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Introduction

Judging from our previous experience, it seems that about 98% of all computer program users never read their User's Guide. Most people just scan the manual as a last resort before calling technical support. With this in mind, we tried to make a manual that would serve as a good reference, but still provide some measure of continuity for that studious 2%.

Most people will **have** to read the installation instructions, although some may not even read that much. However, we **strongly** recommend that you **at least** browse the section of this chapter on the user interface.

The user interface section contains information on operation modes and custom controls that are common to all DeskTop Set modules. These topics will be referred to again and again in the manual. If you read these sections, you will have a much better understanding of the programs and it will take you less time to learn them.

Related Topics:

Manual Conventions

Manual Conventions

Divisions

Throughout your reading, you will see references to other parts of the manual. To make references clearer, the manual is broken down into three major divisions: chapters, sections and topics.

Chapter headings are obvious, as the heading at the top of this page, "**Chapter 1 Installation and User Interface**."

Chapters are broken down into *sections.* Section headings appear in the left margin in enlarged, bold font. For example, see the "**Introduction**" section on the top of this page.

Sections are broken down into *topics*. Topic headings appear in the left margin in bold font. For example, see the "**Manual Conventions**" topic above. Topics may be further broken down to provide clarity.

Menu Commands

You will also see many references to menu commands. Many of these commands may lie in submenus. To denote the menu-sub menu divisions, a slash character (/) is used.

For example, if you are instructed to "Select the Program Manager's **File/Run...** command," this means go to the main menu of the Program Manager and click on the **File** menu. When the pull-down menu opens, click on the **Run...** command.

Mouse Operation

Unless otherwise indicated, all references in this manual to clicking and double-clicking the mouse should be performed with the **left** mouse button. While DeskTop Set does make fairly good use of that seldom-clicked right mouse button, this will always be clearly indicated.

Installation

Installing the DeskTop Set is easy.

Related Topics:

- System Requirements
- Starting the Install Program
- Installation Options
- Reinstalling
- Installing an Update

System Requirements

To install the DeskTop Set programs, you must have:

- Microsoft Windows version 3.0 or higher
- A hard disk with at least 2 Megabytes of free space
- EGA, VGA, Super VGA or 8514A display system (not compatible with CGA or MGA)
- Mouse or compatible pointing device (optional, but highly desirable)
- Hayes compatible modem (optional)
- Caller ID telephone service (optional)

Starting the Install Program

Note: The DeskTop set installation program automatically creates a Program Manager group and inserts the DeskTop Set icons. For this reason, you must be running Program Manager to install DeskTop Set. If you are using an alternate shell, such as Norton DeskTop, you must start a copy of the Windows Program Manager (PROGMAN.EXE) before you begin installation.

Since the installation program automatically locates the Windows directory and the drive that contains the installation diskette, only a few simple steps are required:

- Turn on your PC and start Windows.
- Insert the DeskTop Set diskette into your floppy drive.

If you are in the Windows Program Manager:

- Select the **File/Run...** command.
- Type `A:\Install` (or `B:\Install`) into the *Run* field of the dialog box that appears, then press **Enter** or click the **Ok** button.

If you are in the Windows File Manager:

- Click the icon of the A or B disk (whichever contains the DeskTop Set installation disk).
- Double-click the **A:** (or **B:**) folder to view its contents.
- Double-click the **INSTALL.EXE** program.

The *Installation* dialog box will open. If you understand the default values displayed in the *Installation* dialog box and you don't need to make any changes, click the **Install** button.

Installation Options

The *Installation* dialog box contains several options to control where the programs will be installed and how they will run.

Directories and options

The *Directory and options* area contains the path names used in the installation of the DeskTop Set programs.

Source

The source field displays the location of the installation diskette. It is detected automatically.

Windows

This is the name of the sub directory that has your WIN.COM program. Do not change this information.

Data

This field contains the suggested name of the sub directory that will be created to store your DeskTop Set data files. A separate directory for the data files is helpful for backing up. If you already have a directory with the name appearing in this field, change the name before continuing.

Note: Do not make the data directory a sub directory of the programs directory, i.e. WINDOWS\DESKAPP\DESKTOP.

Programs

The *Programs* field contains the suggested name of the sub directory that will be created to store your DeskTop Set program files. You can change this if you wish. If you already have a directory with the name appearing in this field, change the name before continuing.

Free disk space

The installation program displays the amount of free space on your hard disk. If this space is insufficient, the program will notify you.

Note: You may notice a discrepancy between the amount of free disk space the install program reports and the amount you observe in DOS when you do a directory. This is because Windows has set up a temporary swap file on your hard drive. See your Windows documentation for details about swap files.

- Click the **Install** button to begin installation of the DeskTop Set, **or...**
- Click the **Cancel** button to exit the installation program.

The install program will begin copying and expanding the DeskTop Set program files to the directories you specified. If any errors occur during this process, follow the displayed instructions and try again.

Once this is complete, you will be prompted for your name, company and serial number.

- Enter your name and company name (optional).
- Enter your serial number. This number can be found on a label attached to the DeskTop Set diskette envelope. Your serial number is unique; the programs will not run if it is not entered correctly.

The DeskTop Set installation program builds a Program Manager group named (cleverly enough) "DeskTop Set."

If this group contains a "Read Me" icon, click on it to review the `README.TXT` file for additional technical information or last minute changes. If you have installed an update, you may have an "Update" icon which you can click on to review the `UPDATE.WRI` file for possible additions to the program that didn't make it into this version of the manual.

Reinstalling

For some reason you may want to completely reinstall the program. For example, you may have had problems with your hard disk and you want to install all your programs from scratch. In any case, there are two methods to reinstall, both of which completely wipe out any existing program and data files:

Forced Installation

- Follow the procedures for a normal installation from the Program Manager, **however...**
- When it comes time to type the name of the installation program, specify the "FORCE" parameter, i.e. type `A:\INSTALL FORCE`.

The forced installation will install the DeskTop Set into the existing \DESKTOP and \DESKAPP directories, but all existing data files will be over-written.

Uninstall - Reinstall

You can also 'uninstall' the DeskTop Set and then reinstall it. This method is a little more difficult than the previous one, but you have more control.

- Open the WIN.INI file using the Windows Notepad program. (One method of doing this is to select the Program Manager's **File/Run...** command and then type `WIN.INI` on the command line).
- Locate the **[DeskTop Set]** section by scrolling through the contents of this file, or by using the **Search** command. Do not confuse this with the **[Desktop]** section, which is unrelated.
- Delete the **[DeskTop Set]** section. Save the file.
- Delete all the DeskTop Set data and program files, and remove the directories.
- Restart Windows and repeat the normal installation procedure described earlier.

Installing an Update

At some time you may receive a DeskTop Set update disk. Unless other instructions are given for the update, follow these directions. Updating is simple, safe and fast. The updates only overwrite executable files and add a few new files to the proper directories, leaving your data untouched.

Note: Before any update, you should back up your data files.

The DeskTop Set update program is initiated by the same INSTALL.EXE program you originally used to install the applications. It detects that you are only updating by searching for the **[DeskTop Set]** section of your WIN.INI file.

- Start Windows. If you are already in Windows, please exit any DeskTop Set programs that may already be running.
- Insert the DeskTop Set update diskette into your floppy drive.

If you are in the Windows Program Manager:

- Select the **Run...** command from the **File** menu.
- Type `A:\Install` (or `B:\Install`) into the *Run* field of the dialog box that appears, then press **Enter** or click the **Ok** button.

If you are in the Windows File Manager:

- Click the icon of the A or B disk (whichever contains the DeskTop Set installation disk).
- Double-click the **A..** (or **B..**) folder to view its contents, then double-click **INSTALL.EXE**.

The *Update* dialog box is similar to the *Installation* dialog box, but none of the fields can be modified. If you wish to install the update into another directory, you will have to move your existing DeskTop set files to the new directories and modify the **[DeskTop Set]** section of the WIN.INI file accordingly.

The descriptions of the fields in the *Update* dialog box are the same as for the *Installation* dialog box (see the **Installation Options** topic earlier in this chapter for details).

- Click the **Update** button to begin the update, **or...**
- Click the **Cancel** button to exit without updating.

The update program will begin copying and expanding its program files to the directories you indicated. Any errors that may occur during this process will be reported in plain English so that you may take corrective action.

Before the update is complete, you will be prompted for your serial number. This number can be found on a label attached to the DeskTop Set diskette envelope. Your serial number is unique; the programs will not run if it is not entered correctly.

User Interface

There are several unique features of the DeskTop set that are common to all DeskTop Set applications.   This section describes each of these features.

Related Topics:

Expert vs. Windows Mode

Common Controls

Clipboards

"&" Character in User Definable Fields

Expert vs. Windows Mode

One unique property of the DeskTop Set programs is their ability to operate in two modes: **Windows** and **Expert**.

Windows Mode

The **Windows** mode is just what you would expect from any average Windows program. It provides a standard menu bar across the top of the program window from which most commands can be issued. There is also a caption (title) bar across the top of the window, a system menu and a minimizing (iconizing) arrow.

Expert Mode

The **Expert** mode lacks the standard Windows menu, system menu, caption bar and minimizing arrow. However, it has special controls known as *expert menus*, and, in some cases, *expert buttons*.

You may find the **Expert** mode less 'cluttered' than the **Windows** mode. It is also more streamlined. For these reasons, the interface is less obvious; the commands aren't always right there in front of your face. But, if you know what you are doing, you can usually do it faster in **Expert** mode.

Note: This manual deals almost exclusively with **Windows** mode operation of the programs. For this and other reasons, you should stick with **Windows** mode until you are truly an expert. We didn't call it **Expert** mode for nothing.

Expert Menus

Expert menus are 'pop-up' menus that are generally accessible by clicking the **right** mouse button over any non-active (no buttons there) area of a DeskTop Set program's window. There are also some *expert menus* that appear when certain buttons or icons are pressed.

Here is an example of the Phone Book's **Main** expert menu:

There is no need to hold down any mouse buttons while in an expert menu; the menu selection bar automatically follows the cursor.

An arrow (Á) on the right side of a menu item indicates that a sub menu is available. To access a sub menu:

- Highlight the menu item with the arrow (Á) indicating a sub menu.
- Slide the mouse cursor to the right until the sub menu appears, then select the desired command.

If you click directly on a menu item that has a sub menu, it will in general execute the most common command from the sub menu. For example, if you clicked directly on the **File** Á selection in the menu above, it would execute the **File/Open...** command.

To close a sub menu:

- Slide the mouse into and out of the sub menu window.

To close an *expert menu* without making any selection:

- Click any mouse button outside the boundaries of the expert menu.

Expert Buttons

Expert Buttons are buttons or icons that appear in an **Expert** mode DeskTop Set program that are not normally there when in **Windows** mode.   These buttons can be used to carry out commands that would otherwise be unavailable because of the lack of normal menus, or to quickly issue some common command.   Their function is indicated by the label or icon design.

Learning Expert Mode

Once you are an expert with **Windows** mode, you may choose to begin learning expert mode. Since *expert menus* are available even when you are in **Windows** mode, the best way to learn is to leave the program in **Windows** mode, but use the *expert menus*.   Once you are comfortable with this, you can switch completely over to **Expert** mode.

Common Controls

There are several controls that are common to the DeskTop Set applications. The use of these controls is outlined here so that you don't have to read it over and over again as you come across references to these controls in other parts of the manual. If you forget how to use these controls, you'll always know to refer to this part of the manual, and you won't have to 'hunt.'

As you will see, most of these controls allow you to enter information without having to touch the keyboard, which is one of DeskTop Set's strong points.

Mini-Calendar

The *Mini-Calendar* is a small box that displays one month of the calendar. It is used to quickly enter date fields without having to touch the keyboard, or to quickly proceed to certain dates (as in the case of the Calendar's *Navigator* window).

To see an example of a *Mini-Calendar* control, run the Calendar, switch to **Day** mode, and select the **Edit/Event...** command.

The current (today's) date is usually highlighted in the calendar. To select a date from the displayed month, just click on that day. To change the month or year that is displayed:

- Click the up-arrow to go back one month.
- Click the down-arrow to go forward one month.
- Click the scroll bar above the scroll box to go back one year.
- Click the scroll bar below the scroll box to go forward one year.

The Mini-Calendar also has its own *expert menu*:

◆ Click the right mouse button anywhere over the Mini-Calendar to bring up the expert menu.

The menu lets you quickly go to any month for the current year, or to return to the current month.

Clock

The *Clock* control is a round window that resembles the face of a clock. It is commonly used to enter time fields without having to touch the keyboard.

To see an example of a *Clock* control, run the Calendar, switch to **Day** mode, and select the **Edit/Event...** command.

Imagine that the *Clock* control is the face of a clock and you have to set the hour and minute hands to the time of some event. Follow these guidelines:

◆ First, click the number that corresponds to the hour hand of the event (1,2,3, etc.)

◆ Then click the number that corresponds to the minute hand of the event (3 = 15 minutes, 5 = 25 minutes, 9 = 45 minutes, etc.). To move in 1 minute increments, first click the closest 5 minute interval; every subsequent click of that number will increase the time by 1 minute.

◆ Finally, click the AM or PM indicator to finish the time.

◆ Click the right mouse button to close the *Clock* control (if applicable).

To clear the time entry and start again, click the time indicator in the center of the clock.

As an example, let's say you wanted to set a time field to 11:42 AM. You would:

- Click 11 once for the 11th hour

- Click 8 once for 40 minutes
- Click 8 two more times to add 2 minutes
- Click the AM indicator to complete the time entry

Time Ruler

The *Time Ruler* assists you in entering time periods or events without having to touch the keyboard. It resembles a ruler with times instead of measurements.

To see an example of a *Time ruler* control, run the Calendar, switch to **Day** mode, and select the **Edit/Event...** command.

To specify a time period or enter an event:

- Place the cursor at the ruler position that corresponds to the starting time.
- Click and hold down the left mouse button.
- While holding the mouse button down, begin making the time block selection by dragging the cursor to a position that corresponds to the ending time.
- While the left mouse button is still down, you may click the right mouse button to advance the time block's ending boundary in 5 minute increments (Useful after a good party!).
- Release the mouse button when the block is complete.

To adjust the time block position:

- Click and hold down the left mouse button over the time block.
- Drag the block to the desired position.
- While the left mouse button is still down, you may click the right mouse button to advance the entry's time block in 5 minute increments (Also useful after a good party!).

To clear (remove) the time block:

- Click the left mouse button outside of the active block boundaries.

The Calendar's *Event* dialog box has a special version of the *Time Ruler* which has additional functionality. This is explained fully in that section of the manual.

Windows Menu

The *Windows* menu is a menu item that appears on the far right of the main menu of every DeskTop Set program.

The *Windows* menu lists every Windows application that is currently running. You can use this menu to quickly switch to another application; just click on it in the menu.

If you are in **Expert** mode, the *Windows* menu is available in each program's **Main** menu as a sub menu titled **Windows**.

Occasionally you will see an item in the *Windows* menu for which you don't have a corresponding application. This is because some programs, such as Word or Norton DeskTop, run 'background' processes to accomplish some task. These processes sometimes show up on the *Windows* menu. Just ignore them. In any case, you won't cause any harm if you accidentally select one of them.

Clipboards

The DeskTop Set applications deal with very structured data that cannot readily be converted to/from text format. However, the Windows Clipboard program uses only text. Imagine trying to convert a Phone Book record, complete with record links, reminder information, notes, etc., into some sort of legible, usable text; not to mention the amount of text this would create!

It is for this reason that several of the DeskTop Set programs have *internal* clipboards. *Internal* clipboards allow each program to "cut & paste" its own structured data within the program itself. These *internal* clipboards have nothing to do with the Windows Clipboard, and they don't transfer any data to it.

Throughout the manual, whenever cutting, pasting, or any other form of data transfer is discussed, it will specify which clipboard is being used, and what (if any) information is available to you.

"&" Character in User Definable Fields

There are several places (especially in the Phone Book) where you can customize field labels. For example, run the Phone Book and select the **Dial/Setup...** command. Notice the first column of fields ("&Office", "&Home", "Pa&ger", etc.).

Each of these fields contains an ampersand (&) character. The "&" immediately precedes and is used to denote the 'hot' character of the field. The 'hot' character is the underlined character you see when that label is displayed somewhere in the program. Hot characters are used throughout Windows in menus and on buttons to let you carry out some command just by pressing that letter (sometimes in combination with the **Alt** key).

For example, note the first user-definable field in the *Phones and dialing setup* dialog box, "&Office." Now close the dialog box and open the **Dial** menu. Notice that the "O" in "Office" is underlined. This is the 'hot' character, and you can dial that person's office number just by pressing the **O** key (if the menu item is enabled).

About the Phone Book

The DeskTop Phone Book is a powerful database and contact management tool. It uses the power and flexibility of your computer system to combine many functions into an easy-to-use phone book. The most important of its features are:

- Store an unlimited number of entries.
- Each entry can contain all common business and home address data and phone numbers as well as notes, account numbers, reminders, alarms and 32 user-definable fields.
- Keeps track of documents, phone logs and notes for each entry.
- The entries can be organized into topic pages, categories, groups and books.
- Create mail merges, send faxes and print labels, envelopes or Rolodex cards directly from the Phone Book.
- Comprehensive printing facility allows you to print the phone book in any one of a number of pre-configured formats, including all Day Timer styles; Or, design your own format.
- Integrates with the Calendar, Dialer and Message Pad to provide data links to entry information.
- Groups to hold your most commonly accessed entries.
- Provides several search functions including phonetic, exact and "by category."
- Exports/imports data to/from many of the most popular database formats.
- Interfaces with Caller ID.
- Interfaces with the Sharp Wizard Electronic organizer.

To open the Phone Book,

- ◆ Double-click the Phone Book icon in the Program Manager's DeskTop Set group, or...
- ◆ Double-click the BOOK.EXE application in the File Manager or MS-DOS Executive, or...
- ◆ Launch the Phone Book from another DeskTop Set application (see the Calendar chapter).

The Phone Book will automatically open to the page you were on when you last used it. If the book appears to be "closed," double-click on the book cover or select the **File/Open book** command.

The Phone Book window looks like an open personal phone book. There are two facing pages, each of which consists of two columns separated by a vertical line. The left column is where the names of your entries are displayed and the right column is for the numbers.

The control bar across the top of the book contains six icons: **left arrow**, **reminder** symbol**,** **telephone** symbol, **notepad** symbol**,** **file** symbol and **right arrow**. Click the **left** and **right** arrows to turn the phone book one "page" backward or forward, respectively.

Click the **reminder** symbol to bring up a reminders menu. Click the **telephone** symbol to bring up a menu which is roughly the equivalent of the **Dial** menu. Click the **notepad** symbol to bring up the **Edit** menu. Click the **File** symbol to bring up a combination of the **Enter** and **Log** menus. All of these are expert-style menus (see Chapter 1).

Related Topics:

Navigating Through the Phone Book

Navigating Through the Phone Book

As was stated above, you can use the arrow icons on the control bar to turn the phone book pages. The letters along the sides of the page can be used to move quickly to the corresponding page in the book. The current letter is displayed in the upper left corner of the page. The current page number is displayed in the upper right corner. As you fill your book with entries, additional pages can be added.

You can use the keyboard or mouse to move around in the book. The following table describes the different ways of moving about:

To Move To...	Keyboard Method	Mouse Method
A certain letter	Ctrl + Letter	Click desired letter on page border
The next page	PgDn	Click right arrow icon
The previous page	PgUp	Click left arrow icon
An entry on the current page	Up & Down-arrow	Click entry
An entry on the facing page	Move to last entry, Tab to next page	Click entry
An entry's phone number	Tab	Click phone entry

Adding Entries

Page Entry

To add an entry to the book, you must first enter the page information. The page information consists of two parts: the *page name*, which is a person's name or nickname, or a company name, and the *page number*, which is the number you most commonly use to call this entry.

- Turn to the page where you want to make the entry.
- Move to an empty line on the page.
- Double-click or Shift-double-click to open Business or Home Information dialog box for quick entry, or...
- Enter the *page name* in the left-hand column.
- Enter the *page number* in the right-hand column.

The *page name* does not have to be the proper name for the individual or company; it is merely a name you can easily associate with the entry. The proper information for this entry can be entered in the *Business* or *Residence information* dialog box, which we will see shortly.

Similarly, the *page number* is the phone number you most commonly use to call this entry. There is plenty of room to enter other numbers for this entry in the *Business* and *Residence information* dialog boxes.

Note: It is a good idea to always enter the area code for all phone numbers, even if it is a local number. The Dialer will automatically strip off area codes for local numbers. If you travel, this will allow you to dial from anywhere in the country just by changing the current local area code in the Dialer setup.

Let's enter Okna Corporation's record as an example. There may already be an entry for Okna in your book, so just move to a blank line and make a second entry.

- Move to the O page by clicking the **O** tab or by pressing **Ctrl-O**.
- Select a blank line and type in *Okna Corporation*.
- Move to the phone number field by clicking in it or pressing the **Tab** key.
- Enter Okna's number: 201-460-0677.

Business Information

Use the *Business information* dialog box to enter the address, company name, pager, fax and car numbers and other information.

To open the *Business information* dialog box for our example:

- Move back to the *Okna* text entry by clicking in the field or by pressing **Shift-Tab**.
- Double-click on the entry or press **Enter**, **or...**
- Select the **Edit/Business...** command from the main menu.

The *Business information* dialog box contains fields for just about any common bit of business-related information. Use the **Tab** key to move from field to field. The name for each field is displayed near the top of the dialog box. As you move between fields, the name changes accordingly.

The fields are self explanatory, but here are some notes:

- The fields may scroll as you enter text; just keep typing. When the field's maximum length has been reached, it will not accept any additional characters.
- The *Notes* field will word wrap as you enter text. If you want to force it to advance to the next line, press **Ctrl-Enter** or **Ctrl-M**. The *Notes* field can hold a maximum of 299 characters. This field is meant for brief notes on the entry; Use the **Edit/Notes...** command if you want to keep unlimited notes on an entry.
- The *Company and Address* field names are guidelines only. If you need to enter an address that has more than 3 lines of information, you can "overflow" into the *Additional address* field without any problem.
- The labels on the phone number fields can be tailored for each record. For example, you may have an associate in your book that has no pager number, but 2 fax numbers. You can change the pager label to "Fax 2" in this case. See **Specifying Dialing Options** in the **Dialing from the Phone Book** section for details.

For complete length information on each field in the *Business information* dialog box, refer to **Appendix A**.

Name Recognition

The first time you open the *Business* (or *Residence*) *information* dialog box, the program will analyze your page entry to determine weather it is an individual's name or a business name. If program recognizes the entry as one of these, the name will be placed in the appropriate dialog box field.

To determine individual's names, the program reads the *names table*. There are about 500 male, female and generic business names in this table. You can add names to the table using the *Setup name recognition* dialog box.

- Select the File/Setup/Name recognition... command.

To see if a name is in one of the lists, place the cursor in the **Male**, **Female**, or **Business** *Find* edit field and type the name. If it is in the corresponding list, it will be highlighted. To add a name to one of the lists:

- Select one of the lists;
- Press the **Add** button; a *Name recognition* prompt will appear;
- Enter the new name and press **Ok** or **Enter**.

To remove a name from any of the lists, highlight the name and press the **Delete** button.

- Press the **Ok** button to exit and save the changes to the names table.

Number Placement

If you included a *page number* when you were entering the page information for this entry, the Phone Book will copy this number into the *Business Telephone* field. If you don't want the number there, or it is not the proper business number for the entry, you can simply change or delete the number; the page entry will not be affected.

Salutation Field

The *Salutation* field is where you can specify how you would normally like to greet this person or business in a letter, for example. This information can be used later to create letters, mail merges or to export to word processor documents.

When you first enter the *Salutation* field, the Phone Book will attempt to create a salutation using the *Business Salutation template* which can be found in the *Phone Book setup* dialog box. Feel free to change this entry. (For more information on the salutation templates, see the **Customizing the Phone Book** section of this chapter.)

To enter the business information for our example:

- Click or **Tab** between fields to enter the following information for a [fictitious] Okna Corporation employee:

```
Mr. Thomas U. Gregory
Programmer
Research & Development
```

- Click or **Tab** to the *Company and Address* section and enter Okna's information:

```
Okna Corporation
285 Van Buren Street
Lyndhurst, NJ   07071
```

- Move to the *Fax* number field and enter Okna's fax number (201-507-8725).

Local Edit Menu

The *Business information* dialog box has a local edit menu that you can use to copy, cut, paste, etc., any of the business information fields to/from the Windows Clipboard. This is an expert-style menu.

To open the local edit menu:

- Move the cursor to any gray (non-field) area of the dialog box.
- Click the right mouse button.

Button Functions

There are seven buttons along the bottom of the *Business information* dialog box. They function as follows:

Paste

Moves information from the Windows Clipboard into the *Business information* dialog box. A special dialog box will appear listing all the fields that it recognized in their appropriate places. You can move and edit the text until everything is in the correct location, then click the **Paste** button. The **Paste** button is only active the first time you enter business information. It changes to **Swap** thereafter.

Swap
Replaces the address information in this dialog box with the address in the Residential Information dialog box. Current business address is placed into the Residential section.

Category
Opens the *Categories* dialog box. This is equivalent to selecting the **Edit/Categories...** command from the Phone Book's main menu.

Link/Unlink
Copies business information from the *Link record* that you previously selected. See the section on **Linking Entries** later in this chapter.

Misc
Opens the *Miscellaneous information* dialog box. This is equivalent to selecting the **Edit/Miscellaneous...** command from the Phone Book's main menu.

Home
Opens the *Residence information* dialog box. This is equivalent to selecting the **Edit/Residence...** command from the Phone Book's main menu.

Ok
Saves the business information and closes the dialog box.

Cancel
Closes the dialog box without saving any changes you have made.

- Click the **Ok** button to close the dialog box and save the changes.

Residence Information

The *Residence information* dialog box is very similar to the *Business information* dialog box, except that it stores home information about an entry. If you didn't read the **Business Information** section (immediately preceding this section), read it now so that you will be familiar with the subjects discussed here.

To open the *Residence information* dialog box for our example:

- Move to the *Okna* text entry by clicking in the field or by pressing **Tab**.
- Select the **Edit/Residence...** command from the main menu.

Optionally, if this is a new entry and you have not yet entered any business information:

- Hold down the **Shift** key and either double-click on the entry or press **Enter**.

