcuts for Managing To Do List Entries

To quickly add a task to today's To Do list, position the mouse over any open To Do list slot and double click.


To reschedule a task from today to tomorrow, click on the task in the To Do list and hold down the mouse cursor while you drag it to the **Upcoming** list. To reschedule to another calendar date, drag the task to that date on the calendar pane.

# Viewing To Do List Items

To view your tasks, select any of the views listed below. To help locate entries pertaining to a particular person or topic, you may **Search** by assignee, category, or word(s) contained in the Notes field.

<b>View</b>	<b>Information Displayed</b>
	<b><u>Daily Planner</u></b> - shows all information related to a date (including tasks with follow up dates).
	<b><u>Weekly Planner</u></b> - shows all information related to a week (including tasks with follow up dates).
	<b><u>Monthly Planner</u></b> - shows all information related to a month (including tasks with follow up dates).
	<b><u>Task List</u></b> - shows your entire task list, including tasks with no follow up dates.
	<b><u>Timeline</u></b> - lists in chronological order all date-related activities (including tasks with follow up dates).
	<b><u>Global List</u></b> - lists all entries including tasks (both with and without dates).

## Using the Task List View

To view all of your tasks, whether or not they have due dates assigned, click on the  view button.

Tasks can be sorted by due date or priority.

To move through your task list, use the scroll bar.

### **Related Topics:**

[Viewing Finished Tasks](#)

[Sorting by Assignee or Category](#)

[Controlling Entry Size](#)

[Controlling the Display](#)



[Saving View Settings](#)

[Controlling the Contents of List Views](#)

[Searching and Repositioning](#)

[Printing](#)


## Viewing Finished Tasks

To view finished tasks, click on the  display button on the lower left portion of the task list window. To return to your unfinished tasks, click on the  button.

### **Related Topics:**



[Completing a Task](#)

## Setting the Display Order




By default, the list is displayed sorted by date. This is indicated by the  button on the **Display** button bar. To reorder the entries by order of priority, click on the

 button.

## Controlling Entry Size

To display more entries on a page, use the  button. Conversely, the  button displays fewer entries per page, with more data per entry.

## Controlling the Display

To zoom in on notes in any list view, click on the entry and then on the  button at the bottom of the window (to change zoom window size, drag the border up or down). To scan successive entries, click on the scroll. To edit text, click in the text window and make changes. To save or discard changes, click on the   buttons, respectively.

## Modifying a Task

To modify a task, double click on the task on any view screen (or click on the task and then click on the



button). When the template appears, click on any field you wish to modify and proceed as you would when adding a task .

To modify **Multiple Entries** at the same time, press the **Ctrl** key while you click on each entry (to select a range of entries, click on the first entry, then press the **Shift** key while you click on the last entry). Next, click on the **Modify** button, and select the field(s) you wish to change.

If the task is **Recurring**, you may choose between **All Occurrences of this entry**, or a **Single Occurrence**.

When modifying multiple entries, you cannot modify the **Notes** field, custom fields, linked entries, attachments or address information (unavailable fields will be grayed out).

To save your modification, click on the **Ok** button.


## **Rescheduling with the Mouse**

To quickly change a task's due date, click on the task, and then drag the task to the desired date. In the Weekly or Monthly Planner views, you can drag them to the desired date if it is displayed. Alternately, you can drag it to a date on the calendar at the left of the Daily Planner or Weekly Planner view.




## Completing a Task

When a task is completed, select the task by clicking on it on any View window. You may then either delete it from your database, or save it as a finished task.

You can mark a task as finished by dragging it onto the  button or by dragging it directly into the Diary & Work Record pane of the Daily Planner view. **The task with its notes and associated material will remain in the database and can be used for later searches and reports.**


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To select multiple tasks at the same time, press the **Ctrl** key while you click on each task. To select a range of adjacent tasks, click on the first entry, then press the **Shift** key while you click on the last entry.

To delete the selected task(s), click on the  button. Next, click on **Yes** to confirm that you want to permanently delete the task. *Day-Timer Organizer for Workgroups*: if a task was assigned to you by another user who did not give you delete rights, use the

 button described below.

To finish and save the selected task(s), click on the  button. To view finished tasks, click on the

 button, then click on the

 button.

With a recurring task, you may modify **All Occurrences**, or a **Single Occurrence**. When you delete or finish the current occurrence, the next occurrence will replace it on your task list.

# Advanced Task Management Features

The following advanced features are available when you add or modify a task.

## **Related Topics:**

[Recurring Tasks](#)

[Pop-Up Alarm](#)

[Advance Notice](#)

[Stopwatch](#)

[Assigning Tasks to Others](#)


[Setting Up a Category](#)

[Custom Fields](#)

[Linked Entries](#)


[Shortcut Buttons](#)

## Recurring Tasks



To schedule a repeating task, click on the  button on the template. Next, click on the type of recurring task you want.

- ◆ **Daily** tasks occur every day.
- ◆ **Weekly** and **Biweekly** tasks occur on one or more weekdays (e.g. Tuesday and Thursday).
- ◆ **Monthly** tasks can be on a date (e.g. the first of each month) or an occurrence of a weekday (e.g. the 2nd Tuesday of each month).
- ◆ **Quarterly** tasks are similar to monthly tasks (if your company operates on a **Fiscal Year**, see [Database Setup](#)).
- ◆ **Yearly** tasks can be on a date (e.g. April 15) or an occurrence of a weekday in a particular month (2nd Tuesday in May).

If you set **Starting** and **Ending Dates**, the recurring task will not occur outside these dates (to leave either date open, type "none").

To save your settings, click on **OK**. Recurring entries will be preceded by a  icon on all list view screens.

## Pop-Up Alarm


To set a pop-up alarm with audio alert on the due date, click on , then click on desired time. If *Day-Timer Organizer* is running (even in a minimized or inactive window), alarm messages will pop up over any active program. Entries with alarms will be displayed with an  icon on all view screens.

## Advance Notice

Advance notice gives you time to prepare for upcoming deadlines. Any task for which advance notice is set will appear in the **Upcoming** pane of *Day-Timer Organizer's Daily Planner* during the notification period. For example, a task due July 15 with advance notice set to 1 week will appear as an upcoming task between July 8 and July 14.





To set advance notice, click on the **Advance Notice** button, and either select the desired notification period from the pulldown menu or type a time.

## Stopwatch


To record time spent on a task for billing or accounting purposes, click on the  button to the right of the **Time Spent** field. To start or stop the stopwatch, click on the **On** or **Off** button, then on **OK**. You may also adjust **Start Date**, **Start Time**, or **Time Spent** independently.

## Shortcut Buttons

For your convenience, *Day-Timer Organizer* provides the following shortcut buttons at the bottom of the task entry template:

Button	Function
	save the current entry and add another
	save the current entry and add a duplicate copy (which may be modified as needed)
	delete the current entry
	finish the current entry without discarding it

# Adding an Address

To add an entry to your address book begin by clicking on the  button on the **Actions** button bar. From the pull-down menu, Click on **Address**. *Day-Timer Organizer* will present a template. From the template, fill in the desired information. Click with the mouse, or use the **Tab** key to move between fields and skip any fields which do not apply. When the form is complete, click on **OK** to save the entry.

Note that you do not need to type capital letters for type names and addresses. *Day-Timer Organizer* will automatically capitalize words for you, to ensure correct formatting.

## **Related Topics:**

[Specifying One or More Addresses](#)

[Finding Names Quickly](#)

[Entering Phone Numbers](#)

[Editing Note Text](#)

[Internet Access](#)

[Controlling Address Display](#)

[Setting a Follow-Up Date](#)

[Drag and Drop Follow-Up with Contacts](#)

[Recurring Follow-Up](#)

[Requesting Pop-Up Alarms](#)

[Setting Advance Notice](#)

[Related Meetings](#)

[Drag and Drop Scheduling of Related Meetings](#)

[Related Phone Calls](#)

[Custom Fields](#)

[Shortcut Buttons](#)

[Customizing Address Formats for International Addresses](#)



## Specifying Multiple Addresses

From within an address entry, you can specify multiple addresses by clicking on either the **Work Address** or **Home Address** tab, then typing the address. When entering the address, you can use

- **Tab** to move to the next field
- **Shift+Tab** to move to the previous field
- **Arrows** to move between work address, home address, phone numbers, etc.

## Finding Names Quickly in the Address Book

There are two methods for quickly finding names in your address book. From the address list view,

- click on one of the letter tabs at the right edge to take you to the first name beginning with the specified letter
- enter the first few letters of a name into the **Find** field at the bottom to quickly find a specific name


If you prefer to find an organization or zip code, you can click on one of the sorting buttons at the bottom of the screen to sort by that field. In this case, the **Find** box allows you to find an organization or zip code, rather than a name.

## Entering Phone Numbers

From within an address entry, enter phone numbers by first clicking on the **Phone Numbers** tab. Then click on the desired phone number fields, and type telephone numbers and extensions if applicable.






**If you type a 10-digit phone number, *Day-Timer Organizer* will reformat it automatically for easy viewing once you close the entry.**

Alternately, you may embed parentheses, dashes, or slashes for ease of reading. To change the label on the button in front of any phone number, click on the button and type the desired text.

To assign a **Dial Code** (e.g. "9" for an outside line) directly to a phone number, click on the  button next to that number (for more information on dial codes, see [Telephone Settings](#)).

# Sorting Your Address Book


Display buttons under the address window control the order in which addresses are displayed. To choose a different order, simply click on the desired button. The button that corresponds to the sort order that is currently in effect will be displayed recessed.

Button	Sort Value	Function
	<b>Name</b>	sorts by the last name, if present (otherwise by organization)
	<b>Organization</b>	sorts by organization, if available (otherwise by name)
	<b>Zip Code</b>	sorts by zip code
	<b>Follow-Up Date</b>	sorts by date, displaying only addresses with follow-up dates set
	<b>Category</b>	sorts by category


## Finding a Name


To navigate quickly through your address book, click on **Letter Tabs** on the right side of the address book window (if there are multiple pages of names starting with a letter, click on the letter tab **Multiple Times**).

For greater precision, use the scroll bar. If you click on the scroll bar thumb and hold down the mouse button, the speed box shows the name(s) associated with the thumb position.


Alternatively, click on the  button or select **Find Name** from the **Search** menu. Type the first few characters of the desired name, then press **Enter**. Regardless of which navigation method you use, positioning and searching is based on the sort order you have selected.

## Modifying an Address

To modify an address entry or view any of its details, double click on the address on any view screen (or click on the address and then click on the  button). When the template appears, click on any field you wish to modify and proceed as you would when adding an address.

To modify multiple entries at the same time, press the **Ctrl** key while you click on each entry (to select a range of entries, click on the first entry, then press the **Shift** key while you click on the last entry). Next, click on the  button, and select the field(s) you wish to change. Only a limited number of fields are available for modification when modifying multiple entries.


## Deleting an Address

To permanently delete an address, click on the address on the Address View window, then click on the  button (or press the **Del** key). Next, click on **Yes** to confirm that you want to permanently delete the entry.

To select multiple entries for deletion, press the **Ctrl** key while you click on each entry (to select a range of adjacent entries, click on the first entry, then press the **Shift** key while you click on the last entry).

**Note that deleting an address entry from the To Do list deletes the address, not the follow-up. To remove address follow-ups from the To Do list, you should finish the entry, drag it to the Diary & Work Record, or modify the address and remove the follow-up.**

# Copying an Address to the Clipboard


To copy an address to the operating system clipboard, click on the desired address, then click on the  button. Not all fields are copied.


To paste the address into your word processor, use the **Paste** command on your word processor's **Edit** menu.

## Related Topics:

[MailMerge](#)


## Controlling Address Display

The entry size buttons  control the number of lines per address in the Address Book view. To always default to entry size you have selected, choose the **Save Settings** command from the **View** menu.

To zoom in on notes for any address entry, click on the entry and then on the  button at the bottom of the view window (to change zoom window size, drag the border up or down). To scan successive entries, click on scroll bar arrows (or use the **Arrow** keys). To edit text, click in the text window and make changes.




## Follow-Up Date

To set a date on which to contact a person in your address book from within an entry, click on the  button on their address template, then click on the desired calendar date.




From the keyboard, you can type in a follow-up date in a variety of ways. *Day-Timer Organizer's* smart date recognition accepts most formats, such as "tu" for Tuesday or "2w" for 2 weeks from today. Any name with a follow-up date will appear on the Daily Planner's **To-Do** list on that date. If you set **Advance Notice**, the name will appear in the Daily Planner's **Upcoming** pane before the follow-up date. Any follow-up not completed as scheduled will show as **Overdue** (with date shown in red) until completed.

**To clear a follow-up date**, click on the address entry on any View screen. Next, click on the  button on the button bar. **Do not use the**



**button** unless you want to permanently delete the entire address entry.


Alternatively, you may clear the follow-up date by clicking on the  button at the lower left corner of the address entry template.

## **Drag and Drop Follow-Up with Contacts**


To set a follow-up date using *Day-Timer Organizer's* drag and drop feature, open your Address List and any Planner view (Daily, Weekly, Monthly) at the same time, resizing them so both are visible. Then click on the desired address and hold the mouse button down while you drag it to the desired date on the calendar.

If you drag an address to the To Do pane of the Daily Planner view, it creates a follow-up. Dragging the name to the schedule pane creates a meeting with that person at the specified time.

## Recurring Follow-Up

To set a recurring follow-up date (e.g. every month) from within an entry, click on the  button, and select daily, weekly, biweekly, monthly, or yearly follow-up. The entry will appear in the to do list at the appropriate day.


## Pop-Up Alarm

To set a pop-up alarm with audio alert on the follow-up date, from within the entry, click on the  button, then click on the desired time.

If *Day-Timer Organizer* is running (even in a minimized or inactive window), alarm messages will pop up over any active program. Entries with alarms will be displayed with an alarm icon on all view screens.

## Advance Notice

Advance notice gives you time to prepare for upcoming deadlines. Any follow-up for which advance notice is set will appear on the Daily Planner's **Upcoming List** during the notification period. For example, a July 15 follow-up with advance notice set to 1 week will appear as upcoming between July 8 and July 14.

To set advance notice from within an entry, click on the  button and select the desired notification period from the pulldown menu.

Alternately, you can simply type the desired notification period.

## Notes

*Day-Timer Organizer* can store up to 35 pages of notes *per contact*. To store notes, click on the **Notes** tab and type any additional information you wish to record (notes provide a convenient place to record interactions with customers, suppliers, or friends). Information stored in your notes can be easily located later using the **Word Search** feature.

### Related Topics:

[Editing Note Text](#)

## Related Meetings

*Day-Timer Organizer* lets you link meetings directly to any entry in your address book. To view or create linked meetings, click on the **Meetings** tab on the address template.

To add a meeting which is directly linked to the displayed address, click on **New Meeting** and fill out the schedule entry.

To modify or delete a linked meeting, click on the **Modify Meeting** or **Delete Meeting** button. To break the link between a meeting and the address entry, click on the **Break Link** button.

## Drag and Drop Scheduling of Related Meetings

To add a meeting which is directly linked to a displayed address using *Day-Timer Organizer's* drag and drop feature, open your Address Book and Daily Planner at the same time (move or resize them so both are visible). Click on the desired daily planner date, and scroll the Daily Planner's Schedule pane so the desired meeting time is visible. Next, click on the address and hold down the mouse button while you drag it to the desired position on the schedule pane.

Note that this creates a follow-up and when the action has been completed, **you should finish the entry, drag it to the Diary & Work Record, or modify the address and remove the follow-up.**







## Related Phone Calls

To view phone calls linked to this contact from within the address entry, click on the **Phone Calls** tab. To create, modify, or delete a linked phone log entry, click on **New Call**, **Modify Call**, or **Delete Call** buttons.

## Shortcut Buttons

Use the following shortcut buttons on the address template to save time:

Button	Function
	save the current entry and add another
	save the current entry and add a duplicate copy (which may be modified as needed)
	delete the current entry
	finish and save the selected entry

## Using the WinFax Interface

The address book that you create in *Day-Timer Organizer* can be used by WinFax PRO (version 4.0 and higher) to serve double duty as your WinFax address book. When you install *Day-Timer Organizer*, it automatically links its address book to the address book list in WinFax PRO.

When you fax from WinFax PRO, simply select *Day-Timer Organizer* address book from the Phonebook menu. The information that was entered in *Day-Timer Organizer* (including fax number, contact name, company name, voice telephone number, etc.) will be used by WinFax PRO to fill in the cover page and fax to the specified phone number.

# Customizing Address Formats

By default, *Day-Timer Organizer* labels address fields to conform to the standard used in the United States. When you add an entry in your address book, the **Work Address** and **Home Address** tabs display addresses with those labels. To select different labels, click on the **Customize** button from the address template.

Note that if you customize address format, it does not change all of the address layouts.

## Related Topics:

[Selecting the Country for Individual Addresses](#)

[Selecting a Different Standard \(Default\) Layout](#)

[Defining a new Address Format](#)

[Adding Information to an Existing Layout](#)

[Changing the Labels for Phone and Email Descriptions](#)

[Choosing the Default Display Tab for Address Entries](#)

## Selecting the Country for Individual Addresses

To select the address labels for a different country, click on the pull-down for the **Address and label layout** field. Choose the country that you need for the current address.

If you then click on **OK**, the current address will be updated to use the selected labels. For example, if you have chosen Canada, the labels will be similar except that you will see fields labelled "Province" and "Postal Code" rather than the U.S. "State" and "Zip" fields.

## Selecting a Different Standard (Default) Layout

The standard layout is used whenever you add a new address in *Day-Timer Organizer*. If you wish to change the address layout that is displayed when you enter new names, within an address entry click on the **Customize** button from the Address template. Then from the **Address Customization** dialog box, click on the **Make these settings the default for new entries** check box. This will not change addresses that have been entered previously, but any new addresses that are created will be displayed with the new format.

## Defining a New Address Format

You may want to have an address format for a country that is not available in the standard list. To define a new country format, from the **Address Customization** dialog box, click on the **Add** button.

Enter the country name in the **Format Name** field.

### *Setting Up the Appropriate Fields and Labels*

The **Standard** list displays the standard names of all the fields that are available. The **Display Name** indicates how these fields are labelled on the screen. For example, if you scroll down, you will see a field labelled Zip. This is the U.S. postal code; other countries often label this as a Postal Code or Postcode. You can type a new label for this value in the **Display Name** field and the new label will be used on the entry screen.

There are two spare fields labelled with a dot (.) and a comma (,) that you can use to identify additional fields such as county, mail stop, rural route number, etc. Simply replace the (.) and the (,) label with your preferred text.

### *Defining the Address Layout for Printing*

The **Address Layout** box on the right allows you to specify what fields are to be used and their order when you print labels or envelopes.

To add an additional field to the address layout, begin by scrolling the **Standard/Display Name** box until the field is displayed. Then drag the field name into the **Address Layout**, to the desired location.

To move a field to a new location, drag it to the desired place within the **Address Layout** area.

To remove a field, drag it off of the **Address Layout** area. The cursor will change to a trash can to indicate that the value is about to be removed.

### *Saving the New Country Definition*

Once you have defined the new layout, click on **OK** to save the definition. If you wish, you may make that country definition your standard (default) layout.

## **Adding Information to an Existing Layout**

If you want to include address information such as county, mail stop, etc. that is not part of the standard address, you can define a custom format or alter the current address definition for your country. To alter the current address definition, from the **Address Customization** dialog box, click on the **Modify** button. Then proceed as you would in adding an entirely new definition.

## Changing the Labels for Phone and Email Descriptions

By default, the phone values are labelled as office, fax, mobile, and home numbers. To change the labels that are used to describe these phone numbers, you should be in the address template (i.e. as though you were adding a new address). Click on the **Phone Number Descriptions** button on the **Address Customization** dialog box. This will change the current entry only. To make your new definition the default for new entries, use the **Make Default** command.

Note that the descriptions match the labels that are displayed on the Phone Numbers tab for adding addresses.

You can change these descriptions as you wish, and the new descriptions will be displayed.

Alternately, you can click on the button that displays the label (e.g. the **Office** button on the template when adding a phone number to an address) and a dialog box will appear that allows you to enter a new label for the button.

When you click on **OK**, the button label will be updated.

In the same fashion, *Day-Timer Organizer* allows you to have up to four e-mail addresses which are labelled "Address 1", "Address 2", etc. To change the label that appears when you click on the e-mail tab of the template, you can click on the button itself to change a single button. You will be prompted to enter the new label and when you click on **OK** the button label will be updated.

Alternately, you can change Email address labels by clicking on the **Email Address Descriptions** button on the **Address Customization** dialog box. For example, you might choose to label the first two EMail addresses as Business and Personal.

If you click on **OK** to accept this change, the **Email Addresses** tab will then be displayed.



## Choosing the Default Display Tab for Address Entries

By default, when you add a new address, the **Phone** tab is displayed. You can choose a different tab from the **Address Customization** dialog box. This tab will then be displayed when the current address is modified. If you click on the **Make these settings the default for new entries** check box, the selected tab will be displayed whenever a new address is added.

# Setting Up to Make Calls

If your computer has a Hayes™ or 100% compatible modem or a TAPI- or TSAPI-compliant phone system, *Day-Timer Organizer* can dial telephone numbers for you. Even if you do not have a modem, you may want to take advantage of *Day-Timer Organizer's* phone call logging capabilities.

Before dialing for the first time, follow these steps:

- ◆ Choose **Telephone** from the **Setup** menu and check **Area Code** and **Modem Settings** (for more information, see [Telephone Settings](#)).
- ◆ Make sure your modem is turned on and properly connected to both your computer and the telephone line.
- ◆ If you have a multi-line phone system, verify that a dial tone is available at your modem.

## Related Topics:

[Using the Speed Dialer](#)

[Dialing from the Address Book](#)

## Using the Speed Dialer

The Speed Dial feature of *Day-Timer Organizer* allows you to quickly access and if you have a modem, dial frequently used numbers.

### Related Topics:

[Setting Up Frequently Dialed Numbers](#)

[Including the Speed Dial Button on the Button Bar](#)


[Dialing](#)

## ***Setting Up Frequently Dialed Numbers***

To set up a number for speed dialing, choose the **Tools...Speed Dial...Add/Modify List** command. You will be prompted for up to twelve name/phone number combinations.

Enter the names and numbers that you wish to have on your speed dialer. When you click on **OK**, these names will be stored. You can change your speed dial numbers at any time in the same manner.

## ***Including the Speed Dial Button on the Button Bar***

Once you have set up speed dial numbers, you may want to include the  button on the button bar. To do that, choose the **Setup...User Preferences** command and select the **Button Bar** option. Click on the




button to highlight it so that it will be included on the standard button bar. When you click on **OK**, the button bar will be updated. Note that if your screen is too small or you already have too many buttons displayed, you may not be able to include an additional button.

## ***Dialing***

There are two ways to speed dial:


1. Choose the **Tools...Speed Dial** command from the menu. The speed dial name/numbers will be displayed and you can choose the desired name from the submenu.



2. If you have included the  button on the button bar, simply click on it and then choose the desired name/number from the pull-down menu.

## Dialing from your Address Book

To dial any number listed in your Address Book, proceed as follows:

- ◆ From the Address List view, click on the person you wish to call.
- ◆ Click on the  button on the button bar.
- ◆ If there are multiple numbers listed for that person, select the desired number.
- ◆ Once the number and dial code are correct, click on the **Dial** button.
- ◆ When prompted, pick up your handset, then click on either **OK** (to bypass call logging) or **Log Call** (to create a linked phone call entry).

### Related Topics:

[Using the Speed Dialer](#)


[Dialing from the Address Template](#)

[Dialing Numbers Stored in Text](#)

[Dialing Other Numbers](#)

## Dialing from the Address Template

To dial from within an address book entry, double click on the address and then click on the **Phone Numbers** tab. *Day-Timer Organizer* will display the phone numbers.

Click on the  button next to the number you want to dial. When prompted, pick up your handset, then click on either **OK** (to bypass call logging) or **Log Call** (to create a linked phone call entry).



## Dialing Numbers Stored in Text

To dial a number in the **Notes** field of **Any Entry** (schedule, task, address, note, expense, or message), proceed as follows:

- ◆ Position the mouse cursor at the beginning of the number.
- ◆ Hold down the mouse button while you drag the cursor to the end of number.
- ◆ Click on the **Right Mouse Button** and select **Phone Dialer** from the menu.
- ◆ Click on the **Dial** button. When prompted, pick up your handset, then click on either **OK** (to bypass call logging) or **Log Call** (to create a phone call entry for this call).

## Dialing Other Numbers


To dial a number not stored in *Day-Timer Organizer*, click on the **Phone Dialer** button, and type in the desired number or click on the on-screen phone keypad buttons.

To **Redial** the last number you dialed, click on the **Last** button.

Once the number and dial code are correct, click on the **Dial** button. When prompted, pick up your handset, then click on either **OK** (to bypass call logging) or **Log Call** (to create a phone call entry).

## Logging a Call

You can take advantage of *Day-Timer Organizer's* phone logging capabilities whether or not you are using a modem to dial calls directly through your computer. If *Day-Timer Organizer* is dialing a call for you, you will be prompted to log the call or to bypass call logging by clicking on **OK**.

To manually log a call, you should first select the name of the person you are calling in the Address Book view and click on the  button. You would then click on the **Log Call** button. You can also log calls to people who are not in the address book.

*Day-Timer Organizer* will present a phone call template, with most of the required information filled in for you. All you normally need to do is click on the **Notes** tab and record the details of your conversation.

Alternately, you can click on  and select **Phone Call**.

To return to the address without closing out the phone call (e.g. to retrieve or record information), click on the **Linked Entries** tab, then double click on the address displayed there. To **Modify** the original address entry in this manner, you must have dialed from the address book view (see *Dialing from your Address Book*), rather than from the Phone Numbers section of the address entry template.

If you were unable to make contact, select the appropriate call **Status** from the pull down list (to customize your call status list, see *Telephone Setup*).

When the call is finished, click on **OK** to turn off the timer and save the call.

### **Related Topics:**

[Editing Note Text](#)

[Changing TAPI/TSAPI Settings](#)

[Setting the TSAPI Device](#)

## Changing TAPI and TSAPI Settings

From the **Phone Dialer** dialog box, you can change the TAPI and TSAPI settings if you have selected TAPI or TSAPI devices.

**TAPI:** Enter updated values in the fields provided.

**TSAPI:** Click on the **Change TSAPI User/Device** button. **Do not open this dialog unless you wish to change the server name and you have the user name and password available since opening this dialog may clear previous settings.**

[Logging in to a TSAPI Device](#)

[Setting the TSAPI Device](#)

## Logging into a TSAPI Device

This dialog appears when you have clicked on the **Change TSAPI User/Device** button on the **Phone Dialer** dialog box **OR** you have tried to login to a TSAPI device. You must fill in the values for:

the **Server** pull-down lists the available telephony servers

**Login ID** - user name for the telephony server (ask your system administrator for your user name and password)

**Password** - user password

**Remember Password** - if this option is set will, *Day-Timer Organizer* will keep password encoded in the INI file

**Note that if you return to this dialog by clicking on the Change TSAPI User/Device button, the user name and password will be cleared and you must re-enter them.**

## Setting the TSAPI Device


This dialog appears when you are changing TSAPI settings or if you have not previously specified the TSAPI device. You must specify the telephone device that is being controlled by TSAPI by filling in the value of the pull-down or field labelled **Controlled Telephone Device**. The value to be inserted should be supplied by your administrator, and it is typically the phone extension number.

## Viewing Phone Calls to One Person

To view all phone calls linked to an address book entry, double click on that entry, then click on the **Phone Calls** tab.

To create, modify, or delete a linked phone call entry, click on **New Call**, **Modify Call**, or **Delete Call** buttons.

# Viewing Phone Calls

To view your entire phone log, click on the  view button.

The Phone Calls view presents calls with the most recent calls first. Entry size and zoom controls behave the same as those described in [Controlling Address Display](#).

To view all calls with a particular call status, search by **Call Status**. To view calls which apply to a person, project, or topic, search by **Assignee**, **Category**, or **Word**. For more on searching, see [Searching](#).

## Related Topics:

[Selecting the Type of Call to View](#)

[Viewing Phone Calls to One Person](#)




## Selecting the Type of Call to View

On the **Display** button bar, there are three buttons that allow you to select what type of phone call should appear on the list.



You can click on one of these buttons to display only incoming calls, outgoing calls only or all calls respectively.

## Viewing Your Notes


To view a list of your separate note entries, click on the  button on the button bar at the top of the window. Recently added notes appear at the top of your list, but you can move a note to any desired position. To move through your notes, use the scroll bar.

## Copying from the Clipboard into Day-Timer Organizer

If you have copied information from another application to the clipboard, you can insert that into *Day-Timer Organizer* by issuing the **Edit...Paste** command. This is most useful when copying text from a word processor or from a Web page into Notes in *Day-Timer Organizer*.

## Sorting Notes

By default, notes are sorted by position (recently added notes appear at the top of your list, unless you explicitly set their position).



- To sort by follow-up date (showing only notes flagged for attention), click on the  button, or select **Sort By Date Due** from the **View** menu.
- To sort by title (alphabetically by the title field of the note), click on the x button or select **Sort by Title** from the **View** menu.

If you have changed the display order, you can return to viewing the notes by position by clicking on the




button.

## Controlling Entry Display


The   buttons (or keypad **Plus** and **Minus** keys) control the number of lines visible per note in the Notebook view.


To save viewing settings, including window size and position, sort mode, and entry size, select the **Save Settings** option on the **View** menu. *Day-Timer Organizer* will use these settings each time you open the notes view.

## Viewing the Full Text of Notes

To expand the text for any note (or restore it to its normal size), click on the note and then on the  button at the bottom of the window (to change zoom window size, drag the border up or down). To scan successive notes, click on scroll bar arrows (or use the arrow keys). To edit expanded text, click in the text window. To save changes, click on the **OK** button. To exit the note without saving changes, click on the **Cancel** button.

# Editing Note Text

To pull down a menu of word processing options, click with the right mouse button while the pointer is positioned over the **Notes** field of an entry. Alternately you can click on the  button. Note that the editing menu is not the same as the **Edit** pull-down menu.

