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## What's New

### **September 05, 1997; Some of the new features in version 2.1 of all Organizers are:**

- New Search/Replace function;
- Improved Label printing (specify number of copies for one record);
- Improved Summary display;
- Integration with web browsers (Software, Hardware Organizers);

### **May 10, 1997; Some of the new features in version 2.0 of all Organizers are:**

- Resizable main window with self-adjusting data fields;
- Selectable Fonts for various elements of the main window;
- Selectable individual field widths in printed reports;
- Improved Label printing (color support, more options, preview rulers, support for European Avery labels);
- Templates for adding new records;
- Template for field names;
- Easier access to many options from Popup menus;
- Support for Year-Only date format;
- Auto-Fill combo boxes (automatically picks up list elements based on the first typed-in characters);
- New dialing function;
- Improved help system;
- Manual in the electronic file form;
- Some bug fixes and more

## Getting Started

The information in this manual applies to all our Organizers. Since you are reading this document we can assume that you have successfully installed our software on your system. As a result of the installation you should have a program group containing the Organizer icon. Double-click on this icon to start the program. After the main window is displayed you can immediately start entering new records, but first please read the following topics:

[Application Main Window](#)

[Options \(Preferences\)](#)

[Controls used in the Details Page](#)

[Adding New Records](#)

## Application Main Window

The main application window contains two basic elements: the **Table of Contents** and the **Details page**. Both of these elements contain your data, but each of them presents it in a different way. The left side of the window (Table Of Contents) lists several records and the right side (details page) displays the detailed information about a selected record. The main window also contains a **menu** from which you can select many functions e.g. *Search/Find*. Most of the menu functions are duplicated in the **Speed Bar** which is displayed at the bottom of the main window. The function buttons in the Speed Bar are divided into two sets (or pages) accessed by the clicking on the Standard and Advanced tabs. The main window is **resizable** and you can also change the widths of both left and right pages (TOC and Details Page) by dragging the little red-and-yellow handle at the bottom of the main window.

### Table of Contents:

- Can be configured to display any number of any data fields in any order (see: [Header](#));
- Consists of [Record Buttons](#) which display record data fields as selected in the Header;
- You can browse the TOC by clicking on *First*, *Page Up*, *Page Down*, and *Last* buttons;
- You select a record by clicking on the Record Button;
- Each Record Button has a popup menu (displayed with right-mouse click) which contains some useful functions.

### Details Page: Contains data fields for the currently selected record;

- Is divided into several parts which can be accessed by clicking on the Tabs labeled Part1, Part 2, (underneath the Details Page);
- Contains a small Speed Bar (at the bottom of the Details Page) with some functions that can be applied to the current record e.g. *Copy Record*, *Paste Record*, *Delete Record*, *Undo*, etc.
- Data fields displayed in the Details Page can be readily modified by typing in new information;
- The changes to the current record are saved automatically when you select another record, click on the *New* button, or *Exit* from the program;
- Use of a broad range of [controls](#), such as tab pages, combo boxes, calendars, calculators makes this application not only fun to use, but also increases your productivity and reduces time spent maintaining data.
- Each Detail Page has a [popup menu](#) (displayed with right-mouse click) which contains useful functions.

**Customization:** The program provides a wide range of customization functions. Before you start entering new records it is a good practice to play with some [options](#) of the program.

- It will allow you to set program options that are close to your individual preferences (colors, fonts, size, position, data field names..).
- Experience will speed up the future data entry process (record templates, copy/paste record, filter, sort, backup).

## Controls used in the Details Page and in some dialog boxes

Controls are used for both displaying and changing the data. Controls in the Details Page directly correspond to the database fields - changes in these controls are automatically reflected in the underlying database.

**Hint:** all controls have **Popup Menus** (accessed with the right-mouse click) containing many useful functions.

### The following control types are used in our software:

**Edit Boxes :** Edit Boxes are the most basic controls that accept text. Characters typed in can be alphanumeric (letters of alphabet and numbers); they also accept 'special characters' like: quotes, exclamation marks, percent signs, asterisks, etc. The edit controls have the following **Popup Menu** functions:

- *Undo* : undoes the last changes;
- *Cut* : deletes the selected text and copies it to the Clipboard;
- *Copy* : copies the selected text to the Clipboard;
- *Paste* : pastes text from the Clipboard;
- *Delete* : deletes the selected text;
- *Select All* : selects entire text;
- *Font* : allows you to select the font for all single-line edit controls;
- *Color* : allows you to select the text and background color for all single-line edit controls except numeric fields;

**Combo Boxes :** A Combo Box is a control that combines an edit box with a list, much like that of a list box. Users can either type text in the edit box or select an item from the list. The lists in the Combo Boxes can be edited in *Maintenance/Edit Lists* function or from the Popup Menu. The combo box controls have the following **Popup Menu** functions:

- *Undo* : undoes the last changes;
- *Cut* : deletes the selected text and copies it to the Clipboard;
- *Copy* : copies the selected text to the Clipboard;
- *Paste* : pastes text from the Clipboard;
- *Delete* : deletes the selected text;
- *Select All* : selects entire text;
- *Load* : loads the list from a text file;
- *Save* : saves the list in a text file;
- *Font* : allows you to select the font for all single-line edit controls;
- *Color* : allows you to select the text and background color for all single-line edit controls except numeric fields;
- *Edit List* : allows changing, deleting, and adding new list elements;
- *Auto-Fill* : if checked, can speed up data entry by automatically picking up list elements based on the first typed-in characters;

**Date Fields :** Date Field is a variation of an edit box that displays and accepts date values in different formats. Enter a date using numeric keys on the keyboard. Clicking on the '...' button of the Date Field, displays a small calendar, from which you can select a date. The date will be automatically entered as a text in the date field. Date formats can be set from the 'Options' function on the main menu or from the Popup Menu. The Date Fields have the following **Popup Menu** functions:

- *Undo* : undoes the last change;
- *Today* : enter the current system date;
- *Clear* : clears the field contents;
- *Font* : allows you to select the font for all single-line edit controls;

- *Color* : allows you to select the text and background color for all single-line edit controls except numeric fields;
- *Date Format* : allows you to choose one of the four date formats (MM/DD/YYYY, DD/MM/YYYY, YYYY/MM/DD, and YYYY).

**Numeric Fields** : Numeric Fields are variations of edit boxes, and accept numerical data only. Use numerical keys on the keyboard to manually enter data into the numeric field. Pressing on the '...' button of the numeric field displays a small keypad. Use keypad buttons to enter value in the field. Press the 'Checkmark' button to accept the entry, the 'Cancel' button aborts the data entry and closes the keypad. The Numeric Fields have the following **Popup Menu** functions:

- *Undo* : undoes the last changes;
- *Cut* : deletes the selected text and copies it to the Clipboard;
- *Copy* : copies the selected text to the Clipboard;
- *Paste* : pastes text from the Clipboard;
- *Delete* : deletes the selected text;
- *Select All* : selects entire text;
- *Font* : allows you to select the font for all Numeric Fields;
- *Color* : allows you to select the text and background color for all Numeric Fields;

**Attachment Fields** : These edit boxes allow you to attach external files to the records (Audio file, Video file, Word Processor file, Graphical file, Text file, ... ). Later you can start an associated application (Word Processor, Notepad, Movie Viewer, Sound Player,...) with a corresponding file. The Attachment edit box is disabled - you can not enter the name of the file manually. The attached file and the corresponding application has to be selected in the [Attachment dialog](#) box. Pressing on the '...' button of the edit box displays the dialog box. The Attachment Fields have the following **Popup Menu** functions:

- *Clear* : clears the contents of the field;
- *Set/Run* : allows you to edit the file link, change the associated application, or run the associated application;
- *Font* : allows you to select the font for all single-line edit controls;
- *Color* : allows you to select the text and background color for all single-line edit controls except numeric fields.

**E-Mail Edit Boxes** : These edit boxes are a special type of the Attachment Fields. They allow you to enter e-mail address and later start an e-mail application (Eudora, Pegasus Mail, Microsoft Explorer,...) with the contents of this field sent as a parameter. The e-mail application has to be selected in the Send E-Mail dialog box. Pressing on the '...' button of the edit box displays the [Send E-Mail](#) dialog box. E-Mail Edit Boxes have the same Popup Menus as regular edit controls with the addition of the *Send E-Mail* function.

**List Boxes** : List Boxes display a scrollable list of items that you can select but cannot directly modify. List Boxes are not used in the main window but are used in many dialog boxes.

**Phone Edit Boxes** : These are a special type of an edit control. When you click on the '...' button the Dial dialog box will be displayed. If your computer is equipped with a modem you can dial the number that is contained in the Phone Edit Box (or any other number). In order for the Dial function to work your modem COM Port and modem parameters must be selected in

- *Options/Modem*. Phone Edit Boxes have the same Popup Menu as regular edit boxes.