Once again, the fields are self explanatory, and the same rules that apply to the *Business information* dialog box apply here also. For complete length information on each field in the *Residence information* dialog box, refer to **Appendix A**.

The *Residence information* dialog box has a local edit menu, name recognition and number placement just like the *Business information* dialog box.

If you were following along in our example, several of the residence information should already be filled in. To complete the entry for our example:

- Click or **Tab** to the *Home address* section and enter the information.

```
45 Smetana Lane
Wayne, NJ 07470
```

- Copy the Business number to the Home number field (try the local edit menu).

Button Functions

There are six buttons in this dialog box. They function exactly as their counterparts in the *Business information* dialog box, except that they apply to home information only.

Paste

Moves information from the Windows Clipboard into the *Residence information* dialog box. The **Paste** button is only active the first time you enter business information. It changes to **Swap** thereafter.

Swap

Replaces the address information in this dialog box with the address in the Residential Information dialog box. Current business address is placed into the Residential section.

Category

Opens the *Categories* dialog box. This is equivalent to selecting the **Edit/Categories...** command from the Phone Book's main menu.

Copy

Copies selected home information to the Windows Clipboard for subsequent pasting into other Windows applications. This is equivalent to holding the **Shift** key down and selecting the **Edit/Copy** command from the Phone Book main menu. See the section on **Manipulating Entries** later in this chapter.

Misc

Opens the *Miscellaneous information* dialog box. This is equivalent to selecting the

Edit/Miscellaneous... command from the Phone Book's main menu.

Office
Opens the *Business information* dialog box. This is equivalent to selecting the **Edit/Business...** command from the Phone Book main menu.

Ok
Saves the residence information and closes the dialog box.

Cancel
Closes the dialog box without saving any changes you have made.

- Click the **Ok** button to close the dialog box and save the changes.

Note: The *Page name* and *Page number* have nothing to do with any of the information in either the *Business* or the *Residence information* dialog boxes. This allows you more flexibility, more phone number fields and more ways to refer to the same record.

Miscellaneous Information

The *Miscellaneous information* dialog box holds just what its name implies.

To open the *Miscellaneous Information* dialog box:

- Select the Edit/Miscellaneous... command, or...
- Press the **Misc** button in the *Business* or *Residence information* dialog box.

Assistant Info.

These fields are for entering information about this person's assistant, if they have one.

Billing

You can store information about how this person bills you, how you bill them, and the interval for the billing (such as Hour, Day, Month, etc.). This information may be used in a future release of DeskTop Set to automatically record billing amounts.

E-Mail

Enter E-Mail information about this person here. At this time, this information is for your reference only. In future versions of the DeskTop Set, it may be used to automatically route E-Mail to this person.

Birthdays

Enter the record owner's (person's) birthday, and that of his/her spouse (if applicable).

Other

The *Dept. No.* and *Employee No.* fields are for your reference. The *Pager account* is used by the dialer when dialing pager numbers. You can also put an '800 number' in the *Toll-free* field.

Custom Fields

The Phone Book has 32 user-definable custom fields in which you can enter just about any kind of information you like. While the *Business, Residence* and *Miscellaneous information* dialog boxes provide you with many fields, you may need additional or unique fields to store more information. *Custom Fields* give you the room and flexibility to do just that.

Setting up a Custom Field

- Select the **File/Setup/Custom fields...** command.

The *Setup Custom Fields* dialog box opens:

This dialog box displays the field names and merge fields/keywords for the first sixteen custom fields. To display the next sixteen, press the **Next** button. Similarly, the **Prev** button will take you back to the first sixteen.

Define field No: #

The top section of the dialog box displays the settings for the currently selected custom field.

The group name for this section of the dialog box displays the number (#) of the custom field that is selected for editing. This field will be in black.

Field type

There are several types available for each field. The field type specifies what kind of information may be placed in the field and how it is stored in the database. There are also two field types which apply special processing.

Text

A *text* field can contain any character information including letters, numbers, symbols, etc. This field will hold as many characters as can physically fit in the allotted space.

Money

Money fields can hold any monetary figure such as $25.86, $0.32 and so on. The "$" symbol is automatically placed at the beginning of a money field. If anything besides a valid monetary figure is placed in this field, it will be reset to $0.00. Money fields can hold values exceeding 1 billion dollars ($1000000000.00). Do not use commas in money fields.

Numeric

Numeric fields can hold any number value in one of many formats. It can be in integer (44), decimal (98.6) or scientific (3.0E8) notation. Number fields can hold values exceeding 1 billion (1000000000). Do not use commas in numeric fields. You can place invalid information (such as text) in a number field, but it will not be printable.

Cumulative Money

This field is similar to a regular money field, but each time you place a new value in the field, it is added to a running total. The field displays the last value you entered, and the total is displayed in the label for the field.

Cumulative Numeric

This field is similar to a regular numeric field, but each time you place a new value in the field, it is added to a running total. The field displays the last value you entered, and the total is displayed in the label for the field.

Note: With all numeric and money fields, including cumulative: Be careful when very large numbers (over 1 billion) are entered in these fields. Windows will round these numbers, and it does not always do so correctly.

Field name

This name will be used as the field label when you are viewing/editing the custom fields in the *Custom Fields* dialog box.

The "&" character should be placed in front of the letter that you want to be the 'hot key' for the field. This letter will be underlined when that label appears in the *Custom information* dialog box.

For example, to create the label "Nickname," you would enter "Nic&kname." The **Alt-k** key could then be used to activate that field. For more information, see Chapter 1, **"&" Character in User Definable Fields**.

Merge field/keyword

Use this field to enter a descriptive keyword. This keyword is used to represent the field when you define custom formats or letter templates.

The *Merge field/keyword* will automatically be converted to all capital letters and enclosed in angle brackets (example: <MERGE FIELD>).

To set up a custom field:

- Click in, or **Tab** to , one of the empty fields. The *Define field No.* label at the top of the dialog box will reflect your choice.
- Select a type from the *Field type* combo-box. (If you are using the keyboard, press **Alt-T** to activate the *Field type* combo-box.)
- Click or **Tab** to the *Field name* field and enter a name for the field.
- Click or **Tab** to the *Merge field/keyword* field and enter the keyword.
- Select the next field to set up, or press **Ok** when you are done.

Editing Custom Fields

Once the custom fields have been defined, you can add or edit information just as you would in the *Business* or *Residence Information* dialog boxes. To open the *Custom information* dialog box:

- Select the **Edit/Custom fields...** command.

Any custom fields that you have set up will appear in this dialog box. The dialog box displays 16 custom fields at a time. Use the **Prev** and **Next** buttons to view/edit the other 16. The program will remember which field you were last on when you left the dialog box, so you won't have to re-position the cursor so often.

Reminders & Alarms

The Phone Book enables you to set unlimited reminders for each entry. The reminders have descriptive text, notes, date and time information, advance notification, alarms, color coding and symbolic representation. Use them to remind you about people's birthdays, anniversaries, meetings, dates, etc.

Although reminders are connected to phone book entries, they are stored in a separate database. Reminder information from all of your phone books is stored in this one file. The file is monitored independently by a *Reminder* program. This means that, as long as the Reminder program is running, you can receive reminders and alarms from any phone book without even having that book open.

Note: Unlike in previous versions of DeskTop Set, alarms are now just a special type of reminder with sound and message features.

Entering Reminders

Reminders are entered from the phone book on a record by record basis. This means that you first must choose the person or company (record) for which you want a reminder.

- Highlight the record for which you want to make a reminder.

From this point, there are two methods of creating the reminder:

- Select the Remind/Enter event... command, or...
- Click and hold down the left mouse button over the record; the cursor shape will change.
- While holding the left mouse button down, position the cursor over the Reminders program icon (the Reminders program must be running).
- Release the left mouse button.

The *Edit reminder* dialog box appears:

The *Edit reminder* dialog box contains all of the important information regarding the reminder. This dialog box features a *Mini-calendar* control, a *Clock* control and *Reminder templates*, all of which contribute to helping you create reminders without ever touching the keyboard.

The *Clock* and *Mini-calendar* controls are discussed in Chapter 1, **Common Controls**. The *Reminder templates* are like pre-configured reminders that have many of the attributes already set up, so all you have to do is make the final adjustments. We will discuss how to set up these templates shortly.

Reminder

- Select one of the reminder templates; the reminder description will appear in the *Reminder* field, **or...**
- Enter your own reminder text in the *Reminder* field.

Date

This is the actual date of the event about which you wish to be reminded.

- Enter the date of the reminder event in the *Date* field.

Remind on

This is the date on which you want to start being reminded about the actual event. For example, you may have a friend with a birthday on July 4th. You could enter 07/04/92 in the *Date* field, and put 06/20/92 in the *Remind on* field. You'll be reminded about the birthday 2 weeks ahead of time so you won't forget to go buy a present.

Hint: Use the *mini-calendar* control to enter the date fields with the mouse. See Chapter 1, **Custom Controls**, for details.

◆ Enter the advance date in the *Remind on* field.

Time

This field holds the time of the event, and is optional. For example, a reminder for a birthday doesn't need a specified time, but a reminder for a birthday party does.

◆ Enter the time of the event in the *Time* field (optional).

Alarm

If you want the event to have an alarm, enter a time in this field. The alarm consists of an audible sound coupled with a visual alert such as a blinking cursor or message box.

The alarm will go off on the date specified in the *Date* field, at the time specified in the *Alarm* field.

Hint: Use the *Clock* control to enter the time fields with the mouse. See Chapter 1, **Custom Controls**, for details.

Note

The note field can hold brief, free-form text concerning the reminder. In our birthday example, we might put a list of possible gifts in this field. If the reminder were about a business meeting, you could list the items you have to take to the meeting.

◆ Enter free-form text in the note field (optional).

◆ Press the **Ok** button to save the reminder and close the dialog box.

Daily, Weekly, Monthly - Floating reminders

If you want a reminder to occur periodically, select one the recursion method. Floating reminders will appear as any other events. As soon as the date changes past the date of last occurrence, the program will change the date of the event to the next occurrence. The date change will happen regardless of the event state (i.e. Done or Enabled). To learn more about setting floating reminders, please review the **Recurring events** chapter of the **Calendar** section.

There is one significant difference between Calendar's recurring events and floating reminders. Calendar program posts all recurring events to the dates that they occur. Reminders program rolls (floats) them over. Thus, if you will be checking future reminders, you will not see the floating reminders on the date of its consecutive occurrence unless today's date if past the last reminder's due date.

Viewing Reminders

Reminders can be viewed in two different ways. You can display all the reminders for a particular person, or for the current day.

By Person

Imagine, merely for the purposes of this example, that my record is in your phone book, complete with mailing address information. You forgot when my birthday is, but you simply must find out so you can send me lots of presents. You could quickly find this information by viewing all of the reminders associated with my record.

To display all the reminders for a particular person (or record):

◆ Highlight (select) the record.

◆ Select the Remind/Edit reminders... command.

The *Reminder list* dialog box appears:

The *Reminder list* dialog box displays a list of all the reminders associated with the currently selected phone book record. Use the symbols, dates and/or event descriptions to quickly spot important events associated with a person.

Use the buttons along the bottom of the dialog box to manage the reminders:

Done
Marks a reminder as completed or 'acknowledged'. A completed reminder appears in the list with a check mark next to the date field. If it has an alarm, the alarm will no longer sound.

If you are positioned on a completed reminder in the list, the **Done** button changes to the **Enable** button. Press this button to re-activate a reminder and remove the 'completed' check mark.

Delete
Removes the currently selected reminder. When the reminder is deleted, a blank line remains in its place. Notice that, while you are positioned on that blank line, the **Delete** button changes to **Undelete**. If you have made a mistake and unintentionally deleted a reminder, you can restore it. This option only remains in effect until you close the *List reminders* dialog box.

Add
Press this button to create a new reminder for the person. The *Edit reminder* dialog box will appear.

Edit
This opens the *Edit reminder* dialog box for the currently selected reminder. Use this to view or edit the reminder settings, options and notes.

Cancel
Closes the *Reminder list* dialog box.

By Date
You may want to display all the reminders that you have for today (this is the whole purpose of reminders).

◆ Select the **Remind/Pending...** command.

The *Today's reminders* dialog box appears displaying all the reminders for the current day. This list consists of all reminders that fall within the date range specified by their *Remind on* date and *Grace period*.

As you will remember, the *Remind on* date is specified for each reminder in the *Edit reminder* dialog box. The *Grace period* (for template events only) is specified for each event in the *Reminder templates* dialog box.

Reminder Templates

The templates that are used for reminders are very similar to those used for the Calendar's events. To view/edit/add templates, open the *Reminder templates* dialog box:

◆ Select the **Remind/Templates...** command.

The list box on the left displays all of the existing reminder templates.

- Use the **Add** button to create a new template.
- Use the **Down** and **Up** buttons to change the position of the currently selected template in the list. Your most often used templates should appear at the top of the list for quick access.

The first text field below the list box is the name of the reminder template. Reminder templates should be named in terms that are easily identified with their meaning.

The text field along the bottom of the dialog box holds the actual template text. Enter event text and keywords in this field. When this event template is used to create a reminder for a record, the keywords will be replaced by the associated information from the record.

Study some of the existing reminder templates for ideas on how keywords can be used effectively. See **Appendix B** for a full list of keywords.

The symbol and color code for the currently selected template are displayed to the right of the template text line. To select a new symbol, click on one of the available symbols in the bar along the top of the dialog box. To assign a new color, click on the corresponding bar in the *Color code* area.

Alarm
The options in this area determine the alarm properties of the reminder. The *On* check box is used to determine whether or not the reminder has an alarm (many reminders do not). The *Advance* field specifies the number of minutes before the event time that the alarm will sound. The *Alarm sound* dialog box is used to specify which tune will be used for the alarm.

Options
The *Options* section is used to specify the reminder's date range. The *Advance period* specifies how many days before the event you wish the Reminder program to start reminding you about it. *Grace period* specifies how many days after the event you want to continue being reminded.

Floating reminders
The *Floating* options allows to indicate the recurrsion pattern for the reminders.

You may chose *Daily* option to have the reminder occur every *X* day, *Weekly* to occur ever *X* week, and *Monthly* to set any conceivable pattern you wish, such as third Tuesday of every second week. You should also use Monthly option to set annual events, such as birthdays. To learn more about setting floating reminders, please review the **Recurring events** chapter of the **Calendar** section.

- When you are done entering/editing the alarm templates, press the **Ok** button.

Record Information
This topic describes how you can configure the options for the record.

- Select the **Edit/Record options...** command.

The *Record information* dialog box appears:

The *Record information* dialog box contains information about the entry's record (in the database) and options for the record.

Last edited
This field displays the date and time that the record was last modified.

Access
This section contains options having to do with accessing and modifying the entry

Locked
Prevents the page entry from being modified, cut or cleared. This can help you avoid accidentally changing or deleting records.

Private
Designates the entry as private. Private entries will show up as blue (yellow when highlighted) on the page. You can hide private records from view by selecting the **Page/Hide private** command. This can prevent prying eyes from seeing your personal entries, but it is not a security measure.

View only
Prevents you from changing any of the entry's information, other than the page information. All of the *Edit* dialog boxes are disabled; you can only view the record using the *View window*. This also prevents you from cutting and clearing, or even copying the record. Use this in combination with the *Locked* option to completely "freeze" a record from anything other than viewing.

Record
With the exception of the *Clone* check box, these options are used only in the network version of the Phone Book. While they have no affect on your current program, if you ever switch to the network version, they will be valid.

Local
This means that the phone book entry is only for your personal reference, and there is no need for it to show up in everybody's book.

Network
This type of entry will be available to every Phone Book user on the network.

Owner
This specifies the record of the owner of this particular copy of the DeskTop Phone Book. In most cases, this is your record.

Clone
This check box is informational. It tells you whether or not the record is a cloned entry. Cloned entries will not print out (it is assumed that you only want the original entry to print). You can change this by un-checking the *Clone* box (the record will functionally remain a clone).

Default view

This section allows you to specify how you want the record to be displayed when you double-click or press **Enter** on the *page name* field for the entry.

Default

The record is displayed according to the Phone Book's setup options (**File/Setup/Book...** command, *Mouse click opens* section).

View window

The record is displayed in a *View window* (see the **Viewing Entries** section later in this chapter).

Edit business

The *Business information* dialog box will be opened.

Edit residential

The *Residence information* dialog box will be opened.

Events dialog

Opens the *Reminders* dialog box (see the **Alarms & Reminders** topic of this section).

Default

When you create a new entry, the Phone Book initializes all of its information using internal defaults. You can, however, designate one of your own records ad the default record. This default record will be used to initialize the fields of any new records you create.

Current record

Designates the current record as the default record, which will be used to initialize all new records.

Apply to new

This check box is only visible if the *Current record* box is checked. If selected, the Phone Book will apply the current record to all newly created records. If it is unchecked, the current record remains designated as the default record, but the Phone Book will revert to its internal defaults when initializing new entries.

It is not necessary for you to change any of the record options for our example, but if you wish to test the effects of various options:

- Select the desired options.
- Click **Ok** to close the dialog box and return to the entry page.

Viewing Entries

There are several different ways to view your entries, most of which were explained briefly in the **Record Information** topic.

To view an entry:

- Select (highlight) the record you wish to view.
- Double-click or press **Enter**.

The record information will be displayed via the view option that is selected in the *Default view* section of the *Record information* dialog box.

Related Topics:

View Window

Other Viewing Options

Global Viewing Options

View Window

The default option for viewing entries is the *View Window*.

The *View* window allows you to review the information for the selected record at a glance. Business and personal information, phone numbers, notes and categories are displayed simultaneously in this resizable, movable window. The Phone book remembers the last size and position of the *View* window for each record and will display it that way the next time it is opened.

You can open *View* windows for as many records as you like, and display them all simultaneously. When a *View* window is iconized, it appears with your other program icons as a file folder with the entry's page name as the caption. You can move the icon wherever you wish.

The color of the tab on the folder icon is determined by the name of the entry. If the Phone book can recognize the name as that of a woman or man, it makes the tab red or blue, respectively. In those cases where it does not recognize the name, or it is strictly a business entry, the tab will be green.

View windows can be left open or iconized when you close the Phone Book. When you restart the program, they will re-open in the same position and state as when you quit.

As an example of using *View* windows, say you work for a doctor or dentist. You could select, view and iconize all of the patient's records for today. Then, as each of them arrives, you could double-click on their folder to review their information. I'm sure you're not all working for doctors or dentists, but you see how the idea could carry over to other uses.

The *View* window has a menu with commands which let you manage information associated with the record. The menu is basically the same as the Phone Book's main menu (Windows mode). However, it is missing some of the commands that do not apply to single records, such as the **Find** and **Show** submenus and their associated commands.

The Phone Book can open an unlimited number of *View* windows. Unfortunately, Windows itself imposes a limitation on the total number of windows you can open. Each open window requires an unusually high percentage of system resources, 3-4% under Windows 3.0 and 1-2% under Windows 3.1.

Local Menu

The *View* window has a local, expert-type menu with several functions that allow you to manipulate the window.

Close

Closes the current view window.

Zoom

Resizes the *View* window so that all of the record information is visible.

Cascade

Arranges all open *View* windows in a cascade formation so that all the captions (and hence page names) are visible. This way you can display many *View* windows in a relatively small area, and activate only the one you are currently concerned with.

Records

This selection is only active when you have multiple view windows open. By highlighting this selection and sliding the mouse over to the right, you can display a sub-menu which lists all open *View* windows. Select one from the list to activate it.

Close All...

Closes all *View* windows, including iconized ones.

Additional Functions

The *View* window has several other functions.

- Double-click the mouse anywhere in the window to bring up a *Dial* menu for the entry. This is analogous to selecting the entry on the phone book page and clicking the *Phone* icon. There is no keyboard equivalent.
- Press the **PgDn** or **PgUp** key to toggle between normal and enlarged fonts.
- Press the **Esc** or **Enter** key to close the window, or select the system menu **Close** command.

Other Viewing Options

Besides the *View* window, there are several other ways you can view selected record information. The *Record information* dialog box (**Edit/Record options...** command) contains a section called *Default view* which allows you to choose the viewing method for each record. (See the **Record Information** topic in the **Adding Entries** section of this chapter for more information on the *Record information* dialog box.)

The view options are as follows:

Default
The record is displayed according to the Phone Book's setup options (**File/Setup/Book...** command, *Mouse click opens* section).

View window
The record is displayed in a *View window*.

Edit business
The *Business information* dialog box will be opened.

Edit residential
The *Residence information* dialog box will be opened.

Events dialog
Opens the *Reminders* dialog box (see the **Alarms & Reminders** topic of this section).

Global Viewing Options

You can set the default viewing option for all records in the book that have no explicit view option set. This view option will be used for all records that specify *Default (Setup)* as the *Default view* in the *Record information* dialog box.

This option is set in the *Mouse click opens* section of the *Phone Book Setup* dialog box. The options are as follows:

Edit

This sets the *Business Edit* dialog box as the default view option.

View

The *View* window will be the default view option.

See the **Customizing the Phone** Book section of this chapter for more details.

Manipulating Entries

Once you begin entering phone book information and you start to get a feel for how you want to lay out your book, you may decide to copy, move or remove some of your records. The Phone Book has several commands which allow you to do this.

Related Topics:

Moving, Copying and Removing

Copying Information to Other Programs

Pasting Information from the Clipboard

Gathering Entries

Sorting Entries

Moving, Copying and Removing

The lower portion of the **Edit** menu has all the commands you need to move, copy and remove entries.

Copying

Use the **Edit/Copy** command to copy the information from the currently selected entry into the Phone Book's internal clipboard. It can subsequently be transferred to other locations.

Note: The Phone Book's internal clipboard is not the same as the Windows Clipboard. For a complete description on the differences between the two, see **Chapter 1, Installation and User Interface**.

For example purposes, we'll use the *Okna Corporation* record we create earlier in the chapter.

- Turn to the **O** page and select the *Okna* record.
- Select the **Edit/Copy** command.

The information for Okna is now in the internal clipboard.

Pasting

The **Edit/Paste** command transfers information from the Phone Book's internal clipboard into the currently selected page entry. If the page entry is not empty, the Phone Book will ask you if you really want to over-write the existing information.

Assuming you followed the instructions above and copied the Okna entry, you can:

- Select a blank entry on the page.
- Select the **Edit/Paste** command.

You now have two (or more) entries for Okna. Aren't you lucky.

Cloning

The **Clone** command creates a "cloned" page entry on the currently selected line using the information in the Phone Book's internal clipboard. To understand how this differs from the *Paste* command, you have to understand a little bit about how phone book entries are stored.

The Phone Book keeps all of the entry information in a database file. When you create a new entry in the *Business* or *Residence information* dialog box, the program saves the information in a database record.

When you *Copy* and *Paste* an entry, the program creates a whole new page entry and database record and simply copies the information from the original record. However, when you *Copy* and *Clone* an entry, the program does not create a new record. Instead, it creates a new page entry but uses the same original record to hold the information.

In this way, you can have several *Page entries* that refer to the same *record* of information. Since the *Page entry* can be completely different from the information stored in the *Business* and *Residence information* dialog boxes, this means you can have two or more page entries, with different names, that refer to the same record.

Take, for example, the Okna Corporation entry that we created earlier in the chapter. Sometimes you may be able to remember the company name, "Okna." However, at other times you can only remember the name of the program, "DeskTop Set," or the name of a programmer there, "Chris

Hacker."

- Select the Okna record and choose the **Edit/Copy** command.
- Turn to the **D** page and select an empty line.
- Select the **Edit/Clone** command.
- Change the page entry from "Okna Corporation" to "DeskTop Set."

You now have a cloned entry for Okna with a page name of "DeskTop Set".

To demonstrate that the two page entries point to the same database record, choose the **Edit/Business** command to enter a few notes in the "DeskTop Set" record. Then turn back to the **O** page and view the business information for the "Okna Corporation" record. The notes will appear there also (if you have several Okna entries, make sure you view the one that we copied from to make the clone).

Moving

If you want to remove an entry from one page and place it somewhere else, use the **Edit/Cut** and **Edit/Paste** commands. The **Cut** command differs from the **Copy** command in that it copies the entry's information into the internal clipboard, and then it removes the entry.

- Select one of the Okna records.
- Select the **Edit/Cut** command.
- Select a blank line on another page.
- Select the **Edit/Paste** command.

The entry is now moved.

Removing

To completely remove an entry from the book, use the **Edit/Clear** command.

Here is your chance to get rid of all those Okna entries (leave one for future reference):

- Select one of the extra Okna records (or some other record you want to remove).
- Select the **Edit/Clear** command.

The entry is now removed; the information is not copied to the clipboard.

Copying Information to Other Programs

The Phone Book enables you to transfer selected entry information to the Windows clipboard. This information can then be pasted into other Windows programs. You can also paste information from the Windows clipboard into the *Business* or *Residence information* dialog boxes.

Setting Up the Copy Templates

The *copy templates* specify which information fields will be transferred whenever you use the Phone Book's copy commands. The templates come pre-configured with default values which you can change if you wish. To view/edit the templates:

- Select the File/Setup/Copy templates... command.

Use template... with key

The combo-boxes in this section of the dialog box define which template will be used for the various copy commands. The 'default' copy command is specified by the *No key* combo-box; this is the template that will be used when you do a normal copy.

As you will see in the next topic, you can change the type of information that will be copied by holding down the **Shift**, **Ctrl** or **Alt** key when you issue the command. The corresponding combo-boxes specify which template will be used when any of these special keys is held down during a copy.

Template

This edit field is where the template is defined. The fields in the template specify which information will be copied, and shows how it will be formatted. For more information on templates, read the **Designing Letters** topic in the **Printing & Mail Merge** section of this chapter.

There are four templates available: *Business*, *Home*, *Misc. 1* and *Misc. 2*. To view/edit any of these templates, press the corresponding button in the bottom of the dialog box.

Keywords

The *Keywords* list displays all of the available keywords. Double-click on any of the keywords to insert it into the template at the cursor position.

When you are through modifying the templates:

- Press the **Ok** button to save your changes and exit, **or...**
- Press the **Cancel button** to exit without saving changes.

Copying to the Clipboard

Business information

To copy business information from the selected record into the Windows Clipboard:

- Choose the **Edit/Copy** command.

Note: The **Edit/Copy** command has the dual function of copying the entry's information into the Phone Book's internal clipboard and copying selected information into the Windows clipboard.

The information that has been placed in the Clipboard can subsequently be pasted into other applications.