To expand the text for any note (or restore it to its normal size), click on the note and then on the  button at the bottom of the window (to change zoom window size, drag the border up or down). To scan successive notes, click on scroll bar arrows (or use the arrow keys).

[Positioning the Cursor](#)

[Inserting and Deleting](#)

[Working with Blocks \(Cut/Copy/Paste\)](#)

[Searching and Replacing](#)

[Inserting Dates and Times](#)

[Setting Indents](#)

[Setting Tabs and Display Margins](#)

## Positioning the Cursor

Click on the desired cursor position. To move short distances, use arrow keys. To move to the beginning of the next word, press **Ctrl+Right Arrow**. To move to the beginning of the previous word, press **Ctrl+Left Arrow**.

To move to the beginning (end) of the current line, press the **Home (End)** key once. To move to the beginning (end) of the text on the screen, press the **Home (End)** key twice. To move to the beginning (end) of all of the text, press the **Home (End)** key three times.

To move through a long entry a page at a time, click above or below the scroll bar at the right side of the screen (or use **PgDn** and **PgUp** keys). Alternately, position the mouse cursor over the scroll box, hold down the mouse button, and drag the scroll box to the desired position. To move through long portions of text (either up or down), click on the scroll arrows at either end of the scroll bar.




## Text Input - Insert & Delete

Typed characters are inserted at the cursor, moving subsequent text to the right. To type over existing text, press the **Ins** key to enter overwrite mode. To return to insertion mode, press the **Ins** again (this key toggles between modes).

To delete the character **Before** the cursor, press the **Backspace** key. To delete the character **Under** the cursor, press the **Del** key. To delete a **Word**, press **Ctrl+Delete** (or **Ctrl+Backspace**). To delete to **End Of Line**, press **Ctrl+L**.

## Text Input - Block Commands (Cut/Copy/Paste)

Block commands operate on the Windows clipboard, letting you move text from one entry to another within *Day-Timer Organizer* or between *Day-Timer Organizer* and other programs.

Note that this process uses the editing menu, which you can use by clicking with the right mouse button while the pointer is positioned over the notes field or clicking on the  button.

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To mark a block of text (or highlight it), hold down the mouse button while moving the mouse from beginning to end of text, then release. For multi-page blocks, click at the beginning of the block, reposition to the end of the block, hold down the **Shift** key, and click again.

To replace the marked block with new text, simply type new text. To duplicate the marked block to the Windows clipboard, select **Copy** from the editing menu (click on the right mouse button to view this menu). To delete the marked block, press the **Del** key. To delete the text from the document and copy it to the Windows Clipboard, select **Cut** from the editing menu. To insert the contents of the clipboard into the current document, move the cursor to desired position and select **Paste** from the **Edit** menu.

## Text Input - Search & Replace

To find a character sequence, select **Find Text** from the editing menu.

Normally, *Day-Timer Organizer* ignores whether the letters are capital or small letters. However if you wish it to distinguish capital from small letters, click on **Case**. So for example, if you search for paper, it would normally find "Imperial Paper Company", "...and the paper requirements ..." or "The PAPER project is...". However if the **Case** option is enabled, it would find only entries where the word "paper" appeared (and ignore "PAPER" and "Paper").

Set search direction to **Down**, **Up**, or **From beginning**. To start searching, press **Find Next**.

To replace existing text with new text, select **Replace** from the **Edit** menu, and type old and new text. To turn off the verify feature (which checks before each replacement), click on the **Verify** check box. To distinguish between capital and lower case letters, click on **Match Case**. To proceed, click on **OK**.

## **Text Input - Date & Time Stamp**

To insert the **Current Date** in your text, select **Insert Date** from the **Edit** menu. To insert the **Current Time**, select **Insert Time** from the **Edit** menu.

To insert any date into your note, first display a calendar by selecting **Calendar** from the **Edit** menu. Then from the calendar, click on the desired date.

## **Text Input - Indents**

To **Indent** a paragraph from the current cursor position, select **Insert Indent** from the **Edit** menu . To remove indenting, position the cursor at the beginning of the indented text and press the **Backspace** key.

## **Text Input - Tabs and Display Margins**


To set tabs or expand the right margin, select **Tabs and Margins** from the editing menu.

To change spacing between **Tabs**, type new spacing. By default, *Day-Timer Organizer* wraps text at the window boundary. To display a table wider than the window, set **Word Wrap** wider than table width.

## Text Input - Phone Dialer

To dial any number in your text, hold down mouse cursor while you drag from the beginning to the end of the number, then select **Phone Dialer** from the **Edit** menu.

# Recording an Expense

To begin creating an expense record, click on the  button on the Button Bar. From the pull-down menu, click on **Expense** and *Day-Timer Organizer* will present a dialog box. You can then fill in the fields and click on **OK** to add the expense entry.

## Related Topics:

[Entering Notes with Your Expense Record](#)

[Selecting An Expense Date](#)

[Selecting Expense Type](#)

[Assigning Expenses to Others](#)

[Copying Entries to the Clipboard](#)

[Attaching Files to Entries](#)

[Custom Fields](#)

[Categorizing Your Information](#)

[Searching and Repositioning](#)


[Linking Entries](#)

[Sharing Entries With Others](#)

[Totalling Time and Expenses](#)



## Entering Notes with Your Expense Entry

In the Notes field, you may include as many details as you wish (*Day-Timer Organizer* allows up to 35 pages of text *per entry*). To expand the text window (or restore it to its normal size), click on the  button at the bottom of the scroll bar. For a menu of editing features, click on the right mouse button when the pointer is on the text.

### Related Topics:

[Viewing Your Notes](#)


[Sorting Notes](#)

[Controlling Entry Display](#)

[Viewing the Full Text of Notes](#)

[Editing Note Text](#)


## Selecting An Expense Date

Click on the  icon next to the date field, then click on the desired calendar date from the resulting window.



Alternately, you can simply type a new value into the **Date** field. *Day-Timer Organizer's* smart date recognition accepts most typed formats, such as "tu" for Tuesday or "2w" for 2 weeks from today.

## Selecting Expense Type

Type  


Click on the arrow selector next to the **Type** field to pull down a list of expense types, and select the type which applies. If any type you need is not on the list, you may add it, as described in [Customizing Expense Types](#).

If you select **Entertainment**, *Day-Timer Organizer* will prompt you for **Location** (name of restaurant or establishment), **With** (names of people who attended), and **Purpose** (business purpose for meeting).

If you select **Mileage**, *Day-Timer Organizer* will ask for mileage traveled and the reimbursement rate per mile (which will be saved for future reference). The total amount will be calculated automatically.

## Marking Expenses as Submitted




To mark an expense entry as submitted (e.g. after you have submitted an expense report to accounting),

click on the entry on any View screen, then click on the  button. Next, click on **Yes** to confirm that you want to mark the entry as finished (for your convenience, there is also a **Submitted** check box on the entry template, accessible when you add or modify the entry).


To finish multiple entries at the same time, press the **Ctrl** key while you click on each entry (to select a range of adjacent entries, click on the first entry, then press the **Shift** key while you click on the last entry).

## Shortcut Buttons

For your convenience, *Day-Timer Organizer* provides the following shortcut buttons at the bottom of the expense entry template:

Button	Function
	save this expense entry and add another
	save this expense entry and add a duplicate copy (which may be modified as needed)
	delete this expense entry

## Viewing Your Expenses

To view expenses, select the  button on the button bar or use the **View** menu. Recent expenses appear at the top of the list. To move through the list, click on the scroll bar. To locate entries for a particular person or topic, you may search by assignee, category, or word(s) contained in the text field.




### **Related Topics:**

[Viewing Submitted and Unsubmitted Expenses](#)



[Entry Display Size](#)


## Viewing Submitted and Unsubmitted Expenses

When you add an expense entry, it is unsubmitted unless you indicate otherwise. After submitting it to your accounting office for reimbursement or billing purposes, you may mark it as submitted.

Button	Function
	display expenses not submitted for reimbursement (the default)
	display expenses submitted for reimbursement
	display all expenses together, in reverse date order (most recent expenses appear first)

## Entry Display Size


To display more expense entries on a page, use the **Entry Size** buttons:   to enlarge and reduce respectively the size allotted for an entry.

To **Zoom** in on notes for any entry, click on the entry and then on the  button at the bottom of the window (to change zoom window size, drag the border up or down). To scan successive entries, click on scroll bar arrows (or use arrow keys). To edit text, click in the text window and make changes.


## Totaling Time and Expenses


To total time and expenses allocated to any project, select the **Total Time & Expenses** command from the **Tools** menu.

If you selected one or more entries on screen, *Day-Timer Organizer* will total time and expenses for those entries. Otherwise, it will total all entries, subject to search and date range settings.

- ◆ **Search** buttons let you filter by person, project, word, category or entry type. Any search settings in the active view will be automatically retained; to clear search settings, click on .
- ◆ **Dated Between** lets you select expenses between a range of dates. Click on the date buttons and select desired dates from the calendar.
- ◆ **Hourly Rate** lets you tally labor costs for a project. If you enter a rate, it will be multiplied by time spent to determine total labor cost.

Once the search settings are correct, click on **OK**. *Day-Timer Organizer* will present a screen.

To view a breakdown of the totals by expense type, click on the  button. To view a list of entries for any expense type, click on the

 button for that type.

Note that the totals generated through this command cannot be printed.

## Modifying an Expense Entry


To modify an expense entry, double click on the entry on any view screen. If you prefer, you can click on

the entry and then either click on the  icon or drag the entry over the




icon. When the template appears, click on any field you wish to modify and proceed as you would when adding an expense (described in [Adding an Expense](#)).


To modify multiple entries at the same time, you must select them. To select a series of entries, press the **Ctrl** key while you click on each entry. To select a range of entries, click on the first entry, then press

the **Shift** key while you click on the last entry. Once the entries are selected, click on the  button, and select the field(s) you wish to change. Finally, click **OK** to save the changes.




## Deleting an Expense Entry

To permanently delete an expense entry, click on the entry on any view screen. Once the entry is selected, click on the  button (or press the **Del** key). Next, click on **Yes** to confirm that you want to permanently delete the entry (for your convenience, there is also a

 button on the entry itself, accessible whenever you add or modify an expense entry).

To select multiple entries for deletion, press the **Ctrl** key while you click on each entry (to select a range of adjacent entries, click on the first entry, then press the **Shift** key while you click on the last entry).

# Viewing Timelines

To display Timeline view, click on the  button on the **View** button bar or choose the **View...Timeline** command. This view presents an unbroken list of all date-related activities in chronological order. The entries displayed in the timeline include:

- schedule
- tasks
- phone calls
- expenses
- addresses (with follow-ups)
- notes (with follow-ups)
- messages





## **Related Topics:**

[Moving Through the Timeline](#)

[Controlling Timeline Entry Size](#)


## Moving Through the Timeline

To move through your Timeline list, use the scroll bar. If you click on the scroll bar's thumb and hold down the mouse button while you drag the thumb up or down, a speedbox will show the date corresponding to the current thumb position. This makes it easy to move quickly yet precisely through time.

To move backward or forward by a week, click on the  or  button respectively on the **Display** button bar. To move backward or forward by a month, click on the  or  buttons. To return to today's date, click on the **Today** button. To move through larger time intervals, use the **Find Date** command on the **Search** menu and type the desired date. Alternately, you can click on the icon to set the date.


## Controlling Timeline Entry Size

To display more entries on a page, use   buttons at the bottom of the window.

To zoom in on text for one entry, click on the entry and then on the  button at the bottom of the scroll bar. To scan successive entries, click on scroll bar arrows (or use **Arrow** keys). To edit expanded text, click in the text window.

# Global View

The Global view shows all *Day-Timer Organizer* entries such as schedule, tasks, addresses, notes, phone calls, expenses, and messages (multi-user database only) in one place. The Global view includes both **Dated** and **Non-Dated** items, which makes it well-suited for finding everything which applies to a topic.

To select the global view, click on the  button or choose the **View...Global** command. The global list is sorted so that entries added or modified most recently appear at the top. To move through your list, use the scroll bar. To view entries prior to today, click on the up arrow icon of the scroll bar.

## **Related Topics:**

[Controlling Entry Size](#)



[Saving View Settings](#)


[Controlling the Contents of List Views](#)

[Search and Repositioning](#)

[Printing](#)

## Controlling Entry Size

To display more entries on a page, use   buttons at the bottom of the window (or the keypad **Plus** and **Minus** keys).

To zoom in on text for one entry, click on the entry and then on the  button at the bottom of the scroll bar. To scan successive entries, click on scroll bar arrows (or use **Arrow** keys). To edit expanded text, click in the text window.

# Setting User Preferences

Preference options let each user personalize a variety of settings in *Day-Timer Organizer*. When you select **User Preferences** from the **Setup** menu, *Day-Timer Organizer* will display a dialog box like that shown below. When you select an option in the panel on the left, the panel on the right shows your current settings.

## Related Topics:

[Controlling the Display of the Calendar Week](#)

[Controlling the Alarm Settings](#)

[Specifying your Standard Business Hours](#)

[Setting Miscellaneous Features](#)

[Selecting the Screen Font](#)

[Customizing the Button Bar](#)

[Requesting Notification Messages \(multi-user database only\)](#)

## **Controlling the Display of the Calendar Week**

This command allows you to specify whether the week is to begin on Sunday (as in the U.S.) or on Monday (as is done in Europe).

The month calendars at the left in Daily Planner view, the calendar popup for setting dates, and the Monthly Planner view may display either Sunday or Monday as the leftmost day.

The weekly view displays Monday to Sunday, although the printed report of the Weekly Planner will reflect your choice.



## Controlling the Alarm Settings

To control pop-up alarm behavior, use the **Alarm Settings** selection in the **Setup...User Preferences** command.

When an alarm sounds, you may clear it or snooze it. If you snooze it, it will pop up again after the **Snooze Interval** (which is initially set to 15 minutes, but may be set to any time interval you wish).

If no action is taken on an alarm (perhaps because you are away from your desk), an audio alert will automatically repeat at periodic intervals (by default, every 5 minutes). Even if *Day-Timer Organizer* is running in an off-screen window and you are away from your desk when an alarm sounds, you will hear it within 5 minutes of your return.

If the **Autosnoozing** box is checked, pop up alarms which remain on screen with no action taken will be automatically removed from the screen after the snooze interval (and pop up again after another snooze interval has passed). This allows any active program which is interrupted by an alarm to receive processing time.

## Specifying your Standard Business Hours

To set your business hours, select **User Preferences** from the **Setup** menu, then select **Business Hours**. Note that business hours cannot begin before 6 a.m. and cannot extend past 10 p.m.

You may control the beginning and end of your work week, as well as the beginning and end of your business day. These settings control both printouts and the Find Time feature in the Team Organizer view, which finds the next available time you and others can meet. The start must be before the end.

Long business hours may cause reports to use more than the normal number of pages (daily and weekly).

## Setting Miscellaneous Features

The **Miscellaneous** choice on the **Setup...User Preferences** dialog controls three settings:

To disable the audio alert when *Day-Timer Organizer* displays an error message, click on the check box to turn **Error Bell** off.

*Day-Timer Organizer* automatically identifies potential conflicts whenever a Schedule entry is added or changed. To disable this feature, click on the check box to turn **Find Conflicts** off.

To reduce screen clutter, *Day-Timer Organizer's* daily, weekly, and monthly planner views do not show your name next to entries assigned to you and no one else. To display all names on planner views (including your own), click on the box beside **Display Own Name** so that a check mark appears.

## Selecting the Screen Font

To choose screen fonts, select **User Preferences** from the **Setup** menu, then choose the **Screen Fonts** option. You may set screen fonts independently for daily and weekly planners, monthly planner, all other views, and the text editor. To do so, click on the appropriate button.

Select the font, style, and point size you want. If the font you select results in clipped characters or strange screen behavior, it is inappropriate for your hardware configuration and you should choose a different screen font. Note that not all on-screen attributes can be changed with this option.

This command affects only the screen display. To change reports, use the options on the Printing Options dialog box.

## Customizing the Button Bar

Although the default button bar settings meet the needs of most users, users with specialized needs may substitute or add buttons if they wish. Depending on your screen size, you may want to add or remove some of the buttons. On a higher resolution screen, you may have room for additional buttons whereas on lower resolution screens, you may want to remove the buttons that you use less frequently. To customize your button bar, select **User Preferences** from the **Setup** menu, then select **Button Bar**.

Buttons that are highlighted will appear on the button bar. To omit a lighted button from the button bar, click on it. To include an unlighted button on the button bar, click on it.

## **Requesting Notification Messages (multi-user database only)**

By default, *Day-Timer Organizer for Workgroups* automatically sends a notification message whenever you assign a schedule or task entry to another network user. Users who routinely delegate large numbers of tasks may find automatic notification an unnecessary burden upon the assignees. To turn off automatic notification for either task or schedule entries, select **User Preferences** from the **Setup** menu, then select **Messages**.

You can choose to have automatic notification when schedule entries or to do entries (tasks) are assigned

# Controlling Startup Behavior

When you start *Day-Timer Organizer*, you will usually see the standard startup screen from which you can select a view.

If you have a favorite view or set of views, you may want to save a different startup configuration. To do so, open all the views you want to display at startup, and configure everything exactly the way you want it, including:

- ◆ Size and position of the *Day-Timer Organizer* window.
- ◆ Size and position of each view you want open.
- ◆ Search settings (optional) to save for each view you have open.

Next, select **Startup Screen** from the **Setup** menu, and select **"Save Current Views"**. To save search settings in all open views, click on the **"Include Search When Saving"** checkbox. To save views (and optionally, search settings) each time you exit, select **"Save Views at Exit"**.

If you have previously saved settings and you wish to use the default startup screen, select **"Use Startup Screen"**.

# Telephone Settings

To set local area code, communications port, modem settings, or frequently used dial codes, select **Telephone** from the **Setup** menu.

## **Related Topics:**

[Local Area Code](#)

[Modem Settings \(including TAPI and TSAPI\)](#)

[Dial Codes](#)

[Direct Phone Interface \(DDE\)](#)

[Call Status](#)



## Local Area Code

*Day-Timer Organizer's* dialer will automatically place a "1" in front of all area codes except your local area code. If you reset this area code when you travel to another city, *Day-Timer Organizer* will automatically adjust local and long distance dialing correctly. To reset your local area code, select **Telephone** from the **Setup** menu, then select **Local Area Code**. Type the correct area code in the provided window.

To distinguish local numbers from long distance numbers inside your local area code, place a "1" in front of the long distance numbers. By default, *Day-Timer Organizer* will omit your local area code when dialing long distance within your area code. To include your local area code in long distance calls, click on the **Include When Dialing** option.

## Modem Settings (Including TAPI and TSAPI)

To verify that *Day-Timer Organizer* has the correct settings for your modem, select **Telephone** from the **Setup** menu and click on **Modem Settings**. Make sure **Com Port** and **Type of Phone** settings are correct.

When using a modem with *Day-Timer Organizer*, some of the factors to consider are:

- ◆ Your modem must be Hayes or 100% compatible.
- ◆ Most PCs have 2 serial ports, labeled Com1 and Com2. Unless you have a PS/2 style mouse, your mouse will normally be connected to Com1. External modems will normally be connected to Com2.
- ◆ Internal modems have jumpers on the modem board (see your modem manual) which are normally set to Com4 or Com2. If you are using an internal modem and have a computer with two serial ports, set your internal modem to Com4 to avoid conflicts with your 2nd serial port (if your internal modem must be set to Com2, disable the 2nd port via your computer's Setup utility).
- ◆ Com3 shares a hardware interrupt with Com1, and Com4 shares an interrupt with Com2. For this reason, you should not use Com1 and Com3 (or Com2 and Com4) concurrently.
- ◆ If you have a multi-line phone system, make sure a dial tone is available at your modem.

### Setting the Com Port

If you are using a modem, you can simply select the appropriate port (Com1 through Com4) are required. If you are using a TAPI or TSAPI phone system with *Day-Timer Organizer*, you must select that from the **Com Port** pull-down.

#### Using DDE

Direct Phone Interface (DDE)

#### Using TAPI

**For Windows 3.1 / Windows NT:** If you have not already done so, you need to obtain the TAPI Add-on package from Microsoft. Once you have installed this add-on package and have correctly setup your modem under Control Panel then you need to select **Use TAPI** in the **Com Port** pull-down.

**Windows 95:** Use the Control Panel to install your telephone/modem under Windows 95. Once this is complete, then to select **Use TAPI** in the **Com Port** pull-down.

#### Using TSAPI

If you have not already done so, you need to obtain the TSAPI Add-on package from Novell. Once you have installed this add-on package and have correctly setup your equipment under the Control Panel, then you need to select **Use TSAPI** in the **Com Port** pull-down. You will then be required to select a NetWare TELEphony Services server and to provide the login ID and password. In addition, you must specify a controlled "device" (in this case, your desktop telephone extension number). This information will be retained by *Day-Timer Organizer* for future use. You can change your TSAPI settings later from the phone dialer dialog.

### Related Topics:

Changing TAPI/TSAPI Settings

## Setting the TSAPI Device

## Dial Codes

Dial codes let you handle special dialing situations (e.g. "9" for an outside line). To set a dial code, select **Telephone** from the **Setup** menu, then select **Dial Codes**. In addition to the code itself, you may type a description by which it will be referenced. To include a dial code for all your calls, click on **Use As Default**.

To insert a telephone number into a dial code, place a caret (^) where the number will be positioned. To insert a pause, use one or more commas. To wait for a dial tone, use a **W**. For a complete list of modem control characters, see your modem's instruction manual.

## Direct Phone Interface (DDE)

*Day-Timer Organizer* also provides a software interface to phone systems which provide windows based dialing software. This support is currently limited to *Inter-Tel Axxess*™ telephone systems equipped with *Axxessory Connect*™ Windows software, but future versions of *Day-Timer Organizer* will support additional systems.

*Day-Timer Organizer's* direct phone interface provides windows based access to all your system's capabilities, plus the ability to dial from within *Day-Timer Organizer*.

In dialing areas which support **Caller ID**, the direct phone interface lets *Day-Timer Organizer* automatically find the address book entry corresponding to an incoming call's phone number. This lets you know who's calling before deciding whether to take a call, and gives you information about the caller before you pick up the phone.

For assistance with your Inter-Tel Axxess telephone system, contact Inter-Tel.

To take advantage of *Day-Timer Organizer's* direct phone interface capabilities, select **Telephone** from the **Setup** menu, then select **DDE Dialing**. Under the **Voice Mail** option, type the voice mail facility's extension on your system (which is not the same as your personal voice mail extension).

### **Related Topics:**

[Modem Settings \(including TAPI and TSAPI\)](#)

## Call Status

When you are logging phone calls, the Status field is a pull-down which allows you to set the call's status.

The labels that are displayed in the pull-down can be customized with the **Call Status** option of the **Setup...Telephone** command. This option is available only in single user databases, or when logged in as the Supervisor in a multi-user database.

## Customizing Expense Types

*Day-Timer Organizer* ships with a list of expense types that will be sufficient for most users. If you have specialized needs, you may substitute your own expense types for the ones we provide. To do so, select **Expense Types** from the **Setup** menu. For instructions, see [Tracking Expenses](#). Only the supervisor can change the standard expense types in a multi-user database.

# Creating Custom Fields

Custom fields are a flexible way for you to choose what data to associate with entries in your schedule, address book, to do list, expense report, phone log and notes.

For example, you might want to track the following information for contacts:

- the date and event where you met them (e.g. a tradeshow, etc.)
- their birthday or spouse's birthday
- what industry they are in
- which products and services they are interested in
- the size of their company (e.g. number of employees, annual sales range, etc.)

You can also use custom fields to help you target your mailings. For example, if you tracked company size, you might want to send a direct mail piece but only to contacts who work for companies with less than 50 employees. You could then request a search by the custom field containing the number of employees and print mailing labels only for those contacts.

As another example, after a trade show, you might enter new contacts in your address book and you might want to note the type of computer system they use (e.g. Macintosh or Windows), product line interests, etc.

To define your own custom fields, choose the **Setup...Custom Fields** command. Click on the tab that corresponds to the type of entry—schedule, address book, etc.

Then simply type in the name of the new custom field.

When you now add an address entry, clicking on the Custom Fields tab will show your field definitions.

Only the supervisor can change the names of custom fields in a multi-user database.



# Setting and Displaying Holidays

Holidays display on your planning view, just like on a paper calendar. For example, on the Daily, Weekly and Monthly Planner views, the holiday name will be displayed beside the day indicator in the top left corner.

*Day-Timer Organizer* is preset with holidays from a number of countries. By default, only holidays from your own country (as set in your computer's operating system environment) will be displayed on the daily, weekly, and monthly planner views.

Holidays are also used by the Find Time feature of the group scheduler (when you try to schedule a meeting, it will not search holidays for available time). If you are using this feature, it is important to maintain an up-to-date holiday schedule.

**Note that you should not use holidays to track birthdays or anniversaries because holidays are shared by all users (multi-user databases only) and are not exported and imported when you transfer data between systems.**

## **Related Topics:**

[Setting Personal Holidays](#)

[Displaying Holidays for Other Countries](#)

[Defining New Countries and Holidays](#)

## Setting Personal Holidays

You can define new holidays if your company observes additional regional holiday or vacation days, or to account for personal days off (e.g. an anniversary or birthday). For example, if a major holiday falls on a Tuesday or Thursday, many companies also give the corresponding Monday or Friday as a holiday to give staff a 4-day weekend. You can record these holidays in *Day-Timer Organizer* so that no schedule entries are accidentally set for that day.

To define a new holiday, choose the **Setup...Holidays** command and you will see a dialog box with a list of countries whose holiday schedules are programmed into *Day-Timer Organizer*. To set a special holiday, first be sure that your country is selected. Click on the **Holidays** button to display the holidays for your country. Then click on the **Add** button to create a new holiday.

Enter the name of the holiday and click on **Is a vacation day** if the company is closed for that day.

Click on the name(s) of the country or countries for which this is a holiday.

Finally, click on **New** in the **Occurs on** panel to specify the date of the holiday.

Enter the date for the holiday and click on **OK** to continue. You can click on the **Add Another** button to add additional holidays.

When you click on **OK**, the defined holiday(s) will be added.

Note that you should maintain a list of the special holidays that you create. Holidays are maintained as part of the database structure and holidays are not exported and imported. In addition, if your database is damaged and you have to rebuild it, holidays may not be recovered.

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## Displaying Holidays for Other Countries

In addition to displaying the holidays for your own country, you may do business in other countries and want to be advised of their holidays. For example, if you have relatives or business associates in Canada, you may wish to have Canadian holidays displayed. If you help staff plan business trips to the U.K., you may need to know about British holidays.

To display another set of holidays in addition to or in place of the current set, choose **Holidays** from the **Setup** menu. Any country shown with an asterisk (\*) will have its holidays displayed on your planner views.

To select a country's holidays for display, click on that country on the **Countries** list, then click on the **Modify** button, and then click on the **"Show Country's Holidays"** checkbox. When you click on **OK** to close the dialog box, the holidays for the selected country will be displayed on your planner views.

To turn off any country's holiday display, click on that country, then click on the **Modify** button, then click to turn off the **"Show Country's Holidays"** checkbox. When you click on **OK** to close the dialog box, the holidays for the selected country will be removed from your planner views.

## Defining New Countries and Holidays

If your country is not displayed on the Countries list, you may add it by simply clicking on the add button and filling out its name.

To add, modify, or delete holidays, click on the **Holidays** button to view the holiday list. Then click on the **Add**, **Modify**, or **Delete** button as required (before modifying or deleting, click on the desired holiday to select it).

When adding a holiday, type its name (e.g. Independence Day), designate whether it is a vacation day, click on the country to which it applies, and then click on the **New** button for each occurrence you wish to add (this lets you accommodate government holidays that fall on weekends some years). Click on the **OK** button when finished.

# Database Security Setup

When you select **Database** from the **Setup** menu, you can

[Set Password\(s\) on your Database](#)

[Set New Entry Default Rights \(Viewing Rights on Entries\)](#)

[Set the Quarterly Start Date](#)

The expanded database setup options for *Day-Timer Organizer for Workgroups* are only available to the Supervisor or Database Manager. For a discussion of database management options which pertain to Network installations, consult your *Day-Timer Organizer Workgroup Guide*.

## Setting Passwords on your Database

Passwords prevent unauthorized access to sensitive information. If you set a password, you will be prompted for it whenever you start *Day-Timer Organizer*. There are two types of password on your database:

### **Password Type**

user password (multi-user database only)

database password

### **Function**

Prevents other users from logging in to the database with your user name and viewing your private data.

Protects the entire database from access by an unauthorized user. **For multi-user databases, only the supervisor or database manager can set the database password.**

### **Related Topics:**

[Setting Your User Password \(multi-user database only\)](#)

[Setting a Database Password](#)

### ***Setting Your User Password (multi-user databases only)***

To set your user password, select the **User Security** option from the **Setup...Database** dialog box.

- ◆ To set a password for the first time, click in the **New** field and type up to 8 characters. Next, click on the **Verify** field and type the new password. Write down your password and keep it in a safe place.
- ◆ To change an existing password, click on the **Old** field and type your old password. Then type your new password into the **New** field and again in the **Verify** field, as described above.

## ***Setting a Database Password***

To set a password on the entire database, select the **Database Security** option from the **Setup...Database** dialog box. If your current database is a multi-user database, only the Supervisor or the database manager is allowed to set the database password.

- ◆ To set a password for the first time, click in the **New** field and type up to 8 characters. Next, click on the **Verify** field and type the new password. Write down your password and keep it in a safe place.
- ◆ To change an existing password, click on the **Old** field and type your old password. Then type your new password into the **New** field and again in the **Verify** field, as described in [Setting Your User Password](#).



## Setting Viewing Rights for New Entries

By default, all entries are **Private** - i.e. only the person who created a task may view, modify or delete it. You may choose to allow all entries to be viewed by everyone by clicking instead on the **Viewable by everyone** button. You may also wish to allow all users to modify other users' entries by clicking on the **Modifiable by everyone** button. Note that this setting would allow users to change or delete each others' entries.

## Setting the Quarterly Start Date

By default, *Day-Timer Organizer* works from a calendar year. This means that when you schedule recurring events to occur quarterly, *Day-Timer Organizer* assumes that the first quarter begins on January 1, the second quarter begins on April 1, etc.