**Graphic Fields** : These data fields store graphical images. There are 2 types of Graphic

Fields: Large and Small. The Large Graphic Field allows storing any size images. It also has a Speed Bar with the function buttons at the bottom. The Small Graphic Field does not have the Speed Bar. Both types of Graphic Field have a **Popup Menu** with the following functions:

- *Clear* : clears the image;
- *Load* : loads the image from a disk file (BMP format only);
- *Save* : saves the image to a disk file (in a BMP format);
- *Zoom* : zooms in and out the image for better viewing (available only in Large Fields);
- *Screen Capture* : allows capturing a selected screen area into the field;
- *Copy* : copies the image to the Windows Clipboard;
- *Paste* : pastes the image from the Windows Clipboard into the field.

**Multi-line Edit Fields** : These fields allow entering multiple lines of text up to about 64KB in size. The fields' **Popup Menu** has the following functions:

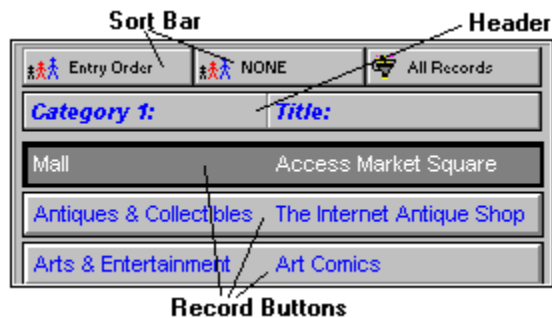
- *Undo* : undoes the last changes;
- *Cut* : deletes the selected text and copies it to the Clipboard;
- *Copy* : copies the selected text to the Clipboard;
- *Paste* : pastes text from the Clipboard;
- *Delete* : deletes the selected text;
- *Select All* : selects entire text;
- *Font* : allows you to select the font for all Multi-Line Edit Fields;
- *Color* : allows you to select the text and background color for all Multi-Line Edit Fields;

**Internet Address Edit Boxes** : These edit boxes allow you to enter World Wide Web Page Addresses. Pressing on the '...' button of the edit box sets your Web browser to activate the World Wide Web page address from the selected record. This function may be also invoked from the popup menu of the edit box. The WWW address can be captured automatically from your browser by selecting the *Get Address* command from popup menu of the edit box. Note: both *Send Address* and *Get Address* functions require that your Web browser is running.

Currently supported Web Browsers are:

- Netscape Navigator 4.0 and all older versions;
- Microsoft Internet Explorer 4.0 and all older versions;
- CompuServe Web browser;
- America Online Web Browser;
- NCSA Mosaic 2.0.

## Record Buttons



Record Buttons are displayed in the [Table Of Contents](#). In essence, record buttons give you a quick view of a certain number of records at once. The number of record buttons depends on the main window size (12 is the default number). This number can be changed by adjusting the size and type of fonts (right mouse click).

Record Buttons are controlled by the [Header](#) which determines which data fields are displayed, in which order, and how wide each field is. Multi-line edit fields and graphic fields cannot be displayed on record buttons.

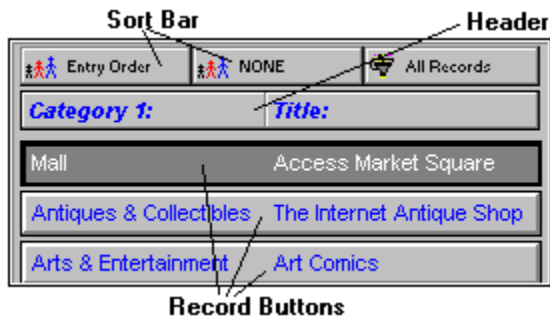
Clicking on a Record Button results in the selection of the record. [Details Page](#) for the selected record is displayed.

Record buttons have the following **Popup Menu** functions:

- *Quick View* : gives you a fast view of the selected record directly from the Record Button without having to actually make the record active;
- *View Copy Buffer* : Copy Buffer is temporary storage to which a record is being copied when using the Copy Record function; later you can Paste the record from the copy buffer;
- *Paste Record* : paste a record from the Copy Buffer;
- *Copy Record* : copy a record to the Copy Buffer;
- *Delete Record* : delete this record (cannot be undone);
- *Print Record* : print only this record;
- *Font* : allows you to select the font for the text displayed on the buttons;
- *Color* : allows you to select the text and background color for all record buttons;
- *Help* : displays information about record buttons;
- *Go To Web Page* : load the Web site from the record into the Web browser (available only in Internet Organizer); (only in Internet Organizer)
- *Capture Web Page* : capture the Web site from the Web browser into the record (available only in Internet Organizer); (only in Internet Organizer)



## Header



Header displays the Names of the data fields that are displayed underneath on [Record Buttons](#). Header controls which fields are displayed and in what order as well as the width of each field. The user can change the order by dragging and dropping the field names on the Header (left mouse click). The widths can be changed by dragging the dividing lines on the Header (left mouse click).

The Header **Popup Menu** (right mouse click) contains the following functions:

- *Insert Field* : inserts a data field into the Header (and Record Buttons);
- *Remove Field* : removes a data field from the Header (and Record Buttons);
- *Load From Template* : allows the user to quickly load a Header layout previously Saved;
- *Save As Template* : allows the user to save the current Header layout in a template for future use;
- *Delete Template* : removes the selected template from the list of header templates.

## Letter bar



### What is it?

The Letter bar is a shortcut to filtering records alphabetically. The records are filtered into separate letters according to the first letters of [Primary Sort Field](#) data. Letter Bar is displayed in the middle of the application window (you can also have it displayed at the right window edge - see: [Options](#)). The Letter Bar contains letter buttons (A-Z). The letters that are displayed in Red (default) color signal the presence of records. Black (default) color on the other hand marks 'empty letters'. The Yellow (default) color letter (also pushed down) marks the currently selected letter for which records are displayed. You can change the Letter Bar colors in Options/Colors. You can also disable Letter Bar in Options. **Note:** When the Primary Sort Field is not a text field (e.g. ENTRY ORDER or Date Field) the Letter Bar becomes inactive automatically.

### How to use it?

Press on a letter in the bar to see all the records which primary sort field starts with that letter of the alphabet.

**Hint** : learn how to use [Sort](#) the database if you want to use the Letter Bar.

## Adding New Records

To create a new data record manually:

- Press the *New* button on the 'Standard' section of the Speed Bar (positioned below the Table of Contents or below the Details Page), or select *File/New Record* from the application menu. A new record will be prepared for data entry, you will be positioned in the Details Page.
- Simply enter your data in the fields on the Details Page.
- The new record is saved automatically when you select another record , click on the *New* button, or *Exit* from the program.

**Note:** Some fields in the record may be 'required'. This means that they can NOT be left blank - you must put some data there.

**Note:** When the new record is saved, it is positioned automatically in the data according to your sort order.

**Hint :** Advanced users may want to take advantage of the Record Templates when creating new records.

You can also create a new record by using Paste Record function. This may be useful when you are entering similar records which differ only in some data fields. In this case do the following :

- Enter manually the first record;
- Use *Copy Record* to save it in a Copy Buffer;
- Press the *New* button;
- Use *Paste Record* function;
- Modify the data fields that are different;

**Note:** The new record is saved automatically when you select another record , click on the *New* button, or *Exit* from the program.

[Copy Record and Paste Record](#)

[Deleting records](#)

[Using Record Templates](#)

## Copy Record and Paste Record

Using the 'Copy and Paste' utility will help you create new records by duplicating existing records. To duplicate the selected record:

- Position yourself in the Table of Contents.
- Use the right mouse button to invoke the pop-up menu.
- From the pop-up menu select *Copy Record*.
- Click on an empty record in the Table of Contents (or *New* push button).
- Use the right-click on that empty record to invoke the pop-up menu again.
- Select 'Paste Record' from the pop-up menu.
- Result: an identical copy of the original record was created, and appended to the database.

**Note:** You can also Paste a record into the existing record.

[Adding New Records](#)

[Deleting records](#)

[Using Record Templates](#)

## Deleting records

Records of data can be permanently removed from the data file using the 'Delete' function. This function can be accessed from the Speed Bar at the bottom of the Details Page, from the Details Page Popup Menu, and from the Record Button Popup Menu.

### How to delete a record:

- Select the record you would like to delete.
- Press the 'Delete' button, or select the 'Delete' item from the Popup Menu.
- Type in 'Yes' in the confirmation dialog box. Pressing 'Cancel' will abort the deletion.

**Note:** the deletion process can not be undone! Pressing 'Cancel' aborts the deletion process. If you do not want the confirmation dialog box to be displayed before the deletion you can change set the Immediate Delete Option (see Options).

**Hint :** You can delete a range of records (see: [Maintenance](#) and [Filters](#)).

[Adding New Records](#)

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## Using Record Templates

Advanced users may want to take advantage of record templates which can speed up data entry. If you know that you will be entering a number of records having similar contents (e.g. some data fields are identical)

- Enter values that are the same.
- Save this record to a Record Template. You can do this by using the **Popup Menu** of either the [Details Page](#) or the Template Button (located at the top right corner of the Details Page). Select the *Save Record to Template* menu item. In the **Save Record As Template** window enter the template name, set options for date fields, and click on the OK push button.