Residence information

Copying residence information to the Windows Clipboard works almost exactly like the business information:

- Press and hold the **Shift** key down.
- Select the **Edit/Copy** command.

Drag & Drop Method

If you have a mouse, the Phone Book allows you to "drag" an entry right from the phone book page and "drop" it into a Windows word processor or editor.

This method is more convenient than cutting and pasting, but it requires that you position your windows properly. The Phone Book window must be on top of the word processor window, but at least part of the word processor's window must be showing. Once this is accomplished:

Business information

- Move the mouse over the desired entry.
- Press and hold the left mouse button. The mouse cursor will change shape.
- While continuing to hold the left mouse button, position the mouse over the word processor window.
- Release the mouse button.

A slightly simpler method is to iconize the word processor or editor and then drag and drop the phone book information onto the icon. It has the same affect. In both cases, the business information is pasted to the end of the document.

Residence information

Dragging and dropping residence information is the same as it is for business information, only you must hold the **Shift** key down while you perform the entire operation.

A quick note about the mouse cursor; When you press and hold the mouse button on an entry, the mouse cursor changes shape:

- If the Phone Book can identify the record as belonging to a man or woman, the cursor will change shape to that of a little man or woman, respectively.
- If the sex of the entry cannot be determined, or it is determine that the entry is strictly a business record, the cursor changes shape to a moving truck.

The sex of the entry is determined by comparing the entry name to the names found in the file NAMES.TBL. For more information on this file, see **Adding Entries, Business Information**, Name recognition (earlier in this chapter).

Pasting Information from the Clipboard

You can paste information from the Windows Clipboard into your *Business* or *Residence information* dialog box. This function is only available when you are first creating an entry, and, of course, it requires that there is some type of text in the Clipboard.

From either the *Business* or *Residence information* dialog box:

- Click the **Paste** button.

The *Paste* dialog box appears:

The Phone Book examines the "raw" information in the clipboard and tries to guess which pieces of information belong in which phone book fields. It does best with phone numbers, zip codes, company and individual names that it recognizes.

The purpose of the *Paste* dialog box is to allow you to modify the information before it is pasted into your phone book entry. It has several buttons to help you do this (in case it didn't guess so well):

Swap names

This swaps the text in the *FName* and *LName* fields.

Swap phones

Swaps the *Business* and *Home* phone fields.

Misc

Click this button when you are done editing and you want to paste the information into your entry.

Gathering Entries

The *Gather* dialog box allows you to create lists of entries and then move or clone them to another page. You may, for example, want to clone several people on a topic page that you have just created. The **Gather** command would be the ideal way to do this.

You can also assign one or more categories to the entire *Gather* list. This is the perfect way to create mailing lists. Just gather all the names you want to be on the list and assign them a category. Then you can easily print labels or a mail merge for just this category of people. (More about printing and mail merge in the **Printing & Mail Merge** section of this chapter.)

To open the *Gather* dialog box:

- Select the **Page/Gather...** command.

The *Records* list box in the *Gather* dialog displays the list of gathered records. This list is empty unless you gathered records previously in this session of the Phone Book. To gather names into the list:

- Position the *Gather* dialog box off to the side of the phone book so that you can easily see the pages.
- Turn to the page and highlight the record of the person you want to add to the list.
- Double-click on the name, or press the **Select** button in the *Gather* dialog box.

You can add as many names to the list as you like in this manner. To remove names from the list:

- Highlight the name you wish to remove.
- Press the **Remove** button.

To move or clone the gathered list of entries to another page:

- Turn to the page on which you wish to place the names.
- Press the **Clone** or **Move** button.

To see the differences between moving and cloning records, see the **Moving, Copying & Removing** topic in this chapter section.

To assign categories to the list of entries:

- Press the **Category** button.

A list box of your phone book categories (if you have created any) appears on the right side of the *Gather* dialog box. (For information on creating categories, see the **Categories** topic in the **Organizing Entries** section of this chapter.)

Sorting Entries

You can sort all of the entries on any phone book page [pair].   This includes any extra pages you may have added for that letter.

- Select the **Page/Sort** command.

With the present version of DeskTop Set, there is no way to sort you entire phone book.

Linking Entries

Linking is convenient way to share and update common information between the entries in a phone book. If, for example, you are dealing with several individuals from the same company, you want the company's address and phone number to be in each of the entries. There is no need to retype the information for every individual; You can enter it just once and then link it to all the entries. Furthermore, any changes in the master record are immediately reflected in all linked entries.

Related Topics:

Selecting the Master Record

Linking to Other Entries

Removing Links

Selecting the Master Record

Linking replaces data fields in the linked records with the corresponding fields from the *master* record. To link records, you must first select the *master* record. The *master* record is the phone book entry that has the information you wish to link into other records.

- Select the **Edit/Link...** command.

The *Link* dialog box appears:

The top section of the dialog box displays the information for the *master* record. This is just for your review, and cannot be edited from here.

Shared data

This section provides check boxes where you can select which information you want to be included in the link **from** this *master* record **to** any other records. For any box that is checked, the corresponding information will be included in the link.

- Check the desired boxes to select the information to be linked.
- Press the **Ok** button.

You have now selected the current record as the *master* link record, and it will remain so until you select a new *master* record or until you quit the program.

Linking to Other Entries

- Select the record that you wish to link the information into.
- Open the *Business information* dialog box (**Edit/Business...** command).
- Press the **Link** button.

The *Link* dialog box appears again. At this point you can review the *master* record's information and specify which fields you want to link.

- Select the desired link fields.
- Press the **Ok** button to complete the link.

You should now see the information from the *master* record pasted into the corresponding fields in the current entry. As long as the link is maintained, any time you update the *master* record, the linked records will also be updated to reflect the changes.

The text in the linked fields will be displayed using different color and the fields can't be edited.

As you can see, once the record is linked, the **Link** button changes to **Unlink**.

Removing Links, changing link options

There are two reasons that you may want to remove a link or to change link options.   First, you may no longer want to associate the person with the *master* record (they may no longer work for that particular company, for example).   Second, you may not want the entry information to be updated every time the *master* record is changed, thirdly, you may want, for example, to unlink fax telephone number because this particular person has a different number.

For example, you may have a person in your book that works for a particular company, but he works at a remote location, so his record information is slightly different from the *master* record.   You could use the **Link** command to copy the information from the *master* record into his entry.   Then **Unlink** his record so you can make the minor changes and not have to worry about them being changed back every time you make a modification to the *master*.

If you want to remove the link from the current entry or change link options to the *master* record:

- Select the record and open the *Business information* dialog box (**Edit/Business...** command).
- Press the **Unlink** button. The *Link Options* dialog box will open.
- Select new options or press the **Unlink** button again.

Organizing Entries

The Phone Book is capable of holding as many entries as you wish. Its page design and searching features make it easy for you to find entries, but there may be times when you want to otherwise organize your entries for easy manipulation, viewing and printing. The Phone Book offers categories, extra pages, topic pages, groups, yellow pages and additional books to help you do this.

Related Topics:

Categories

Extra Pages

Topic Pages

Groups

Additional Phone Books

Yellow Pages

Categories

Categories are a convenient way to organize your phone book entries. You can have as many as 128 different categories defined per book, and you can assign up to 128 categories to each entry.

Say, for example, you want to send a letter to every attorney in your phone book. You could create a category called "Attorney," then assign it to every attorney in your book. You could then easily get a list of all attorneys at any time by using the **Find/Category...** command. You could print a letter to each attorney in the list just by selecting that category.

Creating Categories

To create categories for the current phone book:

- Select the File/Setup/Categories... command.

The *Define Categories* dialog box appears:

The dialog box displays the list of categories. To create a new category:

- Select one of the "Unused" categories from the list.
- In the category description field (near the bottom of the dialog box), replace the "Unused" description with a category name of your choice.
- Select another "Unused" category and repeat, **or...**
- Press the **Ok** button when finished.

Similarly, you can edit the names of existing categories.

Copying Categories from Other Books

The **Copy** button allows you to copy the entire category list from another phone book into the current book. Only use this command if you don't have any categories defined in the current book, as it will overwrite any existing categories.

- Press the **Copy** button to open the *Select file* dialog box.
- Select the file from which you want to copy the categories.
- Double-click on the selected file, or press the **Copy** button.

The categories from the selected file will be copied into your current open book.

- Press the **Ok** button when finished.

Deleting Categories

To delete an existing category from the list:

- Select the category from the list.
- In the field at the bottom of the dialog box, delete the category description.

The category will revert back to "Unused."

Assigning Categories

To assign one or more categories to a phone book entry:

- Select a phone book entry.
- Choose the **Edit/Categories...** command.

The *Assign Category* dialog box appears:

Assigned
This list box displays all the categories that are assigned to the current entry.

Available
This list box displays all the categories that are defined for this phone book. If the list is empty, then you have not created any categories yet (see above).

To assign a category:

- Select one of the *Available* categories.
- Double-click on the category, or press the **Select** button.

You can repeat these steps for any or all of the available categories.

To remove a previously assigned category:

- Select the category from the *Assigned* list.
- Press the **Delete** button.

You can also use the *Gather* feature to assign categories to an entire list of names at once. Say, for example, you suddenly realize that you have a lot of relatives listed in your phone book, and you want to give them their own category. First, create the "Relative" category. Then, instead of assigning the category to each relative, one-at-a-time, you could:

- Use the *Gather* dialog box (**Page/Gather...** command) to gather the list of relatives.
- Press the **Category** button to display the list of available categories.
- Select the "Relative" category and press the **Select** button.

The "Relative" category is now assigned to every name in the list.

Extra Pages

For each letter in the phone book, you have two facing pages, each capable of holding 19 entries. Of course, the phone book can accommodate many more entries than this. If you should run out of room on any particular letter page, you can simply create another page [pair] for that letter. In fact, the first pair of pages doesn't even have to be full; you can create new pages at any time.

Creating Extra Pages

To create a new page:

- Turn to the letter for which you want to add a new pair of pages.
- Select the **Page/Add page** command.

The new page pair will be created, and the book will turn to that page. Notice that the page letter is displayed in the upper left corner of the page, and the number is displayed in the upper right.

Turning to Extra Pages

To turn the phone book to an extra page:

- Turn to the first page for the particular letter.
- Click the right-arrow icon on the blue control bar or press the **PgDn** key to turn to subsequent pages for that letter.
- Click the left-arrow or press the **PgUp** key to turn to the previous page.

Removing Extra Pages

To remove extra pages:

- Turn to the extra page you wish to remove.
- Select the **Page/Delete page** command.

There are a few points to remember about extra pages:

- You can only create an extra page from the last page for that letter. In other words, if you have two C pages and you want to create a third, you must turn to the second C page before you can do this.
- You can only remove the last page for any particular letter. Furthermore, the first page for each letter can never be removed.
- If you remove a letter page, all entries on that page will be lost unless they are cloned elsewhere.

Topic Pages

Topic Pages are like extra pages in your phone book that are dedicated for one particular purpose. Furthermore, they have their own "name" instead of a letter and number combination and can only be accessed though the topic entry.

Topic pages can be used to hold a group of associated entries. You may have ten people in your book that work for the Okna Corporation, for example. You could create a topic page called "Okna" and place those entries on that page.

Better yet, you could list those people on their proper letter pages and clone them on the "Okna" topic page. This way, if you can remember the persons name, you can just look them up by name. If you don't remember the name, but you remember that they work for Okna Corp., you can turn to the Okna topic page and find them there. That's flexibility!

Creating Topic Pages

To create a topic page:

- Create an entry with the name you wish the topic to have, **or...**
- Select an existing entry (topic entries can have information in them just like any other entry).
- Select the **Page/Add topic** command.

The topic page will be created and the phone book will turn to that page. Notice that there is no letter associated with the page, and that the name of the topic appears along the bottom of the page.

There is no special way to "get out" of a topic page, just turn to another page as you normally would.

Turning to a Topic Page

There are two ways to turn to a topic page. The first method can be used when you are already on the page where the topic entry exists:

- Turn to the page where the topic was created.
- Select the topic entry. Topic entries appear in **bold**.
- Double-click on the topic entry or press the **Enter** key.

Notice that, if you have a topic entry that also contains information, you can no longer double-click or press **Enter** on it to view it. You must explicitly select one of the **Edit** menu commands to access the information. Or, you can select the *Default view* (**Edit/Record options...** command) and then use a **Shift**-double-click or **Shift-Enter** to open that view.

The second method is more direct:

- Select the **Show/Topics...** command.

A list box will appear displaying all the topics in your book:

- Select the topic you want from the list.
- Double-click on the topic, press the **Select** button or press **Enter** to turn to that topic page.

Adding Records to a Topic

You can add records to a topic page just as you would with any other page. You can also use the **Edit** menu commands to move or clone entries to the topic page.

The easiest way to move existing entries on to a topic page is with the **Gather** command:

- Open the *Gather* dialog box (**Page/Gather...** command).
- Gather all the names you want to place on the topic page.
- Turn to the topic page.
- Press the **Move** or **Clone** button to transfer the gathered entries to the topic page.

If you use the **Move** command, the entries will be removed (cut) from their current pages and placed (pasted) onto the topic page. If you use the **Clone** command, the entries will be copied (but left intact) from their current page and clone entries will be created for them on the topic page. (For more information on the differences between moving and cloning, see the **Manipulating Entries** section of this chapter.)

Groups

Groups provide you with an easy way to logically group entries that you deal with often. You can make a group for your "Top ten customers" or "People to call today." Leave the group on your screen all day (as a window or an icon) and, whenever you need information on one of those people, you can use the group to instantly position yourself on their record in the phone book.

With *Groups*, you can iconize the Phone Book to leave more room for your other Windows programs. When you want to see the information for one of your group entries, simply click on the group folder icon to display the group and then select the name to open the *View* window for that person.

You can also use *Groups* to specify a list of people to print or export. In this manner, they act almost like categories, but are far more useful.

- Choose the **Show/Groups...** command.

The *Open group* dialog box appears:

Creating or Modifying Groups

To create a new group:

- Press the **New** button, **or...**

To modify an existing group:

- Select the group from the list.
- Press the **Setup** button.

The *Group Options* dialog box appears:

The *Group Options* dialog box contains all the settings for the currently selected group, or for the new group in this case.

Modified

This is the date and time that the group was last modified. This field will be empty if you are creating a new group.

Group name

The name of the current group. If you are creating a new group, this field says "Untitled group."

Group file

This is the file in which the information for the group is stored. The Phone Book creates this unique filename automatically.

Book file

This is the filename of the current phone book. This field is informational only; you cannot edit it.

Password

You can specify a password for your group in this field. When you (or anyone else) attempt to open the group, you will be prompted for the password before the group will be opened.

Notes

A few simple notes about the group can be placed here. Follow the same guidelines as you would with the *Notes* fields in the *Business* and *Home information* dialog boxes.

Sort names

Check this box if you want the names in the group list to be automatically sorted (alphabetically).

Records
The number of entries assigned to the group.

- Set up the desired options.
- Press the **Ok** button to create the new group.

Viewing Groups

To view a group:

- Select the desired group from the list in the *Open group* dialog box.
- Press the **Open** button.

The *Group* dialog box for the selected group will be displayed:

Use the *Group* dialog box to view and access all of the members of the group. You can have as many groups open at one time as you need. The *Members* list displays all the members for the selected group.

There are eight buttons in the *Group* dialog box that allow you to manipulate the group.

Sort
Alphabetically sorts the member list. If you checked the *Sort names* option in the *Group Options* dialog box, this command will only be necessary when you add a new member to the group.

Up
Moves the selected member name up one position on the list.

Down
Moves the selected member name down one position on the list.

Delete
Removes the currently selected member.

Add
Places the currently selected phone book entry in the group.

Select
Views the currently selected group member (see below).

Cancel
Closes the group without saving any changes you may have made.

Save
Closes the group and saves all changes.

Group dialog boxes are similar to *View* windows in that they can be left open even when the Phone Book is iconized, and they themselves can be iconized. Furthermore, the Phone Book will remember the groups you had open and their states when you last quit the program. When you open the Phone Book again, it will re-open them just as they were before.

If you iconize the Phone Book with open groups, the group dialog boxes will be hidden until the book is restored. However, you can iconize a group before you iconize the book. Then, when you iconize the book, the group icon will remain visible and you can restore it at any time.

The group icon looks like a bunch of file folders. In a sense, it is like a group of *View* window icons. By default, this icon will be placed with your other program icons, but it may be moved anywhere on the screen. The icon caption is the name of the group.

Adding Members to the Group

Adding new members to the group is just like gathering entries.

- Position the *Group* off to one side of the phone book so that you can clearly see the pages.
- Turn to the page and highlight the entry you wish to add to the group.
- Double-click on the entry, or press the **Enter** key, or press the **Add** button in the *Group* dialog box.

The entry will be added to the group. If you have more than one open group, the name will be added to the one that is or was most recently active.

Viewing Group Members

To view a group member:

- Select a name from the member list.
- Double-click on the member or press the **Enter** key or press the **Select** button.

Depending on the state of the Phone Book, one of two things will happen:

  - If the Phone Book window is visible, it will turn to the page and highlight the entry of the selected group member.
  - If the Phone Book is iconized, a *View* window will open for the selected group member.

Additional Phone Books

The Phone Book program allows you to have as many phone books as you like. You can, for instance, have one book for your business entries and one book just for your personal information.

Whenever you start the Phone Book, it will open the book you were using when you last quit the program, and it will turn to the page and entry you were on at that time.

Phone Book Files

Before you create additional phone books, you may want to learn a little about how the information is stored.

As with the other DeskTop Set applications, the Phone Book shields you from file names and particulars. The Phone Book remembers what file you were last in, so that when you load the program again, you start right where you left off. All changes to the files are saved as they occur (in real time).

The Phone Book uses two files to store its data. A file with an ADR extension stores information that appears on the pages. This is the file that you see in the *Select file* dialog box. A file with a BTR extension stores the records' information.

You can keep several Phone Book programs running or access several separate files with the same Phone Book.

Creating a New Book

To create and open a new, empty phone book:

- Select the File/Setup/Create file... command.

The *Create file* dialog box appears:

The Phone Book program stores the information for your entries in several files. The page information is stored in files with an extension of ADR (for ADdRess). The *Create file* dialog box displays all of these ADR files.

- In the field provided at the top of the dialog box, enter the name you wish to give to your new file. The filename must follow standard DOS file naming conventions, and it should have an extension of "ADR."
- Press the **OK** button.

The Phone Book will ask you if you would like to initialize current categories for the new file. Responding "Yes" will copy the category names from the current book to the new book. Otherwise, the new book will have no categories defined.

You will then be asked if you want to initialize the default setup information. A "No" response will tell the program to initialize the setup for you. To accomplish this, it copies the setup from the current book. Otherwise, the new book will have the default setup configuration, and you will have to make any changes to this manually.

The *File options* dialog box will be displayed for you to make any desired changes. Click **Ok** when you are done setting the options.

Finally, a message informs you that the new phone book has been created.

Opening Books

It is very easy to open and switch between books.

- Select the **Show/Books...** command to open the *Available Phone Books* dialog box.

This list displays all of the phone books in the DeskTop directory (DeskTop Set's default data directory). To open one of the books,

- Double-click on the desired book in the list, **or...**
- Select one of the books and press **Open** or **Enter**.

Alternatively, you can use the **File/Open** command to directly open the file of any phone book. This may be useful if you have a book whose files are not in the DeskTop directory.

- Select the **File/Open...** command. (The *Select file* dialog box is displayed.)
- Select a filename from the list.
- Double-click on the filename, or press the **Enter** key, or press the **Open** button.

The selected book will be opened and it will turn to the page and entry you were last on.

Yellow Pages

The Yellow Pages is simply another phone book that you can use just like any other. The only difference is that the pages are yellow instead of white.

The purpose of the Yellow Pages is for you to list the business and commercial entries that you call now and then, but with whom you have no personal or business connections. Basically, they are just like the yellow pages in your phone book. You may, of course, use them any way you like.

You may cut, copy, paste, gather and move records between the White and Yellow pages. You may not, however, link or clone records from the White pages to the Yellow pages or vice-versa.

To open the Yellow Pages:

- Select the **File/Yellow pages** command.

The Phone Book will open the book associated with the Yellow pages (YELLOW.ADR, by default) and turn the page color to yellow.

To switch back to the White (regular) pages:

- Select the **File/White pages** command.

You can associate any book you like with the Yellow pages; it doesn't have to be YELLOW.ADR. To re-associate the Yellow pages with another book:

- Open the Yellow pages, as above.
- Use the **Show/Books...** or **File/Open...** command to open another book, or the **File/Setup/Create new file...** command to create a new book.

The opened book will now be associated with the yellow pages. It is not a good idea to associate the same book with both the white and the yellow pages, as this can get confusing.

Finding Entries

The Phone Book has many features to help you locate entries quickly. There may be times when you can't remember what you entered for a persons page name, for example. With the searching features, you will have no problem locating their record as long as you can remember some piece of information about them.

The **Find** and **Show** menus contain all of the commands you will use to find entries.

Related Topics:

Quick LIST

Page Summary

Names List

Quick Search

Category Search

Phonetic Search

Exact Search

Phone Number Search

Quick LIST

The Phone Book maintains a list of the last ten entries that you accessed. These entries are displayed in the bottom of the **Find** menu. To return to one of these entries:

- Open the **Find** menu.
- Select one of the names from the *Quick List* at the bottom of the menu.

The phone book will turn to the appropriate record.

The *Quick List* is maintained between Phone Book sessions. However, a full list of ten names will only appear here after you have accessed that many records (there won't be any names on the list the first time you use the program).

Page Summary

The *Page Summary* dialog box shows the page name, position and company of each person on any particular page. It can be used to locate one person from a page full of records. This is particularly useful in the case of topic pages.

Say, for example, you have a topic page for the Okna Corporation. You want to call the president of that company, but when you turn to that topic page, you can't remember which of the 25 entries on the page is the president. With the *Page Summary*, you could display all the names and positions of the people on that page in one list, allowing you to quickly spot the president.

To display the *Page Summary* for the page you are currently on:

- Select the **Show/Page summary...** command.

The *Page summary* dialog box appears:

As you can see the list box displays the page name, position and company of all the records on the page. Use the list box to position the phone book on the record of the person you were looking for:

- Highlight the list entry of the person you were looking for.
- Double-click on the entry, press the **Select** button or press the **Enter** key.

You will now be positioned on that person's page entry in the book.

Names List

The simplest entry-finding tool is the *Names List*. This is a continuous list of all the entries in the current phone book.

- Select the **Show/List...** command.

The *Names List* dialog box functions like a modified Windows list box. To locate a name:

- Use the vertical scroll bar or the **Arrow, PgUp, PgDn, Home** or **End** keys to position the list.
- Click on a name to select it, **or...**
- To select a name with the keyboard, type in the first several characters of the name.

The letters you type will appear in the title bar of the dialog box, and the selection bar will move to the name that most closely matches what you have entered.

The more characters you type in, the closer you will get to selecting the correct entry. For example, if the entry's name is Okna, typing in the letter "O" will highlight the first entry beginning with O. "OK" highlights the first entry beginning with OK and so on.

- Double-click on the name or press the **Enter** key to turn the phone book to that entry's page and highlight the page entry.

Entries in the *Names List* can also be marked with the right mouse button. Marked names appear in red, and remain marked until the are unmarked with the right mouse button or until the *Names List* is closed.

Name marking is a convenient way to select records on which you want to perform some arbitrary operation. You could proceed down the *Names List*, marking each entry you want to update. Then, go back to the top of the list, double-click on the first marked name to position the phone book on that record, and perform the operation(s). When you are done with that entry, un-mark it and move on to the next one.

Quick Search

The Phone Book's new *Quick Search* feature allows you to quickly find the name of any page entry in your phone book. This feature is a real-time search which 'closes in' on the name you are searching for as you are typing it. This means that, most of the time, you only have to type the first few letters of a name to find that entry.

- To activate a quick search, press the **Ctrl** and **Alt** keys simultaneously, then release them.
- Begin typing the name you are searching for.

The letters you type will appear in the Phone Book's caption bar. After you type the first few letters, you will see the phone book pages turning and the highlight moving as you 'close in' on the entry you are searching for.

You can place the Phone Book in *Quick Search Mode*, allowing you to execute a quick search at any time without having to press the **Ctrl** and **Alt** keys. Keep in mind however, that while the book is in this mode, you will not be able to add or edit page entries, as the keystrokes are 'captured' by the search.

- Select the **Find/Enable quick search** command to place the book into quick search mode.
- Select the **Find/Disable quick search** command to return the book to normal mode.

Note: In order to find page entries using quick search, you must type in the name as it appears on the phone book page. Also, it can only find entries that have a database record, i.e. it will not find 'empty' page entries (just a name and number).

Category Search

Use the category search to find entries who's page name you can't remember, but who you know belong to a certain category.   You can also use the category search to display every entry that belongs to a particular category.

- Select the **Find/Category...** command.

The *Category Search* dialog box appears:

The list box in the lower left displays all of the available categories.

- Select one of the available categories.
- Double-click on it, or press the **Enter** key, or press the **Search** button.

Every entry from the phone book that belongs to the selected category will be displayed in the list on the top of the dialog box.   To highlight the phone book record of one of the individuals:

- Double-click on the entry name, or press the **Select** button.

You can search as many categories as you like.   Each time you do, the found entries will be appended to the list.   To clear the list of found entries:

- Press the **Clear** button.

Phonetic Search

The *Phonetic Search* is unique in that it requires that you only supply an approximation or the first few letters of the search field. Like a spelling checker, it weighs the proximity of the word you entered to that of all the specified search fields in the phone book. It then comes up with a list of best matches.

For example, you could enter the text "Mike" and come up with entries for "Michelin" and "Michelson." Similarly, entering "Shawn" will find an entry for "Sean." As you can see, this could be very helpful for finding entries which you aren't quite sure how to spell.

To phonetically search for a phone book entry:

◆ Select the **Find/Phonetic...** command.

The *Phonetic Search* dialog box is displayed:

◆ In the *Search for* field, type in the word you believe to be part of the entry you are searching for.

◆ Select any data fields to be searched by checking the appropriate boxes. The page name is always searched, regardless of what additional fields are checked.

◆ Press the **Find** button.

The found entries, if any, are displayed in the list box. To select the phone book record of one of the entries:

◆ Double-click on the name, or select the name and press the **Enter** key or **Select** button.