You can change the quarter start date by choosing the **Quarter Start** option of the **Setup...Database** command.

To change the first day of the first quarter, simply choose an alternate month and/or day.

## Coordinating Users on a Standalone System

You can coordinate the activities of several people using a single-user copy of *Day-Timer Organizer*. Simply define the people to be coordinated using the **Setup...Assignees/Users** command. (Assigning tasks and events to other users is discussed in detail in [Assigning Entries to Others](#).)

# Group Scheduling

For advanced group scheduling, select the  view (the TeamOrganizer view) from the button bar. This view shows a graphic display of an entire week's schedule for any individuals you select, allowing you to schedule a meeting by clicking and dragging on the display. Use the buttons on the **Display** button bar to move by week or month. The scroll bars at the bottom allow you to display other users or other days within the current week. From this view, you can also manage your Email, including searching for specific messages, and adjusting the message display and print the message list. From this view, you can also [search](#) for specific entries, [adjust the display](#) and [print the schedule](#).

## Related Topics:

[Choosing Attendees](#)

[Finding Available Times](#)

[Removing Individuals Who Can't Attend](#)

[Viewing Timeline Entries](#)

[Individual Timelines](#)

[Group Timelines](#)

[Click and Drag Scheduling](#)

[Coordinating Users from a Standalone System](#)

## Choosing Attendees

To select individuals, groups, or resources to view or schedule, click on the **Attendees** button. When you click on the name of each person you want to select, a check mark will appear beside their name.

Click on **OK** to accept your choices.

### Related Topics:

[Assigning Entries to Others](#)

## Finding Available Times


To let *Day-Timer Organizer* find the next available time for all selected individuals, click on the **Find Time** button. Type the required **Duration** (or select it from the pull down list). Click on **Find Next** to find the first time. Once *Day-Timer Organizer* finds a time, click on the **Add** button, or the **Find Next** button to find the next available time . To include weekends in your search, click on **Include Weekends**.


### Related Topics:

[Choosing Attendees](#)

## Group Timelines



The right half of the window shows a block of time for the group of all selected individuals, making it easy to find times when everyone (or almost everyone) can attend. To view more days, click on the horizontal

scroll bar or the  button (the

 button restores the pane to its original size). To adjust the time of day, use the vertical scroll bar.

- ◆ Thick lines indicate that most selected names are busy.
- ◆ Thin lines indicate that most selected names are available.
- ◆ White space indicates that all selected names are available.

## Individual Timelines

The left half of the window shows timelines for each individual you have selected for that particular calendar date (with any overlapping activities showing in red). If there are names which do not fit in the left pane, use the horizontal scroll bar or click on the  button (the  button restores the pane to its original size). To adjust time of day, use the vertical scroll bar.



## **Removing Individuals Who Can't Attend**

To remove an individual who is unable to attend, click on the name of that individual on the left pane. To re-select an individual, click on that name. A check mark beside a name indicates that the name is currently selected.

## Viewing Timeline Entries

If you click on a black area in the timeline, *Day-Timer Organizer* will show entries for that portion of the timeline. To modify one of these entries, double click on it. To reschedule with the mouse, click on the desired entry and hold down the mouse button while you drag it to a new begin time (network users must have view and modify rights to change an entry).

To see a list of the entries at a particular time, position your cursor over the entry so that the cursor changes to a magnifying glass. Then click.

## Click and Drag Scheduling

To schedule an activity for the entire group (except names removed by clicking on the name button), position the mouse cursor over an open timeline area in the right pane, and hold down the mouse button while you drag the cursor from begin time to end time.

To schedule an activity for one individual, position the mouse cursor over an open area in the left pane, and hold down the mouse button while you drag the cursor from begin time to end time.

*Day-Timer Organizer* will create a new entry, filling in Date, Begin Time, End Time, and Assign To fields automatically. All you have to do is click on the **Notes** field, type a description, and click on **OK** to save the entry.

# Administering a Workgroup

[Installing a New Workstation](#)

[Setting the Supervisor Password](#)

[Appointing a Database Manager](#)

[Setting a Database Password](#)

[Specifying Shared Network Settings](#)

[Accessing a Multi-User Database from a Single Copy of Day-Timer Organizer](#)

[Moving from a Single User to a Workgroup Environment](#)

[Transferring Data from a Single User to a Multi-User Database](#)

## Sharing Entries With Others

When working in a multi-user database, users can share entries selectively, facilitating group scheduling, task assignment, internal mail, and general information sharing.

The right to view an entry is controlled by how you have set [viewing rights](#) in your database. In addition, when you assign a task to another user with the **Assign To** feature, that user automatically receives the right to view and modify (but not delete) the task. The standard setting is that, viewing and modify rights for any new entry are set to private, which means that only the person who created it can view or modify it. If you assign an entry to one or more other users (using the entry's **Assign To** field), each assignee will automatically receive rights to view and modify the entry (you may alter these rights if desired).

Assigning an entry to someone else allows them to see the entry without having to set **Assignee Search**, which is ideal for Schedule and Task entries. With other types of entries, recipients may not want their screens cluttered with information shared by other users.

To share an entry with someone else without forcing them to view it all the time, give them viewing rights without assigning the entry to them. They may then view these entries whenever they want by clicking on the **Assignee Search** button and selecting the person who created the entries they wish to see.

When creating an entry, you can control who can view or modify an entry by clicking on the **Viewing Rights** button. You may set viewing and modify rights independently, and you can also control whether users you granted Modify rights can delete the entry.

Viewing or modify rights may be set to **Private**, **Shared**, or **Everyone**. If you choose **Shared**, you may select individuals or groups with whom it will be shared.

To allow all users with **Modify** rights to also **Delete** the entry, click on the "**Modifiers allowed to delete entry**" check box.

For more information on working with entries created by others, see [Proxying for Other Network Users](#) as well as [Setting New Entry Default Rights \(Viewing Rights on Entries\)](#).

# Sending Internal Messages

If you have *Day-Timer Organizer for Workgroups*, you can exchange messages with other *Day-Timer Organizer* users. If your office has an e-mail product which supports VIM (such as cc:Mail™) or MAPI (such as Microsoft Mail™), you may also send messages to other *Day-Timer Organizer* users via those mail packages.

In addition to every-day user-to-user messages, *Day-Timer Organizer* can generate **Automatic Notification** messages when you schedule a meeting or assign a task to another user. Notification messages can be discarded after viewing without affecting the underlying schedule or task entry.

## Sending and Receiving Messages

[Sending a Standard Message](#)

[Sending a Reply](#)

[Meeting and Task Notification Messages](#)

[Reading a Message](#)

[Saving a Message](#)

## Viewing Messages

The Message list view displays messages. From this view, you can also manage your Email, including [searching](#) for specific messages, and [adjusting the message display](#) and [print the message list](#).

[Incoming](#)

[Outgoing](#)

[Saved](#)

## Email Management

[Creating a To Do Item from a Message](#)

[Seeing Who Has Read Your Messages](#)

[Seeing Who Can Attend a Meeting](#)

## Sending a Message

To send a message, begin by clicking on the  button. From the pull-down menu, click on **Message**. *Day-Timer Organizer* will present a template. Alternately, you can double click on a blank entry on the message list view. The **Edit...New Entry...Message** command also creates a message. You can fill in the template as you wish. Typically you would

- enter a brief subject in the **Subject** field (this will appear in the message list view),
- enter the message itself into the **Notes** field
- select the recipient(s) by clicking on the **Send To** button
- click on **OK** to send the message.

In addition, the **Category** button allows you to assign a category to the message. If you wish the message to be automatically deleted after 60 days, you can click on the **Purge after 60 days** option. The **Urgent** option indicates to the recipient that the message is particularly important.

The other three option tabs allow you to enter

Custom Fields

Linked Entries

Attachments

## ***Selecting Recipients***

Click on the **Send To** button, and select the desired recipients from the list of network users. To select (or deselect) a recipient, click on the name. When your selection is complete, click on **OK**.

To send a message to a group or any of its members, click on the group. Next, either click on the **All** button to select all members, or select individual members from the list. When finished, click on **OK**.

To send the message, click on the **OK** button.



## **Urgent Messages**

Clicking on the **Urgent** check box when creating a message designates a message as urgent. In this case, each recipient running *Day-Timer Organizer* (even in a minimized or inactive window) will receive a popup message notification with an audio alert.

## **Purge After 60 Days**


By default, any new message will be discarded from your Out Box sixty days after it is sent. To keep it indefinitely, click on the **Purge after 60 days** check box to remove the check mark.

**Note:** The purge setting does not affect the ability of recipients to save any message to their personal message history.

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## Viewing Incoming Messages

When another user sends you a message, *Day-Timer Organizer* displays a message icon on the status

bar at the bottom of the *Day-Timer Organizer* window. To view incoming messages, click on the  button in the **View** button bar at the top of the window or select **Messages** from the **View** menu.

Click on the **In** button on the **Display** button bar to display incoming messages. To view the complete text of a message, double click on an entry and then click on the **Notes** tab.

Your most recent messages appear at the top of your list. If there are any schedule or task notification messages, you will see them as Schedule or Task entries rather than Messages under the **Type** column.

To move through your message list, use the scroll bar (or **PgUp**, **PgDn**, and **Arrow** keys). You may also search through your messages by assignee, category, priority (tasks only), entry type, or words they contain.

[Custom Fields](#)

[Linked Entries](#) Linking Entries.131

[Attachments](#)


### Related Topics:

[Sending Internal Messages](#)

[Adjusting the message display](#)

[Printing the message list](#)

## Reading a Message

To view the complete contents of a message, double click on that message. If the message is long, you may expand the text field by clicking on the  icon at the bottom of the scroll bar.

The message template typically contains

- a brief subject in the **Subject** field (this will appear in the message list view),
- the message itself into the **Notes** field

In addition, the **Category** button lists the message category. The **Urgent** option indicates that the message is particularly important.

The other three option tabs allow you to display

Custom Fields

Linked Entries


Attachments

## **Saving a Message**

By default, *Day-Timer Organizer* discards messages after you read them. To save a message, click on the **Save to History** check box. Where a message is sent to multiple users, each user's decision to save or discard is personal in scope, and does not affect other users.

Note that by default, the **Remove from In-Basket** option is checked. If you click on this box to turn this option off, the message will remain in the incoming messages list.

## Viewing Saved Messages

To view incoming messages you saved after reading, click on the  button at the bottom of the View window or select **Incoming History** from the **View** menu.

## Creating a Task from a Message

When a message requires action on your part (such as a phone message you want to return), you can add it to your current task list by clicking on the **Add Task** button at the bottom of the message window.

## **Sending a Reply**

To send a reply after you have read an incoming message, click on the **Reply** button at the bottom of the message window. *Day-Timer Organizer* will generate a pre-addressed reply template. Type in your reply, and then click on **OK**.



## **Meeting and Task Notification Messages**

After inspecting a message which notifies you of a schedule or task assigned to you, click on **OK** to discard it from your In Box (the schedule or task entry itself may be viewed elsewhere). If the message is a meeting notification, you will be asked whether or not you can attend.

## Viewing Outgoing Messages

By default, *Day-Timer Organizer* displays incoming messages. To view outgoing messages, click on the



button at the bottom of the View window.

To view the complete text of a message, double click on an entry and then click on the **Notes** tab.

Your most recent messages appear at the top of your list. If there are any schedule or task notification messages, you will see them as Schedule or Task entries rather than Messages under the **Type** column.

To move through your message list, use the scroll bar (or **PgUp**, **PgDn**, and **Arrow** keys). You may also search through your messages by assignee, category, priority (tasks only), entry type, or words they contain.

[Custom Fields](#)

[Linked Entries](#)

[Attachments](#)

### Related Topics:

[Sending Internal Messages](#)

[Seeing Who Has Read Your Messages](#)

[Seeing Who Can Attend a Meeting](#)

[Adjusting the message display](#)

[Printing the message list.](#)

## Seeing Who Has Read Your Messages

To determine who has read a message you sent, select the outgoing message list (see above), and double click on the desired message. When you click on the **Send To** button, all addressees who have read the message will show an **R** next to their selection check mark.

**R** Jackie

## Seeing Who Can Attend a Meeting

For notification messages, proceed as above, but click on the **Notify** button. Any addressee who has read a schedule notification message and can attend will show a happy face. Any addressee who has read and cannot attend will show a sad face.

✓ 😊 Mel

## Coordinating Tasks with Notification Messages

When you assign a task to someone else, each assignee may automatically receive a notification message, if they have requested notifications.

To disable notification messages, or to select additional recipients, click on the **Notify** button.



Selecting message recipients is similar to selecting assignees with the **Assign To** feature, discussed in Assigning Entries to Others.

## Proxying for Other Network Users

The *proxy* option lets you quickly switch to another network user's data (if they have granted you proxy rights) as if you had logged on under their name. This feature lets people who work together closely substitute for one another (e.g. to allow an administrative assistant to manage schedule when co-workers are on a trip).

To switch to another user who has granted you proxy rights, select the **Proxy** option from the **Tools** menu, click on the desired user name, then click on **OK**.

You may also selectively grant other network users proxy rights to view and modify your data. To grant or revoke proxy rights to others, select the **Proxy** command from the **Tools** menu, click on **Grant Proxy Rights**, then click on each user you wish to grant proxy rights. When you grant rights to a user, a check mark will appear beside the user's name to confirm that they have been selected. When you wish to revoke rights, simply click on the user name and the check mark will disappear.

Finally, click on **OK** to save your changes.

# Assigning Rights to the Database

Before a user can access the shared, multi-user database for *Day-Timer Organizer*, they must first have the right to access the network drive where the database is located. A description of how the Novell NetWare supervisor assigns these rights is provided below for your convenience. For other types of networks, consult your system documentation or consult your system administrator for more information.

1. Log in as the Novell **Supervisor**.
2. Map your active directory to the PUBLIC directory - usually on drive F:.
3. Type **Syscon** and press the Enter key.
4. Select **User Information** from the menu.
5. Select the user name that you are assigning rights to (the new user to be enabled).
6. In the User Information windows, select **Trustee Directory Assignments**.
7. Press the Insert key and then enter the full volume and path of where *Day-Timer Organizer* is installed. For example,  
SYS:DTO21

For correct syntax, ask your system administrator or consult your system documentation. Once you have entered this information, press the Enter key.

8. In the **Rights Granted** window, press the Insert key to bring up the **Trustee Rights Not Granted Window**.
9. Now highlight each right you want to give to this user and hit the F5 key for each one.  
You need to give **Read** rights on \DTO21 and **Read, Write**, and **Modify** rights on \DTO21\FILES and \DTO21\USER.
10. When complete, press the Enter key to exit. This will take you to the **Trustee Rights Granted Window** and all of the rights that you have selected will be listed here.
11. Press the Escape key. This will bring you back to **Trustee Directory Assignments**. Once again, all of the rights you selected will be noted in the brackets to right of the directory assignment.
12. Press the Escape key 4 times. Respond **YES** to exit **Syscon**.

# Installing New Users

To set up new users, from the user workstation, run the workstation setup program (WSSETUP.EXE) from the shared network drive where it is located. Note that you must have enough licenses for the new user to access the multi-user database.

If you can't run the workstation setup program:

1. Check to make sure you have the proper rights to the DTO21 directory. Consult your system administrator for additional help.
  
2. If you cannot locate WSSETUP.EXE, Make sure you have the proper rights to this directory and that you are looking in the correct location of where *Day-Timer Organizer* is installed.

## Related Topics:

[Granting User Rights on Novell Networks](#)

[Connecting to a Network Drive on Novell Networks](#)

[Setting up a Windows Workstation](#)

[Setting up a Macintosh Workstation](#)

[Deleting a User](#)



# Connecting to a Network Drive

Before you can access the multi-user database or central program files for *Day-Timer Organizer*, you must connect to the network drive where these files are located. A description of how to do this on a Novell network is provided below for your convenience. For other types of networks, consult your system documentation or consult your system administrator for more information.

## **Windows 95:**

1. On the Desktop, click the right mouse button on the **Network Neighborhood** icon.
2. Click on **Map Network Drive**. On the **Map Network Drive** dialog box, select a drive letter that does not currently have anything mapped to it. (This will be the letter assigned to the drive at your workstation.)
3. Type in the complete volume and path including the network server of where *Day-Timer Organizer* is installed. For the correct syntax of this, consult your system administrator.
4. Click on **Reconnect at Logon** if you want this to be a permanent connection.
5. Click on **OK**.

Note: For specific rights to the directory you have set up, the system administrator will have to grant these. You can only map to a network drive, after the system administrator grants you the rights to the DTO21 directory on the file server.

## **Windows 3.11:**

1. Open the **File Manager** by double clicking on it.
2. From the **Disk** menu, select **Network Connection**.
3. From the **Network Drive Connections** dialog box, select a drive letter that does not currently have anything mapped to it.
4. Type in the complete volume and path including the network server of where *Day-Timer Organizer* is installed. For the correct syntax of this, consult with your system administrator.
5. Click on **Permanent** if you want this to be a permanent connection.
6. Click on **Map**. You will be prompted: "Remap network device?", and you should click on **OK**.
7. Hold down the Alt key and press X to exit.

Note: For specific rights to the directory you have set up, the system administrator will have to grant these. You can only map to a network drive, after the system administrator grants you the rights to the DTO21 directory on the file server.

# Installing a Windows Workstation

Installing Day-Timer Organizer for Workgroups requires several steps for Windows systems:

1. Install program files: copy programs to a central location and create the multi-user database
2. Login for the first time: set up the workstation and login as the Supervisor user
3. Define users
4. Set up workstations to access the central database

## Step 1: Installing Files

### Starting the Installation Program

**Windows 3.x:** Choose the **File...Run** command from the Program Manager. Click in the **Command Line** box and type a:setup, then click on the **OK** button (if installing from Drive B, type b:setup).

**Windows 95:** Choose the **Run** command from the **Start** menu. Click in the typing box and type a:setup, then click on the **OK** button (if installing from Drive B, type b:setup).

### Choosing the Type of Installation

The screen will display the Day-Timer Organizer window and the Installation Setup dialog box will appear. Select one of the following options and click on **OK** to proceed.

Option	Meaning
Full Installation	Install all program files and create a new set of data files.
Upgrade from Day-Timer Organizer 1.0	For use only by users who have a copy of Day-Timer Organizer, version 1 installed; this option will upgrade the old program files and prompt you to convert the old data files for use with Day-Timer Organizer 2.
Upgrade from Day-Timer Organizer 2.0	For use only by users who have a copy of Day-Timer Organizer, version 2 installed; this option will upgrade the old program files and prompt you to convert the old data files for use with Day-Timer Organizer 2.1.
Copy program files	This reverses an Uninstall; no new data files will be created; this option can also be used if your program files have been damaged and need to be replaced.
Increase licensed user count	When installing additional user licenses; this selection increases the internal license count to

allow additional users to access the central database. For information about purchasing additional licenses, contact Day-Timer Technologies, Inc.

### **Selecting the Location for the Program Files**

The next screen allows you to specify the network drive and directory where Day-Timer Organizer will store its files. To accept the recommended program and data directory paths, click on OK.

To choose another directory, select a new drive or type a different directory name and then click on OK.

### **Setting the Network Type**

Select your network type from the list. If your network is not on the list, select NetBIOS if it is peer-to-peer or NetBIOS-compatible; if not, select Other (if you select Other, your system will not have urgent e-Mail alerts or message notification on the status bar).

### **Setting Registration Information**

Finally, from the next screen, type your name, press Tab, and enter your company name.

### **Finishing the Installation**

When you have filled in all the information, click on **OK**.

At this point, Day-Timer Organizer will be copied to your network drive and a central multi-user database called Office will be created in the **DTO21\files** directory. You will be prompted to insert additional disk(s) as required.

### **Installing More than One Set of Licenses**

If you have more than one set of licenses (e.g. if you purchased a 5-user license package and a 2-user license), you will need to install the additional licenses.

## **Step 2: Logging In For the First Time**

When Day-Timer Organizer for Workgroups is first installed, there are two system users:

- **Supervisor**, whose special privileges include adding and deleting users or database members. This name should be reserved for system maintenance purposes. If the system administrator uses Day-Timer Organizer for Workgroups for other purposes, it should not be as Supervisor, but rather under a separate user name.
- **Guest**, which is the name given to anyone who logs in without a user name. Users who log in as Guest will be restricted to databases where access by non-members has been enabled (for more information, see Database Access by Non-Members on page42).

### **Setting Up the Workstations**

Before you can log in to the central multi-user database, you must set up the workstation by running the Workstation Setup program, which will set up a Day-Timer Organizer for Workgroups icon (and, if desired, copy executable files to the workstation). Once this is done, you can log in to Day-Timer Organizer for Workgroups by double clicking on the new icon. Run the workstation setup program as follows:

### **Starting the Workstation Setup Program**

**Windows 3.x:** Choose the **File...Run** command from the Program Manager. Click in the **Command Line** box and type a:wssetup, then click on the **OK** button (if installing from Drive B, type b:wssetup).

**Windows 95:** Choose the **Run** command from the **Start** menu. Click in the typing box and type a:wssetup, then click on the **OK** button (if installing from Drive B, type b:wssetup).

### **Completing the Workstation Setup**

Once the workstation setup program has started, select the drive and path where program files should be placed. When finished, click on **OK**.

### **Logging in as the Day-Timer Organizer Supervisor**

To start Day-Timer Organizer and log in as Supervisor, double click on the Day-Timer Organizer icon, and specify the user name as Supervisor.

## **Step 3: Defining Users**

Individuals may use more than one login name. For example, a clerical assistant may log in under the department head's name. Or the system administrator may log in as the Day-Timer Organizer Supervisor user or under their own name.

### **Defining New Users**

To set up new Day-Timer Organizer user names, proceed as follows:

1. Log in as the Day-Timer Organizer Supervisor.
2. Select Assignees/User Names from the Setup menu.
3. If you have Novell NetWare, click on the Use Bindery option under the Add button, which lets you add users from your network directory services.
4. If you do not have Novell NetWare, click on the  button and choose User from the pull-down menu.
5. Enter a unique user name (users will use this name when they log in to Day-Timer Organizer), up to 20 letters or numbers with no spaces. In addition, you can specify a description and password as described below.

The optional Description field allows you to provide a full name to describe the user (up to 20 characters). For example, the Name field might be

RJONES or ROBERT

and the Description might be

Robert Jones (Marketing).

If desired, click on the Set Password button to enter a password for the new user. Passwords protect the

privacy of both personal and shared information, and are recommended. Each user may reset or clear this password at any time by selecting Database on the Setup menu and clicking on the User Security icon. If necessary, the Supervisor can reset or clear (but not view) a user password.

On Windows systems, *Day-Timer Organizer for Workgroups* allows users to send each other messages, including automatic meeting and task notification messages. If you have an e-Mail package which supports VIM (vendor independent messaging) or MAPI (message application protocol interface) message exchange, and want this user's Day-Timer Organizer messages routed through third party e-Mail instead of Day-Timer Organizer's, enter the user's e-Mail address.

### **Reading Novell Bindery**

If you have Novell NetWare (not NetWare Lite), Day-Timer Organizer for Workgroups can build a user list directly from your network's directory services. To select this option, click on the Use Bindery option under the Add button. Day-Timer Organizer for Workgroups will present a list of network users and groups.

Click on the individuals or groups you want to include. A check mark will appear next to each selected item. When you select a group, Day-Timer Organizer will turn on checkmarks for all group members. When finished, click on OK.

You will be given the opportunity to adjust settings for each new user.

## **Step 4: Setting Up Workstations**

Each copy of Day-Timer Organizer (or each license for Day-Timer Organizer for Workgroups) is to be used by a single person. When additional people need to use Day-Timer Organizer, you should purchase additional copies or licenses.

Note that the only difference between single copies and licenses is that licenses are sold in quantity and are therefore less expensive.

If you purchased a single package (e.g. for 20 licenses), you can skip the next step since the license information was installed when the program was installed in Step 1.

### **Adding User Licenses**

In order for both Macintosh and Windows systems to access the same data files, both must use at least version 2.1 of Day-Timer Organizer.

To begin installing additional user licenses (after first having installed Day-Timer Organizer for Workgroups), first insert disk 1 into the disk drive.

**Windows 3.x:** Choose the **File...Run** command from the Program Manager. Click in the **Command Line** box and type a:setup, then click on the **OK** button (if installing from Drive B, type b:setup).

**Windows 95:** Choose the **Run** command from the **Start** menu. Click in the typing box and type a:setup, then click on the **OK** button (if installing from Drive B, type b:setup).

### **Increasing the License Count**

You will be prompted for the location of your current Day-Timer Organizer for Workgroups files. The licensing information in those files will then be updated to allow the additional users.

### **Running the Workstation Setup Program**

Note that this step is not required for systems with single user versions. Before you can log in to the

central multi-user database, you must set up the workstation by running the Workstation Setup program, which will set up a Day-Timer Organizer for Workgroups icon (and, if desired, copy executable files to the workstation). Once this is done, you can log in to Day-Timer Organizer by double clicking on the new icon. Run the workstation setup program as follows:

### **Starting the Workstation Setup Program**

**Windows 3.x:** Choose the **File...Run** command from the Program Manager. Click in the **Command Line** box and type a:wssetup, then click on the **OK** button (if installing from Drive B, type b:wssetup).

**Windows 95:** Choose the **Run** command from the **Start** menu. Click in the typing box and type a:wssetup, then click on the **OK** button (if installing from Drive B, type b:wssetup).

### **Completing the Workstation Setup**

Once the workstation setup program has started, select the drive and path where program files should be placed. When finished, click on **OK**.

### **Adding Single Users**

To add a single user, you can purchase a single-user copy of Day-Timer Organizer and install it on the workstation.

### **Running Day-Timer Organizer from Workstations**

Once you have installed a single copy of Day-Timer Organizer or run the workstation setup program, you can run Day-Timer Organizer from a workstation by double clicking on the Day-Timer Organizer icon.

When you run the program from a workstation, it runs local program files (that were created during installation) and accesses the database files, using the user name that was specified during workstation setup.

# Installing a Macintosh Workstation

**If you are using both Windows and Macintosh workstations to access a central multi-user database, we recommend that you install the Windows software first.**

Installing Day-Timer Organizer for Workgroups requires several steps for Macintosh systems:

1. Install program files
2. Login for the first time: create the multi-user database and login as the Supervisor user
3. Define users
4. Set up workstations to access the central database

## Step 1: Installing Files

### Starting the Installation Program

Double click on the Day-Timer Installer icon.

From the opening screen, click on Continue to begin the installation.

### Specifying the Locations of Files

The next screen allows you to select the location of the Day-Timer Organizer program files. By default, they will be copied to a folder called Day-Timer Organizer 2.1 on your main hard disk. You can accept the default value or select an alternate location from the next screen.

You can select a different location by clicking on the pull-down in the Install Location box. The Switch Disk button allows you to change to a different disk or to a different folder on the currently selected disk. Click on the Install button to proceed.

In order to install Day-Timer Organizer, all open applications must be closed. You will be prompted to confirm that the installation utility can close all applications that are currently in use. Once that is complete, the Day-Timer Organizer program files will be copied to the destination of your choice and your computer will be restarted.

### Installing More than One Set of Licenses

If you have more than one set of licenses (e.g. if you purchased a 5-user license package and a 2-user license), you will need to [install the additional licenses](#).

## Step 2: Logging In For the First Time

### Creating the Central Database

To begin, start Day-Timer Organizer by double clicking on the program icon.

If you are using both Windows and Macintosh workstations to access a central multi-user database AND you have already installed the Windows software, click on the Open button and choose the Office database stored under the Windows \DTO21\Files subdirectory.

If you are not using Windows and this is the first time that you have installed the Macintosh software for

Day-Timer Organizer, you must create the central multi-user database. To do that, simply click on the New button from the opening dialog box. From the next dialog box, specify the database location to be a shared location on the network. We recommend that you name the database Office. Be sure that the Multi-User Database button is selected before clicking on OK to proceed.

When the multi-user database for Day-Timer Organizer for Workgroups has been opened or created, there are two system users:

- **Supervisor**, whose special privileges include adding and deleting users or database members. This name should be reserved for system maintenance purposes. If the system administrator uses Day-Timer Organizer for Workgroups for other purposes, it should not be as Supervisor, but rather under a separate user name.
- **Guest**, which is the name given to anyone who logs in without a user name. Users who log in as Guest will be restricted to databases where access by non-members has been enabled (for more information, see Database Access by Non-Members on page42).

### Logging in as the Day-Timer Organizer Supervisor

If you have just created the database, you will automatically be logged in as the Supervisor user.

If you have just opened the database with the **File...Open** command, you will be prompted for a user name and password. At that point, you can specify the Supervisor user. After installation, the password for the Supervisor user is blank.

## Step 3: Defining Users

Individuals may use more than one login name. For example, a clerical assistant may log in under the department head's name. Or the system administrator may log in as the Day-Timer Organizer Supervisor user or under their own name.

### Defining New Users

To set up new Day-Timer Organizer user names, proceed as follows:

1. Be sure that you are logged in as the Day-Timer Organizer Supervisor, as described on page30.
2. Select **Assignee/User Setup** from the **Setup** menu.
3. If you have Novell NetWare, click on the **Use Bindery** option under the **Add** button, which lets you add users from your network directory services.
4. Click on the screen box for **Users and Resources** and then click on the **Add** button at the bottom left of the dialog box.
5. Enter a unique user name (users will use this name when they log in to Day-Timer Organizer), up to 20 letters or numbers with no spaces. You may also specify a description or password as described below.

The Description field allows you to provide a full name to describe the user (up to 20 characters). For example, the Name field might be

RJONES or ROBERT

and the Description might be



Robert Jones (Marketing).

If desired, click on the Set Password button to enter a password for the new user. Passwords protect the privacy of both personal and shared information, and are recommended. Each user may reset or clear this password at any time by selecting Database on the Setup menu and clicking on the User Security icon. If necessary, the Supervisor can reset or clear (but not view) a user password.

### **Reading Novell Bindery**

If you have Novell NetWare (not NetWare Lite), *Day-Timer Organizer for Workgroups* can build a user list directly from your network's directory services. To select this option, click on the **Use Bindery** option under the **Add** button. *Day-Timer Organizer for Workgroups* will present a list of network users and groups.