You can use the saved Record Templates in the following way:

**1.** Select templates from the Details Page popup menu:

- Press the *New* button on the 'Standard' section of the Speed Bar (positioned below the Table of Contents or below the Details Page), or select *File/New Record* from the application menu.
- Click with right mouse button on the record details page.
- Highlight the *Replace Record with Template* item.
- Select record template.
- As a result, the record data fields will be initialized from the record template. This form is convenient for entering series of different records.

**2.** Set the *New* button as the template record:

- Click with the left mouse button on the Template Button.
- Select the record template from the displayed menu.
- The name of the selected Record Template will appear on the Template Button.
- As a result, every time you add a new record (by clicking on the *New* button or selecting shortcut) the record data fields will be initialized from the record template. When you exit the program and start again the *New* record function will be set to blank (all fields will be empty). This form is convenient for entering series of similar records.

[Adding New Records](#)

[Copy Record and Paste Record](#)

[Deleting records](#)

## Searching the database

### **What is Search?**

The 'Search' function helps you to locate the record(s) that contain the piece of data you are looking for. With this application, you are able to locate a piece of text in any field in the data file, with the capability of moving to the next record(s) filling your search criteria.

### **Where is the Search function?**

The Search function can be accessed from the *Search/Find* option on the main menu, and in the speed bar (Standard Section - *Find* button).

### **How to use the Search function?**

When in the 'Search' dialog:

- Select the field to be searched (notice the 'All fields' option!);
- Select the 'Start from' (beginning or end);
- Input the text to search for (note the previous entries);
- Press the 'Find' button to activate search.

### **What is the Result of a Search?**

The 'Search' function positions you in the first record that matches your search criteria. Use the 'Find next' button to go to next records that contain the text searched for.

### **What is the result of a search when the "Non-Stop Search Mode" option is marked ?**

The program goes through entire database looking for records that match search criteria. When the search is finished ONLY those records are displayed that contain the text. In order to return to All-Records-Display set the Filter Scope option to All Records (in the Filter dialog box), or select All Records in The Filter Button Popup Menu.

## Sorting the database

### What is sort?

To sort records means to change the order in which the records are displayed and printed. The underlying data structure of the file remains the same: only the way data is being displayed changes.

### Two kinds of sort

This application uses one-level and two-level sort, depending on the number of fields specified in the 'Sort by' option.

### One-level sort

One-level sort is sorting records by one field only. For example: Sort by 'Date' arranges records in ascending or descending order by the 'Date' field.

### Two-level sort

Two-level sort is sorting data records by two fields at the same time. One field becomes the Primary Sort Field, with another becoming the Secondary Sort Field. The result is records ordered by the primary sort field, and within that order by the secondary field.

For example: 'Last name' primary sort field, 'First name' secondary sort field:  
All the records will be arranged alphabetically by the 'Last name'. Within that, all the records with the same 'Last names' will be further arranged by the 'First name'.

### Where is the Sort function?

The 'Sort' function can be accessed from the 'Advanced/Sort' option on the main menu, and from the Speed Bar (advanced section), at the bottom of the screen. However, the fastest access to sort options is from the [Sort Bar](#) displayed at the top of the [Table Of Contents](#) (above Record Buttons).

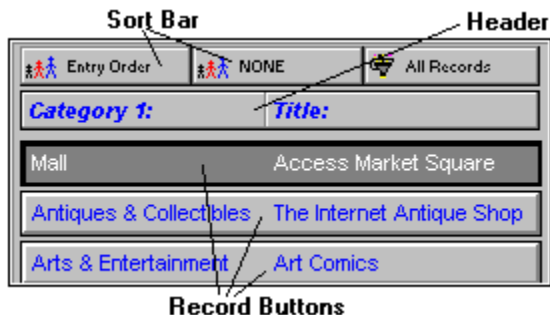
**Note:** Primary and secondary sort fields are also being displayed as buttons above the Table of Contents. Pressing on these buttons also activates the 'Sort' function.

**Hint:** The [Letter Tabs](#)(Letter Bar) remain disabled until you select a text field as the Primary Sort Field.

[Quick Access to Sort and Filter Functions - Sort Bar](#)



## Quick Access to Sort and Filter Functions - Sort Bar



The Sort Bar consists of the following 3 buttons:

**1. Primary Sort Field** (first button): displays the name of the data field used as a Primary Sort Field; if a Text Field is selected as a Primary Sort Field the Letter Bar is enabled and the records are automatically separated according to the first letter of the Primary Sort Field;

**2. Secondary Sort Field** (second button): displays the name of the data field used as a Secondary Sort Field; if the Primary Sort Field is ENTRY ORDER the Secondary Sort Field is disabled; if both Primary and Secondary Sort Fields are text fields they both must have the same Sort Direction (Ascending or Descending).

**3. Filter Button** (third button): displays the current Filter Status (see Filters for more information) :

- *All Records*: filter is not active and all records are displayed;
- *Normal Filter*: filter is active and records that satisfy the filter are displayed;
- *Reversed Filter*: filter is active and records that do not satisfy the filter are displayed;

Clicking on Primary or Secondary Sort Field with the left-mouse button displays the Sort Dialog Box where the user can change the sort options.

A faster way to change the sort options is to use Popup Menus of Sort Buttons.

- Click with right-mouse button on the Sort Button (Primary or Secondary sort button);
- Select Primary Sort Field;
- Select sort field;

Clicking on Filter Button displays the Filter dialog box where the user can create or modify a filter.

The Filter Button Popup Menu contains the following functions:

- *All Records*: deactivates the current filter (all records are displayed);
- *Normal Filter*: activates the Normal Filter option (see Filters);
- *Reversed Filter*: activates the Reversed Filter option (see Filters);
- *Load From Template*: allows the user to quickly load a previously Saved filter;
- *Save As Template*: allows the user to save the current filter in a template for future use;
- *Delete Template*: removes the selected template from the list of filter templates.

## Selecting a subset of all records - Filters

### What is filtering?

Filtering is a method of limiting the number of records displayed to a certain range. A filter specifies the criteria for the process. A filtering example: list me all the records with the value of the 'Date' field greater than '01/01/1992'.

### Kinds of filters.

A filter can specify a criterion for one or more fields in the record. The more criteria for the filter you specify, the better chance of obtaining the range of records that interest you.

### How to access the 'Filter' function?

The Filter function can be located in the *Filter* option on the *Advanced/Filter* option on the Main Menu, and in the Speed Bar (advanced section), at the bottom of the screen. However, the fastest access to filter options is from the [Sort Bar](#) displayed at the top of the Table Of Contents above Record Buttons.

### How to filter?

When in the **Set Filter window**:

1. Select fields to be used in the filter (the box on the right) from the fields list on the left.
2. A filter criteria for each field used in the filter can be specified using the *Edit* button below (see: [Setting a filter criterion for a data field](#)).
3. Use the 'Scope' selection to specify the filter kind:
  - All records: display all records (clear the filter results).
  - Normal filter: use the filter as is.
  - Reversed filter: reverse the action of the filter.
4. Press the *Apply* button to see the effects of your filter settings.

**The result:** Filtering results in a range of records that meet your criteria specified in the filter dialog box.

**Load filter:** Retrieve a previously saved filter from a filter template file.

**Save filter:** Save current filter in a filter template file.

**Note:** you can't set filters for multi-line edit boxes in the filter dialog box. You can use the [non stop search](#) function for this purpose.

**Hint:** you can also use Filters for selecting subsets of records for Printing.

## Setting a filter criterion for a data field

### What does it mean?

This function will allow you to edit filter settings that will apply to a data field.

### How to get there?

When in the [Set Filter](#) dialog box:

- Double click on a field listed in the *Fields Used in Filter* box.
- Highlight a field listed in the *Fields Used in Filter* box and click on the *Edit* push button.

### How to use it?

When in the 'Filter for:' dialog box:

- Select your criteria from the 'Is' list (<, <=, =, >=, >, Between, One Of).
- Type in a value or values corresponding to your criterion selection.

## Summary and Graphs

A summary of records in the database can give you some insight into distribution of your data. For example, a summary by a Category will tell you how many records there are in each Category. Displaying a Graph can make it easier to grasp the overall picture and uncover trends in your data.

### How to display a Summary:

- Click on Summary button on the Advanced Speed Bar (or select it from Advanced Menu).
- Now select the data field (from a drop down box) that you want the summary by.
- It may take some time before the summary is displayed.
- You can Sort your summary by Name or Value.
- You can display a summary by another field at any time.
- After a summary is displayed you can click on the Graph button to display a Graph Window.
- You may want to Define and Apply a [Filter](#) (see *Selecting a subset of all records - Filters*) before using the Summary function in order to select a subset of records.

**Graph Window:** You can display 3 types of Graphs (by clicking on *Chart* radio buttons):

- Bar Chart
- Pie Chart
- Line Chart

You can control some aspects of the graphs by selecting 3D, X Axis Labels, and Items Per Page options. When you are satisfied with the graph you can print it by clicking on the *Print* button.