There are a few rules to remember about the phonetic search:

- Numeric and punctuation characters are invalid.
- You can only specify one word to search for (spaces are invalid).
- The search is case-insensitive.
- The *Search for* text that you provide will be compared to every word in the specified search fields, regardless of position in the fields.

Exact Search

Use the *Exact Search* to find exact matches in the phone book for a particular search field. Unlike the *Phonetic Search*, the *Exact Search* requires an exact match of the full or partial entry to successfully find what you are looking for.

- Select the **Find/Exact...** command.

The *Search for* area contains the field which you are searching, and the search text.

- Use the combo-box to select the field you wish to search.

Use the *Find* field to specify the text for which you wish to search. The search is not case-sensitive (capital and small letters are treated as the same), and it will only find exact matches of the full or partial entry you have indicated.

For example, if you select *POSITION* as the search field, and specify "President" as your search text, you would find entries with a position of "President" as well as "President and Founder." If you specified "pres" as your search text, you would find "President," "President and Founder," "Press Secretary," etc.

As you can see, as long as the search text you specify exactly matches the first *N* characters of the search field (where *N* is the number of characters in your search text), the search will be successful.

- Enter the text you wish to search for.
- Press the **Enter** key or the **Find** button to execute the search.

The list box will display the page names of records for which there was an exact match (if there were any).

- Double-click one of the page names, or select the name and press the **Select** button to position the Phone Book on that person's record.
- Click the **Cancel** button to close the *Exact search* dialog box.

Phone Number Search

The *Phone Number Search* is exactly the same as the *Exact Search*, except that you can only search for telephone numbers. The advantage of this search feature is that it only lists telephone numbers in the search field list so you can quickly pick your search field. It also has one additional entry, *SEARCH ALL PHONE NUMBERS*, which does just what it implies.

◆ Select the **Find/Telephone...** command.

Read the **Exact Search** topic above for instructions on how to use the search features. In addition to the information found there, keep in mind:

- The phone number you specify in the *Find* field must exactly match the number you are looking for. This includes the placement of area codes and hyphens. (A search for 460-0677 will not find 201-460-0677, and 4600677 will not find 460-0677.)
- The *Phone Number Search* has a *SEARCH ALL PHONE NUMBERS* selection which allows you to search all phone book telephone numbers at once.

Attaching Information to Entries

The Phone Book allows you to attach an unlimited number of information items to each entry.   You can log calls, take notes and phone messages, and attach files.   Each of these items is maintained in a list with the date, description and other information.   These lists can easily be scanned or searched, allowing you to easily recall any piece of information at any time.

Related Topics:

Logging Calls

Taking Notes

Taking Messages

Attaching Files

Logging Calls

The Phone Book's call logging feature allows you to keep track of outgoing, as well as incoming, phone calls. For each call, the log keeps track of the date, time, duration, record information, call attributes, subject of conversation and the results of the call.

To log a call:

- Select the record for which you wish to log the call.
- Select the **Log/Log call...** command.

The *Call Log* dialog box appears:

The *Call Log* dialog box contains all the relevant information for logging the call. Just select the appropriate call descriptions in the *Call* area, fill in the *Subject* field, and start the timer.

You can stop the timer at any time by using the *On* and *Off* radio buttons. When the call is complete, just fill in the *Response* field (if desired) and press the **Ok** button. If the timer was still running, it will save the currently displayed time as the duration of the call.

Viewing Call Logs

To view the log of calls for any phone book record:

- Select the record from the phone book.
- Select the **Log/Calls...** command.

The *Phone log* dialog box will appear:

The *Phone log* dialog box lists all calls (that you recorded) for the selected record.

  - Use the **Open** button, or double-click on the selected call to open the *Call log* dialog box.
  - Press the **Delete** button to remove the selected call from the list.

Today's Calls

To quickly bring up a list of all the calls that were recorded for the current day:

- Click once on the Phone Log icon to display its system menu.
- Select the **Today's calls...** command.

The *Today's calls* dialog box functions just like the *Phone log* dialog box. There is one addition, the **Book** button. The *Today's calls* dialog box lists all calls made today, including calls made from phone books that may currently be closed. The **Book** button provides quick access to the phone books and records to which the calls are attached.

- Press the **Book** button to open the book and highlight the record to which the currently selected call is attached.

Searching the Phone Log

The entire phone log can be searched using a variety of keys and selection criteria. This enables you to quickly locate a particular call.

- Click once on the Phone Log icon to bring up its system menu.
- Select the **Search...** command.

The *Search Phone Log* dialog box appears:

Key
Use this combo-box to specify the key field of the phone log which you will use to search.

Search for
Enter the search text in this field. If your *Key* is 'Date', the date should be entered in the form **mm/dd/yy**. Date ranges are entered as **mm/dd/yy - mm/dd/yy**. If your *Key* is 'Phone', remember to enter the entire phone number including the area code: ###-###-####.

Show calls
Use these radio buttons to specify the call attributes of the call you are searching for. This will help you narrow down the number of calls you are searching through. If you don't know the call's attributes, or if you want to search and display all calls, simply select the *All* attributes.

- Select a search key using the *Key* combo-box.
- Enter the search text in the *Search for* field.
- Select the call attributes using the *Show calls* radio buttons.
- Press the **Find** button.

All calls that match the search criteria are displayed in the list box. The buttons function exactly as those in the *Today's calls* dialog box (see above for details).

Phone Log Setup
The Phone Log has a setup dialog box in which you can specify certain default options for logging and searching for calls. You can set these options to match your most common usage of the Phone Log, allowing you to more easily log and find calls.

- Click once on the Phone Log icon to bring up its system menu.
- Select the **Setup...** command.

Area code
By placing your area code in this field, the Phone Log will be able to determine which calls are local and which are long distance.

Search Attributes
These radio buttons control which search attributes are selected when you enter the *Search Phone Log* dialog box. (The search attributes are in the *Show calls* section of the *Search Phone Log* dialog box.)

The *Use previous* option will cause the Phone Log program to store your search attributes and use them again the next time you search the phone log. The *Show all calls* options will automatically initialize all search attributes to *All* each time you search the phone log. You can then change them as necessary.

Call log
These options affect the state of the *Call log* dialog box as you open it to log a new call.

If the *Start timer* box is checked, the timer will be running as soon as the *Call log* dialog box opens. Otherwise, it will have to be started manually.

The *Business, Personal* and *Billable* radio buttons will set the default call log attributes accordingly. Alternatively, you can select the *Detect attributes* option. This option will attempt to set the call attribute (*Business* or *Personal*) depending on which of the record's phone numbers was used.

Taking Notes

You can create a virtually unlimited number of notes for each phone book entry. Each note can contain up to 16 kilobytes (16,000 characters) of text. Description text, note categories and search keywords make it easy to maintain large lists of notes for any entry in your book.

Creating a Note

To create a new note for a phone book record:

- Highlight the entry in the phone book.
- Select the **Log/Enter Note...** command. The *Note* window will appear.
- Enter the note text just as you would in the Windows Notepad program.

Each note can contain up to 16K of text. The Notes program will warn you when you have reached this limit.

  - Use the *Note* window's **Edit** menu functions to help you edit the text.

- Exit the note (using either the **File/Exit** command or the system menu **Close** command).

The *Summary information* dialog box will automatically open so that you may enter information regarding the note.

The *Summary information* dialog box may also be opened at any time during the editing of a note by selecting the *Note* window's **File/Summary info...** command.

Description

Use this field to enter a description for the note. This description will be used in the notes list so that you can find this particular note.

Category

Use this combo box to select a category for the note. Categories are used to help search for particular note types. We will see how to define these categories shortly.

Keywords

You can assign up to four keywords for each note. These keywords can be used to search your list of notes. For example, if you have a note that contains directions to the entry's office, you may want to enter "directions" and "office" as keywords. Then, a year from now, when the entry has 25 notes attached to it, you could easily locate this particular note by searching for "directions."

- Press the **Ok** button to close the *Summary information* dialog box and save the note.

Viewing and Editing Notes

To display the list of notes attached to any phone book entry:

- Highlight the entry in the phone book.
- Select the **Log/Notes...** command, **or...**
- Double-click on the Notes program icon (if it is already running).

The *Notes list* dialog box displays the description and creation date for each note attached to the selected record. The buttons along the bottom of this dialog box help you maintain the notes.

New

Creates and opens a new note for the current record.

Delete
Deletes the currently highlighted note from the list.

Note: This particular **Delete** button has a special safety feature. You must double-click the **Delete** button in order to delete the selected note. Once you have deleted one note, each subsequent click of the **Delete** button within 1 second of the previous click will delete the next note in the list.

Edit
Press this button to open the selected note for viewing/editing. This is the same as double-clicking on a note in the list.

Cancel
Closes the *Notes list* dialog box.

Finding Notes

There may be a time when you know you have some important piece of information in a note, but you can't remember exactly which note it is in, or to whom the note is attached. The note searching features will help you find the note.

- Click once on the Note program's icon to bring up its system menu.
- Select the **Search** command to open the *Notes search* dialog box.
- Using the *Search for* radio buttons, select the element of the summary information you want to use to search: *Description*, *Keyword*, *Date* or *Category*.
- Enter the search text in the edit field provided. In the case of a *Category* search, use the combo-box to select a category.
- Press the **Find** button to begin the search.

All notes that fit the search criteria will be listed with the creation date, name of the record to which it is attached and the description text.

The **Delete**, **Edit** and **Cancel** buttons function just as in the *Notes list* dialog box (see above).

Setting Up Notes Categories

As part of its summary information, each note can be assigned a category. This category can be used to search for notes which are related. To define this category list:

- Click once on the Note programs icon to bring up its system menu.
- Select the **Categories...** command to open the *Define categories* dialog box.
- To create a new category, select one of the 'Unused' categories, **or...**
- To edit an existing category, select it from the list.

The category text will appear in the edit field at the bottom of the dialog box.

- Edit the text as desired.
- Select a new category to edit, or press the **Ok** button to close the dialog box and save your changes.

Taking Messages

The Phone Book enables you to take exhaustive telephone messages and provides you with the tools to keep track of and resolve these messages.   The Message Pad, a separate program that is completely integrated with the Phone Book, provides these features.

For complete information on the Message Pad and how you can use it with the Phone Book to manage phone messages, please see **Chapter 3, Message Pad**.

Attaching Files

The Phone Book can maintain list of files that are 'attached' to your records. For example, say you write a lot of letters using Word for Windows. Each time you write a new letter, you could attach the document file to the phone book entry to which it is addressed. In the future, when you want to view or edit that letter again, all you have to do is turn to the phone book entry, display the list of attached files, and click on the letter. Word for Windows will be launched and loaded with that document.

The same holds true for spreadsheet files, text files, graphics, etc. It is especially convenient if the file is produced by a Windows program, because it can then be launched and edited directly from the Phone Book, as in the example above.

To attach an existing file to a phone book record:

- Highlight the record in the phone book.
- Select the **Log/Attach file...** command to open the *Attach file* dialog box:
- Press the **Browse** button to open a *Select file* dialog box. Use this dialog box to choose the file you wish to attach. If you know the type of file you are attaching, it is especially convenient to use the *List Files of Type* combo-box to narrow the selection list.

Although the *Select file* dialog box is a convenient way to specify the attach file and program, you can also fill in the *File* and *Program* fields manually. This may in fact be necessary in the case of files that are edited by DOS (non-Windows) programs. In either case, be sure to include the full path of the attached file, and the full path of the program executable if it is not in your search path.

Once you have made your file selection:

- Fill in the *Description* field with any text that will easily identify the file.
- Fill in the *Keywords* fields. The keywords are used to help search the file lists in the event that you can't remember which file is which.
- Optionally, you may enter any other text about the file attachment in the *Notes* field.
- Press the **Ok** button to attach the file and close the dialog box.

Editing Attached Files

To view all of the files attached to any phone book record:

- Highlight the record in the phone book.
- Select the **Log/Attachments...** command to open the *Attached file list* dialog box:

This dialog box lists all of the files attached to the current record. For each file, it displays the description, attachment date and the name of the program (if any) that is used to edit the file.

Delete

Use this button to remove an attached file from the list (and hence remove the attachment). The file itself will not be deleted, only the attachment to the phone book record.

Note: This particular **Delete** button has a special safety feature. You must double-click the **Delete** button in order to delete the selected file attachment. Once you have deleted one file attachment, each subsequent click of the **Delete** button within 1 second of the previous click will delete the next one in the list.

Open

Press **Open** to launch the selected file's program and load the file. This is the same as double-clicking on one of the attached files.

Edit
Press this button to display the *Attach file* dialog box for the selected file. You can view/edit the attached file's description, keywords and notes at any time.

Cancel
Closes the *Attached file list* dialog box.

Finding Attached Files

There may be times when you are having trouble finding or identifying a particular attached file. In these instances, you can use the Search feature to find just the file you are looking for.

- Select the record from the phone book to which the file is attached.
- Click once on the Attach program's icon to bring up its system menu (the attach program must already be running).
- Select the **Search...** command to open the *Attached file search* dialog box:

Use the radio buttons in the *Search for* section of the dialog box to specify the aspect of the attached file's description you want to use for the search.

Name
This option specifies that you are searching for the name of the attached file. The search text you enter should follow standard file naming conventions, without the path. Examples are `test.txt` or `letter.doc`.

Program
This option specifies that you are searching for the name of the program that edits the attached file. Example: `winword.exe` or `excel.exe`.

Keyword
When you use this search option, the program will be searching the keywords that you entered in the *Attach file* dialog box when you created the file attachment.

Date
With this search option you can search for a file attachment that was created on a particular date. Enter the date in the **mm/dd/yy** format.

- Select the search option and enter the search text.
- Press the **Find** button to initiate the search.

Any attached files that match the selection criteria will be displayed. The *Open*, *Edit* and *Cancel* buttons can be used to manage the attached files, and have the same functions as in the *Attach file list* dialog box.

Printing with the Phone Book

The Phone Book excels in its ability to produce customized printouts. There are four major types of printouts available: **Records**, **Custom Formats**, **Letters** and **Envelopes**.

Record printouts provide a quick way for you to print all of the information associated with any particular phone book entry.

Custom formats offer a great deal of flexibility. They allow you to define the print layout (or *template*) for your record, header and footer. You can also specify the printer, fonts, paper orientation and margins. There are four pre-defined format files included with the Phone Book which contain the layouts for mailing labels, Daytimer inserts, etc. You can also design your own formats.

Custom formats are best suited for printing pocket phone books or phone book pages that can be inserted into a pocket planer, labels, Rolodex cards, etc.; any type of printout where the paper will contain more than one name in a list or grid form. They are designed to print all or categories of your phone book records. In general, there can be no "static" or fixed text in the layout, only text that comes from the phone book records.

Letters offer a slightly different method of printing. You still have control over the template, header, footer, fonts and margins. However, letters will be printed with only one phone book entry per page. You can also have "static" or "fixed" text in the template, such as letter text or notes.

Letters are designed to print just that, letters. You can create form letters or other types of mail-merge documents. You can print all or categories of your phone book records, or you can print them one at a time. The Phone Book comes with several pre-configured letters.

The Phone Book's **Envelope** printing facility gives you complete control over how the envelope is printed. You control text positions, fonts, address fields and messages. You can even print PostNet bar codes right on your envelopes for quicker processing at the post office.

Related Topics:

Record Printouts

Custom Formats

Defining the Layout

Defining the Template

Printing with Custom Formats

Letters & Mail Merge

Letter Template Setup

Selecting a Printer

Selecting Fonts

Setting up the Header and Footer

Saving the Letter Template

Printing Letters

Envelopes Styles

Envelope Addresses

Printing Envelopes

Record Printouts

Record printouts allow you to quickly print all of the information associated with any phone book entry. The printout can be very useful:

- Take it to a meeting so you are well informed about who you are meeting with;
- Fax it to a colleague or client to easily pass on the information.

Setting up Record printouts

To set up the Record printout, open the *Record printout setup* dialog box:

- Select the File/Print setup/Record page... command.
- Select a printer and specify the paper source;
- Select the page orientation;
- Set the page margins;
- Select a font and size (and optionally, a font style);
- Press the **Ok** button to save the setup, or the **Cancel** button to abort the changes.

Printing a Record

Creating a record printout is simple and convenient:

- Select the phone book record you wish to print;
- Select the **File/Print/Record** command.

Alternatively, if you are in the *View* window of the record you wish to print:

- Select the **File/Print** command.

The record will print to the selected device. Any field for which the selected record has information will be included in the printout.

Custom Formats

Custom formats balance flexibility with ease of use. They may seem complex at first, but they aren't very difficult to understand if you read the manual, and once you set them up, you shouldn't have to modify them unless you get a new printer.

There are several steps that you must perform in order to design and use custom formats. The steps are described briefly here, and then in further detail in the sections that follow.

To use a custom format:

- Open the *Print Formats* dialog box (**File/Print setup/Book styles...** command).
- Press the **File** button and select the format file that matches or best matches your printer.
- Select one of the available formats from the list.
- If your printer doesn't match the format file you have chosen, press the **Printer** button and select your printer from the list.
- If you selected a different printer, press the **Font** button and select fonts for the template text, header and footer.
- Press the **Ok** button to close the *Print Formats* dialog box and save your setup.
- Open the custom formats print dialog (**File/Print/Books...** command).
- Select the format you just set up from the list.
- Select the desired range and categories, and press the **Ok** button to begin printing.

Once you have set up your formats using this procedure, you only need to perform the last three steps in order to print a custom format.

Designing Custom Formats

There are two types of custom formats: formats that will be printed as labels, and formats that will be printed as pages. The differences in these format types have to do with the way the layout parameters, such as columns, rows and spacing, are interpreted during the printing procedure.

Label Formats

Label formats are designated by checking the **Print as labels** check box in the *Options* section of the *Print Formats* dialog box:

Label formats are used when you want to format your output into a list or grid pattern. Each element of the list or grid contains exactly one record's information.

One examples of label formats would be mailing labels (hence the "Print as labels" designation). You could have a long "list" of continuous-form style labels, like the kind you feed into a dot-matrix printer. Or, you could have a "grid" of labels, like the sheet of labels that you feed into a laser printer.

Checking the **Print as labels** box doesn't always mean you are printing labels, however. For example, Rolodex cards and name tags would both be printed as labels.

Page Formats

Page formats are designated by not checking the **Print as labels** check box in the *Options* section of the *Print Formats* dialog box:

Page formats are used when you want to format your output into a page or grid of pages. Each page contains as many records as will fit within its boundaries.

One example of page formats would be a pocket phone book. You could define two virtual "pages" on your printer's actual page, one next to the other:

Day-Timer pages are good examples of page formats. These are blank phone book pages that you can purchase from Day-Timers, Inc. to insert into a pocket planner. There are several Day-Timer formats included with DeskTop Set.

The *Print Formats* dialog box is where you define the layout of all your custom formats.

◆ Open the *Print Formats* dialog box (**File/Print setup/Book styles...** command).

Selecting a Format File

The first thing to do is select a format file. Format files contain pre-defined formats that are included with the Phone Book.

◆ Click the **File** button to open the *Select file* dialog box.

Select the file that most closely matches your printer:

◆ Double-click on the filename or highlight the file and click the **Select** button.

As is evident by the filenames, there are format files for dot-matrix, HP LaserJet II & III and Postscript printers. Don't worry if you don't have one of these printers. The format files have nothing to do with controlling your printer; Windows takes care of that. They just contain the general setup elements for these types of printers, and are a good place to start if you want to learn how to set up your print formats.

If you are experienced with custom formats or you want to start with a completely clean slate, you can create a new format file:

◆ Click the **File** button to open the *Select file* dialog box.

◆ Type the name of the new format file in the filename field. The filename must have a .FMT extension in order to appear in the list of format files.

◆ Click the **Create** button.

If you create a new format file, you will automatically be prompted to create the first format for that file (see below for details).

Selecting a Custom Format

The next step is to specify a format. To select one of the existing formats:

◆ Select one of the pre-defined formats from the list in the upper left corner of the *Print Formats* dialog box.

To create a new format:

◆ Click the **Add** button.

◆ Type the name of the new format in the *Format name* field.

◆ Click the **Ok** button.

To create a new format based on one of the existing formats:

◆ Select one of the pre-defined formats from the list in the upper left corner of the *Print Formats* dialog box.

◆ Click the **Add** button.

◆ Type the name of the new format in the *Format name* field.

- Click the **Copy** button.

This will create a new format and set all of the elements exactly as they are in the format you copied from. This is useful if you want to create variations of an existing format, or you want a head-start on creating a new format.

The format you have created (or selected) should now be highlighted in the list. If you made a typing mistake, or want to rename one of the formats, you can edit the format name in the field just below the list of formats.

Printer Selection

The next step in creating or modifying a custom format is to choose the printer that you want to use to print the current format. Windows can support any number of printers connected to your computer (either directly or through a network). The Phone Book allows you to use any one of your printers for any one of the formats you have.

If you don't have the exact printer specified in the format file you chose (namely, an HP LaserJet II or III, or a Postscript printer), you must choose a printer for each format. Because the Phone Book can print to any one of your printers at any time (unlike many programs), it cannot automatically set itself to use your default printer. You must tell it which printer to use.

Note: If your printer exactly matches the format file you chose (Dot-matrix, HP LaserJet II or III, or Postscript), you do not have to set the printer for each format.

To select a printer for the current format:

- Click the **Printer** button to open the *Printer selection* dialog box.
- Select the printer you want to use for the current format from the list of available printers.
- Click the **Ok** button.

Format Options

The *Options* area contains elements that will control how the Phone Book prints the custom format.

Print as labels

This option designates weather or not you want the output in label or page format (as discussed earlier in this section).

Page per letter

This option only affects the output if you are printing in a page format (not as labels). This will force the Phone Book to skip to a new page every time it starts printing a new letter. This may leave some blank space on your forms, but you won't get your Bs mixed in with your As, for example.

If you selected this option, you will probably also want to select the *Sort records* option (see below). Otherwise, you could end up with a lot of forms with just a few names on each.

Sort records

This option will sort the records in your book before it formats them for printing. Otherwise, the records will come out in what ever order they are in the database. You will almost always want this option checked.

Skip empty space

Instructs the Phone Book not to print blank lines. For example, if your format template includes the <POSITION> keyword, but you don't have the position field filled out for everybody in the phone book, you would see some blank lines in your output unless you check this option.

Print header/footer

Specifies weather or not you want a header or footer in your output. In label formats, you usually don't want to print a header or footer. The header and footer are discussed in a later section.

- Check any of the options you want to be applied to your output.

Defining the Layout

The *Space*, *Layout* and *Page Margins* sections of the *Print Formats* dialog box contain the elements that define the layout of each custom format. Because label and page formats significantly differ in the way they are laid out, they will be explained separately.

Label Space

The *Space* area contains the amount of space (in inches) you want between the various elements of the output. The *Lines* and *Records* fields have no effect on labels; They only affect page-type formats. If you are setting up a label layout, ignore these *Space* fields.

Header

This is the space (in inches) between the bottom of the header text and the first row of labels.

Footer

This is the space (in inches) between the top of the footer text and the last row of labels.

Label Layout

The *Layout* section describes how the labels (or Rolodex cards, name tags, etc.) are laid out. The layout is always based on the page. For example, if you have continuous tractor-feed labels for your dot-matrix printer, the page would be defined as the area between the perforated folds. With laser-labels, the page size is obvious.

Columns

Indicates how many labels there are across the width of the page. Dot-matrix labels commonly have only 1 label across the page, whereas laser-labels often have 2 or 3.

Space (below columns)

Indicates the amount of space between each column. Most label styles are tightly packed across the page, so this value can be very small, even 0". Some label styles, however, have spaces between the columns.

If your labels appear to have significant space between the columns, measure the space (in inches) and put the approximate value here.

Rows

Specifies the number of labels there are along the length of the page. Common values for dot-matrix printers are 6 or 8, while many laser-label pages contain 7 or 10 rows of labels.

Space (below rows)

Indicates the amount of space between each row of labels. As with column spacing, this can often be set to 0", but some label types may require that you specify a larger value.

Set the layout section according to your label page:

- Place the cursor in the *Columns* field, and enter the number of label columns.
- Press the **Tab** key to proceed to the next field, or click in it.
- Enter the amount of space (in inches) between columns of labels.
- Proceed similarly with *Rows* and *Space* (below rows).

Label Margins

This section defines the margins for your page. The margins are very similar to the ones you would set up for a word processing document, for example. They specify the areas around the border of the page that you want to keep clear of any text.

Top
The space between the top of the page and the first row of labels. This is usually a fairly small amount, and can be as little as 0" for dot-matrix printer labels.

Bottom
The space between the bottom of the page and the last row of labels. This is usually set to the same amount as the Top margin.

Left
The space between the edge of the page and the first column of labels.

Right
The space between the edge of the page and the last column of labels.

In most cases, you will want to add a little bit to the margins, especially the *Top* and *Left*. This is because you don't always want the printed text to start exactly at the edge of the label.

Page Space

If you are printing page-style formats (as opposed to label formats), the *Space* area contains the amount of space (in inches) you want between the various elements of the page output.

Lines
Additional space (in inches) between each line of text within a record. If you set this value to 0", the Phone Book won't put any extra space between record lines. This will resemble single-spaced document type, and is quite readable.

Records
Additional space (in inches) between each record. Records consist of the information for one individual entry in the phone book. You may want additional space between records so that they can easily be identified on the page.

Header
This is the space (in inches) between the bottom of the header text and the first record.

Footer
This is the space (in inches) between the top of the footer text and the last record.

Page Layout

The *Layout* section describes how the pages are laid out. The layout is always based on the page. You specify the number of rows and columns of virtual pages you want, and Phone Book will split up your actual page into equal sections on which it prints your virtual pages.

The page size is calculated by subtracting the margin and spacing values from the total area of the actual page. This "printable" area is then divided equally into the number of rows and columns that you specify in the Layout section to yield the virtual page size.

For example, say you want to print pages that are 3" wide by 5" high. Four pages of this size can be printed on one 8½ by 11" sheet of paper, as in the example figure above.

You want two 3" wide pages, and the paper is 8½" wide, so that leaves 2½" of space. By making the right and left margins 1" wide, and leaving ½" between the two columns of pages, you will be left with 6", the proper "printable" space on which to print two 3" pages.

Similarly, for the page height, you need 10" of printable space, enough to fit two 5" high pages. By specifying ¼" top and bottom margins, and ½" of space between the two rows of pages, you will have exactly the amount of room necessary to print the pages.