Click on the individuals or groups you want to include. A check mark will appear next to each selected item. When you select a group, Day-Timer Organizer will turn on checkmarks for all group members. When finished, click on **OK**.

You will be given the opportunity to adjust settings for each new user.

## **Step 4: Setting Up Workstations**

Each copy of Day-Timer Organizer (or each license for Day-Timer Organizer for Workgroups) is for one individual. When additional people need to use Day-Timer Organizer, you should purchase additional copies or licenses.

Note that the only difference between single copies and licenses is that licenses are sold in quantity and are therefore less expensive.

If you purchased a single package (e.g. for 20 licenses), you can skip the next step since the license information was installed when the program was installed in Step 1.

### **Adding User Licenses**

In order for both Macintosh and Windows systems to access the same data files, both must use at least version 2.1 of Day-Timer Organizer.

To install additional user licenses (after first having installed Day-Timer Organizer for Workgroups), insert the license disk into the disk drive and double click on the Day-Timer Installer icon.

Select the Day-Timer Organizer 2.1 folder and the licensing information in that folder will be updated. Once you have updated the license information, run the workstation setup program for each workstation as described below.

### **Running the Workstation Setup Program**

Double click on the DTO 2.1 Workstation Install icon on the network drive.

Once the workstation setup program has started, select the drive and path where program files should be placed. When finished, click on OK.

### **Adding Single Users**

To add a single user, you can purchase a single-user copy of Day-Timer Organizer and install it on the workstation.

### **Running Day-Timer Organizer from Workstations**

Once you have installed a single copy of Day-Timer Organizer or run the workstation setup program, you can run Day-Timer Organizer from a workstation by double clicking on its icon.

When you run the program from a workstation, it runs local program files (copied during installation) and accesses the database using the user name that was specified during setup.

# Setting Shared Network Settings

Associated with the centralized database are a variety of settings which can be set by the system administrator. Once set, these affect all users who access the shared central database.

[Expense Types](#)

[Holidays](#)

[Shared Dial Codes](#)

[Call Status Labels](#)

[New Entry Default Rights](#)

[Database Access by Non-Members](#)

[Custom Database Fields](#)

[Shared Assignees and Categories](#)

## **Expense Types**

Day-Timer Organizer ships with a list of expense types that will be sufficient for most users. If your company has specialized needs, you may substitute your own expense types for the ones we provide. To do so, select Expense Types from the Setup menu. Click on any type you wish to change, and type your own text. Because of the special features associated with Entertainment and Mileage types, these types cannot be customized.

## **Holidays**

Day-Timer Organizer lets you select one or more countries whose holidays you wish to display. You can customize the holiday list for any country. To do so, select Holidays from the Setup menu.

From the resulting dialog box, you can first add any country for which you wish to define the holidays. To do that, click on the Country button and use the Add button to define an additional country.

To define a holiday, click on the Holiday button and then use the Add button to define a new holiday.

## **Shared Dial Codes**

Shared dial codes let the Supervisor establish system-wide dial codes to handle special dialing situations (e.g. 9 for an outside line), eliminating the need for users to set these up individually.

To set shared dial codes, select Telephone from the Setup menu, then select Dial Codes. The first four dial codes on the list are reserved for network-wide shared codes (which only the Supervisor can set or modify). In addition to the code itself, you may type a description by which it will be referenced (for more information, see Dial Codes in the Day-Timer Organizer on-line help.

## **Call Status Labels**

Day-Timer Organizer ships with a call status list that will be sufficient for most users. If your company has specialized needs, you may substitute your own for the ones we provide. To do so, select Telephone from the Setup menu, then select Call Status. Click on any status you wish to change, and type your own text.

## **New Entry Default Rights**

By default, new entries are marked as private, which means that only the creator of an entry can view or modify it. Where there is no need for private entries, select Database from the Setup menu and click on the User Security icon.

If you click on Modifiable By Everyone, all users will be able to view and modify new entries (users may view entries not directly assigned to them by setting Assignee Search).

If you click on Viewable By Everyone, all users will receive viewing rights to new entries (users may view entries not directly assigned to them by setting Assignee Search).

Default settings may be easily overridden on an entry by entry basis when privacy is required for sensitive information.



## **Database Access By Non-Members**

Normally, users who are not members of a database cannot access it. To grant limited access by non-members, select Database from the Setup menu and click on the Database Security icon.

If you click on View Public Entries, non-members may view (but not modify) all entries with viewing rights set to Everyone (see the Day-Timer Organizer on-line help).

If you click on Add/Modify/View Public Entries, non-members may add, view, or modify entries with viewing rights set to Everyone.

Even if access by non-members is permitted, non-members will have no user identity (they will be treated as user Guest, which is the name given to anyone who logs in without a User Login Name).

## **Custom Database Fields**

Day-Timer Organizer allows each database to have up to 12 custom data fields for each entry type (schedule, task, address, etc.). Each custom field can store up to 40 characters of text or numbers, giving users with specialized needs the flexibility to store data specific to their profession. Stockbrokers, for example, might want to store data such as net worth, annual income, and risk sensitivity for each of their clients.

To set up custom field labels for the current database, log in as either the Supervisor or Database Manager, then select Custom Fields from the Setup menu. Click on the Entry Type tab you want. Day-Timer Organizer will display custom field labels for that type. Next, click on the field you wish to label, and type the label text.

## **Shared Assignee and Category Control**

Shared names and categories are viewable by all users of a shared database. Each Day-Timer Organizer for Workgroups database can have its own names and categories, independent from those in other databases. Day-Timer Organizer for Workgroups allows up to 720 shared names and 700 shared categories (plus 48 shared name groups and 48 shared category groups) per database. In addition, each user may have up to 64 personal names (e.g. family members) and 240 personal categories, which will not be viewable by any other user.

Limiting who can add or modify shared assignees and categories helps reduce clutter and assure consistency (creating groups of names and categories also reduces clutter).

To designate who can add or modify shared assignees and categories, select Database from the Setup menu and click on the Rights/Access icon. Click on the Select button, and then click to select or deselect users (all users are initially selected). To prevent users from being able to view others' data by adding themselves to a group, only the Database Manager or Supervisor can specify shared group membership.

## **Accessing a Multi-User Database from a Single Copy of Day-Timer Organizer**

If some of your users have existing copies of Day-Timer Organizer that were purchased for stand-alone systems, they can still use the centralized database of the networked system.

To do this, simply log onto the network from the machine with the stand-alone copy of Day-Timer Organizer. Then choose the Open command from the File menu and choose the name and location of the centralized database. You will be prompted for the user password if one has been set.

In a similar way, other users on the network may optionally access the data that is stored in a stand-alone system by opening the databases on that machine. Generally, when individuals create databases (at installation) on their stand-alone systems, they create them with the Single-user database option. This means that only one person at a time can access them. If data on a stand-alone computer is to be used on a network at a later time, it should be created with the Multi-user database option set.

# Moving from a Single User to a Workgroup Environment

## Single User vs. Multi-User Databases

Day-Timer Organizer can be used stand-alone (single-user database) or as a workgroup solution (multi-user database). As long as the Day-Timer Organizer database was created with the multi-user option, it can be accessed by two or more users and take advantage of the workgroup features. Note that a multi-user database can be accessed by either Windows or Macintosh users, with stand-alone copies of *Day-Timer Organizer* or with a *Day-Timer Organizer for Workgroups* license.

## Adding User Licenses to your Single User Version

If you have an existing stand-alone version of Day-Timer Organizer with a single-user database you can access workgroup features by installing additional software on another computer:

- installing an additional stand-alone copy of Day-Timer Organizer on another computer, as described in the Getting Started Guide; during installation, select the **Full Installation** option, be sure to set your network type correctly, and choose the **Multi-User Database** button when creating the database

OR

- installing a multi-user license for Day-Timer Organizer for Workgroups in a central shared location on the network and following the installation instructions for Windows or Macintosh as appropriate.

# Transferring Data from a Single-User Database to a Multi-User Database

After you have installed the additional users and created a multi-user database, you can transfer the data from your current single-user database to the multi-user database that was created during installation of the new user software. To do this,

Open the single user version of *Day-Timer Organizer*.

Export all of the entries in the database and include all assignees and categories. To do this, any view can be displayed on the screen. Choose the **File...Export Entries** command from the menu.

By default, the Windows version of *Day-Timer Organizer* will create an export file that ends in .exp and we recommend that Macintosh users also add .exp to the end of the exported file that will be created.

Use the **File...Open** command to open the new, multi-user database. Log in as the Supervisor user.

By default, the new entries that you are about to import will be set to be private to you. To change this, from any view choose the **Setup...Database** command and set the New Entry Default Rights before importing the single user data. This will specify how the imported entries are treated, either as private to the current user or as viewable or modifiable by other users.

By default, only the Supervisor user can add or change shared categories. You can select additional users for this privilege by choosing the **Setup...Database** command and then clicking on the **Database Security** icon.

Add any new shared categories, assignees and users to match the names used in the single-user version. The assignees and categories will be imported as personal unless you specifically add them as shared entries, prior to the import.

Use the **File...Import** command to import the .exp file created above.

Once the data has been imported, you may prefer to use the **Setup...Database** command to reset the New entry Default Rights so that users may create private entries.

## Appointing a Database Manager

Day-Timer Organizer for Workgroups allows you to create as many shared databases as you wish. You may also establish a database manager for any database. Database setup options (which define database security, user security, viewing defaults, user access, user privileges, and custom field labels) are available only to the Supervisor or the database manager.

To access database setup options, log in as either the Supervisor or Database Manager, then select the Database option on the Setup menu. Database setup options affect the currently selected database only (see the Day-Timer Organizer on-line help for a discussion of working with multiple databases).

By default, the user who creates a network database becomes the database manager and has control over who may access the database and how it will be used.

## Designating the Database Manager

To appoint a new database manager, select **Database** from the **Setup** menu, and then click on the **Database Security** icon. Click on the **Manager** button, then click on the new database manager's name. When finished, click on **OK**.

## Setting the Supervisor Password

To prevent unauthorized tampering with user, database, and system settings, a Supervisor password is highly recommended. You will be prompted for this password whenever you log in to Day-Timer Organizer as the Supervisor. To set or change the Supervisor password, log in as the Supervisor, select **Database** from the **Setup** menu, and click on the **User Security** option.

To set a password for the first time, click in the **New Password** field and type up to 8 characters. Next, click on the **Verify** field and type the new password. Write down your password and keep it in a safe place.

To change an existing password, click on the **Old Password** field and type your old password. Then type and verify your new password as described above.

To clear your password, click on the **Old Password** field and type your old password. Next, click on the **Clear Password** check box, then click on **OK**.



## Deleting a User

To delete a user, select Assignees/Users from the Setup menu, click on the user you wish to delete, then click on the **Delete** button.

## Setting a Database Password

To set, change, or clear a database password, log in as either the Supervisor or Database Manager and select **Database** from the **Setup** menu. Click on the **Database Security** icon.

To set a password for the first time, click in the **New Password** field and type up to 8 characters. Next, click on the **Verify** field and type the new password. Write down your password and keep it in a safe place.

To change an existing password, click on the **Old Password** field and type your old password. Then type and verify your new password as described above.

To clear your password, click on the **Old Password** field and type your old password. Next, click on the **Clear Password** check box, and then on **OK**.

## Choosing Paper

The printouts are intended for use in loose-leaf binder systems or as stapled booklets. **Note that printouts cannot be used with wire bound formats.**

You can print from *Day-Timer Organizer* either on

- plain paper

or on

- special forms available from Day-Timers, that are perforated and punched to allow them to be quickly inserted into your paper organizer system

Note that you cannot print on the dated planner pages from your paper Day-Timer Organizer, but rather the blank paper with shaded areas, intended specifically for *Day-Timer Organizer*. Once printed, the pages can be inserted into your regular organizer binder.

### **Related Topics:**

[Ordering Day-Timer Preprinted Forms](#)

[Purchasing Other Special Forms](#)

[Using Day-Timer Organizer Printouts with Other Paper Planner Systems](#)

## **Ordering Day-Timer Preprinted Forms**

To order Day-Timer preprinted forms, contact your local computer retailer or Day-Timers, Inc.

<b>If you are located in...</b>	<b>Sales Phone Number</b>
United States	(800) 225-5005
Canada	(800) 465-5501
UK	0800 716134
Australia	1800 251 861
New Zealand	0800 808 383

Please specify product number when ordering. All paper sizes may not be available in all countries.

**Day-Timer Organizer does not support continuous feed paper.**

## **Loose Leaf Style – Sheet Feed and Laser Printers**

- ◆ **Folio (M - Senior Desk) - Product # 20250** 8-1/2" x 11"
- ◆ **Desk (L - Junior Desk) - Product # 20251** 5-1/2" x 8-1/2"
- ◆ **Portable (K - Senior Pocket) - Product # 20254** 3-3/4" x 6-3/4"
- ◆ **Jotter (J - Junior Pocket) - Product # 20255** 2-3/4" x 5"

On some Canon printers, the 'paper out' sensor is lined up with the pre-punched holes in the Desk paper. As a result, the paper may not work well with these printers.

For Desk printouts, you can also use plain paper, cut it in half, and punch it with the special punch sold by Day-Timers, Inc.

## **Booklet Style – Sheet Feed and Laser Printers**

- ◆ **Pocket Booklet (C) - Product # 20252** 3-1/2" x 6-1/2"
- ◆ **Compact Booklet (B) - Product # 20253** 3" x 5"

For Folio (8.5" x 11") binders, plain paper pages can be punched and inserted into your binder. However, for the smaller sizes, the Day-Timer preprinted forms are **strongly recommended** because they can be torn apart on the perforations and inserted directly into your binder. If the forms are printed on plain paper, they must be cut apart manually for insertion.

### ***Purchasing Other Special Forms***

For other forms such as mailing labels, rotary cards and envelopes, suppliers such as Avery provide a variety of types and styles for your laser printer. *Day-Timer Organizer* can print on a standard form, or you can customize the settings for any form you choose.

Note that the selected size of envelope must also be supported by your printer. *Day-Timer Organizer* does not support continuous feed paper or sheet forms (non-label) from Avery.

## ***Using Day-Timer Organizer Printouts with Other Paper Planner Systems***

The printouts from *Day-Timer Organizer* can be used in the binder from your existing paper-based planner system. The page equivalents are shown below.

<b>Day-Timer Page Size</b>	<b>Dimensions</b>	<b>Day-Runner Equivalent</b>	<b>Franklin Quest Equivalent</b>
Folio (Sr. Desk)	8 1/2 x 11	Entrepreneur	Monarch
Desk (Jr. Desk )	5 1/2 x 8 1/2	Classic	Classic
Portable (Sr. Pocket )	3 3/4 x 6 3/4	Running Mate	Compact

## Printer Setup

Before you can print, you must have installed your printer and its driver. If you have not done this yet, refer to the manuals for your computer and printer for instructions. We recommend that you have at least 1 megabyte of printer memory installed in order to have best performance.

Also, make sure your printer is turned on and properly connected to your computer and set to **On Line** before attempting to print.

If you encounter problems when printing, make sure the latest version of the correct printer driver is installed. You can contact the printer manufacturer to see whether an updated printer driver is available. Manufacturers often resolve problems by issuing new printer drivers.

For best results, we recommend printing from *Day-Timer Organizer* to a laser or inkjet printer. These printers have more flexibility in printing options and allow you to print a full range of reports and forms.

When using printers with limited feature sets (plotters, daisy wheel printers, and some dot matrix printers), you may be able to print only list style reports, which are much simpler than other report styles. For best results, select a font directly supported by your printer.

On some Canon printers, the 'paper out' sensor is lined up with the pre-punched holes in the Desk paper. As a result, the paper may not work well with these printers.

If you wish to print envelopes, you must verify that your envelopes are supported by using the Windows Control Panel to make sure that your envelope size is listed in the standard forms.

## Handling Paper for Double Sided Printing

*Day-Timer Organizer* allows you to print on both sides of the page when using a laser or inkjet printer. After printing one side of the paper, you must reinsert the sheets to print on the other side. Since the procedures for printing double sided paper differ between printers, you must determine how to reinsert the paper and whether it needs to be flipped over or reversed. To assist in this process, *Day-Timer Organizer* provides a special **Paper Handling** command on the **File** menu that helps you determine the correct method for double sided printing on your printer.

You must work through the **Paper Handling** command if you wish to print double-sided pages, in order to teach *Day-Timer Organizer* how to print double sided forms on your printer.

**Note:** Some printer manuals state that double sided printing is not recommended. We recommend that you follow the manufacturer's instructions.

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## Choosing the Print Style

By default, when you open the printing dialog, it will assume that you wish to print a report of the currently displayed view. You can select any type of report that you wish by clicking on the appropriate icon in the selection bar at the left of the printing dialog box.

<b>Icon</b>	<b>Prints</b>
<b>Daily</b> <b>Weekly</b> <b>Monthly</b>	Planner pages
<b>Address Book</b> <b>Phone Book</b>	Address and phone book pages
<b>Labels</b> <b>Envelopes</b> <b>Rotary Cards</b>	Names and addresses in a variety of layouts for mailing or for a rotary card file.
<b>Schedule List</b> <b>Task List</b> <b>Notes List</b> <b>Address List</b> <b>Messages List</b> <b>Timeline</b> <b>Phone Log</b> <b>Expenses List</b> <b>Global List</b>	Reports in list (simple table) format  This format is most useful for printers that do not support extensive page layout (typically NON-laser printers) or for users who want more control over which information is printed.

## Choosing the Data to Print

When you begin printing, *Day-Timer Organizer* will assume that you wish to print the data that was selected on the current view screen. You may select a different range of data, or all data.

Before issuing the printing command, you may wish to select the specific data to print. To select a range of data, click on the first entry to be printed. Then use the Scroll bars to display the final entry on the screen. Then hold down the **Shift** key while you click on the last entry to be printed. All of the entries that are selected will be highlighted and you can use the scroll bars to verify that the correct range has been selected.

### **Related Topics:**

[Printing Selected Entries or All Entries](#)

[Filtering the Entries to Print](#)

[Setting the Range of Dates](#)

[Searching and Repositioning](#)

## ***Printing Selected Entries or All Entries***

You can select **Which Entries** are to be printed by clicking on









**Selected** - prints the entries that were highlighted on the view

**All applicable** - prints all data applicable

For example, if you are printing your address book and you have highlighted only some of the entries, by default only the selected entries will print. If you click on **All applicable**, the entire address book will print.


## Filtering the Entries to Print

The **Search By:** button bar allows you to filter the data that will be printed. Depending on the printout that has been selected, not all of the buttons will be displayed on the button bar.

Button	Search Type	Effect
	By Assignee	includes only entries assigned to selected individuals, groups, or resources
	By Category	includes only entries filed under selected categories
	By Word	includes only entries containing selected words (or word beginnings) in the note, address, or custom fields
	By Priority	includes only tasks within selected range of priorities
	By Entry Type	includes only entries of the selected type or any combination of types (schedule, task, address, note, expense, phone call, or message)
	By Call Status	includes only phone log entries by status (such as all calls you did not complete)
	By Expense Type	includes only expenses of any selected type
	By Other Values	includes entries that match selected criteria
	Clear Search	clears all filter settings

**Note:** The filter settings are cumulative. For example, if you were printing an address book and you set the Category to Personal and then set the Keyword search to Tennis, you would see personal contacts with the keyword Tennis somewhere in that entry. The more search commands you issue, the more filters are placed on your data.

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To clear all filters, click on the  button.

## Setting the Range of Dates

To set the start and end dates, click on the  icon next to the date field, then click on the desired calendar date from the resulting window.



Alternately, you can simply type a new value into the fields for the starting and ending date. *Day-Timer Organizer's* smart date recognition accepts most typed formats, such as "tu" for Tuesday or "2w" for 2 weeks from today.

## Setting Paper Options

If you are integrating *Day-Timer Organizer* with a paper-based organizer system, you may choose to print on a paper format that can be inserted into your current binder. Day-Timers offers pre-punched, perforated sheets to make this process as easy as possible

To select the paper size, click on the **Page Sizes** pull-down menu and select from the list of paper sizes.

**Note: If you are using the preprinted, specially perforated forms from Day-Timers, the page size chosen should match your forms.**

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Note also that you cannot print onto the pre-printed, dated pages from a paper-based organizer system.

### Related Topics:

[Ordering Day-Timer Preprinted Forms](#)

[Purchasing Other Special Forms](#)

## Printing Double Sided Forms

To save paper in your binder, you may wish to print your output on both sides of the page. To request this, click on the **Double Sided Printing** option just below **Page Sizes** on the printing dialog box.

In order to print on both sides of the paper, you must first use the **Paper Handling** command from the **File** menu to learn how to orient the paper and to teach *Day-Timer Organizer* how double sided forms on print to your printer. This command prompts you to feed forms through the printer to determine exactly how to feed paper through your printer in order to print correctly on both sides.

Depending on your printer, you may need to turn the paper over or flip it side to side so that both sides to be correctly oriented in relation to each other.

**Note: For some printers, the manufacturer does not recommend double-sided printing. Consult your printer manual for more information.**

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### Related Topics:

[Ordering Day-Timer Preprinted Forms](#)

[Purchasing Other Special Forms](#)

## Choosing an Alternate Font

*Day-Timer Organizer* printouts default to Times Roman font in order to fit all information on the page with the most attractive appearance. If you prefer a different font, click on the **Font** button to select one.

Then select the desired font type from the resulting dialog box. Note that not all fonts may be fully supported by your printer. Specifically, to print TrueType fonts, you must use the **Print...Print Setup...More Setup** command to either print TrueType fonts as graphics or to substitute PostScript fonts as appropriate.

# Making It Print: Using the Button Controls

The buttons at the bottom of the printing screen allow you to control how printing is actually done.

## Printer Setup

This command allows you to set printer options. The options available depend on your printer itself. For more information, consult your system and printer documentation. Note that the paper size selected must be set with *Day-Timer Organizer*, and also within the printer's setup as well.

## Saving Your Printing Settings

If you have made a set of choices that you will be using frequently, you can click on the **Save Settings** button to store the current settings so that they can be used each time you print the same type of page from *Day-Timer Organizer*.

## Previewing Before Printing

You may wish to review your printouts on the screen before printing them. To do that, click on the **Preview** button. A new window will appear that shows the first page to be printed, along with control buttons for viewing and printing.

### Related Topics:

[Printing Directly from Preview Mode](#)

[Cancelling the Printout](#)

[Returning to the Printing Options Dialog Box](#)

[Changing the View](#)

[Viewing Other Pages](#)

[Checking Page Sides for Double Sided Printing](#)

[Printing Only Some Pages](#)



### ***Printing Directly from Preview Mode***

If the displayed images are satisfactory, you can click on the **Print** button to print the output directly.

### ***Canceling the Printout***

To cancel the print operation entirely, click on the **Cancel** button. You will return to the current view of *Day-Timer Organizer*.

### ***Returning to the Printing Options Dialog Box***

If you wish to choose different print options, click on the **Change Settings** button to return to the **Printing Options** dialog box.

## ***Changing the View***

The Zoom slider allows you to view the printed page larger. Simply move the slider to a new position to change the page size.

Once the page is zoomed, you can use the scroll bars at the right and bottom to move around and view other parts of the page.

## ***Viewing Other Pages***

To view a different page, use the page positioning buttons:

<b>Button</b>	<b>Action</b>
First Page	displays the first page
Previous Page	displays the previous page (if applicable)
Next Page	displays the next page (if applicable)
Last Page	displays the last page of the printout (if applicable)

You can move through all of the pages of the printout and view pages as many times as you wish before printing.

### ***Checking Page Sides for Double Sided Printing***

If you have requested double sided printing, you can click on the **Back** radio button to see what will appear on the flip side of the currently displayed page. From the back view, clicking on **Front** displays the front side of the currently displayed page.

### ***Printing Only Some Pages***

The **Sheet will be printed** check box allows you to choose whether specific pages are printed or not. If you do not wish to print a specific page, click on this box and de-select it.

# Setting Planner Page Options

The daily, weekly and monthly planner pages can be printed in a variety of formats. In addition to the standard print settings, a variety of settings can be specified for planner pages.

## **Related Topics:**

[Setting the Amount of Text to Print](#)

[Specifying the Number of Pages per Day](#)

[Setting the Panes to appear on the Printout](#)

[Setting Other Printing Options](#)



## Setting the Amount of Text to Print

*Day-Timer Organizer* allows you to specify how much text is to be printed, to ensure that as many events as possible are displayed. The standard setting is **Critical**, which prints the first line (up to the first time the Enter key was pressed) of the description of the event. This is typically more of an issue on weekly and monthly planner printing, where fewer events can be displayed. You can use the pull-down to set the maximum number of lines that will be printed.

Note that if you specify that up to, for example, five lines can be printed, events with shorter descriptions will not use up a full five lines. If a description is longer than five lines, the sixth and additional lines will simply be omitted.

## **Specifying the Number of Pages per Day**


*Day-Timer Organizer* can print in one page per day or two pages per day format. However if you are printing pages to insert in your paper planner to carry to off-site meetings or on trips, you may wish to use the two page per day format.

## Setting the Panes to appear on the Printout

By default, the daily planner window displays with five panes: scheduled events, to be done list, diary and work record, upcoming events and expense record. You can choose which panes you wish to print by clicking on the **Sections** button and choosing which panes should be included or excluded. When you enable the

### Use Custom Sections

check box, you can then click on the **Sections** button. From the dialog box, you can move columns from

the **Omit** box to the **Include** box by clicking on the column name and clicking on the  button. The



button moves selected items from the **Include** box to the **Omit** box.

To change the order in which columns are displayed, drag them to the correct position in the list. The sections will be displayed in the order that you select, starting from the top left of the page.

## Setting Other Planner Printing Options

Depending on the planner view that you are printing, you will be able to set the following options:

**Print Overdue Tasks** - print overdue tasks as well as current ones

**Exclude Assignee Names** - do not print assignee names with tasks

**Printed Time Increments** - (daily planner only) - specify the time increments to be printed (e.g. 15 minutes, half hours, etc.)

**Banner Multi-Day Events** - (monthly planner only) - multi-day events will be printed as banners across all of the affected days.

# Setting Address and Phone Book Options

The address and phone book pages can be printed in a variety of formats, in addition to the standard print settings.

You can use the standard [search](#) buttons to select your data before printing. Alternately, if you click on **All Applicable**, you can specify an alphabetical range that will be used solely for this printout. For example, you can select from E to J by selecting the **Alphabetical** check box and filling in the **From** and **To** boxes with E and J respectively.

## **Related Topics:**

[Defining Headers and Footers](#)

[Setting the Amount of Text to Print](#)

[Sorting the Names](#)

[Controlling Other Page Options](#)

## Setting Headers and Footers

From the print dialog box, you can customize the headers and footers that are to appear on each page of your address list printout.

**Title** - appears on the first page only

**Header** - appears across the top of all pages

**Footer** - appears across the bottom of all pages

The text that is specified will be aligned to the left, center or right, depending on the radio button that you select to the right of the text. The text can include the following special codes to insert varying information:

**#** - insert the page number

**[Date]** - insert today's date

**[Time]** - insert the current time

Your header and footer settings will be saved if you use the **Save Settings** command and your headers and footers will be inserted automatically whenever you print an address list.

## Setting the Amount of Text to Print

*Day-Timer Organizer* allows you to specify how much text is to be printed, to ensure that as much information as possible is displayed. The standard setting is **Critical**, which prints the first line (up to the first time the Enter key was pressed) of the Notes/text field. You can use the pull-down to set the maximum number of lines that will be printed.

Note that if you specify that up to, for example, five lines can be printed, address items with shorter descriptions will not use up a full five lines. If an entry is longer than five lines, the sixth and additional lines will simply be omitted.

## Sorting the Names

The names and addresses printed in the address and phone books can be sorted in several ways:

<b>Order</b>	<b>Names Sorted By</b>
Name	by last name of the contact
Organization	by the company name
Zip Code	by the zip code
Date Due	by the follow up date that was specified

Note that you can print the address and phone book in different orders at different times. The data is not changed by printing it in a different order.



## Controlling Other Page Options

By default the address and phone books print as many names per page as possible. So, for example, if you only have a few contacts whose last names begin with A, the names beginning with B will be displayed on the bottom half of the page of names beginning with A. If you want to start a new page each time a new letter of the alphabet is reached, click on the **Page break by letter** option. Note that this will not print blank pages for letters for which you have no contacts (e.g. Q, Z or X).

The **Letter Headings** option allows you to request that a letter be printed out for the start of the section for a given letter. For example, if you select this option, a heading "H" would appear before the names with last name beginning with H.

By default, contacts are displayed in a normal order. For example

John Q. Smith

If you would prefer them to be displayed with their last names first with for example,

Smith, John Q.

you can click on the

**Last name first**

option.

When you enable the **Box** option, the printout will have a box drawn around the page. This is most useful when printing on plain paper, although you may prefer it on preprinted forms as well.

The **Print Both Addresses** option allows you to request that both work and home addresses be printed. If you select this option, you can then click on **Work Address First** or **Home Address First** to control which address appears first on the printout. If you disable the **Print Both Addresses** option, then you must select whether you wish to print **Work Address Only** or **Home Address Only**.

# Printing Mailing Labels

You can print mailing labels directly from *Day-Timer Organizer* using a variety of label forms from suppliers such as Avery.

You can set the following label parameters.

1. **Label Size.** Select from the list of standard label sizes. If your label size is not on the list, select **Custom**, then click on the **Custom Label Size** button and specify:
  - ◆ Size of label (height and width, in inches)
  - ◆ Page margins (at top and left side of sheet, in inches)
  - ◆ Number of labels per sheet (across and down)
  - ◆ Distance between labels (in inches)
  - ◆ Whether the labels are **For use on a Laser Printer** or not
2. **Label Margins.** (top, bottom, left, and right side, in inches)
3. **Copies of each label.** Number of duplicates of each label to print
4. **First Label** you want printed (position across and down on sheet); this allows you to use up old label sheets that have some of the labels used.
5. **Sort By.** You may sort by last name, organization, zip code, or follow-up date.
6. **Which Address.** Choose work or home address.
7. **Print Barcodes.** Prints POSTNET barcodes for U.S. domestic mail. This code is derived from the zip code in the address (either 5 or 9 digits).