## Using Multiple Databases

The **Load Database** dialog box provides functions that are useful for:

- **Creating** new databases.
- **Deleting** databases that are no more in use.
- **Modifying** names and descriptions of existing databases.
- **Loading** different databases to the program.

A database is a collection of data files permanently stored on a hard disk.

Your data can be spread across separate databases. For example:

- Records with similar topics can be stored in one database, using a topic name as a database name.
- You can create temporary database for records that are entered during one month/week period. When the time cycle ends and all new records are revised move them to the permanent database file. This is a very secure way of maintaining your data.
- Each member of your family/company can have separate data file.
- Is your computer slow? Do you need a fast access to a group of records? Keep those records in separate databases.
- On a multi-user systems you can created private and public databases.

### Database Functions:

- **Load** Database: This function loads a new database to be used by this application. Select a database name in the *Available Databases* list box. Click on the *Load* push button.
- **Edit** Database: This function will edit information about the currently selected database. You can modify database name and description.
- **New** Database: This function will create a new, empty database. Enter a name for the new database, and a short description. **Note:** the *disk file name* will be generated by the program and it refers to the data files stored on the disk in the C:/ORGANIZER/DATA directory (*filename.dbf*, *filename.dbt*, *filename.mdx*).
- **Delete** Database: This function will delete selected database. Select the database in the *Available Databases* list box. Click on the *Delete* push button.

**Note:** You can't delete a database that is in use.

[How to use Backup and Restore functions?  
Maintenance](#)

## Printing Functions

### How to get there?

You can Print the current record by clicking on the small *Print* button on the Details Page Tool Bar (underneath the Details Page). You can Print a range of records (all records or records selected by either a [Filter](#) or a [Non-Stop Search](#) operation) by clicking on the *Print* button on the Speed Bar or by selecting *File/Print* from the main menu.

### Printing Reports:

You can Print Reports by selecting one of the above Print functions and then selecting *Standard Report* in the subsequently displayed Window.

### Printing Labels:

You can Print Labels by selecting one of the above Print functions and then selecting Labels in the subsequently displayed Window.

**Hint:** You can print a subset of all records by setting a Filter first.

[Printing Reports](#)

[Printing Labels](#)

## Printing Reports

The Print Report window allows you to create reports, set various report options, preview reports on the screen, and finally print reports on the selected printer.

### How to create a Report?

In order to create a report do the following (in the Print Report window):

- Decide which Report Layout you want to use (see below: *Report Layout*). The default layout is Fields In Columns. If you want to use Fields In Rows layout go to Report Options page.
- On the Data **Fields page** select the data fields that you want to include in your report (highlight a field on the left-side list and click on the 'green arrow' button). If you selected Fields In Columns as Report Layout you can specify the widths of individual fields (highlight a field on the right-side list and enter the width value into the *Width* edit box).
- On the Report **Options page** select the report options. Make sure you select the *Report Layout* you want (Fields In Columns or Fields In Rows).
- Select Page Settings (*Margins, Page Size and Orientation*) on the next page.
- Select the *font type/size/color* for the report on the **Fonts page** (click on Change Font button).
- Define the report title and additional options on the **Report Title page**.
- After the report has been created you may want to test it by clicking on the *Preview* button. If you are not satisfied with the report adjust the report options and Preview it again.
- When you are satisfied with the report you can Print it on the Windows current printer by clicking on the *Print* button.
- If you think you may want to use this report in the future Save the report as a **Report Template** by clicking on the *Save* button. Later you can reuse the saved report by clicking on the *Load* button.

**Hint:** To change Pages in the Print Report window use *Previous* and *Next* buttons or click on the *Tabs: Fields, Options, Page, Fonts, Title*.

[Printing Functions](#)

[Printing Labels](#)

## Printing Labels

The Print Labels window allows you to create label reports, set various report options, preview reports on the screen, and finally print labels on the selected printer.

### How to create a Report?

In order to create a report do the following (in the Print Report window):

- On the Data **Fields page** select the data fields that you want to include in your report (highlight a field on the left-side list and click on the '*green arrow*' button). If you want to include next field in the same line then press on the '*plus*' button. '*Red single arrow*' button: remove selected field; '*Red double arrow*' button: remove all selected fields.
- Select **Page Settings** (*Margins, Units Of Measure, Page Size and Orientation*).
- On the **Label page** select either one of the predefined Avery labels or create a custom label type. Enter the *Number of Copies* : how many times each record has to be printed on the label sheet. Enter the *Print from Label* number: the starting position on the label sheet.
- Select the *font* and *starting position* for the label body text on the Label **Body page** (click on Change Font button to select a font).
- If you want some text to be identical on all labels define a header/footer on the Label **Header/Footer page**.
- Finally, if you want to include a graphic image on your labels select a BMP file and specify the image position on **Logo Settings page**.
- After the label report has been created you may want to test it by clicking on the *Preview* button. If you are not satisfied with the report adjust the report options and Preview it again.
- When you are satisfied with the report you can Print it on the Windows current printer by clicking on the *Print* button.
- If you think you may want to use this report in the future Save the report as a Report Template by clicking on the *Save* button. Later you can reuse the saved report by clicking on the *Load* button.

**Hint :** To change Pages in the Print Labels window use *Previous* and *Next* buttons or click on the *Tabs: Fields, Page, Labels, Body, Header/Footer, Logo*.

**Hint :** You can use Printing Labels function for creating more complex reports.

[Printing Functions](#)

[Printing Reports](#)



## Options (preferences)

### What does it do?

This application can be customized to suite your needs and preferences. For example:

- you can select fonts and colors for various elements of the user interface.
- you can show, hide some elements , or change their position.....

### How to find preferences?

User preferences can be accessed through the 'Options' function on the main menu at the top of the screen. Many options can be set faster from **Popup Menus** of various [controls](#). For example, when you click (with the right mouse button) on any Date edit box you can select a date format directly from that menu.

### How to set preferences?

Use pages in the 'Options' dialog box to customize the application, and set important system functions. All Options are grouped into the following pages (accessed through tabs):

- 1. User interface page** - general settings controlling some aspects of the user interface.
- 2. Modem page** - modem settings used by [Phone Edit](#) Boxes to dial phone numbers (may not be used by some Organizers).
- 3. Data page** - initial (startup) data file selection (usually you want it as *Load Last Used File*). Here you can also modify the data field labels (or names). This lets you use some data fields for other purposes than designed.
- 4. Date page** - on this page you can select Date Format for data edit boxes.
- 5. Colors page** - here you can modify colors for most elements of the main window.
- 6. Fonts page** - you can select Fonts for groups of controls, e.g. single-line edit boxes, multi-line edit boxes, etc.
- 7. Security page** - if you want to restrict access to your database set the Password option to Password Required. In general, you should not modify the Data Root Directory setting. You may want to do this in some situations but make sure you know what you are doing (read Advanced Topics first). Access Rights settings can only be modified if you select a Multi-User System option on the Users page.
- 8. Users page** - if you select Multi-User System you can create, modify, and delete user accounts. See Multi-User System section for more information.

- 1. User interface page** - general settings controlling some aspects of the user interface.
  - Menus and Speed Bars (Read also: [Menus, Speed Bars](#)).
    - Show Both Menus and Speed Bars.
    - Show Only Menus.
    - Show Only Speed Bars.
  - Letter Tabs (A..Z) (Read also: [Letter Tabs](#)).
    - Use Letter Tabs.
    - Don't Use Letter Tabs.
  - Hint Messages (Hints are one line messages displayed close to the mouse pointer).
    - Show Hint Messages.
    - Hide Hint Messages.
  - Record Delete Mode.
    - Ask User to Confirm.
    - Immediate Delete.

- Letter Tabs Location (Read also: [Letter Tabs](#)).
  - Center.
  - Right.
- Speed Bar Location (Read also: [Speed Bars](#)).
  - Top.
  - Bottom.
- Miscellaneous Options.
  - Display Tips On Startup.
  - Auto-Fill (set the auto-fill option for combo boxes) (Read also: [Combo Boxes](#)).
  - Don't display reminders (data backup reminders, data maintenance functions) (Read also: [Data Maintenance](#)).

**2. Modem page** - modem settings used by [Phone Edit](#) Boxes to dial phone numbers (may not be used by some Organizers).

- Com Port (select your modem comport)
- Dial Type
- Modem (select modem type from the list, or select *Custom Type* if modem settings have to be entered manually).
- Modem Configuration List String (if the modem not listed then enter value from the modem manual).
- Modem Initialization String (if the modem not listed then enter value from the modem manual).
- Modem Hangup String (if the modem not listed then enter value from the modem manual).

**3. Data page** - initial (startup) data file selection (usually you want it as *Load Last Used File*). Here you can also modify the data field labels (or names). This lets you use some data fields for other purposes than designed.