The Layout elements are as follows:

Columns
Indicates how many virtual pages there are across the width of the actual page. The more columns you have across the paper, the narrower each virtual page will be.

Space (below columns)
Indicates the amount of space between each column of pages. You will want to put some space here so that the pages do not run right up against each other.

If you are using blank pre-printed pages, such as Day-Timers, measure the amount of space between each column of pages, and put that value here.

Rows
Specifies the number of virtual pages there are along the length of the actual page. As with Columns, the more rows of pages you have, the shorter each will be.

Space (below rows)
Indicates the amount of space between each row of pages. As with row spacing, you should specify some value other than 0" here so that you have some space between the pages.

Set the layout section according to the number and size of pages you want on the paper:

- Place the cursor in the *Columns* field, and enter the number of page columns.
- Press the **Tab** key to proceed to the next field, or click in it.
- Enter the amount of space (in inches) between columns of pages.
- Proceed similarly with *Rows* and *Space* (below rows).

Page Margins
This section defines the margins for your page. The margins are very similar to the ones you would set up for a word processing document, for example. They specify the areas around the border of the page that you want to keep clear of any text.

Top
The space between the top of the paper and the first row of pages.

Bottom
The space between the bottom of the paper and the last row of pages.

Left
The space between the left edge of the paper and the first column of pages.

Right
The space between the right edge of the paper and the last column of pages.

Printer Options
There is really only one *option* in the *Printer Options* section:

Open printer setup
This check-box specifies weather or not you want the Phone Book to open the *Printer Setup* dialog box before it prints the custom formats. This is important when printing labels, especially with dot-matrix printers, because you must set the printer's paper size to that of your label page. Laser and ink-jet printers almost always work with 8½ x 11" label pages, so there is seldom a need to change

the paper size.

Note: The *Printer Setup* dialog box is part of your printer driver and has nothing to do with DeskTop Set. The Phone Book simply calls your printer driver setup, just as many word processors do, so that you can conveniently change its options when necessary.

Reminder field

The *Printer options* area also contains a field where you can type notes about the current format. These notes will show up when you are printing using the custom formats. Examples of reminders are "Make sure to set paper size to 8 x 10," or "Prints mailing labels, 10 rows by 3 columns."

Selecting Fonts

The Phone book can use any one of the fonts available to your printer to print your formats. You can select the fonts for the template, header and footer text.

If you are creating a new format, or have changed the printer for the current format, you must select fonts for the format.

To select fonts for the current format:

- Click the **Font** button.

The *Font selection* dialog box appears:

You must select a font name and size for each of the text types listed in the *Element* section (lower right corner of the dialog box).

Page text

This is the font that will be used to print the actual record information. It is the one you are usually most concerned with.

Header

This is the font that will be used to print the header line which appears at the top of each page.

Footer

This is the font that will be used to print the footer line which appears at the bottom of your label page.

Note: In a label format, the header and footer will print only once per page of labels, at the top and bottom respectively. In a page format, the header and footer will print on each page.

To select the fonts for your format:

- Click on the **Page text** radio button.
- Select a font name from the list of available fonts.
- Select a font size (must be done after a name is selected).
- Select one or more of the font styles (optional).
- Click on the **Header** radio button.
- Follow the same steps as above to select a font name, size and style for the header text.
- Click on the **Footer** radio button.
- Follow the same steps as above to select a font name, size and style for the footer text.
- Click the **Ok** button to return to the *Print Formats* dialog box.

Note: As with all Windows programs, the fonts and sizes you see in the list come from your Windows system information and your printer driver. DeskTop Set does not control which fonts you have in your system.

Defining the Template

The last step in setting up your format is to define the template. The template shows the fields that will be printed on your format along with the header and footer information.

- Click the **Template** button to open the *Template definition* dialog box.

The best way to see how templates are used is to open the template of a pre-defined format. Here is an example of a template:

You enter...

<TITLE> <FIRST NAME> <LAST NAME>
<POSITION>
<COMPANY>
<ADDR ONE>
<ADDR TWO> ~b. <BUS PHONE>

It prints...

Mr. Wile Coyote
Buyer
Acme Products
3000 Foot Drop Road
Mojave Desert, CO   b. 555-1212

To edit the template:

- Place the cursor in the *Template* field.
- Type the desired merge fields in the position you wish them to appear on your custom format (use only capital letters and enclose all fields in angle brackets, "< >").
- Press **Ctrl-Enter** or **Ctrl-M** to start a new line or insert a line.

The *Merge fields* list box show all of the available merge fields. To quickly insert a merge field into the template:

- Place the cursor in the template where you wish to insert the merge field.
- Select one of the fields from the *Merge fields* list box.
- Double-click on the merge field, or click the **Insert field** button.

You can right-justify text in the template by preceding it with the tilde (~) character. You could, for example, place the <PAGE NAME> field on the left side of the label, and place the <PAGE PHONE> field on the far right by placing the ~ in front of it:

<PAGE NAME> ~h.<HOME PHONE>

Notice the "h." in the above template line. You can place "static" or "fixed" text after the ~. In this example, the "h." is used to signify that the number is for the persons **h**ome. There are a few guidelines you should follow when placing static text after the ~.

If you place more than five static characters (including spaces) after the ~, that text will be printed no matter what. If you use less than five characters, the text will not be printed if there is no information in the entry associated with the merge field you have indicated.

This is why the "h. " was used instead of "home. " in the example. Using "home. " would be six characters (including the space) and would print out all the time, even if there were no home number in a particular record.

Defining the Header & Footer
The Header and Footer definition fields are identical and function in the same manner. They each consist of several elements.

Print
Check this box if you want your format to have a header/footer. This is the same as checking the *Print header* or *Print footer* box in the *Options* section of the *Print Formats* dialog box.

Line
Check this box if you want a thin line to appear between the header/footer and the label text, such as you see in the footer at the bottom of this manual page.

Space
This is the space (in inches) you want between the header/footer and the label text. This space matches the value you have specified in the *Header* and *Footer* fields in the *Space* section of the *Print Formats* dialog box.

Header/Footer template
The template line for the header and footer is broken up into three sections: left-justified, centered and right-justified. Text or merge fields place in these sections will be positioned accordingly.

Just as with the label template, you can place any of the available merge fields into these lines. You can also place "static" text into these lines. Be aware that, depending on your label page size, justified header/footer text fields may run into each other because there is not enough room on the page.

As stated earlier, the header and footer will only print out once per page in a label format. In a page-format, they will print out once per page (there could be multiple pages per sheet of paper).

Choosing a Sort Field
The *Sort field* is where you specify the merge field that you want the Phone Book to use to sort your records. You can choose any of the available merge fields as the sort field. You can type the sort field on the provided line, or insert it from the list as you can with the template fields.

Note: The *Sort field* will only have an effect if the *Sort records* box is checked in the *Options* section of the *Print Formats* dialog box.

- Click the **Ok** button to save your template and return to the *Print Formats* dialog box.

You are now done defining your custom format! It may have seemed complex, but just think of the amount of flexibility you had in setting it up. And remember, once you have your formats perfected, you never have to do this again.

Saving the Label Format
To save the format(s) you have just created or modified:

- Click the **Ok** button to return to the Phone Book.

If you made some mistakes and don't want them saved:

- Click the **Cancel** button to abandon all changes and return to the Phone Book.

Printing with Custom Formats

To print your phone book entries using one of the Custom Formats,

- Open the *Print Custom Formats* dialog box (**File/Print/Books...** command).

The *Print Custom Formats* dialog box has several fields which control what gets printed and how.

Select Format

Lists all the available formats as defined in the *Print Formats* dialog box (see the **Designing Custom Formats** section of this chapter).

Reminder

This is the text from the *Reminder* field in the *Printer options* section of the *Print Formats* dialog box. This field usually contains some notes about the label format or printer setup.

Range (A to Z)

Here you can specify the letter range you want to print. This letter range is based on the *Sort field* specified in the *Template definition* dialog box, and not on the phone book page letter.

For example, if you specified <HOME CITY> as your sort field, then a print range from W to Z would print only those records in which the home city field starts with a W, X, Y or Z.

Note: The letters used to specify the *Range* are not case sensitive; an 'A' is the same as an 'a'.

Print Categories

By default, the Phone Book will print all of the entries in the phone book which fall within the specified letter range (see above). However, you can tailor your printout by selecting a category or categories of records that you want to print.

If none of the categories in the list are specified, then the phone book will print all entries within the specified range, as stated above. Once you select one or more categories that you want to print, the Phone Book will only print phone book entries that belong to those categories.

You can select as many of the available categories as you like. Furthermore, categories are unrelated to the letter range so you can combine these two options to very accurately select those records to print.

Device

The **Device** button opens the *Printer Setup* dialog box for the printer you have selected for the chosen format. This is in case you have to modify the printer setup before you begin printing. You may, for example, want to set the paper size or change the page orientation.

Some Custom Formats will automatically open the *Printer Setup* dialog box when you begin to print. (See the **Printer options** section earlier in this chapter.)

- Select a Custom Format from the *Select Format* list.
- Select a letter range to print (optional).
- Select one or more categories to print (optional).

- Check the *Reminder* field for notes and, if necessary...
- Click the **Device** button to make changes to the printer setup.
- Click the **Ok** button.

A message box will appear to tell you the status of the printing. You can click the **Cancel** button to stop printing.

Notes & Hints

- If you selected the *Sort records* option in the format setup, all entries will be sorted before they are printed.
- If you are printing as labels, the print message box will keep you informed of how many labels have been printed.
- If you are printing as pages, the print message box will tell you how many pages have been printed. Don't be alarmed; This does not mean pages of paper, rather it refers to the number of page "forms" it has printed (there may be several page "forms" to one page of paper).
- Always use plain paper to design and test Custom Formats. You can superimpose this paper onto your labels or forms to see if they line up correctly, rather than waste labels, forms or time swapping these items in and out of your printer.
- Make sure your printer setup (paper size, orientation) matches your page layout before you begin printing. Unfortunately, Windows does not allow DeskTop Set to automatically set the printer up for you, or it would.

Letters & Mail Merge

The Phone Book lets you create letters that can automatically paste information from the phone book record into the letter in any format you like. Letters can be printed one-at-a-time or for entire categories of records. As with print formats, you have control over the fonts, margins, header and footer information.

There are several steps that you must perform in order to design and use letters.

Letters and Libraries

Letters are defined in templates. These templates specify the text and merge fields that will appear in the letter, as well as the setup options, such as fonts, margins, headers and footers.

Since you may have many different letters for different occasions, you can put groups of letters in "libraries." These "libraries" act as folders for the letters you create. You can create multiple library files for different types of letters, or place all your letters in one library file.

- Open the *Letters Library* dialog box (**Edit/Letters...** command).

The list of available libraries appears on the left. The list on the right contains all the letters that are stored in the currently highlighted library. As you can see, the Phone Book comes with four pre-configured letters in a library called BUSINESS.LTT.

To select another library (if there is one), click on one of the other library names. The letters in the selected library will be displayed.

Here is a brief summary of the button functions in the *Letters Library* dialog box:

Printer
Opens the *Printer Setup* dialog box for the printer assigned to the current letter. This is convenient if you are unsure of the paper orientation or other printer options.

Document
Opens the *Document Management* dialog box. This is where you can create new libraries and letters, or edit the names and descriptions of current libraries and letters.

Print
Prints one copy of the current letter using the currently selected Phone Book record as the merge record. This is used when you want to print just one letter as opposed to a mail merge.

Edit
Opens the *Letter Edit* window. This is where you edit your letter templates and configure the letter options.

Cancel
Exits the *Letters Library* dialog box.

Creating Letters & Libraries

To create a new library:

- Click the **Document** button to open the *Document Management* dialog box.
- Click the **Library** radio button in the *Commands apply to:* section.
- Enter the new library name and description in the appropriate fields.
- Click the **Add** button to create the new library.

To create a new letter:

- Click the **Document** button to open the *Document Management* dialog box.
- Click the **Letter** radio button in the *Commands apply to:* section.
- Enter the new letter name in the appropriate field.
- Click the **Add** button to create the new letter.

Your newly created letter will appear on the list.

Editing Letters

Letters are edited in the *Letter Editor* window. This is where you edit the text and assign the merge field associated with a particular letter. You also specify the page layout and options here.

- From the *Letters Library* dialog box, click the **Edit** button to open the *Letter Editor* window.

Note: The Phone Book Letter Editor is not a word processing application. It is a utility designed for creating letters used in conjunction with the Phone Book. If you need more functionality, you can use any of the commercially available word processors for Windows.

The editor has two modes: *Template* mode and *Merge* mode. In *Template* mode, you create the form in which the text information and merge fields are presented in your letter. In *Merge* mode, the information from the selected Phone Book entry is displayed in the merge fields for your reviewing, modification and printing.

By default, whenever you create a new letter, you are in *template* mode. To change modes:

- Choose the **File/Template** or **File/Merge** command.

The grayed out selection in the **File** menu indicates the current mode.

The best way to see how a letter is formatted is to choose one of the pre-configured letters that is included with the Phone Book. Choose one of these letters, and place the *Letter Editor* in *Template* mode.

As you can see, the letter is made up of regular text and merge fields. When the letter is printed, the regular text will be printed just as it appears here. The merge fields will be replaced by information from the currently selected or mail-merge record.

You can review and modify the complete letter, along with merged information, by placing the *Letter Editor* in *Merge* mode.

To edit the letter, place it in *Template* mode and type the text just as you would in any other Windows editor. You can insert merge fields by typing them (be sure to use all capital letters and enclose the fields in angle brackets '< >'). You can also insert merge fields:

- Place the cursor in the desired location.
- Select one of the fields from the *Merge Fields* list box.

The selected field will be inserted at the cursor.

Appendix B contains a list of all the available merge fields.

Hint: Remember that, to make a permanent change to the letter, you must be in *Template* mode. Any changes made while in *Merge* mode will only affect the current merged copy of the letter.

Input Prompt

One merge field unique to Letters is the *Input* prompt. This field consists of a question mark followed by a space followed by a question or query that you specify:

`<? query text>`

You can place this merge field anywhere in the letter, just as any other field. When the letter is merged or printed, you will be interactively queried to fill in the requested information for the *Input* prompt.

For example, say you inserted the following input prompt in a letter:

`<? Enter the name of the product:>`

When you print or merge (review) the letter, a dialog box will appear to prompt you for the information:

Simply fill in the appropriate information and press the **Ok** button.

Formatting Paragraphs

You can format paragraphs in your letter by using "dot" commands from the **Paragraph** menu.

Center
Centers the paragraph between the margins.

Align right
Aligns the text of the paragraph along the right-hand margin, instead of the left (default).

Indent
Indents the entire paragraph by the amount specified in the *Para. indent* field of the *Page Setup* dialog box.

Double indent
Indents the entire paragraph by twice the amount specified in the *Para. indent* field of the *Page Setup* dialog box.

To use one of the "dot" commands to format a paragraph in your letter:

- Put the editor in *Template* mode (**File/Template** command).
- Place the cursor at the beginning of the first line in the paragraph you wish to format.
- Choose one of the formatting commands from the **Paragraph** menu.

One of the dot commands will automatically be inserted.

Letter Template Setup

The next step is to set the page and printing options for your letter.

- From the *Letter Edit* window, choose the **File/Page setup..** command.

The *Page Setup* dialog box is where you specify the layout, fonts and other options for the current letter.   Here is a description of each section:

Printer options

This is where you specify options that will affect how the letter is printed.

No widows/orphans
If this option is checked, paragraphs that are on page boundaries will not be split up.   They will instead appear intact on the second of the two pages.

Interactive merge
During a mail merge, the Phone Book will prompt you before each record is printed if this option is checked.   Use this option if you want to control printing on a person-by-person basis.

Justify
This will cause full lines of text to be justified at printing time.   The spacing between each word on any full line of text will be adjusted so that the first letter of the first word lines up along the left margin and the last letter of the last word lines up along the right margin.

Open Setup
This will cause the *Printer Setup* dialog box of the printer selected for the current letter to open just prior to printing.   This is so you can make any final adjustments to the printer setup.

Note field
This is the field just below the print option check boxes.   Here you can place a note or reminder about the letter.   This note is displayed at the bottom of the *Letters Library* dialog box and in the *Mail merge* dialog box.

Some examples of reminders would be "Regular size page," or "Don't forget to insert legal size paper."   These can save you from making a costly printing mistake, especially when doing large mail merges.

- Choose the desired printer options by checking the appropriate boxes.
- Type any notes or reminders in the provided field.

Fonts

This is strictly informational.   It displays the fonts that are selected for the text, header and footer of the current letter.   Refer to the **Selecting Fonts** section below to see how to choose your letter fonts.

Margins (1st)

These are the page margins for the first page of the letter.   They function exactly like those of any word processor.

Margins (Next)

These are the page margins for the next page of the letter.   If your letter is longer than one page, these margins will be used for the second and subsequent pages.

This is for printing letters on which the first page will be printed on letter head, and the following pages will be printed on regular paper.

- Set the desired first page margin sizes by placing the appropriate values in the fields (remember, all measurements are in inches).
- Similarly, set the margins for subsequent pages in the *Margins (Next)* section.

Miscellaneous

These are options that effect various spacing aspects of the letter. All of these values are expressed in inches.

Tab step

Distance that the tab character will indent the text.

Note: The **Tab** key will only indent properly for the first occurrence. The effect of subsequent **Tab**s is unpredictable. If you need to indent further than one tab space, increase the value for the Tab step or use spaces. As was stated earlier, the *Letter Edit* window is not a sophisticated word processor. It is merely a facility for creating simple letters.

Line space

This is the amount of additional space that will be inserted between lines of the letter. If this value is left at 0", the document will be single spaced.

Para. space

This is the amount of space that a blank line (with just a carriage return/line feed) will advance the page when printed. This option has no effect on how the letter appears on the screen.

In the *Edit Letters* window, you need to enter a blank line of text between paragraphs to separate them. When you print the letter, the printer will leave the amount of space specified in the *Para. space* field for each blank line. If you set the *Para. space* field to 0", there will be no space separating paragraphs, no matter how many blank lines you have between them.

Para. indent

Amount of space that the first line of each paragraph will be indented.

- Set the miscellaneous options by placing the appropriate values in the fields (remember, all measurements are in inches).

Selecting a Printer

- Click the **Devices** button to bring up the *Printer selection* dialog box.

Because the Phone Book can print any one of your letters to any available printer, it may not be automatically set up to use your default printer.

- Choose the desired printer from the list of available printers.

The *Setup* button opens the *Printer Setup* dialog box for the currently selected printer. Use this to change page size, paper orientation, number of copies, etc. The *Setup* button is also available from the *Page Setup* dialog box.

- Click the **Ok** button to save your printer selection and return to the *Page Setup* dialog box.

Selecting Fonts

The Phone book can use any one of the fonts available to your printer to print your letters. You can select the fonts for the letter body, header and footer text.

If you are creating a new letter, or have changed the printer for the current one, you must select fonts.

To select fonts for the current letter:

- Click the **Font** button.

The *Font selection* dialog box appears:

You must select a font name and size for each of the text types listed in the *Element* section (lower right corner of the dialog box).

Page text
This is the font that will be used to print the body of the letter. It is the one you are usually most concerned with.

Header
This is the font that will be used to print the header line which appears at the top of the page.

Footer
This is the font that will be used to print the footer line which appears at the bottom of the page.

To select the fonts for your format:

- Click on the **Page text** radio button.
- Select a font name from the list of available fonts.
- Select a font size (must be done after a name is selected).
- Select one or more of the font styles (optional).
- Click on the **Header** radio button.
- Follow the same steps as above to select a font name, size and style for the header text.
- Click on the **Footer** radio button.
- Follow the same steps as above to select a font name, size and style for the footer text.
- Click the **Ok** button to return to the *Page Setup* dialog box.

Note: As with all Windows programs, the fonts and sizes you see in the list come from your Windows system information and your printer driver. DeskTop Set does not control which fonts you have in your system.

Saving the Setup

Once you are done setting up your page:

- Click the **Ok** button to save the settings and return to the *Letter Editor* window.

If you made some mistakes and want to abandon your changes:

- Click the **Cancel** button to exit without saving your changes.

Setting up the Header and Footer

You can have a different header and footer for each letter. The Letters facility allows you to set the header/footer text, font, spacing and starting page.

- Choose the **File/Header/Footer...** command to open the *Header/Footer setup* dialog box.

The header and footer options are identical and contain several options and fields.

Print

Check this box if you want the header/footer to print. Leaving it unchecked will disable the header/footer, no matter what the other settings are.

Line

This option will print a thin ruling line below the header or above the footer, as you see in the footer at the bottom of this manual page.

Space

This is the space (in inches) between the body of the text and the header/footer.

From page

Here you can specify the starting page for the header/footer. You may, for example, want to start the footer on page 1, but start the header on page 2 so it doesn't interfere with the letter head you are using for the first page.

Header/footer template

The header/footer template line is broken into three sections; left, center and right. Text placed in any of these sections will be justified accordingly.

You can place regular text or any of the available merge fields into the header/footer templates. Be aware that large amounts of text, especially those created by merge fields, may unexpectedly run into each other because of the justification. Always test your header/footer setup before doing a mail merge.

Note: The header and footer fonts are displayed here for information purposes only. Remember that the header/footer fonts are selected by clicking the **Fonts** button from the *Page Setup* dialog box.

- Select the desired *Header* options.
- Fill in the appropriate values for *Space* and *From page*.
- Enter the Header text in the template fields.
- Proceed similarly for the *Footer* section.
- Click the **Ok** button to exit and save your changes.

To exit without saving changes, click the **Cancel** button.

Saving the Letter Template

To save the letter template:

- Exit the *Letter Edit* window (**File/Exit** command, or double-click the system menu button).

This will save the letter template and return you to the *Letter Library* dialog box. There is no need to explicitly enter a save command.

To save the current merged letter as a text file, choose the **File/Save as...** command.

Printing Letters
There are two ways to print letters; one-at-a-time and as a mail merge (in groups).

Use the one-at-a-time printing functions when you only need to send one or two letters to specific people. Use the mail merge function when you want to print letters for entire letter ranges or categories of people.

One-at-a-Time Printing
Printing letters one-at-a-time is straightforward:

- Select the phone book name for which you wish to print the letter.
- Open the *Letters Library* dialog box (**Edit/Letters...** command).
- Open the desired letter library file (click on it in the list).
- Select the appropriate letter.
- Press the **Print** button.

One letter for the selected person will be printed.

Optionally, you can review the letter first, then print it:

- Select the phone book name for which you wish to print the letter.
- Open the *Letters Library* dialog box (**Edit/Letters...** command).
- Open the desired letter library file (click on it in the list).
- Select the appropriate letter.
- Press the **Edit** button.

The *Letter Edit* window will open, displaying the merged letter.

- Make any desired modifications.
- Print the letter (**File/Print** command).

Mail Merge
To print letters for entire categories and/or letter ranges of people, use the Mail Merge facility:

- Open the *Print Mail Merge* dialog box (**File/Print/Letters...** command).

The *Print Mail Merge* dialog box very closely resembles the *Print Custom Formats* dialog box. In fact, the only difference is that letter templates are displayed instead of custom formats. This dialog box contains several fields which control what gets printed and how.

Select Format
Lists all the available formats as defined in the *Letters Library* dialog box (see the **Letters and Libraries** topic of this chapter section).

Reminder
This is the text from the *Reminder* field in the *Printer options* section of the *Page Setup* dialog box. This field usually contains some notes about the label format or printer setup.

Range (A to Z)
Here you can specify the letter range you want to print. This letter range is based on the phone book page letter. For example, if you specified a print range from W to Z, the mail merge would

print only those records on the W, X, Y or Z pages.

Note: The letters used to specify the *Range* are not case sensitive; an 'A' is the same as an 'a'.

Print Categories

By default, the Phone Book will print all of the entries in the phone book which fall within the specified letter range (see above). However, you can tailor your printout by selecting a category or categories of records that you want to print.

If none of the categories in the list are specified, then the phone book will print all entries within the specified range, as stated above. Once you select one or more categories that you want to print, the Phone Book will only print phone book entries that belong to those categories.

You can select as many of the available categories as you like. Furthermore, categories are unrelated to the letter range so you can combine these two options to very accurately select which records to print.

Device

The **Device** button opens the *Printer Setup* dialog box for the printer you have selected for the chosen letter. This is in case you have to modify the printer setup before you begin printing. You may, for example, want to set the paper size or change the page orientation.

Some letters will automatically open the *Printer Setup* dialog box when you begin to print. (See the **Printer options** section earlier in this chapter.)

- Select a letter from the *Select Format* list.
- Select a letter range to print (optional).
- Select one or more categories to print (optional).
- Check the *Reminder* field for notes and, if necessary...
- Click the **Device** button to make changes to the printer setup.
- Click the **Ok** button.

A message box will appear to tell you the status of the printing. You can click the **Cancel** button to stop printing.

If the merge is interrupted by a query <?...> prompt, enter the requested information and click the **Ok** button to continue.

Envelopes Styles

The Phone Book has one of the most advanced envelope printing facilities available. Its power and flexibility let you print sharp-looking envelopes with just a few mouse clicks. One of the more distinct features of this facility is its ability to print to as many printers as you have connected to your PC.

The envelope printing facility can be configured to support just about any type of envelope. It comes with several pre-configured styles. You can use these as-is, or modify them to suit your needs. You can also create styles of your own.

- Select the File/Print setup/Envelope styles... command.

The *Envelope styles* dialog box appears:

Options

It may look like an overwhelming amount of information, but if you look at it one section at a time, it's quite easy to understand. You will see immediately the amount of flexibility you have in laying out print styles.

Styles

This list box displays the available envelope styles. When you select one of the styles, you will see all of the other options fields change to reflect the style you have chosen.

Style name

This is the descriptive name of the currently selected style. You can edit this field to change the name of the current style.

Return address

This section allows you to specify which return address, if any, you wish to use on the current envelope style. *First* refers to your normal return address, and *Second* refers to your alternative return address. Typically, the *First* return address is your business address and the *Second* is your home address.

If you click on *None*, no return address will be printed on the envelope. Use the *None* option if you are printing on an envelope that already has a preprinted return address.

Note: The address fields are defined in the *Envelope Addresses* dialog box (**File/Print setup/Envelope addresses...** command). They will be discussed later in this section.

Recipient address

This specifies which address will be used for the recipient.