## Related Topics:

[Using the Quick Print Option](#)

## Using the Quick Print Option

*Day-Timer Organizer* includes a quick print option for printing labels. To use the quick printing feature, you must save your label settings and customize the button bar to include the Quick Print button for Labels, as described below.

### **Related Topics:**

[Saving the Label Settings](#)

[Including the Quick Print Button on the Button Bar](#)


[Selecting the Name\(s\) to Print](#)

[Printing Labels](#)

### ***Saving the Label Settings***

Once you have specified exactly how labels are to be printed, you can save the label settings by clicking on the **Save Settings** button.

## ***Including the Quick Print Button on the Button Bar***

Once you have saved your label printing preferences, you may want to include the  button on the button bar. To do that, choose the **Setup...User Preferences** command and select the **Button Bar** option. Click on the



button to highlight it so that it will be included on the standard button bar. When you click on **OK**, the button bar will be updated. Note that if your screen is too small or you already have too many buttons displayed, you may not be able to include an additional button.


### ***Selecting the Name(s) to Print***

Once you have saved your label settings and customized the button bar, you can select the name(s) to be printed.

1. Select a single name by clicking on it.
2. Select a group of names by first clicking on the first name in the group; then hold down the **Shift** key and click on the last name in the group.
3. Select several specific names by first clicking on the first name; then hold down the **Ctrl** key and click on the second name; hold down the **Ctrl** key while you click on all of the other required names.

## ***Printing Labels***



Once the  button is displayed on the button bar and the label settings have been saved, and the names selected, you can print labels by simply clicking on the



 button.

# Printing Envelopes

You can print envelopes directly from *Day-Timer Organizer* using a variety of envelope sizes.

You can set the following envelope parameters.

1. **Envelope Size.** To select envelope size, click on the down arrow next to the size field. Normally you will want a standard #10 (4-1/8" x 9-1/2") envelope. These sizes are determined by your printer and what sizes it supports.
2. **Return Address.** If you type a return address, it will be printed on your envelope and stored for future reference. To omit the contents of the return address field from envelopes you are currently printing, click on **Omit Return Address**.
3. **Use Envelope Feeder.** If your printer has an envelope feeder, you may select it by clicking on this check box.
4. **Sort By.** You may sort by last name, organization, zip code, or follow-up date.
5. **Which Address.** Choose work or home address.
6. **Print Barcodes.** Prints POSTNET barcodes for U.S. domestic mail. This code is derived from the zip code in the address (either 5 or 9 digits).
7. **Return Address.** Prints the specified return address in the top left corner of the envelope.
8. **Address Position.** Allows you to specify the exact positioning (in inches) of the return address and the TO: address.

Note that the envelope size may also need to be set at the print driver (printer setup) level as well. In addition, since envelopes are seldom 8.5" x 11", they must often be fed through a special tray or slot in the printer and the **Paper Source** setting adjusted accordingly.

## **Related Topics:**

[Using the Quick Print Option](#)



## Using the Quick Print Option for Envelopes

*Day-Timer Organizer* includes a quick print option for printing envelopes. To use the quick printing feature, you must save your envelope settings and customize the button bar to include the Quick Print button for Envelopes, as described below.

### **Related Topics:**

[Saving the Label Settings](#)

[Including the Quick Print \(Envelopes\) Button on the Button Bar](#)


[Selecting the Name\(s\) to Print](#)

[Printing Labels](#)

### ***Saving the Label Settings***

Once you have specified exactly how envelopes are to be printed, you can save your settings by clicking on the **Save Settings** button.

## ***Including the Quick Print (Envelopes) Button on the Button Bar***

Once you have saved your printing preferences, you may want to include the  button on the button bar. To do that, choose the **Setup...User Preferences** command and select the **Button Bar** option. Click on the



button to highlight it so that it will be included on the standard button bar. When you click on **OK**, the button bar will be updated. Note that if your screen is too small or you already have too many buttons displayed, you may not be able to include an additional button.


### ***Selecting the Name(s) to Print***

Once you have saved your envelope settings and customized the button bar, you can select the name(s) to be printed.

1. Select a single name by clicking on it.
2. Select a group of names by first clicking on the first name in the group; then hold down the **Shift** key and click on the last name in the group.
3. Select several specific names by first clicking on the first name; then hold down the **Ctrl** key and click on the second name; hold down the **Ctrl** key while you click on all of the other required names.

## ***Printing Labels***



Once the  button is displayed on the button bar and the envelope settings have been saved, and the names selected, you can print by simply clicking on the



button.

# Printing Rotary Cards

You can print rotary cards directly from *Day-Timer Organizer* using a variety of form sizes from various suppliers.

You can set the following parameters.

1. **Card Size.** Select from the list of standard rotary card sizes. If your card size is not on the list, select **Custom**, then click on the **Custom Card Size** button and specify:
  - ◆ Size of card (height and width, in inches)
  - ◆ Page margins (at top and left side of sheet, in inches)
  - ◆ Number of cards per sheet (across and down)
  - ◆ Distance between cards (rows and columns, in inches)
2. Whether or not cards are **For use on a Laser Printer**
3. **Card Margins** (at top, bottom, left, and right side, in inches)
4. **First Card** position on sheet (across and down)
5. **Sort By.** You may sort by last name, organization, zip code, or follow-up date.
6. **Which Address.** Choose work or home address or both.

# Printing Lists

Lists are especially useful for non-laser printers that have limited page formatting capabilities. Lists are also useful for specialized reports.

The printed list will have a simple columnar layout.

1. **Title** (optional), which will appear at the top of the first page (to insert date or time, type [Date] or [Time]). The text of the title will be aligned to the left edge of the page, centered, or aligned to the right edge of the page, depending on whether you choose the **Left**, **Right** or **Centered** button on the **Title** line.
2. **Header** (optional), which will appear at the top of every page (to insert date, time, or page number, type [Date], [Time] or [#]). You can also click on the **Left**, **Right** or **Center** button to specify whether the header text should be aligned to the left or right margin of the page, or centered.
3. **Footer** (optional), which will appear at the bottom of every page (to insert date, time, or page number, type [Date], [Time] or [#]). You can also click on the **Left**, **Right** or **Center** button to specify whether the footer text should be aligned to the left or right margin of the page, or centered.
4. **Amount of Text**. **Critical** prints up to the first carriage return, **Full** prints entire text field, **Full 1/Page** prints entire text field with each entry on a new page, **Text Only** prints the entire text field and nothing else.
5. **Margins** (top, bottom, left, and right), in inches. This setting controls how much white space to leave the edges of the paper.
6. **Columns** let you select fields and their column order. To move an Omitted field to the Include box (or vice versa), click on the field, then click on the direction button. To change field order, click on the desired field and hold down the mouse button while you drag to desired position.
7. **Type**. Choose unfinished or finished. (Task List only).
8. **Sort By (Notes List)**. Choose position (the default), or due date (which prints only notes with follow-up dates).
9. **Sort By (Address List)**. You may sort by last name, organization, zip code, or follow-up date. (Address List only).
10. **Message Type**. Choose incoming, incoming history (saved messages), or outgoing (messages you sent) (Message List only).
11. **Call Type**. Choose incoming calls, outgoing calls, or all calls. (Messages List and Phone Log only).
12. **Expense Type**. Choose unsubmitted, submitted, or both. (Expense List only).

# Merging Addresses with Form Letters

You may mail merge *Day-Timer Organizer* addresses with form letters created in *Day-Timer Organizer*, or form letters created in another program (e.g. your word processor).

## **Related Topics:**

[Mail Merge to WordPerfect 5.2](#)

[Mail Merge to WordPerfect 6](#)

[Mail Merge to Word for Windows 6/7](#)

[Mail Merge to Ami Pro 3](#)

[Mail Merge with a Day-Timer Organizer Note](#)



## Mail Merge with a *Day-Timer Organizer* Note

To create a reusable form letter in *Day-Timer Organizer*, add a **Note** entry. Put a title such as "Form letter - overdue receivables" (which will not appear in letters you print) on the top line, followed by the body of the letter.

Click wherever name or address fields will be inserted, then click the right mouse button to bring up the popup menu. Select **Insert** and then **Insert Mail Merge Fields** from the **Edit** menu. Select desired fields, then click on **OK**. When finished, click on **OK** to save the letter.

To merge this letter with *Day-Timer Organizer* addresses, click the letter in the **Notes** view, and select **Mail Merge** from the Tools menu.

Next, open the **Address Book** view and click on addresses you want:

- ◆ To select multiple addresses, press the **Ctrl** key while you click on each address
- ◆ To select a range of adjacent addresses, click on the first address, then press the **Shift** key while you click on the last address
- ◆ To select all addresses conforming to current search filters (e.g. a category), use the **Select All** option on the Edit menu.

Once addresses are selected, choose **Mail Merge** from the **Tools** menu. Click on **Day-Timer** format.

Select desired font, paper size, and printed page margins. If desired, you may print a page header and footer as well (to insert date, time, or page number, type [Date], [Time] or [#]).

After printing letters, addresses remain selected, allowing you to print envelopes or mailing labels if desired.

## **External Mail Merge: Word Perfect 5.2 & *Day-Timer Organizer***

The following are the fields that are available to you when you do a mail merge between DTO 2.1 and Word Perfect 5.2.

Field Names:

1. MrMrs
2. FirstName
3. Initial
4. LastName
5. Title
6. Company
7. Address1
8. Address2
9. Address3
10. City
11. State
12. Zip
13. Country
14. Email1
15. Email2
16. Email3
17. Email4
18. Nickname
19. Phone1
20. Phone2
21. Phone3
22. Phone4
23. Phone5
24. Phone6

1. Using Word Perfect 5.2, create a form letter containing merge field names (listed above). Follow the mail merge instructions in your word processor manual. When finished, exit your word processor and save the form letter.

Please contact Word Perfect for any technical assistance regarding their word processing package.

Word Perfect 5.2 Mail Merge instructions:

- a. Place the cursor within the document where you want the field to be inserted.
- b. Tools Menu
- c. Merge
- d. Field
- e. Enter the # corresponding the field you wish to place there. Use the Field Name list from above with the 24 fields.

Example: You want the Company name, use #6.

- f. Be sure to SAVE the document and CLOSE your word processor when you complete the document.

2. In *Day-Timer Organizer*, open the Address Book view and click on the addresses you want.

\*\* To select multiple addresses, press the Ctrl Key while you click on each address.

\*\* To select a range of adjacent addresses, click on the first address, then press the Shift key while you click on the last address.

\*\* To select all addresses conforming to current search filters, use the Select All command on the Edit menu.

\*\* To select all addresses filed under a category, use Category Search.

3. Once addresses are selected, choose Mail Merge from the Tools menu. Click on Word Processor print style, then click on the pull down menu and choose Word Perfect 5.2. Make sure the word processor directory PATH is correct, but do not change the Options or Macro lines.

4. *Day-Timer Organizer* will start your word processor. When prompted by Word Perfect 5.2, specify the document you created in Step 1. All you have to do is Preview and Print when the macro is complete.

## **External Mail Merge: MS Word 6.0/7.0 & *Day-Timer Organizer***

The following are the fields that are available to you when you do a mail merge between DTO 2.1 and MS Word 6.0/7.0.

Field Names:

MrMrs

FirstName

Initial

LastName

Title

Company

Address1

Address2

Address3

City

State

Zip

Country

Email1

Email2

Email3

Email4

Nickname

Phone1

Phone2

Phone3

Phone4

Phone5

Phone6

1. Using MS Word 6.0/7.0, create a form letter containing merge field names (listed above). Follow the mail merge instructions in your word processor manual. When finished, exit your word processor and save the form letter.

Please contact Microsoft for any technical assistance regarding their word processing package.

MS Word 6.0/7.0 Mail Merge instructions:

- a. Place the cursor within the document where you want the field to be inserted.
- b. Insert Menu
- c. Field
- d. Categories: Mail Merge
- e. Field Names: MergeField
- f. Field Codes: MergeField FieldName (Where FieldName corresponds to a name from the list above.)  
Example: MergeField LastName
- g. Click on OK.
- h. Repeat steps a to g for each field you want located within the document.
- i. Be sure to SAVE the document and CLOSE your word processor when you complete the document.

2. In *Day-Timer Organizer*, open the Address Book view and click on the addresses you want.

\*\* To select multiple addresses, press the Ctrl Key while you click on each address.

\*\* To select a range of adjacent addresses, click on the first address, then press the Shift key while you click on the last address.

\*\* To select all addresses conforming to current search filters, use the Select All command on the Edit menu.

\*\* To select all address filed under a category, use Category Search.

3. Once addresses are selected, choose Mail Merge from the Tools menu. Click on Word Processor print style, then click on the pull down menu and choose MS Word 6.0 or 7.0. Make sure the word processor directory PATH is correct, but do not change the Options or Macro lines.

4. *Day-Timer Organizer* will start your word processor. When prompted by MS Word 6.0/7.0, specify the document you created in Step 1.

5. All you have to do is Preview and Print when the macro is complete.

## **External Mail Merge: Word Perfect 6.0/6.0a/6.1 & *Day-Timer Organizer***

The following are the fields that are available to you when you do a mail merge between DTO 2.1 and Word Perfect 6.0/6.0a/6.1.

Field Names:

1. MrMrs
2. FirstName
3. Initial
4. LastName
5. Title
6. Company
7. Address1
8. Address2
9. Address3
10. City
11. State
12. Zip
13. Country
14. Email1
15. Email2
16. Email3
17. Email4
18. Nickname
19. Phone1
20. Phone2
21. Phone3
22. Phone4
23. Phone5
24. Phone6

1. Using Word Perfect 6.0/6.0a/6.1, create a form letter containing merge field names (listed above). Follow the mail merge instructions in your word processor manual. When finished, exit your word processor and save the form letter.

Please contact Word Perfect for any technical assistance regarding their word processing package.

Word Perfect 6.0/6.0a/6.1 Mail Merge instructions:

- a. Place the cursor within the document where you want the field to be inserted.
- b. Tools Menu
- c. Merge ...
- d. Form ...
- e. Click on None
- f. Click on OK
- g. Insert Field ...
- h. You will get the following message: No field names or records were found.
- i. Click on OK
- j. Place the cursor in the document where you want the field to be placed.
- k. Prompted for a Field:  
Use the numbers associated with the fields listed above. Example, if you want company name, use #6.
- k. Click on Insert.
- l. Repeat steps j to k for each field.
- m. Click on Close when you are done with the Fields.
- n. Repeat steps g to k if you need to enter more fields into the document.
- o. Be sure to SAVE the document and CLOSE your word processor when you complete the document.

2. In *Day-Timer Organizer*, open the Address Book view and click on the addresses you want.

\*\* To select multiple addresses, press the Ctrl Key while you click on each address.

\*\* To select a range of adjacent addresses, click on the first address, then press the Shift key while you click on the last address.

\*\* To select all addresses conforming to current search filters, use the Select All command on the Edit menu.

\*\* To select all address filed under a category, use Category Search.

3. Once addresses are selected, choose Mail Merge from the Tools menu. Click on Word Processor print style, then click on the pull down menu and choose Word Perfect 6.0/6.0a/6.1. Make sure the word processor directory PATH is correct, but do not change the Options or Macro lines.

4. *Day-Timer Organizer* will start your word processor. When prompted by Word Perfect 6.0/6.0a/6.1, specify the document you created in Step 1. All you have to do is Preview and Print when the macro is

complete.



## External Mail Merge: Ami Pro 3.0 & *Day-Timer Organizer*

The following are the fields that are available to you when you do a mail merge between DTO 2.1 and Ami Pro 3.0.

Field Names:

MrMrs

FirstName

Initial

LastName

Title

Company

Address1

Address2

Address3

City

State

Zip

Country

Email1

Email2

Email3

Email4

Nickname

Phone1

Phone2

Phone3

Phone4

Phone5

Phone6

Header File:      dtoaphd.sam              (Located in the DTO 2.1 directory.)

1. Using Ami Pro 3.0, create a form letter containing merge field names (listed above). Follow the mail

merge instructions in your word processor manual. When finished, exit your word processor and save the form letter.

Please contact AmiPro for any technical assistance regarding their word processing package.

Ami Pro 3.0 Mail Merge instructions:

- a. File
- b. Merge
- c. Create or edit a merge document
- d. Click on OK
- e. Do you want to use current document as the merge document? Yes or No. (If you select No, you will be prompted to open an existing document.) Select Yes if you were typing in the letter into the current document.
- f. Change the directory to where *Day-Timer Organizer* is installed.
- g. List files of type = Comma Delimited
- h. Select dtoaphd.sam
- i. Click on OK
- j. Field names list in
- k. Description File =  
Change directory to where DTO is installed.  
Select dtoaphd.sam
- l. Click on OK
- m. Now place the cursor within your document where you want the field to be placed.
- n. Select the field under Field Names
- o. Click on Insert
- p. Repeat steps m to o for each field you want within your document.
- q. Click on Close when you are done with the Field Names. To bring them back, repeat steps a to e.
- r. Be sure to SAVE the document and Close the word processor when done.

2. In *Day-Timer Organizer*, open the Address Book view and click on the addresses you want.

\*\* To select multiple addresses, press the Ctrl Key while you click on each address.

\*\* To select a range of adjacent addresses, click on the first address, then press the Shift key while you click on the last address.

\*\* To select all addresses conforming to current search filters, use the Select All command on the Edit menu.

\*\* To select all address filed under a category, use Category Search.

3. Once addresses are selected, choose Mail Merge from the Tools menu. Click on Word Processor print style, then click on the pull down menu and choose Ami Pro 3.0. Make sure the word processor directory PATH is correct, but do not change the Options or Macro lines.

4. *Day-Timer Organizer* will start your word processor. When prompted by Ami Pro 3.0, specify the document you created in Step 1. All you have to do is Preview and Print when the macro is complete.

## How Data is Stored and Exchanged

*Day-Timer Organizer* stores your data in a collection of files called a *database*. These files contain all of the entries that you have created, linkages between data, and information that is created by *Day-Timer Organizer* to help manage, search through, and view your data.

**When you create an entry, it remains in the database until you delete it.**

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While individual entries take up very little space, periodically (e.g. quarterly, semi-annually, or annually), you may want to archive and remove old data from the database to free space for new entries. Removing data also speeds searches since less data must be reviewed in searching.

**The database is a set of several files. You must be very careful when working with database files because damage to one file *may* make the entire database invalid.**

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# Exchanging Data with Other External Systems

*Day-Timer Organizer* can import data from other systems. The most common use for this facility is importing contact information from other organizer software programs or corporate databases.

Just as you may wish to import data from other systems, after entering large amounts of data in *Day-Timer Organizer*, you may want to use that data in other systems. The most common use for this facility is exporting names and addresses for use as mailing lists.

The means for data exchange with other systems is via specially formatted text files. While there are no universal standards for data exchange, in PC-based systems, files are commonly converted to plain text for transfer to other systems. These files are coded in ASCII character codes and hence are called ASCII text files.

Note that holidays are stored as part of the structure of the database itself. If you have defined your own holidays, these will not be exported or imported.

## **Related Topics:**

[Creating an Export File](#)

[Importing Data Files](#)

[Reconciling Changes at Import Time](#)

[ASCII Import Options](#)

## **Importing Data from Other Electronic Systems:**

[ACT! 1.0 and 2.0](#)

[Sidekick 1.0](#)

[Sidekick 2.0](#)

[ECCO Simplicity 1.1](#)

[Lotus Organizer 1.1](#)

[Lotus Organizer 2.0](#)

[Lotus Organizer 2.1](#)

## Creating an Export File

To copy entries from the current database (the one you are in right now) to an export file, select **Export Entries** from the **File** menu. Click on desired **Export File Type**:

- ◆ Select **Day-Timer/Win** to format export data for another *Day-Timer Organizer* database (e.g. from a multi-user, network database to a single user database on a portable computer). You can also exchange data between *Day-Timer Organizer* databases with the **File...Synchronize** command as described in **Coordinating Data Between a Portable Computer and the Central Database**.
- ◆ Select **ASCII** to format export data for a program such as a spreadsheet or database which can import delimited ASCII data (for ASCII field formats, see Appendix B).
- ◆ Select **IntelliLink** if you have IntelliLink™ translator software for exchanging data between *Day-Timer Organizer* and palmtop organizers  
HP IIP 95LX/100LX/200LX  
Sharp Wizard YO600, OZ5500, OZ5600, OZ6500, OZ7000, OZ8000, OZ9000; Zaurus ZR5000  
Casio 4000, 5000, 7000, 9000 series, SF-R10, SF-R20  
US Robotics Pilot 1000 and 5000  
  
or other programs (ACT!, Calendar Creator Plus, Commence, Current, dBase, Ecco, Excel, Lotus 123, Lotus Organizer, Packrat, Paradox, PC Tools, Schedule+, Sidekick, Microsoft Word, WordPerfect, or Word-Perfect Office). For purchase information, contact IntelliLink Corp, One Tara Blvd, Suite 210, Nashua, NH 03062 (603) 888-0666.
- ◆ Select **Archive** to export (in *Day-Timer Organizer* format) and/or remove information that is no longer needed on a day-to-day basis (you can export and delete entries, export entries without deleting them, or delete entries without exporting them).

### Related Topics:

[Pre-Selecting Entries to Export](#)

[Date Filtering at Export Time](#)

[Export Search Options](#)

[Exporting Categories and Assignees](#)

[Export File Name](#)

[ASCII Export Options](#)

### ***Pre-Selecting Entries to Export***

If you pre-select entries in the active view **Before** clicking on **Export**, the **Which Entries** selection in the export dialog box will default to the selected entries. To pre-select entries, follow instructions below:

- ◆ To select a single entry, click on that entry.
- ◆ To select **Multiple Entries**, press the **Ctrl** key while you **Click** on each desired entry
- ◆ To select a **Range** of adjacent entries, click on the first entry, use the mouse and the scroll bar to move down the list, then hold down the **Shift** key while you click on the last entry

Any **Search** settings in the active view will be transferred to the export dialog box (where you may use, clear, or replace them).

## ***Date Filtering at Export Time***

You may filter the entries you export by any of the options below:

- ◆ **Selected** - exports entries you selected in the active view (see previous)
- ◆ **All in Search** - exports all entries conforming to search settings (or, if no search settings active, to default search) in the active view
- ◆ **All** - exports all entries in database (or, in the network version, all entries you have rights to view)
- ◆ **Modified Since** - exports all entries added or changed since the date you specify (this makes it easy for a portable computer user to update the office database after a trip).
- ◆ **Dated Before** - use this option when exporting older data for archival purposes.



## ***Export Search Options***

Search options in the export dialog box let you narrow the export focus (if there were search settings in effect in the active view, they will be automatically transferred to the export dialog box). Search options are described in [Searching](#).

## ***Exporting Categories and Assignees***

By default, *Day-Timer Organizer* exports only categories and assignees directly associated with the entries you export. To include all categories and assignees in the export file (e.g. to synchronize category and assignee lists in two databases), select **All categories and assignees in database**.

### ***Export File Name***

Type the drive, directory path, and name of the file to which entries will be exported. For example, to export a file to the floppy disk, enter the file name as

A:\MYFILE.EXP


To create an ASCII file on the C: hard drive, enter the file name as


C:\MYFILE.ASC

Note that you must specify the full name (including the drive letter and the extension of .ASC for ASCII files and .EXP for export files).

## **ASCII Export Options**

If you choose ASCII export, *Day-Timer Organizer* will export entries to an ASCII text file, enclosing each field in **Quotes**, and using a **Comma** as the delimiter character between fields.

You may control field selection and field order for each entry type. To **Omit** an included field, click on the field in the Include box, then click on the  button. To **Include** an omitted field, click on the field in the Omit box, then click on the

 button. To change **Field Order** in the Include box, click on any field you want to move, then hold down the mouse button and **Drag** it up or down to the desired position.

First, you will need to determine exactly which entries you want to export out of *Day-Timer Organizer*. You can either highlight specific entries, or conduct a search. Once the entries you wish to be exported have been selected;

Step 1: Go to the File menu, and choose "Export entries..."

Step 2: Under the "Export Type" now choose ASCII.

If you have selected or searched for entries, you can skip directly to setting the field order for the export file. Otherwise, you can search for entries.

### **Searching For Entries**

To search out exactly which entries you want to export, use the Search buttons provided on the export screen. They will allow you to set the criteria for selecting entries. You can also click on the Modified Since option and enter a date. This will only export the entries that have been modified since that date. Another option is to click on Dated Before and enter a date. This will only export the entries entered before that particular date.

### **Choosing the Field Order**

To select the order of the fields that will be in you export file;

Step 1: Fill in the "Field Ordering for \_\_\_\_\_" Choose which ever entry type - addresses, tasks, schedule, etc. you want to export.

Step 2: Now pick the order in which you want the fields exported. This order is very important, for this is the order in which your data will get imported in your target program. Begin by moving field names from the Omit box to the Include (in order) box. Double click on the field name in the Omit box to move the field name to the Include box on the right.

Step 3: Continue to include all of the field names you wish to have in your export file.

Step 4: To change the order of the field names, click and hold down on the field name and drag it up or down to the desired location. Make sure that you put the tip of the arrow of your mouse pointer exactly on top of the field name right below your desired spot.

Step 5: Export To: should be the path and file name to the directory or floppy drive that you want the file to be exported to. For example, you can name it Export.asc. For an ASCII file, it should have an extension of ".ASC".

Step 6: Choose OK, and the export will begin

Now you can follow the import instructions for *Day-Timer Organizer*, and be able to understand the field order that you need to import your data correctly into *Day-Timer Organizer*.

Note: Not every record (ie. address) has all the information for a particular field. You may have some records (i.e. contacts or people) where there is no Company name. The record should appear as follows:

(First Name)(Last Name) (Company Name) (Title) (Address) (City) (State) (Zip)

"John","Smith","","Supervisor","2855 Campus Dr.,"San Mateo","CA","94403"

Notice that the Company Name is not there, however there is a place holder of "". This place holder tells *Day-Timer Organizer* when it is reading the file, that the Company Name field is blank for that particular record, therefore go on to the next field and leave the Company Name field blank. If you know that other records in your file do have company name information, then you **MUST** still assign Company Name as a field name for that blank when importing into *Day-Timer Organizer*. Otherwise, those company names will **NOT** import into *Day-Timer Organizer* and you will get an error message.

## Importing Data Files

To import entries into the **Current** database (the one you are in) from an export file, select **Import Entries** from the **File** menu, and click on desired **Export File Type**.

- ◆ Select **Day-Timer/Win** when importing data from another *Day-Timer Organizer* database (e.g. from a network database to a single user database on a portable computer).
- ◆ Select **ASCII** when importing data from a program such as a spreadsheet or database which can export delimited ASCII data (for required ASCII field formats, see [ASCII File Formats](#)).
- ◆ Select **IntelliLink** if you have IntelliLink™ translator software and wish to import data from palmtop organizers (HP 95LX/100LX, Sharp Wizard, Casio BOSS, Psion) or other programs (ACT!, Calendar Creator Plus, Commence, Current, dBase, Ecco, Excel, Lotus 123, Lotus Organizer, Packrat, Paradox, PC Tools, Schedule+, Sidekick 2.0, Microsoft Word, WordPerfect, or WordPerfect Office). For support or purchase information, contact IntelliLink Corp, One Tara Blvd, Suite 210, Nashua, NH 03062 (603) 888-0666.
- ◆ Select **Archive** when importing data from a *Day-Timer Organizer* archive file.

## Reconciling Changes at Import Time

When you export entries in *Day-Timer Organizer* format, the export time is stored for future reference. When you import entries in *Day-Timer Organizer* format, *Day-Timer Organizer* checks incoming entries to see whether they already exist in the receiving database. If so, the two copies are reconciled according to the following rules:

- ◆ If neither the incoming nor the existing copy has changed since you last exported, the incoming copy will be discarded.
- ◆ If the existing copy has changed but the incoming copy has not, the incoming copy will be discarded.
- ◆ If the incoming copy has changed but the existing copy has not, the incoming copy will replace the existing copy.
- ◆ If both copies have changed since you last exported, *Day-Timer Organizer* will display both copies together, listing fields where they differ. You may keep the incoming copy, the existing copy, or both.

## ASCII Import Options

If you choose ASCII import, *Day-Timer Organizer* will import entries from an ASCII file.

You may control field selection and field order for each entry type. To do this, drag field names to the matching data. You can view additional records by clicking on the **Next >>** button to verify that you have mapped the fields correctly.

By default, when importing an ASCII file, *Day-Timer Organizer* searches for files that end in .ASC in your directory. If possible, we recommend that you name your ASCII files with a .ASC extension.

### Opening an ASCII Export file

Step 1: Does the software package you are exporting from support a quote delimited, comma separated ASCII format, comma separated or a tab separated format? This software package MUST export the field names so they look like one of the examples below.

Examples:

"Smith","John","12 Maple Lane","Hometown", "USA", "12345","123-555-1212"

Smith, John, 12 Maple Lane, Hometown, USA,12345,123-555-1212

Smith John 12 Maple Lane Hometown USA 12345 123-555-1212

[The first example is of Comma + quote delimited. The second example is Comma delimited. The third example is TAB delimited.]

### How to determine if your export file is in a quote delimited, comma separated ASCII format:

\* You will first need to look at the contents of the file. To do this:

1. Go into the Windows File manager or Windows Explorer.
2. Search for the export file that you created.
3. Once you have located the file, you may double click on it, and it should open up as a text document.
4. View the text, if it looks similar to the one of the examples above, then you have the right format and you can continue on with the import process.

Note: If you are still not sure if the program you are exporting from supports one of these formats, you should contact the technical support staff for that program.

### Choosing the Field Order

Step 1: What is the field ordering of the export file you created? When you import this file into *Day-Timer*



*Organizer*, we need to know what order the fields are in. (Please refer to the ASCII attachment for instructions on how to determine the field ordering for your export file)

IMPORTANT: You MUST write the field order down on a piece of paper so that you may use it later when you begin your import process into *Day-Timer Organizer*.

Also remember that if your export file contains address information as well as schedules, tasks or other information, you will need to know the field ordering for EACH entry type. For simplicity sake, we recommend you do each entry type into their own file. One file for addresses, one for schedules and one for tasks.

### **Importing Data Into *Day-Timer Organizer***

Note: If you are using a word processing or spreadsheet program to alter the file it must be saved in a text-only format. Consult that programs documentation if you are not sure how to save a file in text-only format.