- Initial Data File.
  - *Load Default File* (when you install the program and start the first time the **data.dbf** file is created: this is the default file).
  - *Load Last Used File* (you can have any number of data files; when this option is set the data file from the last session will be loaded at program startup).
- Modify Labels (Labels that are listed above all data entry fields are only our suggestion, you can change them here).
  - Select the label that you want to modify in the *Labels* box.
  - Enter new value in the *New Label* edit box.
  - Click on the *Change* push button.
  - *Save* push button: saves current label settings to a template.
  - *Load* push button: loads labels from previously created templates.

**Note:** You can also change labels directly in the record details window. Left-mouse click on any label will display the label popup menu.

**4. Date Formats page** - on this page you can select Date Format for data edit boxes.

- *Date Fields* (select date field).
- *Date Format* (set the date format).

**Note:** Date Format can be automatically set in the Record Details Window. Left mouse-click on any date field will display the popup menu.

**5. Colors page** - here you can modify colors for most elements of the main window.

- *Applications Elements* box (select application element here).
- *Colors* box (click on the new color here).
- *Save* push button: saves current color settings to a template.
- *Load* push button: loads color settings from previously created templates.

**Note:** Color can be automatically set in the program Main Window. Left-mouse click on: [record button](#), [single-line edit](#) box, or [multi-line edit](#) box will display a popup menu with access to the Set Color function.

**6. Fonts page** - you can select Fonts for groups of controls, e.g. single-line edit boxes, multi-line edit boxes, etc.

- Component (select the control element here).
- Change Font push button (displays the Windows standard Font dialog box, select the font type and size here).

**Note:** Font type/size can be automatically set in the program [Main Window](#). Left mouse-click on: [record button](#), [single-line edit](#) box, or [multi-line edit](#) box will display a popup menu with access to the Set Font function.

**7. Security page** - if you want to restrict access to your database set the Password option to [Password](#) Required. In general, you should not modify the Data Root Directory setting. You may want to do this in some situations but make sure you know what you are doing (read Advanced Topics first). Access Rights settings can only be modified if you select a Multi-User System option on the Users page.

- Password.
- Public Files Access Rights (All Users).
- Data Root Directory.

**8. Users page** - if you select Multi-User System you can create, modify, and delete user accounts. See [Multi-User System](#) section for more information.

# Password

## Why set password?

Setting a password on this application is a measure of security. When you protect your application with a password, only those who know the password will be able to access your data.

## Where to find password functions?

The 'Password' function can be found in the 'Advanced|Password' option on the main menu, as well as in the advanced section of the speed bar at the bottom of the screen.

## How to set/modify password?

When in the 'Password Dialog':

- Enter your old password into the field provided, press *OK* to continue. This serves to verify that you are authorized to change the password.
- Enter the new password in the second dialog box, press *OK* to continue.
- Verify the new password by typing it in again, press *OK* to complete the 'Set/modify password' process pressing *Cancel* at any time aborts the process.

**The result:** The new password is effective immediately after you have set or changed it. Use your new password next time you start this application.

**Important:** In order to activate the Password system select Password Required in [Options/Security](#). In a [multi-user system](#) only the Supervisor can access Options/Security settings.

## Export

You can export records (all or only those selected by a Filter) to:

[Text File](#)

[DBF File](#)

[Netscape Bookmark File](#) (only Internet Organizer)

[Microsoft Internet Explorer Favorites](#) (only Internet Organizer)

**Note:** The only Export function that preserves all information is Export To DBF File (when you export to other file types graphic and multi-line text fields are not exported).

**Hint :** You can export a subset of all records by setting a [Filter](#) first.

## Export To A Text File

### What is exporting data to a text file?

This operation will move all or selected records to a text file. The text file will list all exported records in the following way:

- Each record will be listed in one line.
- Data fields will be separated from each other by: tabs, commas or another user defined character.
- Data fields will be optionally delimited by: commas, quotes or another user defined character.

### How to find Export?

The 'Export' function can be accessed in two ways:

- from the *Advanced* section on the speed bar: the *Export* button;
- from the *Advanced* section on the main menu: the *Export* option.

Then select *Export To Text File* radio button (it is a default option) and click on *OK*.

### How to use Export?

When in the 'Export Options' screen:

- select the '*Fields separated by*' option and '*Fields delimited by*' option
- the left list box contains *all the fields* that build the application data file;
- the list box on the right side contains fields that make a structure of the text file that is the export destination (to which the data will be exported from the application);
- select field(s) from the *All fields* list box, and use the button with one green arrow to add selected field(s) to fields included in export ;
- use the button with green arrows to include all the fields to export;
- select field(s) from the *Fields included*, and use the button with one red arrow to exclude selected field(s) from the export;
- use the button with red arrows to exclude all the fields from the export;
- when the structure of the destination data file is complete, press *OK* to continue the data export (*Cancel* will abort the export process);
- select the export destination file in the *Enter/Select Export File Name* dialog box and press *OK* to continue (*Cancel* will abort the export process).

**The result:** A text file containing exported records (one record per line).

## Export To DBF File

You can export all or a subset of records from a current database to a DBF file. This is useful when you want to transfer records to another database file. The data is always exported to a file in the EXPIMP directory under the current user data directory. For example, if your data directory is C:\ORGANIZER\DATA then your export directory is C:\ORGANIZER\DATA\EXPIMP. This directory is automatically created if it does not exist. This makes it easier to locate your import/export files, especially on a multi-user system. It also restricts access of one user to DBF files owned by other users. After you export data to a DBF file you can then import it (most likely after Loading another database) back using [the Import From DBF](#) File function.

### How to find Export?

The Export function can be accessed in two ways:

- from the *Advanced* section on the speed bar: the *Export* button;
- from the *Advanced* section on the main menu: the *Export* option.

Then select *Export To DBF File* radio button and click on *OK*. You will then be asked for the export target file name.

**Note:** All fields are exported for each record.

**Note:** Each database consists of three files: dataname.dbf, dataname.dbt, dataname.mdx. Those three files you can find in the EXPIMP subdirectory.

## Export To Netscape Bookmark File

This function is available only in our **Internet Organizer**. You can export all or a subset of records from a current database to a Netscape Bookmark file. This is useful when you sometimes use Netscape Bookmarks. The data can be exported to a file in any directory. Fields exported are: Title, Address and optionally Description.

### How to find Export?

The Export function can be accessed in two ways:

- from the *Advanced* section on the speed bar: the *Export* button;
- from the *Advanced* section on the main menu: the *Export* option.

Then select *Export To Netscape Bookmark File* radio button and click on *OK*. You will be asked if you want to include the contents of the Description field in a bookmark file. Then you will have to select name (and directory) for your bookmark file.

**Note:** You may want to set a Filter before using the Export function (if you want to export only some records).



## Export To Microsoft Internet Explorer Favorites

This function is available only in our **Internet Organizer**. You can export all or a subset of records from a current database to a Microsoft Internet Explorer Favorites. Fields exported are: Title, Address and optionally Category.

### How to find Export?

The Export function can be accessed in two ways:

- from the *Advanced* section on the speed bar: the *Export* button;
- from the *Advanced* section on the main menu: the *Export* option.

Then select *Export To Netscape Bookmark File* radio button and click on *OK*. You will be asked if you want to include the contents of the Description field in a bookmark file. Then you will have to select name (and directory) for your bookmark file.

## Import

You can import records from:

[Text File](#)

[DBF File](#)

[Netscape Bookmark File](#) (only Internet Organizer)

[Microsoft Internet Explorer Favorites](#) (only Internet Organizer)

**Hint :** You can import record to the currently opened database. New records will be appended (merge).

## Import From Text File

### What is importing data?

Importing data is another option of adding records to this application. You can import data from text files that have the following characteristics:

- fields have to be separated from each other by: tabs, commas or another user defined character;
- fields can be delimited by: quotes or another user defined character;
- each line corresponds to one record in the database.

### How to find Import?

The Import function can be accessed in two ways:

- from the *Advanced* section on the speed bar: the *Import* button;
- from the *Advanced* section on the main menu: the *Import* option.

Then select *Import From Text File* radio button (it is a default option) and click on *OK*.

### How to use Import?

When in the **Import Options** screen:

- select the *Fields separated by* option and *Fields delimited by* options;
- the left list box contains all the fields that build the application data file;
- the list box on the right side contains fields that make a structure of the text file that is the import source (from which the data will be imported into the application);
- select field(s) from the right list box, and use the button with one green arrow to add selected field(s) to the import source;
- use the button with green arrows to add all the fields to the import source;
- select field(s) from the import source, and use the button with one red arrow to remove selected field(s) from the import source;
- use the button with red arrows to remove all the fields from the import source;
- when the structure of the source data file is complete, press *OK* to continue the data import (*Cancel* will abort the import process); make sure the data fields selected for the Import are in the same order as in the import source file;
- select the import source file in the *Enter/Select Import File Name* dialog box and press *OK* to continue (*Cancel* will abort the import process).