Orientation

This specifies the orientation of the printing (portrait or landscape).

Paper source

Many printers have several sources of paper such as bins, trays, automatic feeders, etc. This option instructs the printer driver to use the indicated source. Some printer/driver combinations don't support this feature. In most cases, selecting *Default* will work properly.

Paper size

This tells the printer driver what size envelope you are using. As with the *Paper source* option, most printers and their drivers don't process this information.

Ideally, you would set the envelope size here and then define your margins based on the exact envelope dimensions. Unfortunately, many printers will ignore this information. Instead, you may have to set this to your normal paper dimensions (like *Letter 8½ x 11 in.*) and then adjust your margins accordingly. Let's hope that, in the future, the printer driver designers include more support for these types of features.

font & margins

There are three similar *font & margin* sections: *Return address, Recipient address* and *Message*. Each of them allows you to choose a font, size, and optional style. You also must specify the starting position of the corresponding text, relative to the upper left corner of the envelope.

The *Recipient address font & margins* section also allows you to specify upper case printing. If it is required that the address be in upper case (as in some foreign correspondence), check this box.

PostNet bar code margins

You can print PostNet bar codes on your envelopes. These codes let your mail bypass certain sorting procedures, allowing it to potentially be delivered faster. Specify the position of the PostNet bar code relative to the upper left corner of the envelope. If you don't want PostNet codes on your envelopes, un-check the *Print* box.

According to the USPS Mail Flow Planning System, PostNet bar codes no longer have to appear in the lower right hand corner of envelopes. The bar codes can now be printed above or below the address, as long as it does not touch any lines or printing. Leave a space at least .04" between the bar code and any text above or below it. Also, keep the barcode at least .125" from the envelope's window (if it has one). The bar code should appear within 4" from the bottom of the envelope, and should be spaced at least .5" from the left and right edges of the envelope. This gives you a lot of room to play with.

Note: Some earlier versions of printer drivers do not handle the PostNet codes properly. The bars may be too thick or spaced unevenly. Check to see that your printer's PostNet bar codes look correct (compare with some of your own mail). If they do not, contact your printer manufacturer for the most recent printer driver. (The most recent HP LaserJet III driver we have obtained is version 30.3.86. Incidentally, the LaserJet III driver included with Windows 3.1 works fine.)

Print message

Use this field to specify a short message to appear on your envelope. The list contains many messages, and you can edit or add to the list by pressing the **Mssge** button. If you don't want any message printed, choose *None*.

Button Functions

There are several buttons along the bottom of the *Envelope styles* dialog box to help you manage the various styles and options.

Add

Press this button to create a new envelope style.

Delete

Removes the currently selected style.

Test

This prints a "test" envelope using the current style and option settings. When you push this button, you will be given the opportunity to have ruling lines printed on your test envelope. This feature is extremely helpful when you are creating a completely new style.

We recommend that you test your envelope designs on plain paper first (to save time and envelopes). Once you perfect the design, you can try it with a real envelope.

Printer

Allows you to select and configure the printer for the currently selected style. You can select a different printer for every style. You may want your business-to-business envelopes to be printed on your high quality laser printer, while your dot matrix printer is good enough (and cheaper to use) for your home-to-home correspondence.

Mssge

This opens the *Messages* dialog box which lets you edit or add to the list of envelope messages.

Use the field at the bottom of this dialog box to edit the selected message. To add a new message:

- Press the **Add** button.
- Type the new message in the pop-up box provided and click **Ok**.

Creating a New Style

To create a new envelope style:

- Press the **Add** button.

The *Create new style* dialog box appears:

- Type in the name of the new style.
- Press the **Add** button to create the new style and initialize its options to the defaults, **or...**
- Press the **Copy** button to create the new style and copy the options from the currently selected style.
- Select the desired options and settings as described previously in this section. Be sure to select fonts and type sizes, as your envelope may not print if this is not done.
- Press the **Printer** button and select the printer for this style.
- Press the **Test** button to preview your new style (optional).

Envelope Addresses

The Phone Book's envelope printing function allows you to define two return addresses and two recipient address templates.   This provides you with a fair amount of flexibility between home and business mailing.

To edit or view the envelope address templates:

- Select the File/Print setup/Envelope addresses... command.

The *Envelope Addresses* dialog box appears:

The dialog box is divided into the four possible addresses.

Return address
Type your primary (or first) return address in this field.   If you use the Phone Book for business purposes, this field usually holds your business address, or vice-versa for home use.

Alternative address
Type your secondary (second) address in this field.   It is most likely the opposite of the primary address (home or business).

Business address template
This is the template that will be used to create the recipient's business address.   It follows the same guidelines as *Custom Formats* and *Letters* templates.   (See below for details.)

Home address template
This template is used to create the recipients home address.   This is the address that will be used when you are mailing to an individuals home rather than their business.

Constructing Templates

Templates are constructed using merge fields/keywords.   At print time, the keywords are replaced with the corresponding information from the currently highlighted phone book entry.   For example:

You enter...

<TITLE> <FIRST NAME> <LAST NAME>
<POSITION>
<COMPANY>
<ADDR ONE>
<ADDR TWO>

It prints...

Konstantin Monastyrsky
President/Programmer
Okna Corporation
310 Bay Blvd.
Rain Forest, FL 12345

To edit the template:

- Place the cursor in the one of the *Template* fields.
- Type the desired merge fields in the position you wish them to appear on your custom format. Use only capital letters and enclose all fields in angle brackets, "< >".
- Press **Ctrl-Enter** or **Ctrl-M** to start a new line or insert a line.

The **Fields** button opens a list box which shows all of the available merge fields.   To quickly insert a merge field into the template:

- Press the **Fields** button. The *Merge fields* dialog box appears.
- Position the *Merge fields* dialog box so that you can see it and the address field at the same time.
- Place the cursor in the template where you wish to insert the merge field, or highlight the field you wish to replace.
- Select one of the fields from the *Merge fields* dialog box.
- Double-click on the merge field, or press the **Enter** button.

Hint: For a complete list of merge fields/keywords and their descriptions and locations, see **Appendix B**.

Undo

The **Undo** button "undoes" the last modification that you made in any of the address edit fields. It will only undo one modification, such as replace a deleted line, or return some deleted characters. If you made several mistakes and want to revert back to the original addresses, press the **Cancel** button and start over.

Printing Envelopes

Envelopes can be printed one-at-a-time or for a group of people.   To print envelopes:

One-at-a-time

- Select the **File/Print/Envelope...** command.

The *Print envelope* dialog box appears:

This dialog box presents you with the style, options and addresses that will be used to print the envelope.   The program remembers the last style you used and automatically selects that style.

Options

Although the options for each style are set up in the *Envelope styles* dialog box, you are given the opportunity here to change them for this particular printout.   For a full description of the options, see the section on **Envelope Styles** (a few pages back).

Print style

Choose the style of envelope you wish to print from this combo-box.

Return address

Select your primary, secondary or no return address.

Recipient address

Select the template that will be used to create the recipient's address.

Orientation

Specify the orientation of the printer (Landscape or Portrait).

Paper source

Select the source (bin, tray, etc.) from which the paper will be drawn.

Paper size

Specify the envelope or paper size.

Note: Keep in mind that the *Paper source* and *Paper size* options are ignored by many printer-driver combinations.   Set the *Paper source* to *Default* and the *Paper size* to *81/2 by 11 in.* and adjust the margins accordingly

From

This is the address specified in the *Return address* option.   You may review and edit it for this particular printing.

To

This is the recipient's address as it will appear on the envelope.   It was created using the template specified in the *Recipient address* option.   You may review and edit it for this particular printing.

Messages

This is the list of available messages.   You may leave the message as is, choose a new one or highlight *None* to print no message.

Print message

This is the text for the currently selected message.   You can edit it or enter a new message for the current printing only.

Button Functions

There are several buttons in the *Print envelope* dialog box to help you review your style options and print your envelope.

Printer

Press this button if you want to select a new printer or set up the currently selected printer.

Paste

This button is only active when you are in one of the address fields. Press **Paste** to insert the contents of the Windows clipboard at the cursor. This means that you can cut or copy an address from any Windows program and have it printed out from the Phone Book's envelope printing facility.

Print

Begins printing the current envelope style with the specified addresses and options.

Printing the Envelope

- Select the desired envelope style. The options and addresses will be updated to reflect your choice.
- Review the options and change any if desired. Remember that changing the options here will only affect the current printing. To permanently set the style options, use the *Envelope styles* dialog box.
- Review the addresses and message and make any necessary changes.
- Press the **Print** button.

Printing Groups of Envelopes

To print envelopes for several phone book records (as opposed to one-at-a-time):

- Select the **File/Print/Envelopes...** command to open the group version of the *Print envelope* dialog box.
- Select an envelope *Print style*.
- Optionally, modify the print options and return address just as you would in the regular *Print envelope* dialog box (see above for details).
- Select one or more categories from the *To* list.
- Press the **Print** button to begin printing.

Note: Keep in mind that the envelopes will be printed one after another. Unless you have an automatic envelope feeder, you will have to feed them in by hand.

Dialing from the Phone Book

Any telephone number that you have entered into the Phone Book can be dialed automatically by using the DeskTop Dialer. If you don't have a modem, you can still use the dialing commands to look up a number quickly.

Related Topics:

Page Number

Other Numbers

Specifying Dialing Options

Page Number

The *Page Number* is the telephone number that appears on the phone book page next to the page entry for an individual or company.   Don't confuse this with *Pager Number*, which is the number for a person's pocket pager.

Since the page number is so easy to view and to dial, it should be the most frequently dialed number for the entry.   It is unique to all other numbers for that entry.   Usually it is just a duplication of the entry's business or home number.

To dial a page number:

- Double-click on the page number field, **or...**
- Highlight the page number and press the **Enter** key.

The Dialer program will pop up and it will automatically begin dialing.

Other Numbers
Dialing any of an entry's other numbers is almost as easy as dialing the page number. This is achieved through the **Dial** menu. There are two forms of the **Dial** menu: Windows and Expert.

Windows Dial Menu
When you open the Windows form of the **Dial** menu, it displays all of the available numbers for the currently selected phone book entry. Numbers for which the entry has no corresponding information are grayed-out.

To dial one of the available numbers, simply select it from the menu.

There are several other entries on the **Dial** menu:

[Entry]...
This menu item displays the page name of the currently selected entry. Choose this command to open a *View* window for the entry.

Dialer...
Pops up the Dialer program without passing it any dialing commands.

Options...
Opens the *Dialing Setup* dialog box which allows you to specify phone numbers, labels and dialing formats (See the next topic).

Note: "Pops up" means that, if the program mentioned is already running, it is restored and activated. If it is not already running, it will automatically be launched and becomes the active window.

Expert Dial Menu
The Expert form of the **Dial** menu offers slightly more flexibility than the Windows form in that you can specify the way in which you want the number to be dialed. Otherwise, it functions in nearly the same manner as the Windows form.

The Expert **Dial** menu can be opened at any time (even while in Windows mode):

- Click the **Telephone** icon on the Phone Book's blue control bar, or press the **Alt-C** key (for **C**all).

To dial one of the numbers using the default format, simply select the corresponding menu item.

To apply a certain dialing format to the number:

- Highlight the number.
- Slide the mouse to the right, or press the **Right-Arrow** key.

The available *dialing formats* are displayed:

- Select the desired dialing format.

The Dialer will pop up and automatically dial the selected number using the specified format. For more information on dialing formats, see the **Dialer** chapter.

Once you have specified a certain dialing format for a number in the manner described above, the Phone Book will remember that format. The next time you dial that number, if you don't explicitly specify a format, the Phone Book will use the same one you used last time.

Specifying Dialing Options

You can explicitly specify the desired number label and dialing format for each number of a particular entry. You may, for example, want to dial a work friend's office number as an extension, his fax number as local and his home number as long distance.

Or, you may have a client who has two fax phone numbers and no car phone. You could change the "Car" label to "Fax 1" and the "Fax" label to "Fax 2."

This is all accomplished through the *Dialing Setup* dialog box. To open the dialog box:

- Select the **Dial/Options...** command from either **Dial** menu (Windows or Expert).

This dialog box displays three columns of information: the *number label,* the phone number, and the *dialing format*.

Number Label

The *number label* is shown in the left-most column for each corresponding number. Except for the "Page" label, each of these may be changed as you see fit. As the example above explained, you may have entries who have no car or pager numbers, but who have multiple home or office numbers.

- Select the desired label and enter the desired text.

The selected number label will be changed accordingly for every occurrence of that entry (*Business/Home information* dialog boxes, *View* window, **Dial** menu, etc.).

Note: Changing any of the fields in the *Dialing Options* dialog box, including number labels, will only affect the current record.

The "&" character should be placed in front of the letter that you want to be underlined when that label appears in a menu or dialog box. For more information, see **Chapter 1, "&" Character in Definable Fields.**

Phone Number

The center column holds the phone number for the corresponding label. You can edit the number here just as you would on the phone book page or *Business/Home information* dialog boxes.

Dialing Format

The right-most column displays the current dialing format for the corresponding number in a combo-box.

A dialing format of "None" means that no format has previously been chosen for this number. The default dialing scheme will be used, which works fine in most cases anyway.

To change the dialing format:

- Open the format combo-box for the number (click on the down-arrow).
- Select the desired format.

For more information on dialing formats, see the **Dialer** chapter.

When you are through specifying the dialing options for the current record:

- Press the **Ok** button to close the dialog box.

Customizing the Phone Book

The Phone Book has many options and setup parameters that allow you to tailor it to suit your needs. There are program options, book options and book design

Related Topics:

- Book Options
- File Options
- Cover Design

Book Options

The Phone Book's program options are all configured in the *Phone Book Setup* dialog box. Use these options to change the Phone Book's password, user interface, dialer integration, salutation templates, etc.

To open the *Phone Book Setup* dialog box:

- Select the **File/Setup/Book...** command.

The following options are available:

Opening options

These options control how the phone book is "opened" when you first start the program.

Password

To protect the Phone Book's contents from unauthorized persons, enter a one-word password in the *Password* area. Use letter, numbers, punctuation or a combination of all three. Spaces are not allowed. Try to make the password difficult to guess.

The Phone Book encrypts your password when storing it so that it cannot be located by anyone inspecting the program's files.

Note: Be very careful with your password; write it down and keep it in a safe place. The Phone Book program does not have any loopholes or "back doors" to bypass the password feature. If you forget your password, you will not be able to open your phone book, and the only way Okna can help you is if you send us your files.

When you open a book that is protected by a password, all menu command except for the **File** menu are unavailable. You cannot use any of the commands which would allow modification of the book until you type the password.

To further discourage others from accessing a protected book, the program does not automatically prompt for the password. Simply type your password when the closed book appears, and it will open.

You can, however, display the password prompt dialog box by double-clicking on the cover, or by selecting the **Open book** command from the **File** menu.

Keep closed/open

These radio buttons are only active when there is no password specified. Use them to control weather or not the phone book will be opened when the program starts.

Mode

This is where you make a selection between the Windows and Expert modes of the user interface. The program must quit if you change modes.

Windows

This is the most common mode. It has regular Windows menus, a system menu, a title bar and sizing arrows.

Expert

In this mode, the program has no Windows-style menus and no system menu, title bar or sizing arrows. All commands are carried out from the expert menus.

For more information on Windows and Expert modes, see **Chapter 1, Windows vs. Expert Mode.**

Copy template files

These are the names of the template files that are used to specify which information gets moved to the clipboard or word processor during a **Move** or **Copy** command.

Bus

This template file specifies which business information is copied. This file is used whenever a **Move** or **Copy** is performed.

Home

This template file specifies which residence information is copied. This file is used whenever a **Move** or **Copy** is performed with the **Shift** key down.

Dialer integration

If the *Disable* option is checked, the Phone Book will no longer integrate with the Dialer. This is useful if you don't have a modem or can't use the Dialer for some other reason.

When the *Show current record* option is checked, the Dialer program will always be aware of which Phone Book entry is highlighted, and will have that entry's phone number and other information.

Mouse click opens

This option specifies which window is opened when you double-click or press **Enter** on a phone book entry.

Edit

The *Business information* dialog box will be opened.

View

The *View* window will be opened.

Icon Shows

Use these options to specify how the Phone Book will label its icon when it is minimized.

File description

The icon will be labeled with the current phone book's description as it appears in the *File options* dialog box (see next section).

File Name

The icon will be labeled with the current phone book's file name.

Nothing

The icon will have no label.

Salutation Templates

These two template fields are used to create the salutation fields in the *Business* and *Residence information* dialog boxes. You can edit the templates to change the way the phone book creates the salutation fields. This will not have any affect on salutations for existing records.

For a complete list of keywords that can be used in the templates, see **Appendix B**.

Caller ID Options

These options control how the Phone Book will respond when it is informed (by the Caller ID interface) of an incoming call. For complete details, see **Chapter 4, Caller ID Interface**.

File Options

The file options are used to distinguish each separate phone book file. The *Descript.* field describes the particular book. The default description is "Phone Book," but you may change this.

Place your name in the *Owner* field. This field can then be accessed in letter templates by specifying the merge/keyword **<USER NAME>**.

The *Public Password* field can contain a password that the user will be required to enter before the book can be opened. This is intended for future use with the network version of the phone book. However, the password will be enforced even in the single-user version. The best way to password-protect your books is with the *Password* field in the *Phone Book setup* dialog box (see the **Program Options** topic above).

The remainder of the file options are for future expansion to the network version of the phone book. If you do not have the network version, these options will have no effect.

Cover Design

To view the cover of your current phone book:

- Double-click on any blank area of the blue control bar, **or...**
- Select the **File/Close book** command.

The Phone Book cover is displayed whenever the book is closed. It can be re-designed to suit your tastes.

- Select the **File/Design...** command.

Note: The **Design...** command is only available from the **File** menu when the book is closes.

The *Design cover* dialog box is displayed:

By positioning the *Design cover* dialog box off to one side of the closed phone book, you can see how the *Titles* and *Names* are displayed. Any of these text fields may be customized. You can also change the colors of the book cover.

There are three aspects to the color of the phone book: *Cover*, *Frame*, and *Text*. Each of these is represented by a button of the same name.

- Press either the **Cover**, **Frame** or **Text** button to edit the color for that aspect of the phone book.

A *Color* dialog box will appear. This is one of Windows' "common dialogs," and you will see the same dialog box if you edit the system colors using the Control Panel program.

Use this dialog box to select a new color for the phone book. If you don't see a color you like, you can press the **Design Custom Colors...** button to create some colors of your own.

- Once you have selected a color, press the **Ok** button. You will be returned to the *Design Cover* dialog box.
- To see the effect your color change has on the cover of the book, press the **Show** button.
- Select one of the other elements of the book cover to redesign, or press the **Ok** button to save your changes and close the dialog box.

Utilities

The Phone Book has several utilities that help you transfer information between other applications and your phone books. There are also utilities to help you save your information on another disk and restore it later if something should happen to your files.

Related Topics:

- Merging Files
- Importing Information
- Exporting
- Sharp Wizard Data Exchange
- Casio B.O.S.S. Data Exchange
- File Doctor
- Dynamic Data Exchange

Merging Files

The file merge utility allows you to combine the entire contents of two phone books. To open the *Merge file* dialog box:

- Select the File/Utilities/Merge file... command.

Options

Select the *Merge page file* radio button to execute the merge using a page file. This is the best way to merge files, as all the information will be copied verbatim from the merge book into the current book.

Select the *Merge database file* radio button only if you feel that the page file for the book you wish to merge with is corrupted. This type of merge is not ideal, as the page names are reconstructed from the database rather than copied as is.

If the *Check duplicates* box is checked, you will be prompted during the merge if one of the records in the merge file matches a record already in the current phone book.

If the *confirm each record* box is checked, you will be prompted for each record before it is merged into the current phone book.

File to merge

This field displays the name of the phone book file that will be merged with the current book. Press the **File** button to open a *Select file* dialog box so that you can choose a file.

Phone book files are found in the **DeskTop** directory (usually C:\WINDOWS\DESKTOP). Page files have an extension of ADR, i.e. WHITE.ADR, YELLOW.ADR. Database files have an extension of BTR, i.e. WHITE.BTR, YELLOW.BTR.

- Press the **Merge** button to start the merge.

The *Status* field will display the records as they are merged. Upon successful completion of the merge, the phone book will return to the page you were last on. The current phone book will contain any new records that were merge file. The merge file itself remains unchanged.

Importing Information

The Phone Book's import utility is actually a completely separate program that can be run even when the Phone Book is not open. However, it can be conveniently loaded from the Phone Book's **Utilities** sub-menu.

To start the Import program:

- Select the File/Utilities/Import... command, or...
- Double-click on the **Import** program icon in the DeskTop Set's Program Manager group, **or...**
- Double-click on the IMPORT.EXE file icon in the Windows File Manager.

The Import program's main window will appear (it will be completely empty at this point), and the *Select Import File* dialog box will automatically open:

Note: The *Select Import File* dialog box is a version of the new Windows standard 'open file' dialog box. You will see many new Windows programs using this type of dialog box.

Use the *Select Import File* dialog box to select the data file that you wish to import into the Phone Book.

File Types

The Import utility understands many different popular file formats. You can specify the type of file you want to import using the *List Files of Type:* combo-box. The file type is denoted by the three-letter filename extension. Here is a brief explanation of each file type:

Extension	**File Type**
TXT	Generic text (ASCII)
CSV	Comma Separated Values text
TAB	Tab delimited text
WKS	Lotus 123 version 1.x
WK1	Lotus 123 version 2.1
WK3	Lotus 123 version 3.x
XLS	Microsoft Excel version 2 & 3
WKQ	Borland Quattro
DBF	DBase versions 2, 3 & 4
AB3	Power Up Address Book Plus version 3.0
ADR	Tandy Deskmate 3.0

About Text Files

The Import utility works with most common text file formats. In general, text files contain lines of text (records), and each line is broken up into pieces of information (fields). Each record holds the information for one person or company, and the fields in that record contain data such as name, address, phone number, etc.

The lines/records in a text file must be separated by carriage return/line feed characters. A single line/record may not exceed 2000 characters. The fields within each record must be separated by some delimiter character. The two most popular delimiter characters are the *tab* and the *comma*. The Import utility will accept any delimiter character with an ASCII value of 0 to 31, and 44 (the *comma*).

The two most popular text file formats are CSV and TAB. CSV stands for **C**omma **S**eparated **V**alues. This type of file places commas between each field. Fields which contain commas themselves are surrounded by quotes, such as "Smith, Jim". Here is an example:

```
"Hacker, Chris",Programmer,Okna Corporation
"Smith, Jim",Buyer,Acme Products, Inc.
```

The other popular format is TAB, which is a file delimited by *tab* characters (ASCII 9). The *tab* character is a good delimiter because it does not interfere with any of the printable characters (above ASCII 32). The following is an example of a TAB file. The "•" character is used to represent the *tab* because it is not printable.

```
Hacker, Chris•Programmer•Okna Corporation
Smith, Jim•Buyer•Acme Products, Inc.
```

Any other type of text file should be opened using the TXT file type. The Import program opens the file and checks whether the first line contains at least two delimiters. If delimiters are not found, an error message is displayed.

Defining Fields

Once the file is successfully opened, the *Import* window displays the data in a grid format:

Each column in the grid holds a field as determined by the file format. Each row holds the information for one record. The top row of the grid is blank; this is where you place the label for each row.

- Click on one of the fields in the first column (not the top/label field). The cell will be highlighted.
- Assign a label for that column by selecting from the **Entry, Address, Phone** and **Home** menus. The label will appear in the top row.
- Move to the next column and repeat.

Continue defining the columns in this manner until the columns you wish to import have been labeled. You need not define every column; fields you don't wish to import can be left blank. However, at least a first, last or business name must be defined. The Phone Book needs something that it can display on the page.

The **Help** command creates a label description bar at the bottom of the *Import* window. A description for the currently highlighted label menu command will be displayed here.

The *Page name* and *Page phone* fields should really only be used when you are importing a file which was exported from another phone book and these fields are present. This holds true for other source files with similar layout.

Categories, topics, reminders and alarms cannot be imported into a phone book file. Only those fields available from the menus can be converted.

Once you have defined all of the columns:

- Select the **File/Convert...** command.

The *Convert* dialog box appears:

Source file

This is the file that you just defined in the *Import* window, and should not be changed.

Phone Book (target) file
This is the phone book file that you wish to import the information into. To specify this file:

- Type the name of a phone book (ADR) file here, **or...**
- Press the **Open Target** button and select a file.

Options

The *Options* section determines how the imported entries will be displayed on the phone book page.

Page entry shows name
For files that contain both a company and a business name, you must select the name that you want to appear on the phone book page.

Entry begins with name
If you specified that the person's name will appear on the page, select which of the names will come first.

Page shows telephone
Select the telephone number that will appear on the phone book page.

Do not add records
If you check this box, the Import program will only transfer the page name and number to the phone book. It will not create a record in the phone book's database file. Use this option if, for example, you have a large file from which you only want names and numbers.

- Click the **Convert** button to begin the conversion process.

If your target phone book is already open, turn a few pages to view the results.

Common Importing Problems

If the file did not convert, make sure that you have assigned field names to the columns.

If all entries appear on the A page, or entries that should be elsewhere, check to be sure that the page name doesn't begin with a number, symbol or space character.

If you can't see any of the new entries, try turning a few pages to force the program to re-read the files. If this doesn't work, make sure that you are in fact viewing the target file.

Exporting

The Phone Book can export its information in many popular formats, including Lotus 123, Excel, DBase, Quattro, text and others. The export utility is completely flexible, allowing you to export just the information you choose, for the records you specify.

Creating Export Field Profiles

Export Field Profiles provide the way for you to specify exactly which of the Phone Book's information fields will be exported. You can create any number of these profiles and use them to export information for various purposes.

You can have one export field profile for exporting to a spreadsheet that you have, or another that includes the fields necessary to create bills. Whatever your information needs are, you can meet them with export field profiles.

To create export field profiles:

- Select the **File/Utilities/Export/Fields...** command to open the *Fields Profiles setup* dialog box:
- Press the **Add** button on the bottom of the dialog box.
- Enter the new profile name at the prompt.
- Press the **Add** button to create an all-new profile, or the **Copy** button to create a new profile based on the currently selected profile.
- Select any of the *Available fields* you want to be part of the profile. They will appear in the *Selected fields* list. Fields can be selected by double-clicking or by pressing the **Select** button.
- Use the editing buttons to manipulate the selected fields:

All
Selects all available fields into the profile.