Step 1: Start *Day-Timer Organizer*.

Step 2: From any view, choose from the **File** menu, select **Import entries...**

Step 3: Select the **ASCII...** option from the **Import Types** box.

Step 4: From the "Finding ASCII Import File" Dialogue box, navigate to the directory where the export file is located. Highlight the name of the export file you created from the other application, and click **OK**.

Step 5: A Delimiter Type dialog box will appear asking you to confirm the delimiter of the file you have selected. Compare your file to the examples above and select one of the following: Comma + quotes, Comma or TAB.

Step 6: From the "Importing from ASCII" screen, verify that the Entry Types field displays the correct type of entries that you are trying to import.

Note: If you separated each entry type (Addresses, To-dos, Schedule items, etc.) into separate export files then select the entry type that matches each export file (i.e. select Addresses as an entry type when importing the Address only file). If you are importing a file with multiple entry types in one file, be sure to change the Type to Import = Mixed. If you do import a Mixed file, remember you will need to specify the field ordering for each type of entry. If the file contains schedules, tasks and addresses, then you need to specify field orders for all three.

Step 7: The first record of your ASCII export file will be displayed under: Field values for one record in your import file. This will help you to determine the field ordering. Now look at the piece of paper that you used to write down the field order for the export file.

Step 8: Begin now by mapping field names to the incoming fields. Look under the Unmapped fields scroll box for the name of the field that would match the field value at the top of the first record in your export file.

For example, if the first field in your export file shows "Mr." , then you will want to go to the Unmapped fields side, and click and hold down on the Mr/Mrs field name and drag that over to the right on top of the field name "Mr.". Make sure that you put the tip of the arrow of your mouse pointer exactly on top of the field, not the box with the Plus symbol in it. You will notice now that the Mr/Mrs field type is off to the left of that first field in your record.

(Note: the fields are not highlighted as you drag them. But the icon does change to a + when you get to the Mapped Fields column.) Continue to drag and drop until you have mapped all of the fields. For those spots that say empty, you need to determine by looking at your piece of paper exactly what field that is supposed to be. In most cases people don't have a Mr. or Mrs. salutation, so they leave it blank. You still have to map each incoming field, or you will get errors when attempting to import. Make sure you have the fields in the proper order as listed on your piece of paper.

Once the fields are in the Mapped Fields column, you can move them up or down if you accidentally dropped them into the wrong location.

Step 9. If the software program you exported from puts the field names into the export file as the first record, click on Skip First. Otherwise *Day-Timer Organizer* will import those field names as a record in your database.

Step 10: Now choose the Import button, and the file will begin to import.

# ASCII File Formats

*Day-Timer Organizer* imports from (and exports to) comma-delimited ASCII files. Fields must be contained within quotes, and separated by commas (e.g. "09/27/93","14:30").

## ASCII - What is an ASCII File?

ASCII is the acronym for the AMERICAN STANDARD CODE for INFORMATION INTERCHANGE. ASCII characters are the most recognized and understood characters by other computers and software programs. Different software programs use different methods of generating these files. The one that we support, more commonly used today, is CSV, or Comma Separated Value.

## TERMINOLOGY YOU SHOULD UNDERSTAND

**What is a record?:** A record is the entire collection of data for one person, company or entry in your address book. i.e.: First Name, Last Name, Company, Address, City, State.....etc.

**What is a field?:** A field is just one piece of a record...i.e.: First Name or Last Name as shown in the example below. These fields when exported to ASCII, in most cases need to be separated in a way that other programs can understand.

### Example of a record in a CSV file:

(First Name) (Last Name) (Company Name) (Title) (Address) (City) (State) (Zip)

"John", "Smith", "Day-Timer Technologies, Inc", "Supervisor", "2855 Campus Dr.", "San Mateo", "CA", "94403"

**Note that lines in the example above may be wrapped so that they display on two lines if your screen is not wide enough to display a single line.**

The " " (quote) represents the starting and end point for the fields named First Name, Last Name, and Company Name fields. The comma is used to separate each field which tells the program reading the file, that the previous field has reached it's end point and no more information needs to be read for that particular field.

**Field Order - What is field order?:** Field order is the logical order that your fields are put in (from left to right) when your ASCII file is generated. Remember, the field order generated can vary from program to program.

Example:

(First Name) (Last Name) (Company Name) (Title) (Address) (City) (State) (Zip)

"John", "Smith", "Day-Timer Technologies, Inc", "Supervisor", "2855 Campus Dr.", "San Mateo", "CA", "94403"

The field order for this particular example is:

(1)First Name

- (2)Last Name
- (3)Company Name
- (4)Title
- (5)Address
- (6)City
- (7)State
- (8)Zip

## HOW TO DETERMINE FIELD ORDER

If you are looking at your ASCII file, and need to determine the field order of your file, this is how it is done. Always read from left to right. Some programs export their field order automatically and other do not, here is how to tell:

Option 1: If the program exported the field order automatically, you would see that field order is the first record of your export file. Here is an example of what it would look like (remember, this varies from program to program):

```
"Organization","Last Name","First Name","Title","Work Address1","Work Address2","Work City"  
"Day-Timer Technologies","Smith","John","President","2855 Campus Dr.,""Suite 300","San Mateo",
```

The first line is your field order and the second line is your first data record:

Write this first line down on a piece of paper, like this:

- (1)Organization
- (2)Last Name
- (3)First Name
- (4)Title
- (5)Work Address1
- (6)Work Address2
- (7)Work City

Option 2: Some programs do not export the field order, so your ASCII file will look similar to this:

```
"Day-Timer Technologies", "Smith", "John", "President", "2855 Campus Dr.", "Ste 300", "San Mateo"
```

Here you will have to determine on your own what the field order is by looking at your data. For this example you would guess :

"Day-Timer Technologies" is the field name:            Organization or Company

"Smith" is the field name: Last Name

"John" is the field name : First Name

and so on.

If this scenario applies to you, make sure to write down on a piece of paper your field order for your export file. When you write the field names down, number them like this:

(1)Organization

(2)Last Name

(3)First Name

(4)Title

(5) Work Address1

(6)Work Address2

(7) Work City

### **NOW YOU ARE READY TO WORK WITH ASCII FILES and *Day-Timer Organizer*.**

When importing and exporting from *Day-Timer Organizer*, the following additional points should be noted.

- ◆ **Time** is formatted HH:MM format (e.g. "14:30").
- ◆ **Date** is formatted either MM/DD/YY or DD/MM/YY, depending upon the date format setting as specified by Windows.
- ◆ **Advance Notice** is formatted in days (e.g. "010d"), weeks (e.g. "002w"), or months (e.g. "003m").
- ◆ **Amount** and **Mileage Rate** are formatted \$DD.cc (e.g. "\$213.45").
- ◆ **Mileage** is formatted as integers (no decimal point)
- ◆ **Expense Submitted** is formatted as "Y" (if yes) or "N" (if no).
- ◆ **Call Type** is formatted as "O" (if outgoing) or "I" (if incoming).

When exporting, any **Recurring Date** is converted to its next occurrence.

Required ASCII import fields for each entry type are shown below. If entries of more than one type (e.g. addresses and tasks) are included in the same import file, you must also preface each entry with an entry type field ("Schedule", "Task", "Note", "Address", "Expense", "Phone Call", or "Message").

**Schedule:** Date, Text

**Task:** Text

**Note:** Text

**Address:** Last Name (or Organization)

**Expense:** Date, Type, Amount, Mileage, Rate, Text

**Phonecall:** Name, Date, Time

**Message:** Date, Sender, Addressee, Subject

The sample ASCII file shown below contains several types of entries, a task, note and address. Note that some of the fields are missing and therefore a null field ("") is inserted.

```
"Task","08/02/95","","000d","","No","0M","","","This is a task.,""DAN","None"  
"Note","","","000d","This is a note.,""DAN","None"  
"Address","","","000d","Last","First","Mr.,""Title","Company","Add1","Add2","Add3",  
"City","State","ZIP","Country","(415) 555-1212","","","","","","This is an address.  
","DAN","None"
```

# Exchanging Data Through the Clipboard

Your computer system has a clipboard—a temporary storage area where you can place information for later retrieval. A common method for exchanging small amounts of unformatted information between Windows applications (or between different components of a Windows application) is to select the desired data and copy it to the clipboard. Then at the destination, you can retrieve it from the clipboard and paste it at the current location.

Note that the clipboard can only contain one thing at a time. Each subsequent copy to the clipboard overwrites the previous contents of the clipboard.

## **Related Topics:**

[Importing from Another Application](#)

[Exporting to Another Application](#)

[Exchanging Text Within \*Day-Timer Organizer\*](#)

## Importing from Another Application

To transfer text into *Day-Timer Organizer* from a Windows word processor (or other Windows program) via the Windows clipboard, proceed as follows:


1. In your word processor, click and while holding the left mouse button down, drag to highlight the desired text.
2. Select **Copy** option on your word processor's **Edit** menu.
3. Switch to *Day-Timer Organizer*.
4. Double click on the desired entry (or add a new one).
5. Position cursor where you want the text, then click on the right mouse button and select the Paste command.



## Exporting to Another Application

To transfer text out of *Day-Timer Organizer* into a Windows word processor (or other Windows program) via the Windows clipboard, proceed as follows:

1. In *Day-Timer Organizer*, double click on the entry which contains the text you want.
2. Click and drag to mark the desired text.
3. Click on the right mouse button and select **Copy** option.
4. Switch to your word processor.
5. Position cursor where you want the text, then select the **Paste** option on your word processor's **Edit** menu.

To transfer an entry (such as an address) from *Day-Timer Organizer* to the Windows clipboard, position the cursor over the entry, click on the right mouse button, and select **Copy** option. Alternatively, click on the entry, then click on the  button. You may then **Paste** the Windows clipboard contents into any other program that allows this.

## **Exchanging Text Within *Day-Timer Organizer***

Any information which can be transferred to other programs (see previous section) can also be transferred between *Day-Timer Organizer* entries. Simply **Copy** desired information to the Windows clipboard, and **Paste** clipboard contents into the any *Day-Timer Organizer* field.

# Converting Data from other Day-Timer Databases

*Day-Timer Organizer* will translate data from

- *Day-Timer Organizer* version 1.0
- *Day-Timer Address and Phone Directory* format
- *Day-Timer Address Book*

This process will not alter the database which is being translated.

If translating from *Day-Timer Address and Phone Directory*, before translating, make sure the program is not running (or resident in memory). Also, make sure there is plenty of free disk space for your new database. If you are translating a large network database, use the fastest computer available. When ready, select the **Translate** option from the **File** menu, then click on the type of database you wish to translate from the secondary menu.

Next, select the database you wish to convert. Click on the **List Files of Type** pulldown menu (located in the lower left corner of the dialog box) and select the **Version** of your prior product. Then click on the database you want converted.

- ◆ If the database is on a different disk drive, click on the **Drive** pulldown menu and select the correct disk drive.
- ◆ If the database is on a different directory, double click on the top item in the **Directories** box, then double click on the desired directory and subdirectory, then click on desired database.

Translation time depends on the size of the prior database and the speed of your computer. Large databases may take several hours to translate on slow machines.

After translating, select the **Open Database** option from the **File** menu to switch to your new database.

## Connecting to External E-mail

If you have a recent version of cc:Mail™ or Microsoft Mail™ which supports either VIM (vendor independent messaging) or MAPI (messaging application protocol interface) protocols, *Day-Timer Organizer* can send external e-mail messages.

For instructions on installing these products and making them available for third party applications such as *Day-Timer Organizer*, consult your e-mail product documentation or contact your e-mail supplier.

Once this foundation is in place, you may send an e-mail message from *Day-Timer Organizer* as follows:

- 1. Select Entry.** If you select an **Address Book** entry, *Day-Timer Organizer* will use the **e-mail** field in your address book entry as the e-mail address. **Note:** if you select an address book entry that does not contain a valid e-mail address, external e-mail will not work. If you select a **Schedule, Task, Note, or Message** entry, *Day-Timer Organizer* will paste entry text into the message, letting you select an addressee in your third party e-mail application. This is convenient for notifying non-*Day-Timer Organizer* users about meetings, tasks, etc.
- 2. Choose Send External Mail** from the **Tools** menu. Depending on your e-mail product, you may be asked for a log in name and password.
- 3. Type Message.** The dialog box will vary depending on the e-mail application you have. Click on OK to send your message.

# Coordinating Data Between a Portable Computer and the Central Database

If you are a licensed user of *Day-Timer Organizer for Workgroups* and you have a portable computer, you can keep a copy of *Day-Timer Organizer* on the portable machine. You can then make schedule entries, record addresses, maintain expense entries, etc. from the portable unit.

From time to time, you might then synchronize the database on the hard drive of your portable unit with the centralized database on the network. When you synchronize the databases, *Day-Timer Organizer* automatically transfers your new entries to the centralized database and updates the local database with any changes from the centralized database.

For example, while travelling with your portable, you might create new schedule entries, record contact information (e.g. addresses, phone numbers, etc.), enter a variety of expense records, create several notes, etc. You could even assign work to other network users. Then when you return to your office, you would synchronize the database on your portable computer with the centralized system.

When you synchronize your portable computer with the central database, all of your entries are transferred to the central system, where they can be viewed by other users as you have allowed. Of course, your entries are still private, in the usual manner, unless you explicitly allow someone else to access them. If some of the addresses in the shared central files have been updated while you were away, those updates will be transferred to your portable computer's hard drive to keep that system up to date.

## **Related Topics:**

[Setting Up The Portable Computer](#)

[Synchronizing the Portable Computer with the Central Database](#)

[Resolving Conflicts Manually](#)

[Using the Portable Computer as a Workstation](#)

[Accessing a Multi-User Database from a Single Copy of Day-Timer Organizer](#)

## Setting Up The Portable Computer

To set up the portable computer, you must

- install the *Day-Timer Organizer* program files onto the portable computer's hard disk
- create a new database on the portable computer's hard disk
- transfer data from the centralized database to the database on the portable computer

### Related Topics:

[Installing the Programs](#)

[Creating a Database on the Portable Computer's Hard Disk](#)

[Initializing the Portable Computer's Database](#)

## ***Installing the Program***

If you have already been using the portable computer as a network workstation running *Day-Timer Organizer*, you will already have the programs installed and you can skip this step.

If you are going to synchronize a portable computer with your centralized *Day-Timer Organizer* files, the portable computer must be able to connect to the network to access the data files. To set up the portable computer, first connect to the network and install the *Day-Timer Organizer* programs in the usual manner for workstations. Workstation installation is described in the *Day-Timer Organizer Workgroup Guide*.

### ***Creating a Database on the Portable Computer's Hard Disk***

Once you have installed the programs, you must create a new database that will be stored on the hard disk of the portable computer. Creating new databases is described in [Working with Databases](#). Be sure to click on the **Multi-user database** check box when creating the new database if you wish to retain the user names of other users on the network.

The default name for the central database is **Office** and you should choose a different name for your database.

**Once you create your database, the new database becomes active and the database name should be displayed on the status bar.**

---



### ***Initializing the Portable Computer's Database***

When the database is initially created, it is empty. You must synchronize it with the central database to load all of the central data onto your local hard drive. Note that only data that is visible to you will be copied to the local data files. Private data that belongs to other users (e.g. expense records or notes) will not be transferred.

To transfer data from the central database to your portable computer's database files, choose the **File...Synchronize** command.

You will be prompted to specify the database name and disk drive where the centralized database is located. Once you have specified the central database, *Day-Timer Organizer* will scan the local database and the central database and update the data.

Once you have initialized the local database in this manner, you can end your applications and disconnect from the network. You now have a complete *Day-Timer Organizer* program with up to date database files that you can use anywhere.

## Synchronizing the Portable Computer with the Central Database

Once you have made entries on your portable computer, you may want to synchronize your database with the central database files so that you can access the data from your desktop workstation or so that other network users can access the data.

To synchronize the currently open database with the central database, choose the **File...Synchronize** command.

The first time that you synchronize databases, you will be prompted to specify the location of the central database.

*Day-Timer Organizer* will then proceed to scan the local database and the central database and prepare to update the data. This step can take some time, because *Day-Timer Organizer* must evaluate the updates that have been entered in each database since the last synchronization.

Once the scan is complete, *Day-Timer Organizer* will attempt to synchronize all of the changes in the two databases.

### **Related Topics:**

[Understanding Conflicts](#)

[Resolving Conflicts Automatically](#)

## ***Understanding Conflicts***

When you are synchronizing database, a *conflict* can arise when you have changed the entry on your portable unit and someone has changed the same entry in the shared database. For example, if you spoke with a co-worker and they gave you an updated address, you might change it on your portable computer and they might have made a change in the central files as well.

If there are conflicts in your databases, you will see a dialog box and you can select your preferred options for resolving them. You can resolve conflicts in two ways:

- specify the method for resolution and have *Day-Timer Organizer* resolve all conflicts
- view each conflicting record and manually choose how to resolve each conflict on a case by case basis

## Resolving Conflicts Automatically

When conflicts are detected, a dialog box will be displayed.

If there are conflicts, you must resolve them by deciding which correction to keep.

You can choose to have *Day-Timer Organizer* decide which corrected entry is the correct one by selecting one of the radio buttons at the top of the screen. If you then click on **Proceed**, all conflicts will be resolved by the method you have chosen.

<b>Method</b>	<b>Result</b>
Keep Newest	The MOST RECENTLY MADE correction will be kept; for example, if you made an address correction on August 1 and your assistant made a change to that same address entry on August 2, then your assistant's correction will be kept and your entry would be discarded
Keep Oldest	The OLDER corrections will be kept; for example, if a co-worker updated a note entry in the office on July 15 and you modified the same note entry on July 20, your corrections would be discarded and your co-worker's updates would be kept
Keep All from <i>database 1</i>	The changes in the centralized database would be kept and changes in the portable computer's database would be discarded; this would mean that for all conflicts, the entries in your portable database would be discarded and the corrected entries in the central database would be retained
Keep All from <i>database 2</i>	The changes in the portable computer's database would be kept and changes in the centralized database would be discarded;
Ignore Any Individual Selections	Any manually made selections (as described below) will be discarded and ALL conflicts will be resolved according to the other method chosen

## Resolving Conflicts Manually

You may choose to review each conflict and decide on a case by case basis which correction should be kept. When the synchronization dialog box is displayed, the first conflict will appear in the windows at the bottom of the screen, showing how the entry appears in each database.

To select which entry should be retained, click on the **Keep** check box above that entry.

To accept that selection and proceed to view the next conflict, click on the **Next Record** button.

Once you have reviewed all of the conflicts and resolved them, click on **Proceed** to update the database files.

## Using the Portable Computer as a Workstation

If you use your portable computer as a workstation on the network, you should be especially careful about which database is in use when the portable unit is connected to the network.

**When you are using a portable computer connected to the network, you have access to two databases, one on the portable computer's hard disk, and one on the network. The name of the currently active database is displayed on the status bar so that you will know which database is in use.**

---

When you return to your office and want to use your portable computer as a workstation, you should first synchronize to the central database. Then, you should use the **File...Open** command to make the central database active so that any work that you do on the network goes directly into the centralized database.

Whenever you need to remove the portable computer from the network, you should be sure to synchronize with the central database before disconnecting. This ensures that you have a current copy of the database before using the portable computer remotely.

## Importing from ACT! 1.0 and 2.0

Note: You must open the ACT! database from which you wish to export entries. This process must be repeated for each separate database that you have created in ACT! These instructions cover exporting information of Address type only and will not transport information such as Status or other time-related material.

In ACT:

1. Choose File...Save As.
2. Next choose All Contacts and click OK.
3. Choose Save File as Type: Delimited
4. Type in a file name with a .ASC extension.
5. Click OK.
6. In the Exporting Options window, chose Comma as your delimiter. Do not put an X in the Export Secondary Fields box or Export Field Names. *Day-Timer Organizer* does not have enough fields vacant to support your user fields.
7. Click OK. The document will then begin exporting.

In *Day-Timer Organizer*:

1. Start *Day-Timer Organizer* and select any view.
2. Choose **File...Import Entries**.
3. Select **ASCII...**
4. Select the ASCII import file you created above and click **OK**.
5. Set the Delimiter Type = Comma.
6. Under Entry Types, choose Address Book:
7. Drag and drop with your mouse the field names under the Unmapped Fields column to the fields you want them mapped to in the Mapped Fields column (reading down each column):

Organization

Last Name

Work Address1

Work Address2

Work Address3

Work City

Work State  
Work Zip  
Office Phone  
Fax  
Extension  
Fax Extension  
Title  
Custom Field 1  
First Name  
Custom Field 2  
Custom Field 3  
Custom Field 4

(Note: Custom fields may be pre-defined by using the Setup/Custom Fields/Address section of *Day-Timer Organizer*).

8. When you have all the fields mapped in the correct order under the Mapped Fields column, click on the Next button a few times to view all the records in your import file and verify the fields are mapped correctly.
9. When you are ready to import the entries, click on the Import button to begin importing your entries into *Day-Timer Organizer*.



## Importing from Sidekick 1.0

These instructions will walk you through the process of exporting Cardfile entries from Sidekick and then importing them into the Address Book section of *Day-Timer Organizer*.

1. Double click on the Sidekick icon labeled Export Cardfile.
2. Change the Source to the Sidekick Cardfile containing your name and addresses.

Target = c:\dto21\files\sidekick.asc

Target File Type = Comma Delimited (\*.csv)

(Note: The drive and directory may be different if you installed *Day-Timer Organizer* under Windows 95 or elsewhere. Be sure to remember where you put the .asc file.)

Click on Export.

3. Next a Field Selection dialog box will come up. Use the Select All button to put all of the Source Fields into the Target Fields. The fields should be in the following order:

Salutation

First\_Name

Last\_Name

Title

Company

Address1

Address2

City

State

Zip

Phone

Extension

Fax

@Email

Comments

Click on OK.

You will be asked if you wish to export another file, click on NO unless you have other Sidekick Cardfiles you wish to move over to *Day-Timer Organizer*.

4. Open *Day-Timer Organizer*. Select **File...Import entries** from the menu.
5. Select ASCII...
6. Select the file you created. c:\dto21\files\sidekick.asc
7. Set the Delimiter Type = Comma.
8. Entry Type = Address Book
9. Drag-n-drop with your mouse the field names under Unmapped Fields to the Mapped Fields column. The first entry of your import file is displayed to help you match the field names to your data.

(Note: you may want to select Skip First if the field names are listed instead of your first data entry.)

The Mapped Fields column should be close if not exactly matching the following:

Mr/Mrs

First Name

Last Name

Title

Organization

Work - Address 1

Work - Address 2

Work - City

Work - State

Work - Zip

Office Phone

Office Extension

FAX

E-Mail Address 1

Text

You can substitute Home for Work if the addresses are home addresses. Also Home for Office for home numbers.

10. Click on **Import** when you are ready to import the entries.

## Importing from Sidekick 2.0

1. Double click on the Sidekick icon labeled Export Cardfile.
2. Change the Source to the Sidekick Cardfile containing your name and addresses.

Target = c:\dto21\files\sidekick.asc

Target File Type = Comma Delimited (\*.csv)

(Note: The drive and directory may be different if you installed *Day-Timer Organizer* under Windows 95 or elsewhere. Be sure to remember where you put the .asc file.)

Click on Export.

3. Next a Field Selection dialog box will come up. Use the Select All button to put all of the Source fields into the Target fields. The fields should be in the following order:

Salutation

First Name

Last Name

Apartment/Unit #

Address1

Address2

City

State

Zip

Country

Home Phone

Alternate Phone

Company

Spouse

Birthday

Children

Hobby

Group

## Notes/Comments

Please note that if you have added or modified the fields in your Sidekick database they will not match the list above. Make a note of the fields you exported and match them up to the fields on the import. Follow this example to see how this procedure is done.

Click on OK.

You will be asked if you wish to export another file, click on NO unless you have other Sidekick Cardfiles you wish to move over to *Day-Timer Organizer*.

4. Open *Day-Timer Organizer*. Select **File..Import entries** from the menu. Select ASCII.

If this is your first import, you will be prompted for the file name first, then click on OK. Otherwise, click on the Browse button after the Delimiter dialog box.

Set the Delimiter Type = Comma.

Import File = C:\dto21\files\sidekick.asc

Entry types: Address Book

Use your mouse to drag and drop the fields from the Unmapped column to the Mapped column. Match up our field names to the field names listed in the Field values Sidekick.asc column shown in the diagram below.

The Mapped column fields should be in the following order:

Mr/Mrs

First Name

Last Name

Work - Address 3

Work - Address 1

Work - Address 2

Work - City

Work - State

Work - Zip

Work - Country

Home Phone

Office Phone

Organization

Custom Field 1

Custom Field 2

Custom Field 3

Custom Field 4

Custom Field 5

Text

You can substitute Home for Work if the addresses are home addresses. Also phone number fields can be changed to match what was exported.

Be sure to check Skip first to make sure the field names are not imported as a record in your Address Book.

Click on **Import**.

## Importing from ECCO Simplicity 1.1

These instructions will walk you through the process of exporting PhoneBook entries from ECCO Simplicity and then importing them into the Address Book section of *Day-Timer Organizer*.

### Step 1:

1. Open your ECCO Simplicity program.
2. Go to your PhoneBook that you want to export the information over to *Day-Timer Organizer*.
3. **File...Export**

Items to Export = Entire PhoneBook

(Warning: This will also include Appointments and other odd entries. You can delete these later within *Day-Timer Organizer*.)

Format = CSV (comma separated)

Keep DOS Text checked.

Click on <Create Set ...>

You want the Fields Chosen to be the following and in this exact order:

Last Name

First Name

Mr./Mrs.

Job Title

Company

Address1 - Business

Address2 - Business

City - Business

State - Business

Zip - Business

Country - Business

Work #

Home #

Fax #

Cell #

Alt #

Address1 - Home

Address2 - Home

City - Home

State - Home

Zip - Home

Country - Home

When this is complete, you can Add the Field Set to Menu if you expect to be exporting to *Day-Timer Organizer* again. Do not forget to name your field set.

Click on **OK**.

Export to File: Enter the drive, directory and filename of where you want to place the export file. If unsure, use the following: C:\Names.asc.

4. Close ECCO Simplicity.

### **Step 2:**

1. Open *Day-Timer Organizer*.
2. Open the database you want these names and addresses if it is different than the one you are in.
3. File Menu / Import entries
4. Choose ASCII
5. Select the import file using Browse, should be c:\Names.asc. Click OK.
6. Select the Delimiter Type = Comma.
7. Drag-n-drop with your mouse the field names under Unmapped Fields to the Mapped Fields column. The first entry of your import file is displayed to help you match the field names to your data. The Mapped Fields must follow this exact order:

Last Name

First Name

Mr/Mrs

Title

Organization

Work - Address1

Work - Address2

Work - City

Work - State



Work - Zip  
Work - Country  
Office Phone  
Home Phone  
FAX  
Other Phone 1  
Other Phone 2  
Home - Address1  
Home - Address2  
Home - City  
Home - State  
Home - Zip  
Home - Country

8. Click on Next to view each record of your data from your import file and to verify that your data is mapped to the fields you want within *Day-Timer Organizer*.
9. When the data is in the correct order, click on **Import**. This will start the import process.

## Importing from Lotus Organizer 1.1

These instructions will walk you through the process of exporting entries from Lotus Organizer 1.1 and then importing them into *Day-Timer Organizer*.

### Converting Lotus Organizer 1.1 addresses to *Day-Timer Organizer* Address Book

1. Open Lotus Organizer 1.1.
2. Select File Export from the menu.

From section = Address

Export file = c:\dto21\files\address.asc

(Note: The drive and directory may be different if you installed *Day-Timer Organizer* under Windows 95 or elsewhere. Be sure to remember where you put the .asc file.)

Click on **OK**.

3. Now we need to select the fields to export. Map the fields in the following order:

Title = Field 1

First Name = Field 2

Last Name = Field 3

Position = Field 4

Company Name = Field 5

Address = Field 6

Zip = Field 7

Phone = Field 8

Extn = Field 9

Fax = Field 10

User 1 = Field 11

User 2 = Field 12

Notes = Field 13

Type = Field 14 (optional)\*

(Note: The Type field is equivalent to our Category field. If you wish to bring this over, make sure you have added all of the types you have in Lotus Organizer 1.1 as Categories in *Day-Timer Organizer*.)

Click on **Export**.

4. Lotus Organizer 1.1 will bring up a dialog box telling you how many entries it has exported. Click on **OK**.
5. Close Lotus Organizer 1.1 and open *Day-Timer Organizer*.
6. Select **File...Import** entries from the menu.

Select ASCII

Import From = c:\dto21\files\address.asc (exactly what you entered when you exported).

Set the Delimiter Type = Comma + quote

Set Entry Type = Address Book

7. Drag-n-drop with your mouse the field names under Unmapped Fields to the Mapped Fields column. The first entry of your import file is displayed to help you match the field names to your data.

The Mapped Fields column should be close if not exactly matching the following:

Mr/Mrs

First Name

Last Name

Title

Organization

Work - Address 1

Work - Zip

Office Phone

Office Extension

FAX

Custom Field 1

Custom Field 2

Text

Category (optional)\*

\*Only include Category if you included Type in the export from Lotus Organizer 1.1.

\*\*If a home address instead of work address; make the following substitutions:

Home - Address 1           for           Work - Address 1  
Home - Zip                 for           Work - Zip

\*\*\*If a home phone number, make the following substitutions:

Home Phone           for           Office Phone  
Home Extension       for           Office Extension

Click on **OK**.

### **Converting Lotus Organizer 1.1 Notepad entries to *Day-Timer Organizer* Notebook**

Follow the same steps as outlined above but with these changes.

1.     In Lotus Organizer 1.1:

Select File Export

From section = Notepad

Export file = c:\dto21\files\notes.asc

(Note: The drive and directory may be different if you installed *Day-Timer Organizer* under Windows 95 or elsewhere. Be sure to remember where you put the .asc file.)

Click on **OK**.

2.     Map the following fields:

Title = Field 1

Bits = Field 2

Type = Field 3 (optional)\*

\*Type field is equivalent to our Category field. If you wish to bring this over, make sure you have added all of the types you have in Lotus Organizer 1.1 as Categories in *Day-Timer Organizer*.)