**The result:** The imported records are merged into the current database.

## Import From DBF File

You can import records from a DBF file previously created by an [Export To DBF File](#) function. You can only select a file for import from a EXPIMP directory under the current user data directory. For example, if your data directory is C:\ORGANIZER\DATA then your import directory is C:\ORGANIZER\DATA\EXPIMP. This directory is automatically created by Export To DBF File function. This makes it easier to locate your import/export files, especially on a multi-user system. It also restricts access of one user to DBF files owned by other users.

### How to find Import?

The Import function can be accessed in two ways:

- from the *Advanced* section on the speed bar: the *Import* button;
- from the *Advanced* section on the main menu: the *Import* option.

Then select *Import From DBF File* radio button and click on *OK*. You will then be asked for the import source file name. You should not try to import from DBF files that were not created by this program unless you are absolutely sure that the import source file has identical structure as that used by Organizer.

## Import From Netscape Bookmark File

This function lets you import data from a Netscape Bookmark file into a current database (only **Internet Organizer**). This is especially useful when you have many Netscape Bookmarks that you want to transfer to Internet Organizer. Fields imported are: Title, Address, Description and optionally Category (from Bookmark Folders).

### How to find Import?

The 'Import' function can be accessed in two ways:

- from the *Advanced* section on the Speed Bar: the *Import* button;
- from the *Advanced* section on the main menu: the *Import* option.

Then select *Import From Netscape Bookmark File* radio button and click on *OK*. You will be asked to specify some options for the import function. Then you will have to select a name (and directory) of the source bookmark file.

## Import From Microsoft Internet Explorer Favorites

This function lets you import data from a Microsoft Internet Explorer Favorites into the current database (only **Internet Organizer**). This is especially useful when you have many MS IE Favorites that you want to transfer to Internet Organizer. Fields imported are: Title, Address, and optionally Category.

### How to find Import?

The Import function can be accessed in two ways:

- from the *Advanced* section on the Speed Bar: the *Import* button;
- from the *Advanced* section on the main menu: the *Import* option.

Then select *Import From MS Internet Explorer Favorites* radio button and click on *OK*. You will be asked to specify some options for the import function.

## Maintenance

Maintenance encompasses various data file utilities. Their purpose is to **repair** damaged files, **backup** and **restore** data, **erase** all data and **edit lists** of choices in user-defined fields. The following functions are included in the Maintenance window:

- **Reindex database:** this option repairs indexes on your database. It is mainly used when troubleshooting your application, in case your data files become corrupt. It is recommended that you use this function *once a month*.
- **Delete database indexes:** this function is useful when the MDX files become very large overtime.
- **Pack database :** When deleting records from your data files, they are not physically erased. Use the *Pack database* function periodically to reclaim disk space after deleting records.
- **Delete all records :** this function removes all records from your database. Use it with extreme caution - *it cannot be undone*.
- **Delete selected records:** this function can be used to permanently remove a group of records from the database. You select the records to be deleted by setting a [Filter](#) first.
- **Repair data file :** This function will repair a damaged data file. Sometimes your memo or graphic fields (those containing images or binary data) get corrupted, which results in error messages. Use this function to correct this problem. Typically one record (sometimes several records) may be lost. This problem is usually caused by a system crash when Organizer is open or by not closing Organizer before shutting down the system.
- **Backup data :** **it is very important that you back up your database.** If the database becomes corrupted as a result of a system crash Restoring database from a previous backup may be your only chance to recover your data (*Repair data file* function not always works). For more information on Backup function see [the next section](#).
- **Restore data :** you need to use this function only if something went wrong (e.g. your database became corrupted) and you have backed up your database. For more information on *Restore* function see [the next section](#).
- **Edit lists :** this function can be used to edit lists accessible through [combo boxes](#) in the [Details Page](#). It is easier to access this function from combo box **Popup Menus**.

## How to use Backup and Restore functions?

### **It is important to back up your data!**

It is recommended that you back up your data on a regular basis e.g. once a week or once a month. You should especially do a backup after entering new records. When you do a Backup the following data files are copied to DATA\BACKUP directory:

- DATA.DBF and DATA.DBT (this is assuming that you have Loaded DATA.DBF file) (those files contain all your records)
- as well as some LISTx.DBF, LISTx.MDX, (those files contain elements from combo boxes)

DATA directory is located underneath your main program directory. Once you do a backup to your DATA\BACKUP directory you should compress the above files (e.g. using PKZip or WinZip program and copy the compressed file to some backup media e.g. a diskette or a backup tape). You can also use backup software to do it (for example, **Microsoft Backup** included in **Windows 95**. Open: Programs/Accessories/System Tools/ Backup ).

If you have backed up your data, it can be Restored from the backup directory into your data directory. If you compressed your backup files and copied them to a diskette (or some other backup media) you have to decompress it into BACKUP subdirectory (see above) before you can use Restore function.



## Shortcut keys

### What does it do?

Shortcut key sequences provide fast function access through combinations of keystrokes.

Shortcut key list:

- Ctrl+Alt+'A'..'Z' - Letter Tab
- Ctrl+Home - First
- Ctrl+PgUp - Page Up
- Ctrl+End - Last
- Ctrl+PgDn - Page Down
- Alt+'1'..'4' - Part 1..4
- Alt+'W' - Capture Web Page
- Alt+'G' - Go To Web Page
- Alt+'Y' - Synchronize
- Alt+'C' - Copy Record
- Alt+'T' - Paste Record
- Alt+'P' - Print Record
- Alt+'U' - Undo Changes To Record
- Alt+'Delete' - Delete record
- Alt+'PgUp' - Previous Page
- Alt+'PgDn' - Next Page
- Ctrl+'P' - Print Report/Labels
- Ctrl+'O' - Display Options
- Ctrl+'N' - New Record
- Ctrl+'F' - Find
- F2 - Options Menu
- F3 - Table Of Contents Record Button Menu
- F4 - Detail Page Menu
- F5 - Header Menu
- F6 - Primary Sort Menu
- F7 - Secondary Sort Menu
- F8 - Filter Menu

## Frequently asked questions and useful hints.

### 1. Where can I find the PrimaSoft's programs?

#### 1) Internet

To find our products on the Internet:

- Connect with our Home Page : <http://www.primasoft.com>

#### 2) CompuServe

To find our products on CompuServe:

- Go WINPROD and do search by contributor id:74643,2635; or
- Go WINSHARE and do search by contributor id:74643,2635;

#### 3) [Contact us](#).

### 2. How can I learn about new versions of your software?

You should visit one of our home pages on a regular basis. Our home page is the first place where new releases of our software are announced.

### 3. How to use backup and restore functions?

See [How to use Backup and Restore functions](#) section for a detailed description (or [Maintenance](#)).

### 4. Why are my DBF, DBT and MDX files so big?

MDX files store your database indexes and can grow substantially overtime if you have used many different orderings and filters. You can trim the MDX file by using Delete Indexes function in [Maintenance](#).

DBF files contain the main portion of your data. After a long-time usage many deleted records can accumulate. The deleted records are not displayed but they occupy your disk space. You can remove those deleted records by using *Pack Database* function in [Maintenance](#).

DBT files store both Multi-line text and graphics and they can take a lot of space (especially graphics). DBT files should be much smaller if you use 16 color graphic images as opposed to 256 or more. Still when you think your DBT file is too large you can try *Repair Data File* function in [Maintenance](#) (or Backup followed by Restore). DBT files can become corrupted in some rare situations, and you should use Repair Data File function in such circumstances.

### 5. I switched to multi-user system and I can not return to single-user system.

#### What should I do?

Enter "**Supervisor**" as User Id in the *Login screen* and leave the *Password* field blank (if you did not set a password for the Supervisor). Then, change the [Options](#) to Single-User system.

### 6. Use the right mouse button!

You can conveniently access many options and functions by clicking with the **right mouse button** on different elements of the main window. For example, right-click on a graphic control and you will see a Popup Menu with functions such as: Clear, Load, Save, Copy, Paste, Screen Capture, and Help.

### 7. Learn how to use filters!

[Filters](#) can be very useful in selecting a subset of all records both for viewing and printing. For example, if you are only interested in records with NAME data field beginning with letters C-F just set the filter for the NAME field with filter expression 'BETWEEN C and F'.

### **8. What is Non-Stop search?**

In the [Find](#) window (after you click on the Search button) there is a useful Non-Stop Search option. You can use it to Find all records meeting your search criteria in one pass. It works very much like a filter - you can use the result of a Non-Stop Search for both viewing and printing.

### **9. Why Letter Tabs are not working?**

The [Letter Tabs](#) are not active in one of two situations: they are disabled in [Options](#) or no Primary Sort Field has been selected. The Letter Tabs only make sense when your database is sorted alphabetically. For more information see [sort](#).

### **10. How many records are there in my database?**

To answer this question you have to disable the [Letter Tabs](#) in the [Options](#) windows. Then Click on Last button in the left panel (Table Of Contents) and select the last record by clicking on the last non-empty Record Button. The number in the right-bottom part of the main window (underneath the Details Panel) will give you the number of records in your database.