Clear
Removes all fields from the *Selected fields* list.

Select
Places the highlighted available field into the profile.

Remove
Removes the highlighted profile field from the profile.

Up
Moves the highlighted profile field up one position in the list.

Down
Moves the highlighted profile field down one position in the list.

Business
Replaces the current list of Selected fields with all the fields from the Business information dialog box.

Home
Replaces the current list of Selected fields with all the fields from the Residence information dialog box.

- Select an export format from the *Available formats* combo-box.
- Edit the export *File name* as desired (optional)

- Enter any comments about the profile (optional).
- Press the **Ok** button to close the dialog box and save the profile, or start a new profile.

Editing Existing Fields Profiles

To edit an existing field profile:

- Select the **File/Utilities/Export/Fields...** command to open the *Fields Profiles setup* dialog box:
- Select the profile from the *Available profiles* combo-box.
- Use the editing buttons to make the changes to the fields profile.
- Edit the Profile name, Available formats and File name as desired.
- Press the **Ok** button to save the changes.

Deleting Field Profiles

To delete a field profile:

- Select the **File/Utilities/Export/Fields...** command to open the *Fields Profiles setup* dialog box:
- Select the profile from the *Available profiles* combo-box.
- Press the **Delete** button to remove the profile.

Creating Export Range Profiles

Export Range Profiles allow you to define exactly which records will be included in an export. You can define and save as many of these profiles as you like.

To create a new export range profile:

- Select the **File/Utilities/Export/Range...** command to open the *Range Profiles setup* dialog box:
- Press the **Add** button.
- Enter the new profile name at the prompt.
- Press the **Add** button to create an all-new profile, or the **Copy** button to create a new profile based on the currently selected profile.
- From the *Groups, Categories* and/or *Topics* lists, select the range of records you wish to export. You can combine *Group, Category* and *Topic* selections to create a range profile. The list boxes are multi-selection, so you can choose as many items as you wish. Records that belong to any one of your selections will be exported.
- Select a *Sort key* from the combo-box. The sort key will be used to sort the records at the time of export.

Exclude duplicates

Check this option if you don't want records which fit into more than one of your range selections to be exported more than once.

Show selections

Check this option to remove all unselected *Groups*, *Categories* and *Topics* from their respective lists. The lists will display only those items you have selected. Furthermore, the profile will be un-modifiable until the *Show selections* check box is unchecked. This can be used as a safeguard.

- Press the **Ok** button to save the profile and exit the dialog box, or press the **Add** button to add another profile.

Editing Existing Range Profiles

To edit an existing range profile:

- Select the **File/Utilities/Export/Range...** command to open the *Range Profiles setup* dialog box:
- Select the profile you wish to edit from the *Available profiles* combo-box.
- Modify the range selections as desired (remember, the *Show selections* option must not be checked).
- Modify the profile name, sort key and duplicates options as desired.
- Press the **Ok** button to save the changes.

Deleting Range Profiles

To delete an existing range profile:

- Select the **File/Utilities/Export/Range...** command to open the *Range Profiles setup* dialog box:
- Select the profile from the *Available profiles* combo-box.
- Press the **Delete** button.

Exporting the Information

Once you have defined your field and range profiles, you can export the phone book data. By choosing the proper range and field profiles, you can control exactly which records, and exactly which information fields from those records, will be exported.

- Select the **File/Utilities/Export/File...** command to open the *Export file* dialog box:
- From the *Range* list, select one of the range profiles. Press the **Range** button if you wish to view/edit the range profiles.
- From the *Fields* list, select one of the field profiles. Press the **Fields** button if you wish to view/edit the field profiles.
- Select an export format from the combo-box. This is optional, as the export format is already defined by the field profile you have chosen.
- Edit the export file name as desired (optional). By default, the export file will be written to your DeskTop Set data sub directory (DESKTOP).

Confirm export

Check the *Confirm export* box if you want to view the list of export records before they are written to the export file. At that time, you will have the option of removing any records from the export.

Write headings

If this option is checked, the export utility will create and export a record which contains the headings of all the fields you are exporting. For example: "Page Name, Page Phone, Zip Code." This can be very useful as you begin to integrate the exported data into some other program.

- Press the **Ok** button to begin exporting.

Sharp Wizard Data Exchange

The Phone Book now supports transfer of phone book data to the Sharp Wizard Electronic Organizer. The interface uses templates which allow you to specify exactly which of your phone book fields will be transferred to Wizards applications. These templates make transferring data to your Wizard straightforward and simple.

Requirements

In order to communicate with Wizard, you must have:

- A Sharp Organizer PC Link or equivalent hardware.
- An available communications port on your PC.

Setting up the Templates

The Phone Book has four templates which correspond to the Wizard's Business Card and Tel 1, Tel 2 and Tel 3 directories.

Business Card

To define the business card template:

◆ Select the File/Utilities/Wizard/Business card... command.

The *Wizard business card format* dialog box opens:

As you can see, this dialog box has a field for each of the corresponding fields contained in the Wizard Business Card database. In each of these fields, you place the Phone Book merge field/keyword(s) that you want transferred to the corresponding Wizard field.

Hint: For a complete list of the Phone Book's merge fields/keywords, please see **Appendix B**.

In the example above, the **<PAGE NAME>** merge field/keyword was placed in the *Name* field. This means that when you transfer your data to the Wizard, the Phone Book's page name will be transferred to the Wizard Business Card's *Name* field.

Transfer format layout

To fill in the fields:

◆ Use the mouse or the **Tab** key to position the cursor in the field you want to define.

◆ Enter the appropriate merge field/keyword.

Instead of entering all the merge fields/keywords by hand, you can use the *Merge fields* dialog box.

◆ Press the **Fields** button to open the *Merge fields* dialog box.

◆ Select one of the keywords in the *Merge fields* dialog box and double-click on it or press **Enter**.

The merge field/keyword will be inserted at the cursor.

Transfer categories

The *Transfer categories* list box displays all of the categories in your phone book. Simply select the categories that you want to be transferred to the Wizard when you execute a Business Card transfer.

Wizard has a limited amount of memory; the DeskTop Set Phone Book is capable of holding many more records than you could ever transfer to Wizard. Therefor, we recommend you create one or two special categories strictly for the purposes of exporting to Wizard.

Assign these categories to the records you want to transfer. Then, when you set up your transfer formats, you can simply select the special categories you created.

- From the *Transfer categories* list, select the categories you wish to transfer to Wizard.
- Press the **Ok** button to save your business card transfer format and close the dialog box.

Telephone Formats

The telephone formats transfer selected DeskTop Set Phone Book data to Wizard's Tel 1, 2 & 3 telephone directories. They work in the same manner as the business card formats; the only difference is the fields.

If you haven't read the previous selection on setting up business card templates, please do so now. This will give you complete instructions on how the template formats work.

To edit the Tel formats:

- Select the File/Utilities/Wizard/Telephone lists... command.

The *Wizard telephone formats* dialog box opens:

- Set up the format fields just as you would in the *Business card formats* dialog box.
    - Use the **Tel 1**, **Tel 2** and **Tel 3** buttons to switch between the templates for the three Wizard telephone directories.
    - Use the **Fields** button to display a list of the available Phone Book merge fields/keywords.
- Press the **Ok** button to save the formats and close the dialog box.

Executing the Transfer

To transfer records to Wizard, open the *Wizard transfer* dialog box.

- Select the File/Utilities/Wizard/Transfer... command.

This dialog box contains all the options and settings you need to transfer records to Wizard.

Communications settings

These options describe the characteristics of the connection between Wizard and your PC. See your Wizard-PC link documentation for more details.

Port

Select the communications port to which your Wizard-PC link is connected.

Baud rate

This is the rate at which data is transferred between the PC and Wizard. For the current Wizard transfer protocol, you must set this baud rate to 9600 (the Wizard default).

Transfer target

Select the **R**andom **A**ccess **M**emory to which you want the information transferred.

Main RAM

This is memory that exists within the Wizard unit.

Card RAM

This is expansion memory that exist on an additional card.

Applications

Use these check boxes to select one or more Wizard applications to which you want the data transferred. Each of the application transfers will use the associated template to format the data.

Mode

These options specify the transfer mode used by Wizard.

Overwrite

In this mode, Wizard replaces existing data with the transferred data. Any information previously stored in the chosen applications is erased.

Append

In this mode, information transferred to Wizard is added to the information already stored in the target applications.

- Select the transfer options and settings
- Press the **Ok** button to begin the transfer.

Note: When the Phone Book exports records to Wizard, it checks to see if the 'key fields' contain valid data. The 'key field' for the Business Card is *Company*, and for the Tel directories, it is the *Name* field. If any of the records you attempt to transfer to Wizard do not have valid information in the 'key field', they will not be transferred.

Casio B.O.S.S. Data Exchange

The Phone Book supports transfer of data to the Casio B.O.S.S. The method is nearly identical to downloading to the Sharp Wizard. The only differences are in the menu commands and dialog box names (substitute "Casio B.O.S.S. for "Sharp Wizard") and the fact that the B.O.S.S. only has one telephone directory as opposed to Wizard's three.

Please see the previous topic entitled **Sharp Wizard Data Exchange**

Note: The Casio B.O.S.S. data exchange does not work reliably at 9600 baud. Please be sure to set the baud rate to 4800. Casio also advises users to replace older PC-Link calbles with new ones (with gold-plated connector).

File Doctor

In the unfortunate event that one of your phone books is corrupted, the File Doctor utility can help. This utility scans the current phone book's files for the most common problems and 'patches them up'. To open the *File doctor* dialog box:

- Select the File/Utilities/File doctor... command.

Clean up pages

Check this box if any of the phone book pages have non-alpha-numeric text or garbage characters in them, or if the pages seem to be corrupt in some other way.

Link pages

This operation will attempt to re-link any phone book pages that are unlinked or linked incorrectly. Symptoms of corrupt page linkage include incorrect page sequence and errors/crashes during page turning.

Link topics

This operation will attempt to re-link any topic pages that are unlinked or linked incorrectly. The symptoms are similar to those of corrupt page linkage.

Pack database

This operation rewrites the database, discarding any records that are marked for deletion. It may also help to solve problems with a corrupt database file. If you add and delete many records from your phone books, you may want to pack the database periodically. Keep in mind, however, that the operation can take a long time, especially on large phone books.

- Press the **Ok** button to proceed with the selected operations.

The *Status* field will inform you of each operation. When the 'file doctoring' is complete, several messages will be displayed to inform you of the completion, and to give you the names of backup files, if any were created.

Dynamic Data Exchange

The Phone Book supports DDE protocol as a Server. The server name is book and the topic name is field. The names of the available fields are identical to the merge keywords, except spaces are substituted with the underscore character and brackets are removed. For example, <PAGE PHONE> becomes PAGE_PHONE. Please see Appendix B for the list of merge keywords.

If you wish to query the currently selected phone book record from a Microsoft Word for Windows document or template, you could enter the following fields:

```
{dde book field title} {dde book field last_name}

{dde book field company}

{dde book field addr_one}

{dde book field addr_two}
```

The above Word fields would retrieve information from the currently selected phone book record and place it in your document. To access the Phone Book via WordBasic, you could enter the following code, for example:

```
ChanNum = DDEInitiate("Book", "field")

LastName$ = DDERequest$(ChanNum, "last_name")

FirstName$ = DDERequest$(ChanNum, "first_name")

DDETerminate ChanNum
```

Using the Message Pad

The Message Pad is a completely new part of the DeskTop Set.   It integrates with the Phone Book to provide automated phone message taking and phone call returning capabilities.   Although the Message Pad is a completely separate program, you can consider it as just another part of the Phone Book.

Related Topics:

Taking a Message

Reviewing Messages

Resolving Messages

Setting Up the Message Pad

Taking a Message

Taking a phone message is quick and easy; you don't ever have to touch the keyboard:

- Select the caller's name in your phone book.
- Select the **Log/Take message...** command.

Or, you can use the 'drag-and-drop' method:

- Press and hold down the left mouse button over the caller's name in your phone book; the cursor will change shape.
- 'Drag' the cursor over the Message Pad icon and 'Drop' the caller (let go of the mouse button).

The Message Pad's *Telephone message* dialog box appears:

The *Telephone message* dialog box will automatically be filled in with the information from the record you selected.

- Select the appropriate message options and type the message text.
- Click the **Ok** button to save the message and close the dialog box, or the **New** button to save the message and take another.

Auto-Search

The Message Pad can search your Phone Book for a phone number and, if a matching record is found, use that record's information to fill in the *Telephone message* information fields.

- Enter the caller's number (including area code) into the *Tel* field.
- Move to another field using either the **Tab** key or the mouse.

If a record is found with a phone number that matches the one you entered, that record's information will automatically be entered in the information fields. If the program finds more than one entry with same telephone number, a list of those entries will appear. Double-click on the correct name to select that record's information.

Reviewing Messages

To review all phone messages:

- From the Phone Book, select the **Log/Messages...** command.

The Message Pad's *Message list* dialog box appears:

The *Pending messages* dialog box has several button functions to help you manage your messages:

Delete

Removes the currently selected message.

Note: This particular **Delete** button has a special safety feature. You must double-click the **Delete** button in order to delete the selected message. Once you have deleted one message, each subsequent click of the **Delete** button within 1 second of the previous click will delete the next message in the list.

Book

Opens the phone book containing the record associated with the current message (if it is not already open) and highlights the page entry for that record.

Show

Displays the *Telephone message* dialog box for the selected message.

Resolve

Opens the *Resolve message* dialog box. See below for details on resolving messages.

Cancel

Closes the *Pending messages* dialog box.

Resolving Messages

The Message Pad's message resolving features allow you to keep track of the status of a message and its resolution. It can even remind you to return a call (via the Phone Book's reminder capabilities). It really simplifies the 'phone tag' game.

To open the *Resolve message* dialog box:

- Open the *Pending messages* dialog box (as above).
- Select the desired message from the list.
- Press the **Resolve** button.

The *Resolve message* dialog box contains the caller and message information from the *Telephone message* dialog box. It also keeps track of the current status of the message and has a field for additional notes.

Button Functions

The buttons along the bottom of the *Resolve message* dialog box provide the following functions:

Delete
Removes the message from the message database.

Call
Open's the DeskTop Dialer and automatically dials the number shown with the caller information.

Ok
Saves the current status of the message and closes the dialog box.

Cancel
Closes the dialog box without saving the current status or any changes you have made to the message.

Call Reminder

As stated above, you can have the Message Pad remind you to return a call.

- Select the *Call later* radio button.
- Fill in the *Date* and *Time* fields with the date and time you want to return the call.

Hint: Use the *Clock* and *Mini-calendar* controls to enter the date and time with the mouse.

The Message Pad will automatically create a reminder for the specified date and time. This reminder will then be handled by the Reminder program, just as any other reminder you create from the Phone Book.

Example

This is the typical use of the *Resolve message* dialog box:

- Open the *Resolve message* dialog box as described above.
- Review the caller information, message, call history and current status (if one exists).
- If you use the DeskTop Dialer, press the **Call** button to initiate the call. Otherwise, dial the call as you would normally.
- Once the call is completed, check the appropriate status radio button.

- Type in any additional notes (optional).
- Press the **Ok** button.

Setting Up the Message Pad

To view/change the Message Pad's setup options:

- Click once on the Message Pad icon to bring up its system menu (the Message Pad must already be running).
- Select the **Program setup...** command to open the *Message Pad setup* dialog box:

The *Alarm notification* section contains options that affect how the Message Pad will remind you to return a message. The check boxes cause the following actions:

List on top
The *Pending messages* dialog box will open.

Flash icon
The Message Pad icon will flash.

Sound
An audible alarm will go off using the tune specified in the *Alarm sound* combo-box. If the alarm is not responded to, it will sound for the time specified in the *Duration* field.

If the *Snooze button* (in the alarm message box) is pressed, the alarm will be put off for the time specified in the *Snooze for* field.

The *Misc. options* function as follows:

Confirm changes
You will be prompted to confirm before any changes are made to existing messages.

Show resolved
Resolved messages will be displayed in the *Pending messages* dialog box. If this option is unchecked, only unresolved messages will be displayed.

Grace period
This is the number of days that the Message Pad will continue to remind you about returning a call after the date of the scheduled return call has passed.

The *Phone Book* section of the dialog box displays information on the phone book you want to be searched when you use the *Auto-search* feature. Use the **Book** button to select the appropriate phone book file. Additionally, you can use the *Enable* box to enable or disable the searching feature.

About Caller ID

The DeskTop Set supports Caller ID services via the Caller ID Interface.   This interface can:

- Display the origination phone number of incoming calls.
- Keep a history list of incoming calls.
- Search your phone book for the caller's number.
- Open the Phone Book and select the record of the caller.

Note: At this time, the various telephone companies only provide caller ID on in-state phone calls. Incoming phone calls that originate outside of your state will not give any caller ID information.

Related Topics:

Requirements

Requirements

To use the Caller ID Interface, you must have:

- Caller ID service on your phone line. Call your phone company for details.
- A Caller ID computer interface unit. This unit passes Caller ID information to your computer via a serial port connection. This unit should be available where you can purchase other caller ID equipment. You can program any Caller ID device that sends formatted information to the computer at the time of call (see **Setup** Section).

  The DeskTop Set's Caller ID program will not work with the devices that send a continuous stream of unformatted characters and expect the program to pick-up relevant information.

  We are using ZyXel U-1496 modem. It is the best modem we've seen in years, and it supports U.S. and Canadian CallerID protocols.

Setting Up the Caller ID Interface

To open Caller ID,

- Double-click the Caller ID icon in the Program Manager's DeskTop Set group, or...
- Double-click the `CALLERID.EXE` application in the File Manager or MS-DOS Executive.

The Caller ID icon will appear at the bottom of your screen with any other Windows program icons.

Related Topics:

Caller ID Options

Phone Book Options

Testing the Setup

Caller ID Options

To set up the Caller ID program's options:

- Click once on the Caller ID icon to bring up its system menu.
- From the Caller ID system menu, select the **Setup...** command.

The *CallerID setup* dialog box appears:

Communications Settings

This group of options control how the Caller ID Interface program communicates with your caller ID interface unit. Set the *Comm port* field to the communications port to which your interface unit is connected.

The *Baud rate*, *Data bits*, *Stop bits* and *Parity* fields should all be set according to the documentation that came with your interface unit.

- Set the *Communication settings* according to your interface unit's connection and documentation.

Program Options

This group of options affect the functioning of the Caller ID Interface program itself.

Load on startup

Checking this option will cause the Caller ID Interface program to be loaded automatically every time you start Windows. This is accomplished by placing a reference to the program on the **load** line in the **[windows]** section of your `WIN.INI` file.

Note: Windows 3.1 users - as an alternative to this option, you can place the Caller ID program icon in your Program Manager's **Startup** group.

Hide icon

This option causes the Caller ID program's icon to be hidden. This leaves more room for other icons, and helps to reduce 'icon clutter.'

The Caller ID Interface program must be running at all times in order for it to effectively identify incoming calls. Once you have it set up, you may not find it necessary to display the icon anymore. If you have chosen the *Hide icon* option and you want to access the Caller ID program's call list or setup dialog box, just click the Caller ID icon in the Program Manager. The call list for the already running Caller ID program will pop up.

Ignore out-of-area calls

As was mentioned earlier, the various phone companies do not provide inter-state Caller ID information at this time. Normally, the Caller ID Interface program will respond to this type of call with an "Outside call" message. If you check this option, out-of-state calls will produce no messages.

Save call list

The Caller ID program can maintain a history list of phone calls. Check this option if you want this list to be saved each time you quit the program. Then, the list will be restored the next time you run.

Store calls

Set this to the maximum number of calls that you want the call list to store. When the list is full, as new calls come in, the oldest calls are removed from the list. The maximum number of calls the list can maintain is 99.

Notification options

This group of options determine how the program will notify you of an incoming call.

Message on call

A message dialog box will pop up displaying the number and name (if one is found in the Phone Book) of the caller.

Search for caller

When this option is checked, the Caller ID program will search your phone book for the number of the caller. If it is found, the caller's name will be placed in the call list.

- If the Phone Book is not running when a call arrives, the Caller ID program will automatically launch it.
- The current phone book (or phone book you last used) will be searched.
- If there is more than one phone book record with the number of the incoming call, the Caller ID program will use the first record it finds.

Open Book

This option is only available if the *Search for caller* option is checked. If the caller's number is found, the Phone Book will be notified of the incoming call. It will then respond according to its own *CallerID options* which are set in the *Phone Book setup* dialog box. See the next topic, **Phone Book Options,** for details.

Flash icon

This option will cause the Caller ID program icon to flash in response to an incoming call. This obviously has no effect if you have chosen the *Hide icon* program option.

System beep

Check this option if you want the program to sound the system beep when a call comes in. The sound can be turned off turned off by clicking on the program icon, responding to the message dialog box, or taking some action in the caller list, whichever is more convenient.

If you don't respond to the alarm in some way, It will sound for at most the number of minutes you specify in the *Beep* field.

◆ Set the *Program options* and *Notification options* according to your tastes.

◆ Press the **Ok** button to save your settings and close the dialog box.

Protocol

This group of options allows you to configure the program to work with almost any CallerID unit by programming its initialization and search options.

We will illustrate the program's settings for ZyXel U-1496 modem and another abstract device. Our goal is to determine the callers' phone numbers by letting the program how to find them among other data that we are getting from the phone company. Regretfully, we have to hassle with this little task because the standards for Caller ID computer interfaces don't exist.

Initialization Command

The modems that can process Caller ID information may require the initialization. In the case of ZyXel U-1496 modem, we will enter **ATS40=4&W0** initialization command. Your modem or Caller ID interface unit may require a different command or none at all. Please consult the device's User's Guide or manufacturer for more information.

Search for Text

When a call is detected, the device will send the information about the caller in the ASCII format to the Caller ID program. You may obtain this information by monitoring your Caller ID device with any serial program. Our ZyXel modem sends the following information:

```
RING
TIME: 07-28 21:45
CALLER NUMBER: 2015551212
```

Because we are only interested in determining which line of text contains the caller's telephone number, we will enter the word **CALLER** into this field. You may enter any partial text string, or even one letter.

Text Offset

The word **CALLER** begins from zero position. We will enter **0** into this field.

Tel. Offset

In the example above, the first digit of the telephone number begins from the position **15**. Note that we begin counting from zero. By entering **15** into the *Tel. Offset* field, we complete the programming of CallerID program to work with ZyXel modem.

The following example illustrates the programming for an abstract device that, at the time of call, sends the following information:

```
A 08081332
B 2015551212
Z G C
```

Because this device doesn't require initialization, we'll leave the *Initialization Command* field blank. We will enter **B** into the *Search for text* field because this line contains the telephone number, **0** into the *Text offset* field and **3** into the *Tel. offset* field. Simple...

Phone Book Options

If the *Open book* option is checked in the *Caller ID setup* dialog box, the phone book will be notified of incoming calls. If the incoming call's phone number is found by the Phone Book, it will respond according to its own *CallerID options*. To set up these options:

- From the Phone Book, select the **File/Setup/Book...** command to open the *Phone Book setup* dialog box.

The *CallerID options* section of this dialog box affect how the Phone Book will respond to the incoming call.

Enable

The Phone Book will recognize the Caller ID program's notification of incoming calls. If this option is not checked, the Phone Book will not respond in any way to Caller ID; Caller ID won't even be able to look up phone numbers.

Position on call

The Phone Book will turn to the page and highlight the page entry of the incoming caller's record (if it is found in the book).

Open view window

A view window for the record of the incoming caller will be opened (if the caller is found).

Book on top

The Phone Book window will be restored and brought to the front of your screen (over any other windows).

Testing the Setup

The CallerID program provides a way of testing your setup. This test will let you see how the *Program options*, *Notification options* and the Phone Book's *CallerID options* affect the interface's response to incoming calls.

Note: This test cannot tell you anything about your hardware (computer interface unit) or communications settings.

- Click once on the CallerID icon to bring up its system menu (the program must already be running).
- Select the **Call demo...** command to open a *CallerID* message box:
- In the field provided, type a phone number complete with area code.
- Press **Enter** or the **Ok** button.

The CallerID program will now respond according to its setup just as if a call had come in.

Using the Interface

When an in-state call is detected by the Caller ID Interface program, it starts a chain of events. The sequence of events is determined by the *Notification options* you have specified in the *Caller ID setup* dialog box (see the previous section).

This section will explain each of the possible events in the chain. You can just skip over those that don't apply to you. The events are not necessarily listed in the order they occur, but rather in the order in which you will most likely respond to them.

Related Topics:

Visual & Audible Alarms

Message

Caller List

Phone Book Notification

Visual & Audible Alarms

The first possible events to occur are the flashing icon and the system beep.

If you don't have the *Message on call* notification option chosen, then:

- Double-click on the flashing icon.

This will have the dual affect of silencing the beeping and opening up the *Caller list* dialog box.

If you have the *Message on call* option specified, then the flashing icon and system beep require no action at this point.

Message

The next possible event in the chain is the *Message* dialog box. This dialog box opens almost simultaneously with the start of the flashing icon and/or system beep.

With the *Message* dialog box, you can review the telephone number of the call. Additionally, if you have the *Search for caller* option chosen in the setup, the caller's name is displayed if it was found in your phone book.

You have two choices to respond to the message:

- Press the **List** button to open the *Caller list* dialog box, **or...**
- Press the **Cancel** button to return your computer to its previous state. The call will still be placed on the call list (see below) and the Phone Book may be opened to the caller's page if you have chosen those options.

Either of these actions will silence the system beep and stop the flashing icon, if they are still active.

Caller List

The next even in the chain is the *Caller list* dialog box. This box will open if you pressed the **List** button in the caller message, or if you double-clicked on the Caller ID program icon.

This dialog box displays the information passed from the Caller ID service. This includes the date, time and phone number of the call. Additionally, if you specified the *Search for caller* option in the setup, and the caller's number was found in the book, a name will appear in the *Caller name* column.

Button Functions

The *Caller list* dialog box has several buttons to help you manage the list.

Delete

Removes the currently selected call from the list.

Book

This button is only enabled if the *Search for caller* option was chosen in the setup. It can have one of two effects:

- If the *Open book* option is not selected, the Caller ID program will search the phone book for the caller's number. If it is found, the caller's name will be placed in the *Caller name* column.
- If the *Open book* option is selected, and the caller's record is found in the phone book, the book will be notified of the incoming call.