.

Click on **Export**.

3.     In *Day-Timer Organizer*:

Select **File...Import entries**

Select ASCII

Import From = c:\dto21\files\notes.asc (exactly what you entered when you exported).

Set the Delimiter Type = Comma + quote

Entry Types = Notes

The Mapped Fields column should be in this order:

Title

Text

Category (optional)\*

\*Only include Category if you included Type in the export from Lotus Organizer 1.1.

Click on **OK**.

### **Converting Lotus Organizer 1.1 Calendar, To Do, Planner, Anniversary entries**

(Note: To convert the data from your Lotus Organizer 1.1 Calendar, To Do, Planner and Anniversary section you must use another piece of software to convert the dates and times into formats that we will accept.)

For example:

5/6/95	must be converted to	05/06/95
1/20/95	must be converted to	01/20/95 (all dates have to be 2 digits)
8:30 AM	must be converted to	08:30
3:15 PM	must be converted to	15:15 (all times have to be military and drop the AM or PM)

These changes can be done with a word processing package or a spreadsheet program using the Find and Replace options.

Since Lotus Organizer 1.1 keeps track of the duration of a scheduled event and we record the end time. We are unable to accept the duration of the appointments for an end time.

### **Converting Lotus Organizer 1.1 Calendar entries to *Day-Timer Organizer's* Schedule**

1. In Lotus Organizer 1.1:

Choose **File...Export**

From section = Calendar

Export file = c:\dto21\files\cal.asc

(Note: The drive and directory may be different if you installed *Day-Timer Organizer* under Windows 95 or elsewhere. Be sure to remember where you put the .asc file.)

Click on **OK**.

2. Map the following fields:

Date = Field 1

Time = Field 2

Text = Field 3

Click on **Export**.

3. In *Day-Timer Organizer*:

Choose **File...Import entries...**

Select ASCII

Import From = c:\dto21\files\cal.asc (exactly what you entered when you exported).

Set the Delimiter Type = Comma + quote

Entry Types = Schedule

The Mapped Fields column should be in this order:

Date

Begin Time

Text

Click on **OK**.

### **Converting Lotus Organizer 1.1 To Do entries to *Day-Timer Organizer* Tasks**

1. In Lotus Organizer 1.1:

Choose File Export

From section = To Do

Export file = c:\dto21\files\todo.asc

(Note: The drive and directory may be different if you installed *Day-Timer Organizer* under Windows 95 or elsewhere. Be sure to remember where you put the .asc file.)

Click on **OK**.

2. Map the following fields:

Due Date = Field 1

Priority = Field 2

Text = Field 3

Click on **Export**.

3. In *Day-Timer Organizer*:

Choose File Import entries

Select ASCII

Import From = c:\dto21\files\todo.asc (exactly what you entered when you exported).

Set the Delimiter Type = Comma + quote

Entry Types = Tasks

The Mapped Fields column should be in this order:

Date

Priority

Text

Click on **OK**.

### **Converting Lotus Organizer 1.1 Planner entries to *Day-Timer Organizer* Schedule**

1. In Lotus Organizer 1.1:

Choose **File...Export**

From section = Planner

Export file = c:\dto21\files\planner.asc

(Note: The drive and directory may be different if you installed *Day-Timer Organizer* under Windows 95 or elsewhere. Be sure to remember where you put the .asc file.)

Click on **OK**.

2. Map the following fields:

Date = Field 1

Time = Field 2

Text = Field 3

Click on Export.

3. In *Day-Timer Organizer*:

Choose **File...Import entries**

Select ASCII

Import From = c:\dto21\files\planner.asc (exactly what you entered when you exported).

Set the Delimiter Type = Comma + quote

Entry Types = Schedule

The Mapped Fields column should be in this order:

Date

Begin Time

Text

Click on **OK**.

### **Converting Lotus Organizer 1.1 Anniversary entries to *Day-Timer Organizer* Schedule**

1. In Lotus Organizer 1.1:

Choose **File...Export**

From section = Anniversary

Export file = c:\dto21\files\ann.asc



(Note: The drive and directory may be different if you installed *Day-Timer Organizer* under Windows 95 or elsewhere. Be sure to remember where you put the .asc files.)

Click on **OK**.

2. Map the following fields:

Date = Field 1

Text = Field 2

Click on Export.

3. In *Day-Timer Organizer*:

Choose **File...Import entries**

Select ASCII

Import From = c:\dto21\files\ann.asc (exactly what you entered when you exported).

Set the Delimiter Type = Comma + quote

Entry Types = Schedule

The Mapped Fields column should be in this order:

Date

Text

Click on **OK**.

## Importing from Lotus Organizer 2.0

These instructions will walk you through the process of exporting entries from Lotus Organizer 2.0 and then importing them into *Day-Timer Organizer* for Windows.

### Converting Lotus Organizer 2.0 Address entries to *Day-Timer Organizer* Address Book.

1. Open Lotus Organizer 2.0.
2. Select **File...Export** from the menu.

From section = Address

File name = c:\dto21\files\address.asc

(Note: The drive and directory may be different if you installed *Day-Timer Organizer* under Windows 95 or elsewhere. Be sure to remember where you put the .asc file.)

List files of type = ASCII Text (\*.TXT, \*.CSV)

3. Click on Mapping to select the fields to export. Click on Clear All to clear the current mappings.

The fields should be mapped in the following order:

First Name = Field 1

Last Name = Field 2

Title = Field 3

Job Title = Field 4

Business Company = Field 5

Business Street = Field 6

Business City = Field 7

Business State = Field 8

Business Zip = Field 9

Business Country = Field 10

Business Tel1 = Field 11

Business Ext = Field 12

Business Fax = Field 13  
Business Email = Field 14  
Business Tel2 = Field 15  
Business Notes = Field 16\*\*  
Home Street = Field 17  
Home City = Field 18  
Home State = Field 19  
Home Zip = Field 20  
Home Country = Field 21  
Home Tel1 = Field 22  
Home Tel2 = Field 23  
Home Fax = Field 24  
Home E-mail = Field 25  
Home Unused 1 = Field 26  
Home Unused 2 = Field 27  
Home Notes = Field 16\*\*

These are optional fields that you can map and bring over to *Day-Timer Organizer*:

Categories

Assistant

Spouse

Children

\*Categories field is equivalent to our Category field. If you wish to bring this over, make sure you have added all of the categories you have in Lotus Organizer 2.0 as Categories in *Day-Timer Organizer*.)

\*\*You want to map both Business Notes and Home Notes to Field 16 to combine them.

Field mapping name = Address

Click on Add to save the mappings you have defined.

Click on OK to close the dialog box.

Now click on OK to export the entries.

4. Close Lotus Organizer 2.0 and open *Day-Timer Organizer*.

Select File...Import entries from the menu.

Select ASCII...

Select the file you created. c:\dto21\files\address.asc

Set the Delimiter Type = Comma

Then click **OK**.

Entry Type = Address Book

5. Drag-n-drop with your mouse the field names under Unmapped Fields to the Mapped Fields column. The first entry of your import file is displayed to help you match the field names to your data.

The Mapped Fields column should be close if not exactly matching the following:

First Name

Last Name

Mr/Mrs

Title

Organization

Work - Address 1

Work - City

Work - State

Work - Zip

Work - Country

Office Phone

Office Extension

FAX

E-Mail Address 1

Mobile Phone

Text

Home - Address 1

Home - City

Home - State

Home - Zip

Home - Country

Home Phone

Other Phone 1

Other Phone 2  
E-Mail Address 2  
Custom Field 1  
Custom Field 2

These are optional fields that you can map and bring over to *Day-Timer Organizer*:

Category  
Custom Field 3  
Custom Field 4  
Custom Field 5

Click on **OK**.

### **Converting Lotus Organizer 2.0 Notepad entries to *Day-Timer Organizer* Notebook**

Follow the same steps as outlined above but with these changes.

1. In Lotus Organizer 2.0:

Choose **File...Export**

From section = Notepad

Export file = c:\dto21\files\notes.asc

(Note: The drive and directory may be different if you installed *Day-Timer Organizer* under Windows 95 or elsewhere. Be sure to remember where you put the .asc file.)

List files of type = ASCII Text (\*.TXT, \*.CSV)

2. Click on Mappings... then on Clear All.

Field mapping name = Notes

Map the following fields:

Title = Field 1

Notes = Field 2

Categories = Field 3 (optional)\*

\*Categories field is equivalent to our Category field. If you wish to bring this over, make sure you have added all of the Categories you have in Lotus Organizer 2.0 as Categories in *Day-Timer Organizer*.)

Click on Add save the field mappings.

Click on OK then OK again to export.

(Note: You will need to drop the End Date when converting the date and time fields.)

3. In *Day-Timer Organizer*:

Select **File.. Import entries** from the menu.

Select ASCII...

Select the file you created. c:\dto21\files\notes.asc

Set the Delimiter Type = Comma

Entry Type = Notes

The Mapped Fields column should be close to, if not exactly matching, the following:

Title

Text

Category\*

\*Only include Category if you included Categories in the export from Lotus Organizer 2.0.

Click on OK.

### **Converting Lotus Organizer 2.0 Calendar, To Do, Calls, Planner, and Anniversary entries to *Day-Timer Organizer* Schedule**

(Note: To convert the data from your Lotus Organizer 2.0 Calendar, To Do, Calls, Planner and Anniversary section you must use another piece of software to convert the dates and times into formats that *Day-Timer Organizer* will accept.)

For example:

Start date time = 1995-01-23 09:00:00 must be converted to 2 separate fields = 01/23/95 and 09:00.

All dates have to be in the format of mm/dd/yy with 2 digits each.

All times have to military and in the format of hh:mm.

Examples: 1995-01-03 12:40:00 convert to 01/03/95, 12:40

1995-12-08 08:00:00 convert to 12/08/95, 08:00

These changes can be done with a word processing package or a spreadsheet program using the Find and Replace options. The same process must be done for End date time, From Date, Start Date and any other date or time fields.

### **Converting Lotus Organizer 2.0 Calendar entries to *Day-Timer Organizer* Schedule.**

1. In Lotus Organizer 2.0:

Choose **File...Export...**

From section = Calendar

Export file = c:\dto21\files\cal.asc

(Note: The drive and directory may be different if you installed *Day-Timer Organizer* under Windows 95 or elsewhere. Be sure to remember where you put the .asc file.)

List files of type = ASCII Text (\*.TXT, \*.CSV)

2. Click on Mappings... then on Clear All.

Field mapping name = Calendar

Map the following fields:

Start date time = Field 1

End date time = Field 2

Description = Field 3

These are optional fields that you can map and bring over to Day-Timer

Organizer:  
Categories\*  
Customer Code

\*Categories field is equivalent to our Category field. If you wish to bring this over, make sure you have added all of the Categories you have in Lotus Organizer 2.0 as Categories in *Day-Timer Organizer*.

Click on Add save the field mappings. Click on OK then OK again to export.  
(Note: You will want to drop the End Date when converting the date and time fields.)

3. In *Day-Timer Organizer*:

Select **File...Import entries...** from the menu.  
Select ASCII...  
Select the file you created. c:\dto21\files\cal.asc  
Set the Delimiter Type = Comma  
Entry Type = Schedule

The Mapped Fields column should be close if not exactly matching the following:

Date  
Begin Time  
End Time  
Text

These are optional fields that you can map and bring over to *Day-Timer Organizer*:

Category  
Custom Field 1

Click on **OK**.

### **Converting Lotus Organizer 2.0 To Do entries to *Day-Timer Organizer* Tasks.**

1. In Lotus Organizer 2.0:



Choose **File...Export...**

From section = To Do

Export file = c:\dto21\files\todo.asc

(Note: The drive and directory may be different if you installed *Day-Timer Organizer* under Windows 95 or elsewhere. Be sure to remember where you put the .asc file.)

List files of type = ASCII Text (\*.TXT, \*.CSV)

2. Click on Mappings... then on Clear All.

Field mapping name = Tasks

Map the following fields:

Due date = Field 1

Description = Field 2

Priority = Field 3

Completion date = Field 4

This is an optional field that you can map and bring over to *Day-Timer Organizer*:

Categories\*

\*Categories field is equivalent to our Category field. If you wish to bring this over, make sure you have added all of the Categories you have in Lotus Organizer 2.0 as Categories in *Day-Timer Organizer*.

Click on Add save the field mappings.

Click on **OK** then **OK** again to export.

3. In *Day-Timer Organizer*:

Select **File...Import entries...** from the menu.

Select ASCII...

Select the file you created. c:\dto21\files\todo.asc

Set the Delimiter Type = Comma

Entry Type = Tasks

The Mapped Fields column should be close if not exactly matching the following:

Date

Text

Priority

Date Finished

Click on **OK**.

### **Converting Lotus Organizer 2.0 Calls entries to *Day-Timer Organizer* Phone Calls.**

1. In Lotus Organizer 2.0:

Choose **File...Export...**

From section = Calls

Export file = c:\dto21\files\calls.asc

(Note: The drive and directory may be different if you installed Day-Timer

Organizer 2.1 under Windows 95 or elsewhere. Be sure to remember where you put the .asc file.)

List files of type = ASCII Text (\*.TXT, \*.CSV)

2. Click on Mappings... then on Clear All.

Field mapping name = Calls

Map the following fields:

Start date time = Field 1

Description = Field 2

Telephone Number = Field 3

First Name = Field 4

Last Name = Field 4

Company = Field 4

Status = Field 5

Click on Add save the field mappings.

Click on OK then OK again to export.

3. In *Day-Timer Organizer*:

Select **File...Import entries...** from the menu.

Select ASCII...

Select the file you created. c:\dto21\files\calls.asc

Set the Delimiter Type = Comma

Entry Type = Phone Log

The Mapped Fields column should be close if not exactly matching the following:

Date

Begin Time

Text

Phone

Name/Company

Status

Click on OK.

Lotus Organizer 2.0 Planner entries to *Day-Timer Organizer* Schedule.

1. In Lotus Organizer 2.0:

Choose **File...Export...**

From section = Planner

Export file = c:\dto21\files\planner.asc

(Note: The drive and directory may be different if you installed *Day-Timer Organizer* under Windows 95 or elsewhere. Be sure to remember where you put the .asc file.)

List files of type = ASCII Text (\*.TXT, \*.CSV)

2. Click on Mappings... then on Clear All.

Field mapping name = Planner

Map the following fields:

From date = Field 1

Description = Field 2

Click on Add save the field mappings.

Click on OK then OK again to export.

3. In *Day-Timer Organizer*:

Select **File...Import entries...** from the menu.

Select ASCII...

Select the file you created. c:\dto21\files\planner.asc

Set the Delimiter Type = Comma

Entry Type = Schedule

The Mapped Fields column should be close if not exactly matching the following:

Date

Text

Click on OK.

Lotus Organizer 2.0 Anniversary entries to *Day-Timer Organizer* Schedule

1. In Lotus Organizer 2.0:

Choose **File...Export**

From section = Anniversary

Export file = c:\dto21\files\ann.asc

(Note: The drive and directory may be different if you installed *Day-Timer Organizer* under Windows 95 or elsewhere. Be sure to remember where you put the .asc file.)

List files of type = ASCII Text (\*.TXT, \*.CSV)

2. Click on Mappings... then on Clear All.

Field mapping name = Ann

Map the following fields:

Start date = Field 1

Description = Field 2

Click on Add save the field mappings.

Click on OK then OK again to export.

3. In *Day-Timer Organizer*:

Select **File...Import entries...** from the menu.

Select ASCII...

Select the file you created. c:\dto21\files\ann.asc

Set the Delimiter Type = Comma

Entry Type = Schedule

The Mapped Fields column should be close if not exactly matching the following:

Date

Text

Click on **OK**.

## Importing from Lotus Organizer 2.1

These instructions will walk you through the process of exporting entries from Lotus Organizer 2.1 and then importing them into *Day-Timer Organizer*.

### Converting Lotus Organizer 2.1 Address entries to *Day-Timer Organizer* Address Book.

1. Open Lotus Organizer 2.1.
2. Select Export... from the File menu.

From section = Address

File name = c:\dto21\files\address.txt

(Note: The drive and directory may be different if you installed *Day-Timer Organizer* under Windows 95 or elsewhere. Be sure to remember where you put the .txt file.)

List files of type = ASCII Text (\*.txt)

3. Click on Mapping... to select the fields to export  
Click on Clear All to clear the current mappings.

The fields should be mapped in the following order:

First Name = Field 1

Last Name = Field 2

Title = Field 3

Job Title = Field 4

Business Company = Field 5

Business Street = Field 6

Business City = Field 7

Business State = Field 8

Business Zip = Field 9

Business Country = Field 10

Business Tel1 = Field 11

Business Ext = Field 12

Business Fax = Field 13

Business E-Mail = Field 14  
Business Tel2 = Field 15  
Business Notes = Field 16\*\*  
Home Street = Field 17  
Home City = Field 18  
Home State = Field 19  
Home Zip = Field 20  
Home Country = Field 21  
Home Tel1 = Field 22  
Home Tel2 = Field 23  
Home Fax = Field 24  
Home E-Mail = Field 25  
Home Unused 1 = Field 26  
Home Unused 2 = Field 27  
Home Notes = Field 16\*\*

These are optional fields that you can map and bring over to Day-Timer

Organizer:

Categories

Assistant

Spouse

Children

\*Categories field is equivalent to our Category field. If you wish to bring this over, make sure you have added all of the categories you have in Lotus Organizer 2.1 as Categories in *Day-Timer Organizer*.

\*\*You want to map both Business Notes and Home Notes to Field 16 to combine them.

Field mapping name = Address

Click on Add to save the mappings you have defined.

Click on OK to close the dialog box.

Now click on OK to export the entries.

4. Close Lotus Organizer 2.1 and open *Day-Timer Organizer*.

Select Import entries... from the File menu.

Select ASCII...

Select the file you created. c:\dto21\files\address.txt

Set the Delimiter Type = Comma + quote

Then click OK.

Entry Type = Address Book

5. Drag-n-drop with your mouse the field names under Unmapped Fields to the Mapped Fields column. The first entry of your import file is displayed to help you match the field names to your data.

The Mapped Fields column should be close if not exactly matching the following:

First Name

Last Name

Mr/Mrs

Title

Organization

Work - Address 1

Work - City

Work - State

Work - Zip

Work - Country

Office Phone

Office Extension

FAX

E-Mail Address 1

Mobile Phone

Text

Home - Address 1

Home - City

Home - State

Home - Zip

Home - Country

Home Phone

Other Phone 1



Other Phone 2  
E-Mail Address 2  
Custom Field 1  
Custom Field 2

These are optional fields that you can map and bring over to *Day-Timer Organizer*:

Category  
Custom Field 3  
Custom Field 4  
Custom Field 5

Click on **OK**.

### **Converting Lotus Organizer 2.1 Notepad entries to *Day-Timer Organizer* Notebook**

Follow the same steps as outlined above but with these changes.

1. In Lotus Organizer 2.1:

Choose **File...Export**

From section = Notepad

Export file = c:\dto21\files\notes.txt

(Note: The drive and directory may be different if you installed *Day-Timer Organizer* under Windows 95 or elsewhere. Be sure to remember where you put the .txt file.)

List files of type = ASCII Text (\*.txt)

2. Click on Mappings... then on Clear All.

Field mapping name = Notes

Map the following fields:

Title = Field 1

Notes = Field 2

Categories = Field 3 (optional)\*

\*Categories field is equivalent to our Category field. If you wish to bring this over, make sure you have added all of the Categories you have in Lotus Organizer 2.1 as Categories in *Day-Timer Organizer*.

Click on Add save the field mappings.

Click on OK then OK again to export.

(Note: You will need to drop the End Date when converting the date and time fields.)

3. In *Day-Timer Organizer*:

Select **File.. Import entries** from the menu.

Select ASCII...

Select the file you created. c:\dto21\files\notes.txt

Set the Delimiter Type = Comma + quote

Entry Type = Notes

The Mapped Fields column should be close to, if not exactly matching, the following:

Title

Text

Category\*

\*Only include Category if you included Categories in the export from Lotus Organizer 2.1.

Click on **OK**.

### **Converting Lotus Organizer 2.1 Calendar, To Do, Calls, Planner, and Anniversary entries to *Day-Timer Organizer* Schedule**

(Note: To convert the data from your Lotus Organizer 2.1 Calendar, To Do, Calls, Planner and Anniversary section you must use another piece of software to convert the dates and times into formats that *Day-Timer Organizer* will accept.)

For example:

Start date time = 1995-01-23 09:00:00 must be converted to 2 separate fields = 01/23/95 and 09:00.

All dates have to be in the format of mm/dd/yy with 2 digits each.

All times have to military and in the format of hh:mm.

Examples: 1995-01-03 12:40:00 convert to 01/03/95, 12:40

1995-12-08 08:00:00 convert to 12/08/95, 08:00

These changes can be done with a word processing package or a spreadsheet program using the Find and Replace options. The same process must be done for End date time, From Date, Start Date and any other date or time fields.

### **Converting Lotus Organizer 2.1 Calendar entries to *Day-Timer Organizer* Schedule.**

1. In Lotus Organizer 2.1:

Choose **File...Export...**

From section = Calendar

Export file = c:\dto21\files\cal.txt

(Note: The drive and directory may be different if you installed *Day-Timer Organizer* under Windows 95 or elsewhere. Be sure to remember where you put the .txt file.)

List files of type = ASCII Text (\*.txt)

2. Click on Mappings... then on Clear All.

Field mapping name = Calendar

Map the following fields:

Start date time = Field 1

End date time = Field 2

Description = Field 3

These are optional fields that you can map and bring over to *Day-Timer Organizer*:

Categories\*

Customer Code

\*Categories field is equivalent to our Category field. If you wish to bring this over, make sure you have added all of the Categories you have in Lotus Organizer 2.1 as Categories in *Day-Timer Organizer*.

Click on Add save the field mappings. Click on OK then OK again to export.

(Note: You will want to drop the End Date when converting the date and time fields.)

3. In *Day-Timer Organizer*:

Select **File...Import** entries... from the menu.

Select ASCII...

Select the file you created. c:\dto21\files\cal.txt

Set the Delimiter Type = Comma + quote

Entry Type = Schedule

The Mapped Fields column should be close if not exactly matching the following:

Date

Begin Time

End Time

Text

These are optional fields that you can map and bring over to *Day-Timer Organizer*:

Category

Custom Field 1

Click on **OK**.

### **Converting Lotus Organizer 2.1 To Do entries to *Day-Timer Organizer* Tasks.**

1. In Lotus Organizer 2.1:

Choose **File...Export...**

From section = To Do

Export file = c:\dto21\files\todo.txt

(Note: The drive and directory may be different if you installed *Day-Timer Organizer* under Windows 95 or elsewhere. Be sure to remember where you put the .txt file.)

List files of type = ASCII Text (\*.txt)

2. Click on Mappings... then on Clear All.

Field mapping name = Tasks

Map the following fields:

Due date = Field 1

Description = Field 2

Priority = Field 3

Completion date = Field 4

This is an optional field that you can map and bring over to *Day-Timer Organizer*:

Categories\*

\*Categories field is equivalent to our Category field. If you wish to bring this over, make sure you have added all of the Categories you have in Lotus Organizer 2.1 as Categories in *Day-Timer Organizer*.

Click on Add save the field mappings.

Click on OK then OK again to export.

3. In *Day-Timer Organizer*:

Select **File...Import** entries... from the menu.

Select ASCII...

Select the file you created. c:\dto21\files\todo.txt

Set the Delimiter Type = Comma + quote

Entry Type = Tasks

The Mapped Fields column should be close if not exactly matching the following:

Date

Text

Priority

Date Finished

Click on **OK**.

### **Converting Lotus Organizer 2.1 Calls entries to *Day-Timer Organizer* Phone Calls.**

1. In Lotus Organizer 2.1:

Choose **File...Export...**

From section = Calls

Export file = c:\dto21\files\calls.txt

(Note: The drive and directory may be different if you installed *Day-Timer Organizer* under Windows 95 or elsewhere. Be sure to remember where you put the .txt file.)

List files of type = ASCII Text (\*.txt)

2. Click on Mappings... then on Clear All.

Field mapping name = Calls

Map the following fields:

Start date time = Field 1

Description = Field 2

Telephone Number = Field 3

First Name = Field 4

Last Name = Field 4

Company = Field 4

Status = Field 5

Click on Add save the field mappings.

Click on OK then OK again to export.

3. In *Day-Timer Organizer*:

Select **File...Import entries...** from the menu.

Select ASCII...

Select the file you created. c:\dto21\files\calls.txt

Set the Delimiter Type = Comma + quote

Entry Type = Phone Log

The Mapped Fields column should be close if not exactly matching the following:

Date

Begin Time

Text

Phone

Name/Company

Status

Click on **OK**.

### **Converting Lotus Organizer 2.1 Planner entries to *Day-Timer Organizer* Schedule.**

1. In Lotus Organizer 2.1:

Choose **File...Export...**

From section = Planner

Export file = c:\dto21\files\planner.txt

(Note: The drive and directory may be different if you installed Day-Timer Organizer under Windows 95 or elsewhere. Be sure to remember where you put the .txt file.)

List files of type = ASCII Text (\*.txt)

2. Click on Mappings... then on Clear All.

Field mapping name = Planner

Map the following fields:

From date = Field 1

Description = Field 2

Click on Add save the field mappings.

Click on OK then OK again to export.

3. In *Day-Timer Organizer*:

Select **File...Import entries...** from the menu.

Select ASCII...

Select the file you created. c:\dto21\files\planner.txt

Set the Delimiter Type = Comma + quote

Entry Type = Schedule

The Mapped Fields column should be close if not exactly matching the following:

Date

Text

Click on **OK**.

### **Converting Lotus Organizer 2.1 Anniversary entries to *Day-Timer Organizer* Schedule**

1. In Lotus Organizer 2.1:

Choose **File...Export**

From section = Anniversary

Export file = c:\dto21\files\ann.txt

(Note: The drive and directory may be different if you installed *Day-Timer Organizer* under Windows 95 or elsewhere. Be sure to remember where you put the .txt file.)

List files of type = ASCII Text (\*.txt)

2. Click on Mappings... then on Clear All.

Field mapping name = Ann

Map the following fields:



Start date = Field 1

Description = Field 2

Click on Add save the field mappings.

Click on OK then OK again to export.

3. In *Day-Timer Organizer*:

Select **File...Import entries...** from the menu.

Select ASCII...

Select the file you created. c:\dto21\files\ann.txt

Set the Delimiter Type = Comma + quote

Entry Type = Schedule

The Mapped Fields column should be close if not exactly matching the following:

Date

Text

Click on **OK**.

# Backing Up Your Data

*Day-Timer Organizer* database files normally reside in directory `\dto21\files`.

Each database consists of 9-12 separate files. All files in a database begin with the same name, and should not be separated from each other. During installation, *Day-Timer Organizer* creates a single user database named **Main** or a multi-user databases named **Office**. You may have chosen a different name for your database.

To safeguard against data loss, you should back up regularly. Then in the event of a hard drive problem or data corruption in the database, you can restore to the previous database.

To backup your database, choose the **File...Backup Database** command. You will be prompted to specify a name for the backup file and a location. We recommend that you back up to another disk drive or a network drive. Once you have specified the name of the backup file, all of the database files will be compressed together into a single file that you can restore with the **File...Restore Database** command.

## Related Topics:

[Restoring Data from a Backup](#)

# Restoring Your Data from Backup

If your database is corrupted, you can restore from a previous backup by issuing the **File...Restore Database** command. You will be prompted for the name and location of the backup file. This restoration process will restore the entire database to its state just prior to issuing the backup command.

## Related Topics:

[Backing Up Your Data](#)

# Archiving and Deleting Data

*Day-Timer Organizer* database files are very economical in their use of space. In addition, users derive the most benefit from *Day-Timer Organizer* if ongoing files are maintained online so that they can be searched and reviewed as required. For these reasons, we do not recommend that you delete old data.

If hard disk storage is a concern, you can archive old data with the **File...Export Entries** command, using the **Archive** command from the sub-menu.

Archiving entries will not immediately create free space on your disk. It will remove entries from the *Day-Timer Organizer* database files, if requested, but the files will not be compressed. However when additional entries are created, they will be inserted in the freed space and no additional space will be used.

The Archive dialog box allows you to use [Search Options](#) to specify the range of data to be archived. In addition, you can simply archive by date:

- Click on **Modified Since** and specify a date; all data that has been created or updated since the specified date (e.g. the last archive date) will be archived.
- Click on **Dated Before** and specify a date; all data older than the specified date will be archived.

In addition, you can choose what to do with the archived data:

- **Export Entries but do not delete** - specified data will be archived but will remain in the *Day-Timer Organizer* database
- **Export and Delete Entries** - specified data will be archived and removed from the database
- **Delete Entries but do not export** - specified entries will be deleted only (not archived)

The **Export To** field specifies the file name for the archive file. You can use the **Browse** button to select a location or you can type the full path name (including disk drive) to specify the file for the archived entries. For example

A:MYFILE.ARC

would archive the data to the floppy drive. Alternately, specifying

C:\ARCHIVE\0797.ARC

would create a file on the C: hard drive.

## Related Topics:

[Creating an Export File](#)

# Working with Databases

In general, you do not need to have more than one single-user database (standalone systems) or one centralized multi-user database (networks).

Unless you change the default during installation or when creating a new database, *Day-Timer Organizer* files are stored in directory **\dto21** and its subdirectories (see below).

## **Related Topics:**

[How Files are Stored](#)

[Creating a New Database](#)

[Opening a Different Database](#)

[Changing the Database Name](#)

[Deleting a Database](#)

## How Files are Stored

By default, when you install *Day-Timer Organizer*, the program files are stored in the directory \DTO21 and its subdirectories. The database files are stored in \DTO21\FILES and should be backed up regularly. The subdirectory \DTO21\FILES may also contain export files (which end with **.exp**). These may be deleted when they are no longer needed.

### Figuring Out the Name of My Database

The name of the database you are working in is displayed in the middle of the status bar (the third item from the left).

Each *Day-Timer Organizer* database consists of several files, all of which begin with the database name. When you copy a database, be sure you copy all of the files

**Do not attempt to edit any of these files yourself. If you do, you may corrupt your database.**

---

## Creating a New Database

You can create a new database with the **File...New Database** command. The dialog box that appears will prompt you for a name and location for the database. You must choose a new name (one that has not been used before).