### **11. How can I get pictures into a graphic field?**

Using the right mouse button click on the graphic field and select *Load* or *Screen Capture*. *Load* can only load pictures from BMP files. Using *Screen Capture* you can import pictures from any format. For example, you can open a GIF file in Paint Shop Pro and then import the image into the graphic field using Screen Capture.

## **Contact information**

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## Advanced Topics

[Multi-user applications](#)  
[Network Installation](#)

## Multi-user applications

Usually, you will use Single-User Mode ([Options](#), Users page) on a stand-alone computer and Multi-User Mode on a network. However, if you are not concerned with security on your network (e.g. a small number of reliable users) you may use this software in Single-User Mode (it will still work correctly when multiple users access the same record) - this simplifies the setup. Everybody will access the same set of databases. No user ids and passwords will be required. On the other hand, you may want to use Multi-User Mode on a stand-alone computer if there will be more than one user and each user needs to keep his or her database private.

If you want to use this software in a multi-user environment set Multi-User Mode in [Options](#) (Users page).

Only user who has the '**Supervisor**' user id can modify user accounts ([Options](#), Users page). Every user has his or her own private directory where his or her private databases are stored. Nobody else can access the user's private data. The Supervisor's private directory serves at the same time as a Public Directory. All users can access the Public Directory (unless the Supervisor revokes their access privilege).

Make sure that you have read/write access to the record you wish to make changes to. Only one user is allowed to make changes to a given record at the same time. Our software uses record locking (even in Single-User Mode) and only the user who selected a given record first has full read/write access to it. All other users who select the same record later will have read-only access right to this record.

## Network Installation

Our Organizers use Borland Database Engine (specifically its DBase subset) and you have to perform certain steps in order to set it up on a network. These setup steps are different for the 16-bit and 32-bit version.

### Network installation of a 16-bit Organizer version

#### 1. Program Installation

On your network server run Setup.exe from disk #1, CD ROM, or your hard disk (if you downloaded and unzipped the software) and follow the installation instructions. As a result all components will be installed on the server and icons will be created.

**Note:** If your network server is not running Windows 3.x or Windows 95 you should install Organizer software on a workstation (running Windows 3.x or 95) first. Then copy, from the workstation to the server, the following:

- entire Organizer directory (including subdirectories) e.g. c:\16io20;
- entire Borland Database Engine directory (by default C:\IDAPI) including all subdirectories;

#### 2. Setup of Borland Database Engine

On the machine on which you ran Setup.exe start Notepad and load WIN.INI file from Windows directory. Now, locate the following sections:

```
[IDAPI]DLLPATH=C:\IDAPICONFIGFILE01=C:\IDAPI\IDAPI.CFG
```

```
[Borland Language Drivers]LDPath=C:\IDAPI\LANGDRV
```

Copy the above 2 sections to a new file e.g. Borland.ini and change all drive letters to the network drive letter on which all workstations will access BDE. Also, if BDE is not installed into the default directory you may want to modify the directories to reflect the new BDE location. For example, if your network drive is accessed as F: change all 3 occurrences from C: to F:.

After making the above changes save the new file and exit from Notepad. Copy the created Borland.ini file to a diskette or to the network server where it can be accessed from all workstations.

On every workstation start Notepad and open WIN.INI file in Windows directory. Also, start another instance of Notepad and open created earlier Borland.ini file. Copy the contents of entire Borland.ini file to Clipboard and Paste it at the end of Win.ini file. Now, save the Win.ini file. Finally, open your C:\AUTOEXEC.BAT file and add the location of BDE directory to the PATH statement, for example:

```
PATH=C:\DOS;C:\WINDOWS;F:\IDAPI. Save the AUTOEXEC.BAT file and restart the workstation.
```

#### 3. Create Organizer Icons on workstations

On every workstation, create a program group and icons to access Organizer software. In most cases you will only need one icon that links to the main EXE file (residing on the network server).

### Network installation of a 32-bit version of PrimaSoft Organizer software:

#### 1. Program Installation

On your network server run Setup.exe from disk #1, CD ROM, or your hard disk (if you downloaded and unzipped the software) and follow the installation instructions. As a result all components will be installed on the server and icons will be created.

Note: If your network server is not running Windows NT or Windows 95 you should install

Organizer software on a workstation (running Windows 95 or NT) first. Then copy, from the workstation to the server, the following:

- entire Organizer directory (including subdirectories) e.g. c:\32io20;
- entire Borland Database Engine directory (by default C:\Program Files\Borland\Common Files\Bde - you can put it in C:\Bde on the server); you will have to reflect the BDE location in 2) below;

## 2. Setup of Borland Database Engine

On the machine on which you ran Setup.exe run Regedit.exe from Windows directory and expand the following key: [HKEY\_LOCAL\_MACHINE\SOFTWARE\Borland]. Export this key to a file e.g. Borland.reg. Open the exported file in Notepad and change all drive letters to the network drive letter on which all workstations will access BDE. Also, if BDE is not installed into the default directory, you may want to modify the directories to reflect the new BDE location.

For example, you may have to change:

```
[HKEY_LOCAL_MACHINE\SOFTWARE\Borland\Database Engine][HKEY_LOCAL_MACHINE\SOFTWARE\Borland\BLW32]"BLAPIPATH"="C:\\Program Files\\Borland\\Common Files\\BDE""LOCALE_LIB1"="C:\\Program Files\\Borland\\Common Files\\BDE\\USA.BLL""LOCALE_LIB2"="C:\\Program Files\\Borland\\Common Files\\BDE\\EUROPE.BLL""LOCALE_LIB3"="C:\\Program Files\\Borland\\Common Files\\BDE\\OTHER.BLL""LOCALE_LIB4"="C:\\Program Files\\Borland\\Common Files\\BDE\\CHARSET.BLL""LOCALE_LIB5"="C:\\Program Files\\Borland\\Common Files\\BDE\\CEEUROPE.BLL"
```

to:

```
[HKEY_LOCAL_MACHINE\SOFTWARE\Borland\Database Engine]"DLLPATH"="F:\\Program Files\\Borland\\Common Files\\BDE""RESOURCE"="0009""CONFIGFILE01"="F:\\Program Files\\Borland\\Common Files\\BDE\\IDAPI32.CFG""UseCount"="1""SaveConfig"="WIN32"[HKEY_LOCAL_MACHINE\SOFTWARE\Borland\BLW32]"BLAPIPATH"="F:\\Program Files\\Borland\\Common Files\\BDE""LOCALE_LIB1"="F:\\Program Files\\Borland\\Common Files\\BDE\\USA.BLL""LOCALE_LIB2"="F:\\Program Files\\Borland\\Common Files\\BDE\\EUROPE.BLL""LOCALE_LIB3"="F:\\Program Files\\Borland\\Common Files\\BDE\\OTHER.BLL""LOCALE_LIB4"="F:\\Program Files\\Borland\\Common Files\\BDE\\CHARSET.BLL""LOCALE_LIB5"="F:\\Program Files\\Borland\\Common Files\\BDE\\CEEUROPE.BLL"
```

Notice the double back slash used in the above example. After making the above changes save the file and exit from Notepad. Copy the created Borland.reg file to a diskette or to the network server where it can be accessed from all workstations.

On every workstation start Regedit.exe (in Windows directory) and Import created earlier Borland.reg file.

## 3. Create Organizer Icons on workstations

On every workstation, create a program group and icons to access Organizer software. In most cases you will only need one icon that links to the main EXE file (residing on the network server).



## Details Page - Functions

Details Page have the **following functions** (all listed in the Details Page **Popup Menu** section, some listed in the Details Page **Speed Bar** section):

- *Replace Record With Template*: Displays all previously saved [record templates](#). Select a template, the record data fields will be initialized from the record template. This form is convenient for entering series of different records. **Warning**: If the current record is not empty it will overwrite the contents.
- *Save Record To Template* : save the currently displayed record in the Details Page to a Record Template;
- *View Copy Buffer* : Copy Buffer is temporary storage to which a record is being copied when using the Copy Record function; later you can Paste the record from the copy buffer;
- *Paste Record* : paste a record from the Copy Buffer;
- *Copy Record* : copy a record to the Copy Buffer;
- *Undo Changes* : this feature lets you undo the most recent changes to a record.
- *Delete Record* : delete the currently displayed record (cannot be undone);
- *Print Record* : print only this record;
- *Synchronize* : synchronize the Table of Contents with the current record in the Details Page.
- *Go To Web Page* : load the Web site from the record into the Web browser (available only in Internet Organizer); (only Internet Organizer)
- *Capture Web Page* : capture the Web site from the Web browser into the record (available only in Internet Organizer); (only Internet Organizer)

## Record Template Button

**Record Template** button provides quick access to record template functions. You can invoke functions by **right-mouse** or **left-mouse** click on the Template Button.

**Right-mouse click** on the **Template Button** displays a popup menu with a list of all available record templates (initially there is only one: 'Blank' - empty record). By selecting the item you set the *New* button as the template record. The name of the selected Record Template will appear on the Template Button. As a result, every time you add a new record (by clicking on the *New* button or selecting shortcut) the record data fields will be initialized from the record template. When you exit the program and start again the *New* record function will be set to blank (all fields will be empty). This form is convenient for entering series of similar records.

**Left-mouse** click on the **Template Button** displays a popup menu with the following commands:

- *Replace Record With Template*: Displays all previously saved record templates. Select a template, the record data fields will be initialized from the record template. This form is convenient for entering series of different records. **Warning**: If the current record is not empty it will overwrite the contents.
- *Save Record To Template* : save the currently displayed record in the Details Page to a Record Template;

[Using Record Templates](#)

## Templates

You can save different settings that you want to **reuse** in a template. Just define the settings click on the *Save* push button or select *Save* item from the corresponding popup menu and enter the template name. Later, when you use the program instead of changing the settings one by one you can change the settings by loading them from the template. Select the template in the *Template List*. Clicking on the *OK* push button activates the new settings.

The following settings can be saved in a template:

- New Record Template
- Reports
- Labels
- Layout on Record Buttons
- Filters
- Labels (field names)
- Colors

## Data Root Directory

**You should avoid changing the Data Root Directory unless you really have to do it!**

Typically, you might need to change the Data Root Directory on a network. It is the user's responsibility to move all data directories to the new location. As a default, the Data Root Directory is set to the Organizer home directory. If you change the Data Root Directory all directories (with their contents) underneath the Data Root Directory must be moved to the new location. Typically, the directories that need to be moved will have names:

DATA, DATA0001, DATA0002, etc.

[Multi-user system](#)

## Go to PrimaSoft Web page

### What does it do?

Sets your Web browser to activate the PrimaSoft World Wide Web Home Page -

**<http://www.primasoft.com>**

Stay tuned for future releases of our products. Any new versions will be announced on our Web Home Page. On this site you can also find links to other places that are relevant to this program (graphical images resources, data resources, .....

Note: this function requires your Web page browser be turned on.

Organizer currently supports the following Web Browsers:

- Netscape Navigator;
- Microsoft Internet Explorer;
- NCSA Mosaic 2.0;
- Spy Mosaic - Compuserve Edition;
- America Online Web Browser.

## Edit User Account

This information applies only to [Multi-user Systems](#).

Only the Supervisor can add, delete and modify user accounts. Every user has:

- Name - used only for reference;
- User ID - used during the Login process; cannot be changed by the user;
- Password - used during the Login process; can be changed by the user.

The Supervisor can control every user's Access Rights to the Public Databases. The user can also be temporarily locked out of the system by the Supervisor (Current Status = Not Active).

## User Accounts

This information applies only to [Multi-user Systems](#).  
Only the Supervisor can add, delete and modify [user accounts](#).

## Edit lists

### **What does it mean?**

Lists are stored choices you can pick from [combo-box](#) data entry elements in the application.

By using this function, you can modify contents of these lists:

- select a list
- add/edit/delete items in the list

By clicking on Update Lists button you can update all lists from the current database. This can be a time-consuming process and it is only necessary after you Import data from an external source (Import function).



## Attachment/Start Application

### **What is 'attachment' ?**

The attachment is the file on your hard disk that you want to link with your record. You may attach any type of file with you record (sound files, movie files, text files, word processor files, graphical files...).

### **What is 'start application' ?**

The attached file cannot be opened directly within our program. The attached files can be opened by other applications that are on your computer. Clicking on the start push button launches the program listed in the Application edit box. The program takes as a parameter the content of the Attachment File edit box. The program knows how to handle the associated file.

### **How to attach a file ?**

Click on the Select push button in the Attachment dialog box. The Standard File dialog box is opened. Using this dialog box you can find and select the file. The selected file will be listed in the Attached File edit box.

### **How to select the application for the attached file ?**

Click on the Add push button in the Attachment dialog box. The Standard File dialog box is opened. Using this dialog box you can find and select the application name. The selected application will be listed in the Application edit box. Example: for text files select notepad.exe (Notepad); for graphical files select pbrush.exe (Paint Brush); for movie clips files select mplayer.exe (Multimedia Player). Those files are usually listed in the Windows or Win95 directory.

## Send E-Mail Dialog Box

### **How to select an e-mail program ?**

Click on the Add push button. The Standard File dialog box is opened. Using this dialog box you can find and select your e-mail program. The selected executable file of your e-mail application will be listed in the 'E-Mail Application' edit box. (Examples of e-mail programs: Pegasus Mail, Microsoft Explorer, Microsoft Exchange, Netscape Navigator, Eudora)

### **How to set e-mail parameters/options ?**

Some e-mail applications accept command parameters (check the program manual or help system). You can define parameters that will be passed to the e-mail program at startup. You can enter parameters in the 'E-Mail Application' edit box after the program name.

Example: How to open 'Create New E-Mail' dialog box at startup with a selected e-mail address.

1) Pegasus Mail program. Parameter is: -T

The 'E-Mail Application' edit box should contain: `c:\dir\winpmail.exe -T`

Check the option 'Pass Address on Command Line' .

2) Microsoft Explorer program. Parameter is: mailto:

The 'E-Mail Application' edit box should contain: `c:\dir\iexplore.exe mailto:`

Check the option 'Pass Address on Command Line' .

### **How to start an e-mail program?**

Click on the Run push button.

## Preview this report

This functions lets you preview the currently selected report on the screen before printing. The Preview Window allows viewing different report pages, zooming the displayed report, and printing it on your printer.

[Print Functions](#)

[Print Reports](#)

[Print Labels](#)

## Repair data file

This function will repair a damaged data file. Sometimes your memo fields (those containing images or binary data) get corrupt, which results in impropotional file size increase. Use this function to correct this problem.

[Maintenance](#)

[Backup/Restore](#)

You can order from PrimaSoft PC, Inc. by payment with:

- Check (US, Canadian checks only),
- International Postal Money Order,
- Cash,
- Credit card (MasterCard and Visa).

The numbers for ordering are: 1-604-951-1085 or FAX 1-604-051-1085 or place your order on our secured web server: <http://www.primasoft.com>

Fill in the information in the order window. Print the order form and send it with payment to us.

Make checks payable to: PrimaSoft PC, Inc.

Mail to: PrimaSoft PC, Inc.  
P.O. Box 456  
Surrey, BC V3T 5B7  
CANADA

If you would like to speed up the registration process you can also send your order form as an e-mail with the attached encrypted file (order.enc). Do it in the following way:

- Credit Card payments only (MasterCard and Visa),
- Open the Order Form dialog box and fill the form.
- In order to encrypt the form click on the Save push button (the order.txt, order.enc files will be created)
- You may check the order.txt file with a Notepad or a Text editor (the same encrypted info is in order.enc file)
- Create and send an e-mail with the attached file (order.enc)

**Note:** Files Attached to e-mail messages are not preserved when the source and the destination are not on the same on-line system. Send it to our [e-mail](#) address that corresponds to your online system.

## Replacing the database

### What is Replace?

The 'Replace' function helps you to replace the entire or the part of the field's content with a new value. Use this function with caution. It will check all currently displayed records. Make sure you selected the desired set of records using a filter. The replace process cannot be undone.

This function is useful for users who want to make global changes on the selected field in the entire database. How much time does it take to change one field in a small database of 1000 records? The replace function needs only several seconds to accomplish this task. If the replace process is done manually it can take thousands of times longer, and also there is a chance of introducing some typing errors.

### Where is the Replace function?

The Replace function can be accessed from the Search/Find option on the main menu, and in the speed bar (Standard Section - *Replace* button).

### How to use the Replace function?

Use [filter](#) function to select only desired records.

When in the 'Replace' dialog box:

- Select the *Field To Be Replaced*.
- Select the *Replace Mode*:
  - *Replace Entire Field Contents*: select this mode if you would like to replace the entire content of the selected field with the *Replace With* string.
  - *Replace Substring Only*: select this mode if you would like to replace the part of the selected field. It will search for the text specified in the *Substring To Replace* edit box. Each found text will be replaced with a new value
  - *Auto-Increment*: select this mode if you would like to number your records. Enter the initial value in the *Start From* edit box. The number that will replace the content of the selected field is incremented by one and starts from the value entered in the *Start From* edit box.
  - *Auto-Decrement*: select this mode if you would like to number your records. Enter the initial value in the *Start From* edit box. The number that will replace the content of the selected field is decremented by one and starts from the value entered in the *Start From* edit box.
- Enter *Substring To Replace*: this edit box is displayed when the *Replace Substring Only* mode is selected. Specify the text to search for that will be replaced with a new value.
- Select *Start Replacing From*: select scope for the search/replace function:
  - *Current Record*: search/replace process will start from the record displayed in the detail window.
  - *First Record*: search/replace process will start from the first record.
- Enter *Replace With* text: Specify the text that will replace the whole content or the substring according to the selected options.
- Press the *Replace* button to activate search/replace function.

**Note: The program does not prompt you before replacing. When the function is activated it automatically goes through all currently displayed records and replaces the specified content of the field.**