You must also specify whether the database is to be **Single User** or **Multi User**. The differences between single- and multi- user databases are described in [A Note on Saving Your Data](#).

You may choose to save the database in a different location. By default, the database will be stored in \ DTO21\FILES. Note that if you create a multi-user database, you will be considered the database manager.

## Opening a Different Database

If you have created multiple databases, you can switch to a new database by issuing the **File...Open Database** command. Once you have specified the correct drive and directory, your database name(s) will show in the large window at the left. Click on the name of the designated database so that it moves up to the smaller window on the left side. Click on the **OK** button to accept your choice.

**When you switch to a new database, any alarms that were set in the previous database are deactivated. You will not receive alarms for schedule events in a database that is not open.**

---



## Changing the Database Name

You can change the current database name by choosing the **File...Rename Database** command. Choose a name that is not already used in the list that is displayed. Only the supervisor or database manager can change the name of a multi-user database.

## Deleting a Database

To permanently delete the current database, choose the **File...Delete Database** command. Deleting a database removes all data and files associated with the database. Only the supervisor or database manager can delete a multi-user database.

# Rebuilding a Corrupted Database

If *Day-Timer Organizer* repeatedly displays a **Data Integrity Error**, proceed as follows:

1. Check your hardware to make sure it is running properly.
2. Use the utility specified by your network operating system or hard disk manufacturer to verify your hard disk. Alternately, you may choose to run CHKDSK or ScanDisk (described in your DOS manual), Norton Disk Doctor, or a similar program to diagnose and repair any disk errors. Bad sectors, lost allocation units, cross-linked files, and other similar errors can result in a database failing to rebuild.
3. Restore your database from a recent backup.
4. If you have no recent backup, rebuild the database following the instructions below.

For multi-user databases, you must be the supervisor to rebuild or restore the database.

## Before you Rebuild

1. Try to find and correct the cause of the corruption. Common causes include hardware problems, disk compression utilities, delayed write disk caches, and users who turn their computers off before a disk write operation is complete (or before a disk cache is flushed).
2. Check for sufficient free disk space. You should have free space equal to twice the size of the database you are rebuilding (half for the new database, and half for temporary files).
3. Verify that there is a **Files=60** (preferably more) statement in the **Config.sys** file in your root directory (see your DOS manual).

## How To Rebuild

Rebuilding a large database is time-consuming, and should be done overnight (over the weekend for a very large network database). When rebuilding a network database, use the fastest workstation available.

1. Select the **Rebuild** option from the **File** menu. To rebuild a shared network database, you must be logged in as Supervisor (see *Day-Timer Organizer Workgroup Guide*) and ensure that no users are using the databases. Users must not attempt to access the database during the rebuild process.
2. Choose **Recurring Entries** (if you are experiencing a problem with recurring or multi-day entries) or **Entire Database**.
3. Select the database you want to rebuild. The database name is displayed on the status bar at the bottom of the screen (third box from the left).
4. The rebuilt database will keep the original database name. Type a name for the backup copy of the corrupted database (delete this after successful rebuild).

## After you Rebuild

1. Retry the commands that made you decide to rebuild. If the problem persists, call **Technical**

**Support.**

2. Keep the backup database for a few days to be sure the rebuild was successful, then delete it.

**Rebuild May Not Recover:**

1. Assignee and Category descriptions, group membership settings, default search and default assignment settings.
2. Note positioning information.
3. New holidays that you have created yourself.
4. New entry default rights for all users.

# Common Technical Questions

In addition to the problems listed below, erratic and unpredictable *Day-Timer Organizer* behavior can be caused when a user attempts to edit program, database, system, or Windows initialization (.INI) files. **Do not attempt to edit these files yourself.**

**Problem:** You receive a **Too many open files** message.

**Cause:** The number of open files currently allowed by DOS on your system is too small. To expand this number, see **Files** command instructions in your DOS manual. Files should be set to 60 or more.

**Problem:** Your computer locks up with a **Black Padlock** on screen.

**Cause:** (1)You are waiting for a network resource locked by another user. On peer-to-peer networks such as LANtastic, this often indicates an insufficient number of available locks (see *Day-Timer Organizer Workgroup Guide*).

(2)Your database has become corrupted. You must restore or rebuild the database.

**Problem:** Dates you type are not accepted or are misinterpreted.

**Cause:** The **Date Format** is set improperly. Consult your system documentation for information about choosing between Month/Day and Day/Month formats for date input and display.

**Problem:** Entries seem to disappear.

**Cause:** (1)Current **Search Settings** have filtered out the missing entries. Click on the broom to clear all search settings. If necessary, reset **Default Search** to include all Assignees and Categories (for details, see Using Search Options). Another possibility for **Network Users** is that the owner of the missing entries did not grant rights to view them to other users (see Sharing Entries With Others).

(2)Your database index has become corrupted. You must restore or rebuild the database.

**Problem:** After importing entries into your database, you are unable to find them on any view screen.

**Cause:** Refer to "Entries seem to disappear", above.

**Problem:** Reports do not print, or print incorrectly.

**Cause:** Make sure your printer has been **Installed into Windows** (see your Windows manual). Your printer should be on, connected to your computer, and set to **OnLine**. Many printing problems are caused by faulty or outdated printer driver software - ask your printer manufacturer whether the driver for your printer has been updated. If printing to a network printer, make sure your printer selection is redirected to a network print queue.

**Problem:** You receive a *Day-Timer Organizer Data Integrity Error*.

**Cause:** You may have a data corruption problem. You can generally ignore these messages if they

occur only once and do not specifically instruct to rebuild your database. See [Rebuilding a Corrupted Database](#).

**Problem:** You are unable to dial phone numbers.

**Cause:** Check modem and com port settings (see [Telephone Settings](#)). An "**Invalid Comm.Drv**" message means a communications program designed for Windows 3.0 replaced Comm.drv with a driver incompatible with Windows 3.1. Ask your software supplier for an updated driver.

**Problem:** External e-mail does not function properly.

**Cause:** Make sure your third party E-Mail software supports either VIM or MAPI protocols. Your WIN.INI file should contain a **[MAIL]** section with the line **SMI=1** (if using VIM) or **MAPI=1** (if using MAPI). Make sure the E-Mail program directory is listed in the DOS path statement. In addition, you need to be sure that your workstation are time synchronized with the file server.

**Problem:** Non-English or special characters are not handled properly.

**Cause:** Refer to the **Character Map** section of your Microsoft Windows manual for instructions on using special characters.

# Technical Notes

Day-Timer Technologies has compiled a series of technical documents that address a variety of specific issues. These are available in several ways as described below.

At publication time, documents included technical notes about

- importing/exporting data from/to a variety of specific systems
- rebuilding a damaged database
- common technical problems.

You may find an answer to your questions in one of the technical notes.

By Fax

Through Online Services

On the Day-Timer Technologies Bulletin Board System

On the World Wide Web

## **Technical Notes By Fax**

In the U.S. and Canada, technical notes are available through a fax-back system, 24 hours per day. You can request a current index of documents available at any time. To use the fax-back system, dial the following number from any phone.

800 / 362-9927

and press 1 to access our 24-hour automated fax retrieval system. You will be prompted to specify the document number that you wish to receive. The index is document number 101.

You will also be asked to specify the phone number of the fax to which the technical note(s) should be sent.



# Technical Support

There are many ways to receive technical support for your *Day-Timer Organizer* software:

[Free Online Support](#)

[Free Email Support \(via the Internet\)](#)

[Day-Timer Technologies Bulletin Board System](#)

[By Phone](#)

[By Fax](#)

[Free Technical Information](#)

## **Technical Support By Fax**

You can fax your questions to Day-Timer Technologies' technical support group 24 hours per day at 415/572-9675. We will attempt to respond to all faxed questions by the next business day. In the UK, fax to 0800 966671; in Australia, 1800 124 520; in New Zealand, 0800 449 445; no additional country code required.

## **Technical Support Through Online Services**

Day-Timer Technologies maintains support forums on CompuServe and America Online. You can send your support questions to Day-Timer Technologies Technical Support or you can access the following information:

- Product and company information (brochures, feature lists, pricing, and availability)
- Press releases with information about new product features
- Maintenance upgrades for the latest versions of our products
- Technical support notes
- Frequently asked questions and answers

To access the Day-Timer Technologies support forum on CompuServe, from any prompt, type  
go daytimer

To access the Day-Timer Technologies support forum through America Online, use the keyword  
DAYTIMER

## **Technical Notes On the World Wide Web**

Technical notes and support are available on the World Wide Web at

<http://www.daytimer.com>

## **Technical Support by Email (via the Internet)**

Send Email requests for technical support to

[support@dtf.daytimer.com](mailto:support@dtf.daytimer.com)

We will attempt to respond via Email by the next business day.

## Technical Support On the Day-Timer Technologies Bulletin Board System

The Day-Timer Technologies Bulletin Board system (BBS) is available 24 hours per day. You can download

- the latest maintenance release of *Day-Timer Organizer*
- a single user trial version of *Day-Timer Organizer* which will work for 30 days
- printer drivers for select printers
- technical notes

To access the BBS, use any standard telecommunications package such as the Terminal program in Windows. You must use a standard Hayes compatible modem. Set the communication parameters to

- 8 bits
- No parity
- 1 stop bit

and dial

415 / 572-4728

When you first dial in to the BBS, you will be asked for your login name. If you have never called before, enter the login name

new

and a new account will be created for you. Once an account is set up, you can call in again to see if a newer release has become available.

## Technical Support By Phone

Dial 800-235-7355 (in the U.S. and Canada) for

- ◆ Free start-up help with **installation and initial setup questions**

**OR**

- ◆ to use our free automated support system (available 24 hours per day; touch tone phone required)

**For all other questions**, technical support is available at US\$2.00 per minute (charged to your credit card). Dial 800-235-7355 (U.S. and Canada) and follow the instructions. Note: You will only be billed for actual time spent talking with a technical support consultant.

The technical support phone center in California is staffed from 7 a.m. to 5 p.m. Pacific Standard Time. When you call, you should be at your computer and have the following information ready for our representative:

- ◆ Exact text of error messages (if any) that you encountered
- ◆ Make and model of computer system, monitor, graphics card, printer
- ◆ Operating system software version number
- ◆ *Day-Timer Organizer* version number
- ◆ Location of *Day-Timer Organizer* program and data files
- ◆ Names and version numbers of other software (if applicable)
- ◆ Amount of memory you have

## Using the Uninstall Icon



If you wish to remove *Day-Timer Organizer* from your system, you can click on the Uninstall icon in the *Day-Timer Organizer* program group. This process removes all of the program files from your hard disk.

**The uninstall procedure DOES NOT remove the data files that you have created in *Day-Timer Organizer*. This is a safety feature to prevent accidental loss of valuable data. Data files will only be removed at your explicit command and we strongly recommend that you back up the data files before deleting them.**

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## Removing Databases

To remove a database when you are certain that you will no longer need *Day-Timer Organizer*, you must use the Windows File Manager or DOS commands. The data files are stored by default in \DTO21\FILES as discussed in [How Files are Stored](#).

**Data files will only be removed at your explicit command and we strongly recommend that you back up data files before deleting them.**

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## Setting the Screen Font

The amount of data visible on the view windows depends upon the size of the screen font you select. To change the screen font, select **User Preferences** from the **Setup** menu, and scroll down the options list until the Screen Fonts graphic appears. Click on the button for the view of your choice, and select the font, style, and point size that's best for you.

## **The System Menu**

The System menu is a standard feature for Windows applications that allows you to close the application as well as resize and move the application's window. The Minimize command iconizes the application. The Maximize command enlarges the window to cover the entire screen. From this menu, you can switch to another application or to the Windows Program Manager.

# Tips and Shortcuts

[General](#)

[Schedule](#)

[Notes](#)

[Address Book](#)

[Phone Call](#)

[Internet](#)

[Email](#)

[Tasks](#)

## General Shortcuts

### Entering a weekday or follow-up date

As an alternative to selecting a date from the calendar button, you can enter it as a weekday. If a weekday is not preceded by this, next, or last, the next occurrence is used by default. Typing the single letter, t, n, or l is a faster way of indicating this, next, or last. Weekdays may also be represented by a single letter unless there may be ambiguity (Tuesday/Thursday and Saturday/Sunday), in which case two letters are needed.

Examples:

l w means last Wednesday

n tu means next Tuesday

t f means this Friday

This shortcut applies to the Event Date field in the Address Book section, the Due Date field of a Task, the Follow-up Date field of a Note or Schedule item, the Call Date field of a Phone Call, and the Date field in the Expense section.

### Entering dates as time intervals

You may enter a time block in any of the date fields as 'time remaining until its occurrence'. For example, 2w means: 2 weeks from the current date. To adjust an existing time block, type a time interval preceded by a Plus (+) or Minus (-) sign to indicate whether you are increasing or decreasing the present time block.

Examples:

+4d means 4 days from the current date

-3w means minus 3 weeks from the current date

2m means 2 months from the current date

(Where d represents day, w represents week, and m shows month.)

This shortcut applies to the Event Date field in the Address Book section, the Due Date field of a Task, the Follow-up Date field of a Note or Schedule item, the Call Date field of a Phone Call, and the Date field in the Expense section.

### Transferring information between views

If you have more than one view open at once, it's easy to transfer information between them simply by dragging an entry from one view over to the desired location in the other. For example, if you click on a contact name in your Address Book and drag it to the schedule section of the daily planner view, a new meeting will be created with that contact on the day and time you select.

### Adjusting a time block by a time interval

You may alter a time block by typing a time interval preceded by a Plus (+) or Minus (-) sign in the 'Begin and End Time' field in the Schedule pane.

Examples:

+20m means add 20 minutes to the existing time

-1h means subtract 1 hour from the existing time



## **Schedule Shortcuts and Tips**

### **Quickly schedule a meeting**

To quickly schedule a meeting in the daily planner view, click and hold on the desired start time, then drag the cursor to the desired end time and release. Enter the title of the meeting and it's done.

### **Rescheduling a meeting with Drag & Drop**

Click on a meeting, then hold the mouse button while you drag the event to the new desired time (in the daily planner view) or new desired date (in the monthly calendars to the right of the daily planner screen), then release the button. Fast Drag & Drop rescheduling also works in the weekly and monthly planner views.

### **Scheduling a meeting with someone in your address book**

Open both the Address Book and Daily Planner views and use the **Window...Tile** command to display them side by side, click on the desired address, and drag it to the desired time on the schedule pane (the meeting will be automatically linked to your address entry).

### **Set a Follow-up date for someone in your address book**

Either enter in the follow-up date on the Address book dialog box, or simply drag a contact from the Address List view onto any date on the monthly calendar to the right of the daily view, onto the To-Do section of the daily planner view, onto the weekly view, or onto the monthly planner view.

## **Notes Shortcuts and Tips**

### **Dialing a phone number stored in a Note**

To dial a phone number in the Notes field of any entry (schedule, task, address, expense, or message) or in the Notebook section proceed as follows:

- a) position the cursor at the start of the number
- b) hold down the button and highlight the number
- c) press the right mouse button and select Phone Dialer (Ctrl+P) from the menu
- d) click on the dial button; when prompted, pick up your handset.

### **Launching into a website stored in a Note**

To launch into a website address listed in the Notes field of any entry (schedule, task, address, or expense), or in the Notebook section do the following:

- a) position the cursor at the beginning of the website address
- b) highlight the address by holding down the button
- c) hold down the right mouse button and select Web Launcher from the menu.
- d) your Browser (Netscape Navigator or Microsoft Explorer) will automatically be launched to the highlighted website.

### **Launching into an Email address stored in a Note**

To launch into an Email address listed in the Notes field of any entry (schedule, task, address, or expense), or in the Notebook section do the following:

- a) position the cursor at the beginning of the Email address
- b) highlight the address by holding down the button
- c) hold down the right mouse button and select Send External Email from the menu.
- d) watch your Email package appear with a pre-addressed Email message ready to send!

## **Address Book Shortcuts and Tips**

### **Scheduling a meeting with someone in your address book**

Open both the Address Book and Daily Planner views, use the Window...Tile command to display them side by side, click on the desired address, and drag it to the desired time on the schedule pane (the meeting will be automatically linked to your address entry).

### **Fast launch into a contact's website**

To launch into the top website listed in the Email/Web tab of a contact in your Address Book, do the following:

- a) click on the contact of your choice
- b) click on the Web Launcher button displayed on the Menu
- c) your Browser (Netscape Navigator or Microsoft Explorer) will automatically be launched to that contact's website.

### **Fast access to a contact's Email**

To launch into the top Email listed in the Email/Web tab of a contact in your Address Book, click on the chosen contact click on the Email Launcher icon shown on the Menu Bar. Your Email system is now automatically launched and the message is pre-addressed with your contact's Email address.



## **Phone Call Shortcuts and Tips**

### **Dragging a contact to the Phone Dialer on the Menu Bar**

To dial a number listed in the Phone Number tab of any of your contacts in the Address Book section, do this:

- a) click on the desired contact from the Address List view on the Menu Bar
- b) click on the dial button on the Menu Bar
- c) highlight the correct number
- d) select dial
- e) when prompted, pick up your handset.

### **Dialing a phone number stored in a Note**

To dial a phone number in the Notes field of any entry (schedule, task, address, expense, or message) or in the Notebook section proceed as follows:

- a) position the cursor at the start of the number
- b) hold down the button and highlight the number
- c) press the right mouse button and select Phone Dialer (Ctrl+P) from the menu
- d) click on the dial button; when prompted, pick up your handset.

## **Internet Shortcuts and Tips**

### **Fast launch into a contact's website**

To launch into the top website listed in the Email/Web tab of a contact in your Address Book, do the following:

- a) click on the contact of your choice
- b) click on the Web Launcher button displayed on the Menu
- c) your Browser (Netscape Navigator or Microsoft Explorer) will automatically be launched to that contact's website.

### **Launching into a website stored in a Note**

To launch into a website address listed in the Notes field of any entry (schedule, task, address, or expense), or in the Notebook section do the following:

- a) position the cursor at the beginning of the website address
- b) highlight the address by holding down the button
- c) hold down the right mouse button and select Web Launcher from the menu.
- d) your Browser (Netscape Navigator or Microsoft Explorer) will automatically be launched to the highlighted website.

### **Inserting today's date and time in a note**

To add today's date or the time in the Notes field of any entry (schedule, task, address, expense, or message) or in the Notebook section proceed as follows:

- a) in the notes field, hold down the right mouse button
- b) highlight Insert
- c) select Insert Date, or Inside Time
- d) watch the date or time appear instantly!

## **Email Shortcuts and Tips**

### **Fast access to a contact's Email**

To launch into the top Email listed in the Email/Web tab of a contact in your Address Book, click on the chosen contact click on the Email Launcher icon shown on the Menu Bar. Your Email system is now automatically launched and the message is pre-addressed with your contact's Email address.

### **Launching into an Email address stored in a Note**

To launch into an Email address listed in the Notes field of any entry (schedule, task, address, or expense), or in the Notebook section do the following:

- a) position the cursor at the beginning of the Email address
- b) highlight the address by holding down the button
- c) hold down the right mouse button and select Send External Email from the menu.
- d) watch your Email package appear with a pre-addressed Email message ready to send!

### **Changing months on the monthly planner view**

Here are three ways to change the months on the monthly planner view:

- 1) Click on the monthly tabs at the bottom of the screen
- 2) Use the fast forward (and reverse) buttons at the bottom of the window to move by month or year, or
- 3) Use the scroll bar -- as you drag the scroll bar's thumb, Day-Timer Organizer will display the month corresponding to the thumb position.

### **Keeping track of Birthdays**

Enter in all your friends, co-workers and families' birthdays once, and Day-Timer Organizer will remind you of their birthday's each year. Click on the Add button from the Menu Bar and select Task. Set the task as a yearly recurring event, and give it a week advanced notice so that you remember to send a gift or card etc.

## **Task Shortcuts and Tips**

### **2 ways to reschedule a Task**

To reschedule a task from today to tomorrow, click on the task in the To-Do list and drag it to the Upcoming Events list in the daily planner view. To reschedule a To-Do to another date, Drag the Task to any date on the Monthly calendars on the side of the daily planner view.

# System Requirements

In order to use *Day-Timer Organizer*, you must have certain minimum hardware and software configurations as described below.

## Network

*Day-Timer Organizer for Workgroups* runs on Novell NetWare (Version 2.15 or later), IBM LAN Manager, Microsoft LAN Manager, LANtastic, NetWare Lite, Windows for Workgroups, other NetBIOS compatible networks as well as AppleTalk networks.

Note that instant messaging will not span network types (e.g. Novell to AppleTalk).

*Day-Timer Organizer for Workgroups* requires approximately 5 MB of disk space on a network drive for the program, help, and utility files.

If you have LANtastic, NetWare Lite, Windows for Workgroups, or any other peer-to-peer network, configure the network to allow at least:

- 17 open files per *Day-Timer Organizer for Workgroups* user
- 34 available locks per *Day-Timer Organizer for Workgroups* user (insufficient locks may penalize performance)

## Workstation (IBM-compatible)

- An IBM 386 or higher or 100% compatible computer
- Windows version 3.1 or higher running in enhanced mode
  - OR
  - Windows 95
    - OR
    - Windows NT version 3 or higher
      - OR
      - Windows for Workgroups version 3.1 or higher
- At least 4 megabytes of RAM memory
- A hard disk with 3 MB of available space
- A laser or inkjet printer supported by Windows if you plan to print calendars, address books, organizer pages, or other reports

## Workstation (Macintosh)

- At least a 68020 processor with 32-bit addressing enabled
- A color or gray-scale capable Macintosh
- System 7.0 or higher
- At least 2 megabytes of available RAM memory; 4-6 megabytes are recommended

- A laser or inkjet printer if you plan to print calendars, address books, organizer pages, or other reports

## **Capacity Limits**

Day-Timer Organizer's capacity limits are as follows:

- 240 categories plus 16 groups
- 500,000 entries per database
- 60,000 characters of text per entry

Network capacity limits are:

- 64 private names and 16 private groups per user
- 720 shared assignee or user names or resources and 48 shared groups
- 240 private categories and 16 private category groups per user
- 700 shared categories and 48 shared category groups

# The Tools Menu

The Tools menu provides a collection of features:

[Setting the Date from the Calendar](#)

[Dialing](#)

[Using the Speed Dialer](#)

[Caller ID](#)

[MailMerge](#)

[Speedup Text Search](#)

[Send External Email](#)

[Total Time and Expenses](#)

[Launch Applications](#)

## **Locking Error**

An error has occurred in accessing your data. Contact Day-Timer Technologies [Technical Support](#).



## **Rebuilding Recurring Entries**

This command allows you to rebuild the recurring entries in your database. This is useful if your regular meetings and events are no longer being correctly scheduled and you suspect that there are problems in your data files.

## **Adjusting the Column Displays in List Views**

In list views, you can adjust the columns that are displayed by clicking on the button in the top right corner. A list of undisplayed columns will be shown and you can select the column(s) to be added to the display.

## **Entering Passwords**

If a password has been set for your user login name or for the entire database, you will be prompted to enter the password when you attempt to login (and access the database).

## **Entering the Mail System Password**

If you send mail from within Day-Timer Organizer and the mail is to be routed through an external mail system, you may be required to specify the user name and password that authorize you to send mail through that system.

## **Error in ASCII File Conversion**

There has been an error in converting an ASCII file. Check at the line indicated to verify the problem and correct it.

## **Importing New Users During Data Import**

In the process of importing entries, an entry was detected that belonged to an unknown user. You can choose to create that user in the current database.

# New Features in Version 2.1

Version 2.1 of *Day-Timer Organizer* has many new features:

## Top New Features

- *Day-Timer Organizer* is now Internet-enabled! In the address book, you can now store Email or Web addresses. Then, with a single click, you can launch your Email package or Windows 95 Explorer/NetScape Navigator Web browser to either send mail to the specified Email address or to directly access the requested Web page. You can also directly access a Web page from an address typed as part of a note.
- Quick fill data entry: As you begin typing, *Day-Timer Organizer* will recognize what you are typing and fill in the rest of the word; if the match is incorrect, simply continue typing until a correct entry appears or you have typed the entire text. For example, if you are entering a company name and you begin typing **Day**, if you had previously used the company name **Day-Timers, Inc.**, that name will be filled in automatically for you.
- Easy name finder (address view): Now in addition to the quick letter tabs at the right, you can type the first few letters of a name in the **Find** field at the bottom of the view to quickly find a name in the address book.

## New Planner Features

- Multi-day events are more clearly displayed in monthly view, as banners across the appropriate range of days.
- At midnight, any open planner views will automatically advance to the next day unless the program actively being used or the calendar is already displaying a future date.
- The start and end times are now entered on a single dialog to simplify specifying time for schedule items.

## Enhanced Phone Calls and Logging

- When adding a **Phone Call**, you can set the call time to be in the future and click on the **Set Alarm** box. This is a convenient way to remind yourself of a call you must make at some later time, because you will then receive an alarm at the specified call time. The phone call is not a task or a scheduled item and therefore will not appear on the planner view.
- If you have a modem, you can auto-dial phone numbers directly from the **Phone Calls** tab.
- You can now specify extensions in the **Phone Calls** dialog box.

## Updated Printing Features

- Depending on whether you are printing home or work addresses from the address book, the output will be sorted by the zip code of the appropriate address. If printing both addresses, you can select which one prints first.

- **Printing Ranges:** You can request a range of addresses for your printout (e.g. E-J) or a range of names (e.g. Brown-Jones).
- **Printing Letter Headings on Address Pages:** You can now request that a letter heading be printed at the top of each page.
- **Expanded List Formatting:** You can now ask for a title on the first page as well as headers/footers for each page of list printouts. Text can be positioned to the left, centered, or to the right.
- **Expanded Planner Options:** Scheduled time will be printed shaded on your planner printouts. Multi-day events will now automatically be printed as banners on the monthly printout to better visualize multi-day commitments. You can now specify the time increments to be printed on daily planner pages (e.g. 1/2 hours, 15 minutes, etc.).
- Option to exclude the assignee name on the printout.
- You can now change the default position for address and return address to be printed on envelopes.

#### **New Notebook Feature**

- A new field at the top of the note entry template allows you to create a title for your note. The title of the note will be displayed in the list view for better organization.
- You can now sort the notebook alphabetically by note title, in addition to sorting by position or by due date.

#### **Other Updates and Highlights**

- When entering a new address, by default, the **Phone** tab will be displayed ; you may request that a different tab be displayed.
- Time tip of the Day: A popup box of tips, including shortcuts and examples. These tips are also displayed on our Web page.
- New icons have been added to provide more intuitive information on the list views. These icons display in the **Category** column, and if they are not visible, simply resize the column appropriately so that they are displayed.
- You can set your favorite programs to be icons within *Day-Timer Organizer* so that you can launch them with a single click.
- Extended name lengths: up to 20 characters for categories and assignees allow for more descriptive names.
- The new Easy Back Up option backs up and compresses databases for storage on diskette or in another file. Restore allows you to restore data from these backups quickly and easily.
- The on-line Help system has been greatly enhanced to answer your questions and help you find out more about *Day-Timer Organizer*.
- Based on user feedback, Day-Timer's software engineers have made numerous other updates to enhance the useability, speed and general friendliness of the *Day-Timer Organizer* interface.



## Internet Access (Email/Web)

When entering an address entry, from the address entry, click on the **Email/Web** tab to specify Internet addresses. You may then specify up to four addresses. *Day-Timer Organizer* detects whether the specified address is for Email or for the Web, and an icon will be displayed beside the address (a lightning bolt for email, a W for Web addresses).

### Running Email Directly

If you click on the lightning bolt, *Day-Timer Organizer* will launch your Email package and initiate a message, pre-addressed to the specified address. You can simply complete the message and send it.

### Accessing the Web

If you click on the **W** icon, *Day-Timer Organizer* will launch either the Windows 95 Explorer or NetScape Navigator and access the specified Web page.

### Launching the First Email/Web address from the Address List view

Even simpler, you can click on an address entry from the address list view and then click on the Web icon (**W**) on the button bar. The first entry on the **Email/Web** tab for that address will be launched (either into your Email package, or your Web browser).

### Related Topics:

[Accessing Web Addresses Embedded in Notes Text](#)

## Accessing Web Addresses from Note Text

If you have a Web address (URL) entered as part of the text of a note, you can launch that Web page automatically. To do that, first highlight the Web address and then click the right mouse button. From the popup menu, select **Launch Web Browser**, your Web browser will be launched and you will access the specified page.

# Setting the Delimiter For ASCII Transfers

When ASCII files are imported, the data in them can be delimited in three different ways:

- Comma + quotes
- Comma
- Tab

The delimiter type specifies how the text fields are to be separated (whether with a comma or a tab character) and whether or not the text fields should have quote marks around them.

## **Related Topics:**

[ASCII File Formats](#)

# Launching Other Applications from *Day-Timer Organizer*

You can launch other applications from within *Day-Timer Organizer*.

## Opening the Applications Launcher Toolbar

To open the applications launcher toolbar, choose the **Tools...Launch Applications** command. When you first open the toolbar, it will be empty except for a garbage can icon.

## Adding Applications to the Toolbar

To add an application icon to the toolbar, click on the control box in the upper left corner of the applications launcher toolbar. From the pull-down menu, select **Add Application(s)**. Then choose the application to be added by specifying the name and location of the program file. You can also choose the location of the program icon on the list by specifying the **Insert Before** field.

## Launching Applications

When an application is displayed on the toolbar, you can launch that application by simply clicking once on the program icon.

## Deleting Applications from the Toolbar

To delete an application icon from the toolbar, drag the icon to the trash.

## Displaying the Toolbar Vertically or Horizontally

You can change the toolbar from a horizontal bar to a vertical bar by clicking on the control box in the upper left corner of the toolbar and choosing **Orientation** from the pull-down menu. You can then choose whether the display should be vertical or horizontal.

## Merging Deluxe Databases

If you have purchased the Deluxe version of *Day-Timer Organizer*, you can merge one of the auxiliary databases into your main working database. The Merge command allows you to select the database to merge. The information will appear in your standard views, as though you had entered it in the usual way.