Hint: Double-clicking on one of the names in the *Caller list* dialog box is the same as pressing the **Book** button.

Cancel

This closes the *Caller list* dialog box.

Phone Book Notification

The last possible event in the chain is the phone book notification.   If you specified the *Open book* option in the setup, the Caller ID program will notify the phone book about the incoming call.   The book will respond according to its *CallerID options*.

About the Dialer

The Dialer, in combination with the other DeskTop Set programs, provides an automated phone directory with unmatched flexibility.

The key features of the Dialer include:

- Stores up to 105 password-protected phone numbers for instant dialing. Can dial a virtually limitless amount of numbers from the phone book.
- Allows you to enter a particular label to represent any phone number; for example, by typing "Home," the Dialer could dial a pre-programmed home telephone number.
- Instantly dials fire, police and ambulance numbers in case of an emergency.
- Accepts mnemonic phone numbers for dialing, such as 1-800-FLOWERS.
- Provides an area code directory that allows searching by state, city or area code.
- Handles international dialing codes. Dials foreign numbers from home and domestic numbers from abroad.
- Provides comprehensive support for Private Branch Exchange (PBX) phone systems.
- Allows least-cost routing for selected area codes.. This includes the use of long-distance calling cards.
- Provides a user-definable automatic redial without requiring a modem with automatic redial features.
- Provides comprehensive modem setup, even for modems that are not Hayes-compatible.
- Permits the use of Touch-tone services; can send the codes and commands to bank-by-phone; can send voice mail and paging commands; can be used with other telephone-access systems.
- Works with digital paging systems.
- Allows any program to make calls using the Dynamic Data Exchange protocol.

Using the Dialer

To open the Dialer,

- Double-click the Dialer icon in the Program Manager's DeskTop Set group, or...
- Double-click the DIALER.EXE application in the File Manager or MS-DOS Executive, or...
- Launch the Dialer from another DeskTop Set application (see the Phone book or Calendar chapters).

Note: If you launch the Dialer from another DeskTop Set application, it may automatically dial the telephone number selected in the application.

Note: You must have a modem connected to your computer's serial port. When you launch Dialer, the application attempts to initialize a serial port according to the selected options. (See the **Setup** section of this chapter.) If the Dialer fails to initialize the serial port, it displays the *Setup* dialog box to let you make the appropriate selections. If you attempt to initialize a serial port connected to a serial mouse, a bug in Windows 3.0 will cause a system lock-up.

You can move the Dialer window by clicking the left-hand mouse button anywhere in the window (except on the Dialer's buttons) or on its title bar and dragging it.

Related Topics:

File Menu

The Dial Menu

The Dialer Window

Dialer Button Keyboard Equivalents

Dialing from the Dialer Window

The Memory Pad

Dialing from the Clipboard

File Menu

The **File** menu contains the commands for setting the Dialer options, logging calls and viewing area code information.

Services...

Opens the Touch-Tone services dialog box. Use this facility to contact bank-by-phone services, voice mail, your VCR, etc. The dialing information has to be programmed in advance using the **Setup/Touch-Tone Services** command.

Area Codes...

Opens the *Area Code directory* dialog box. Use the area code directory to determine the area codes and local time for states and major cities. Or, figure out which part of the country a particular area code belongs to. For complete information on the area codes directory, see the **Utilities** section of this chapter.

Log call...

Opens the *Call Log* dialog box. It enables you to keep a record of the current call, its duration and its purpose. If the call has been initiated by the DeskTop Phone Book or Calendar, then the name, phone number and any other available information will automatically be entered in the dialog box fields.

View log...

Allows you to review the phone call log.

Search log...

Allows you to search the phone call log for a particular phone call.

Today's calls...

Shows the phone call log list for all calls that were made today.

Note: For complete information on the Phone Log, see the section in the Phone Book chapter on **Attaching Information to Entries**.

Setup

Opens a sub menu with the options for customizing the Dialer features and setting up the Dialer-modem interface. (See the **Setting Up the Dialer** section of this chapter.)

Copyright...

Opens the *Copyright* window, showing the Dialer version number and other information about the application.

Click the mouse button or press the **Enter** key to close the *Copyright* window.

Exit

Closes the Dialer program. You can also select this command by pressing the **Alt-F4** key on your keyboard.

The Dial Menu

The **Dial** Menu contains the commands for dialing a phone number using any one of the available dialing formats. If the Phone Book is open, it also displays all the available numbers for the currently selected record.

The Dialer Window

The Dialer window looks and functions like an advanced push-button telephone. You can dial from the keyboard, with the mouse or using a combination of both. The Dialer also works with systems equipped with a light pen or a touch-screen.

The Dialer remembers the last location of its windows and opens them in the same place the next time you launch the program.

Display Area

This is the area at the top of the window. It shows the numbers you enter and displays any warning or error messages.

To clear the Dialer's display:

- Click the **Clear** button or press the **Delete** key.
- Use the **Backspace** key to correct any typing errors.

The Display area can also act as a stopwatch for timing your telephone calls:

- Click the left-hand mouse button in the display area to start and stop the timer.
- Click the **Clear** button to stop and reset the timer.

Emergency Buttons

The three buttons on the right side of the Dialer window represent:

- Your local fire department (also the **F1** key on the keyboard)
- Local police department (**F2** key)
- Local ambulance or emergency medical assistance (**F3** key)

The numbers can be dialed automatically by double-clicking the appropriate symbol or by pressing the appropriate function keys.

To program an emergency number:

- Clear the display by clicking the **Clear** button.
- Enter the emergency telephone number.
- Hold down the **Shift** key and either click the corresponding emergency symbol in the Dialer window or press the associated function key on the keyboard.

Telephone Symbol

This symbol (also the **F4** key on the keyboard) is used to open and close the 105-number programmable memory pad. (See the **Using the Memory Pad** section of this chapter.)

Dial Button

Click this button (or press the **Enter** key) to make a telephone call. The Dialer immediately dials the number shown in the display window. The **Dial** button's background color changes from yellow to blue once the call is in progress.

Talk Button

This button (also the **Space** bar) disconnects the modem from the telephone line. You may monitor the progress of a call on the modem speaker, through a phone handset or over a speaker phone.

When you've reached your party:

- Pick up the telephone.
- Click the **Talk** button or press the **Space** bar on the keyboard.

If the modem is the only thing on the line (you are not listening-in using a handset or speaker phone), pressing the **Talk** button will terminate the call.

LND Button

The **LND** (**L**ast **N**umber **D**ialed) button (or the **F5** key) allows you to redial any of the last 10 numbers dialed. (The Dialer will remember them even if the application was quit and the computer was shut off.) As you click the **LND** button, these numbers appear in the Dialer display area.

Clear Button

This button (or the **Del** key) clears the Dialer display area and stops the timer. Double-click the **Clear** button to minimize (iconize) the *Dialer* window.

Note: You do not have to clear the display area after dialing; typing a new number automatically resets and clears the display.

Dialer Button Keyboard Equivalents

The following table lists each of the special buttons on the Dialer's keypad, along with its keyboard equivalent:

Button	**Key**
Dial	Enter
Talk	Space bar
LND	F5
Clear	Del
Fire	F1
Police	F2
Ambulance	F3

Dialing from the Dialer Window

You can dial numbers from the Dialer window just as if you were using a regular phone.

With the Keyboard

You can dial telephone numbers from the keyboard in a variety of ways:

- Type the numbers using the upper row of numerical keys on your keyboard, or...
- Type the numbers using the numeric keypad of your keyboard (You don't have to press the Num Lock key in order to use the numeric keypad), or...
- Type the letters of the telephone number, such as 1-800-FLOWERS, or...
- Type the name of a telephone number as stored in the Dialer's 105-number memory.
- Press the **Enter** key to dial the number and the **Space** bar to begin a conversation or to terminate the call.

Note: Press the F1 key for a Fire, the F2 key for the Police and the F3 key for an Ambulance.

Hyphens are not necessary. If you wish, you may type them between the digits for easier reading.

When dialing a spelled-out number, such as 1-800-FLOWERS, simply type both the letters and numbers as you see them. The Dialer automatically translates all letters into the appropriate numbers when you issue the Dial command. You can also hold down the **Ctrl** key while typing the characters and the Dialer will immediately translate the letters into the corresponding digits. 1-800-FLOWERS would appear as 1-800-356-9377 in the display area.

With a Mouse, Light Pen or Touch-Screen

To dial using any pointing device, simply click on (or touch) the appropriate buttons in the Dialer window to enter the number and to initiate the call. Any of the emergency numbers can be dialed immediately by double-clicking (or touching) on the associated icon.

The Memory Pad

The Dialer can store up to 105 frequently dialed telephone numbers. A 5-page **Memory Pad** (21 numbers per page) is provided for easy dialing.

Each page has its own color; white, black, blue, red and aqua. You might store business numbers on the white page, personal numbers on black, service numbers on blue, etc.

To open the memory pad:

- Click the telephone symbol in the *Dialer* window, or press the **F4** key on your keyboard.

The memory pad will always open to the page that you used last..

Each page of the memory pad has 21 buttons to which you can assign phone numbers and names. At the bottom of the pages there are four yellow control buttons: **Dial**, **Page, Edit** and **Close**.

You may use either the keyboard or the mouse to dial, program and control the memory pad.

Programming the Memory Pad

To program a number into the memory pad:

- Open the memory pad to any page.
- Use the mouse or cursor keys to select an unused button or a button you want to change.
- Click the **Edit** button to open the *Edit memory pad* dialog box and enter an appropriate name, telephone, extention and dialing format information, **or...**
- Type in a name and a phone number.

The phone number appears on the Dialer's display and the name appears on the memory pad button. Use the Backspace key to correct any errors, or the **Del** key to remove an entry completely. The button's text can't contain digits or hyphens.

Hint: Use easily remembered names, such as "Home" or "Office," so that you won't have to open the memory pad to remember the names of your most frequently dialed numbers. (See the next section.)

The Dialer automatically saves the programmed numbers as soon as the memory pad window is closed.

Dialing a Number from the Memory Pad

To dial a memory pad number:

- Double-click the memory pad button using the left mouse button, or...
- Click the desired button to select it, then press the **Enter** key or click the **Dial** button, or...
- Type the name of the desired number in the Dialer display area exactly as it appears on the associated memory pad button.

Note: When typing the name of a number in the memory pad, be sure to enter the name exactly as it appears on the memory pad button. The dialer will not make guesses if no match for the typed name is found. For example, typing "Office" will dial the number labeled "Office" if it exists, but it would not dial the number for "Officer" under any circumstances.

You may use the keyboard arrow keys to move around the page. Press the **PgUp** and **PgDn** keys to move forward or backward though the pages. Press the **Home** key to return to the white (first) page, and the **End** key to view the aqua (last) page.

- Click the **Close** button or press the **Escape** key to close the memory pad.

Password-Protecting the Memory Pad

You may prevent others from opening your memory pad through the use of a password. To assign a password to your memory pad:

- Clear the display area of the Dialer window.
- Type a password as you would type a phone number. The password can contain any combination of letters and numbers.
- Hold down the **Shift** key and either click the telephone symbol in the Dialer window or press the **F4** key. The password is saved.

Dialer clears the password from the display area once you have opened the memory pad. Enter the password whenever you open the memory pad for the first time after launching the Dialer.

To remove the password protection from the memory pad:

- Clear the display area of the Dialer window.
- Hold down the **Shift** key and either click the telephone symbol in the Dialer window or press the **F4** key. The password is saved.

Dialing from the Clipboard and with the DDE.

The **Dial** menu (Windows mode) and **Number** menu (Expert mode) allow you to paste a phone number from the Windows Clipboard into the Dialer display window. The program will scan the Clipboard memory until it finds the first sequence of digits. If the sequence resembles a phone number, the menu will show "**Paste (###-###-####)**" as the last entry.

Dialing with the DDE

The Dialer program supports DDE protocol as a Server. The server name is **DIAL**. The topic name is **CALL**.

At present, the program supports two commands: the **SHOW_DIALER** command brings the Dialer window on top, and the ***number*** command initiates the call.

If you wish, for example, to bring on top the Dialer program from a Word for Windows document or template, you could enter the following fields:

```
{ DDE DIAL CALL SHOW_DIALER }
```

The following command will bring on top the Dialer program and will initiate the call:

```
{ DDE DIAL CALL 201-555-1212 }
```

You may expand the ***number*** command to include a dialing format and an extension. In the following example, the program will dial the telephone using the long distance dialing format, as well as the extension:

```
{ DDE DIAL CALL F3,201-555-1212@110 }
```

As you can see, the **F** character precedes the dialing format number (3), and the **@** character precedes the extension number (110). You must maintain the punctuation exactly as illustrated in the example above.

The following dialing formats values (F1 to F9) are supported:

Local	F1
Local+One	F2
Long distance	F3
International	F4
Extension	F5
Internal	F6
1st Credit Card	F7
2nd Credit Card	F8
3rd Credit Card	F9

Pagers are not supported. The *Dialing Formats* section describes the application and use of the dialing formats. When the dialing format is not indicated, the Dialer will process the call in accordance with its setup.

To access the Dialer via WordBasic, you could, for example, enter the following code:

```
ChanelNum = DDEInitiate ( "DIAL", "CALL" )
DDERequest$ ( ChanelNum, "201-555-1212" )
DDETerminate ChanelNum
```

Setting Up the Dialer

The Dialer is designed to work with any Hayes-compatible modem. If the Windows Cardfile program can dial a phone number on your system, then the Dialer will be able to dial it as well. Therefore, refer to your Windows manual to properly install and configure your modem and Windows to work together. If you can't dial numbers from the Cardfile program, contact the Microsoft Corporation or your modem manufacturer for assistance.

Related Topics:

Dialer Options

Custom Initializers

Dialer Options

The Dialer setup allows you to fine-tune its dialing capabilities. The *Dialer Options* dialog box will open automatically when you launch the Dialer for the first time. At least the local area code field must be filled in at that time.

To open the *Dialer Options* dialog box at any other time:

- If you are in Windows mode, select the **File/Setup/Dialer**... command.
- If you are in Expert mode, select the **Setup** command.

The following options may be set from the *Dialer Options* dialog box:

Modem

This group of options allows you to configure the modem to suit your exact hardware configuration and preferences.

Dial

Allows you to set the dialing type to **Tone** or **Pulse**. If your phone line does not support touch-tone dialing, click the radio button next to **Pulse**. The default setting is **Tone**.

Sound

Allows you to turn the modem's speaker **On** or **Off**, if it is equipped with one. When the speaker is turned on, you can monitor the call without picking up the handset until you are ready to talk. The default setting is **On**.

Speed

Allows you to set the speed of touch-tone dialing (in milliseconds). Most touch-tone systems accept fast touch-tone signals. However, your local system may require a slower speed. Try dialing a couple of numbers with the speed set to 40. If you can't make the connection, or you get the wrong number, select a slower speed. The default speed is 40.

Port

Allows you to choose the communications port to which your modem is connected. Most PCs have two communications ports, one of which is used for the modem. The default setting is COM1.

Note: Windows 3.0 users: Because of a bug in this version of Windows, attempting to use a serial port that has a mouse attached to it will lock up your system. Also, COM3 & COM4 will not work without making some changes to your system setup. See the **Common Problems** section at the end of this chapter, or Contact Microsoft for details.

Baud

Sets the communication speed of your modem. The Dialer can communicate with modems ranging in speed from 300 to 9600 baud. Select a baud rate supported by your modem. With most modems, the baud rate is irrelevant. If you are unsure of the capabilities of your modem, refer to the modem's user manual. The default setting is 1200.

Dialing

The dialing options allow you to fine-tune the dialing performance:

Auto Redial

Select this option if you want the Dialer to automatically redial unanswered (busy, no answer) telephone numbers. Remember to monitor the call's progress on the modem speaker or telephone so that you can pick up the call when it is answered.

The Dialer will auto-redial with any modem, regardless of built-in auto-redialing support; And it will do it patiently and persistently in the background, allowing you to work with other Windows applications while waiting for the call to go through.

Redial Interval
Here you can enter the number of seconds for the Dialer to wait after an unanswered call before trying the number again. When calling an often busy line, you might want to use shorter intervals, such as ten or fifteen seconds.

Redial Attempts
This is the number of times the Dialer will attempt to redial an unanswered number before giving up.

Call Time-out
You can specify the time (in seconds) after which the Dialer will hang up. If the Dialer is not hung up manually (with the **Talk** button) within the time-out period, it will hang up automatically. This value is important for auto-redialing busy or unanswered numbers.

Dial 1
When this option is selected, you can dial any long-distance telephone number without entering a "1" before the area code. The Dialer will add "1" automatically to any number longer than nine digits that is not in your area code. This option should always be turned on, unless some special circumstances dictate otherwise.

Iconize on hang-up
If this option is selected, the Dialer window will be iconized as soon as you click the **Talk** button or press the **Space** bar to terminate the call in progress.

Dial extension
If this option is selected, the Dialer will display the party's extension (from the Phone Book) after you press the **Talk** button. You can click the **Dial** button to dial the extension number. This feature is handy with automated telephone systems.

Local Codes
Based on the codes you enter in this area, the Dialer determines the default dialing strategy.

PBX Prefix
Some office telephone systems require you to dial a PBX (Private Branch Exchange) access number, such as "9," to obtain an outside line. When you enter the required number here, the Dialer will dial it first and will pause briefly to get a dial tone.

Area Code
If you indicate your local area code in this field, the Dialer will treat all numbers with the same area code as local; i.e. it will strip off area codes that match the code you enter here. If you move from one area code location to another, you can simply change this code instead of changing every number in the memory pad or Phone Book.

Country Code
This feature is helpful when using the Dialer and Phone Book to call home from abroad. The country code for the destination country (in our case, the U.S.A.) is entered here.

Int'l Code
Enter the prefix that precedes an international code. In the U.S., for example, this number is 011 when using AT&T international service.

Program Mode

Click the radio button next to the desired mode; Windows or Expert. If you change the user interface mode, the Dialer must close and be re-opened before you can continue using it.

Charge Account

Some companies, for accounting purposes, may require telephone users to enter a personal or departmental code when dialing a number. Enter that code number here. The dialing formats must be customized to enable this feature. (See the **Dialing Formats** section of this chapter for more details.)

When you are satisfied with the *Dialer Options* dialog box settings, click the **Ok** button to save the new settings, or click **Cancel** to leave the setup without saving your changes.

Custom Initializers

The Dialer is programmed to work with Hayes-compatible modems. You may, however, program the Dialer to work with other types of modems or change the default Hayes-compatible parameters. You can control the modem speaker volume, increase the default pause time, increase or decrease the dial-tone detect time, etc.

To set up a custom initialization string:

- Select **Custom Initializers...** from the **Setup** sub menu.

The Dialer requires only four modem-related commands: a **Modem Initialization** string, a **Dial Prefix** string, **Dial Suffix** string and a **Hang-up** string. To enable the use of a custom initialization, prefix, suffix or hang-up strings, click its check box, then enter the new string in the adjacent area. See your modem's User Manual for information about modem commands that can be used in the initialization strings.

The default **Dial Suffix** string contains the semicolon ("**;**") character. It is essential for the proper dialing with the Hayes-compatible modems. The custom dial suffix (or none at all when the field is empty) may be required for themodems of different type.

Problem Modem - Wouldn't hang-up

Some Hayes-compatible modems, the Hayes 1200 internal modem among them, don't hang up when you wish to terminate a call. If you have such a modem, click the **Problem Modem, wouldn't hang-up** check box in the *Custom Initializers* dialog box. Selecting this option with normally functioning modems may cause them not to hang up when requested.

Dialing Strategies and Formats

Based on a caller's geographical location, any phone number can be dialed internally, locally, long distance, or as an extension or international number (Dialing strategies).

As an example, let's consider the business phone number 201-460-0677 of Okna Corporation of Lyndhurst, New Jersey, U.S.A. We will assume that Okna Corporation has offices around the world and that the above number belongs to Wally Hacker, a programmer.

Suppose that another programmer who regularly calls Mr. Hacker likes to go places and carries along a laptop PC. Here are the numbers that this person dials to reach Mr. Hacker from various places:

Calling From	**Number**	**Comment**
Jersey Office	0677	Ext. (last 4 digits)
Home in Jersey	460-0677	Local
New York City	1-201-460-0677	Long distance
Okna's LA office	8-201-460-0677	Internal long distance
A hotel in LA	9-950-1022-201-460-0677	MCI credit card
London office	011-35-201-460-0677	International

Sometimes, a substantial effort is required to complete a call. Consider an attorney with a large law firm who, for billing purposes, must dial his client's number in the following format:

PBX-CASE CODE-PHONE NUMBER-ATTORNEY CODE

9-#9449#-1-201-460-0677-#353#

There are 25 digits just to dial one number!

Many calls are made with credit cards - alternate long distance carriers - which also require a great deal of button-pushing.

These examples illustrate the variety of dialing strategies and formats that may be needed to reach a phone number.

How would it feel to make a credit card or long distance call with just a single command or mouse click?

The **Dial As...** sub menu in the Expert mode or **Dial** menu in the Windows mode allows you to dial any number using the **Local, Local + One, Long Distance, International, Extension, Internal** and three different calling card formats. This is achieved through dialing format templates.

Related Topics:

Dialing Formats

Calling Card Formats

Pager Formats

Least-Cost Routing

Touch-Tone® Services

Dialing Formats

Setting Up Dialing Formats

Because dialing formats vary from one phone system to another, we've provided a flexible method of setting them up. There are keywords for every number or code that the Dialer needs. The templates for every dialing format are entered in the *Dialing Formats* dialog box.

To set up or edit dialing formats (other than calling cards):

- In Windows mode, choose the **File/Setup/Dialing Formats...** command.
- In Expert mode, select **Dialing Formats...** from the **Setup** sub menu.

The *Dialing Formats* dialog box appears:

- Enter or edit the format for each command. All of the available keywords are displayed in the top section of the dialog box.
- When you are through, click the **Ok** button to save the new formats.

To quickly insert one of the available keywords into a format line:

- Place the insertion point at the desired position in the format line. (Click the left mouse button at the desired position.)
- Click on one of the keywords in the top half of the dialog box.

The keyword will automatically be inserted.

When the default format (last field in the dialog box) is enabled, the Dialer's standard dialing strategy will be replaced with the format in this field. This format will be applied to all calls made from the phone book or calendar for which no dialing format has explicitly been specified.

When a dialing command using one of the templates is performed, the keywords in the selected template are substituted by the actual values. The resulting string is sent to the modem.

The following table lists the currently available keywords with a brief description of each, as well as the location at which each of the keyword values can be found:

Keyword	**Meaning**	**Location**
<PBX>	PBX code	*Dialer Options* dialog box
<TEL>	Phone number	Dialer display
<EXT>	Extension	Phone Book record
<LOCAL>	Phone number with area code stripped	Dialer display; derived
<LDx>	Last x digits of number	Dialer display; derived
<HANGx>	Hang up in x seconds	Entered on format line
<INTL>	Intl. access code	*Dialer Options* dialog box
<COUNTRY>	Country code	Phone Book record
<CLIENT>	Client code	Phone Book record

<ACCOUNT>	Charge back code	*Dialer Options* dialog box
<LCR>	Least-Cost Routing prefix	*Least Cost Routing* dialog box
<DEFAULT>	Default dialing	Internal to Dialer
<STRATEGY> (used only in the default field)	If the telephone matches the area code entered in the Dialer's Setup, the number is dialed using the Local strategy, else the Long Distance strategy is used	Internal to Dialer, see the explanations below.
<QUERY>	Data to send to pager	Pager query dialog box at the time of call
<PAGER#>	Pager account number	Phone Book record

The <STRATEGY> keyword is useful when you need, for example, to dial the local calls with the prefix 8, and the long distance -- with the prefix 9.

To use the <STRATEGY> keyword, enter it into the "Default:" edit field and enable the *Enable default* option. Then, enter an appropriate sequence into the *Local* and *Long distance* edit fields. In the example above, 8,<LOCAL> and 9,1<TEL> should be entered into the respective fields.

The table below gives the examples of dialing formats for a business office telephone system that requires a PBX code and a pause for a tone before dialing the actual number. The PBX code is 9 and the number in the Dialer display is 201-460-0677. The dashes are shown for clarity, but are not required:

Format	**Template**	**Results**
Extension	<LD4>	0677
Local	<PBX><LOCAL>	9,460-0677
Internal	8,1<TEL>	8,1-201-460-0677
Long Distance	<PBX>1<TEL>	9,1-201-460-0677
International	<INTL><COUNTRY><TEL>	011-35-43-...
MCI Card	<PBX><ACCESS>0<TEL>	9,950-1022-0-...

Note: The <PBX> keyword will automatically be followed by a comma character when it is translated. This is recognized by the modem as a pause. You may tell the modem to shorten or lengthen the pause by entering a custom initialization string, or you can lengthen the pause simply by adding commas to the format line after the <PBX>. The default time for a pause is one second.

Verifying Dialing Formats

To test one of the dialing formats on the number currently in the dialer display area:

- Place the insertion point in the desired format line. (Click the left mouse button on the line.)
- Click the **Test** button at the bottom of the dialog box.

The *Dialing format test* dialog box will appear:

The template for the selected format is displayed in the upper line of the dialog box. The lower line shows the string that will actually be sent to the modem. The phone number usually appears on the right end of this string. Characters on the left side of this string are modem commands. To find out more about these commands, see your Modem's user guide.

In the above dialog box, the "ATS11=60DT" portion of the dial string is a set of modem commands. The actual phone number begins with the "9", a PBX prefix, which is automatically followed by a comma for a pause. The next digit is "1" for long distance, and the rest of the number, "201-460-0677", follows.

Placing Calls with Dialing Format Commands

- Enter the number you wish to dial from the keyboard, Phone Book or Calendar.
- In Windows mode, select the **Dial** command, or...
- In Expert mode, display the **Dial As** sub menu, or...
- Click the right mouse button over the Dialer's phone number display area.
- Select the appropriate dialing format.

To verify that the dialing string is correct, hold down the Ctrl key on your keyboard while selecting the **Dial** menu command. A message box will display the dialing string with the format string in the caption (title) area.

Overriding Dialing Formats

To override the Dialer's formatting of command strings, enter the "&" character in front of the number. As stated above, a "," can be used to indicate a pause. For example, to dial an internal number that requires dialing 8 first, you would enter: &8,460-0677.

This is useful when you want to dial an unusual number directly from the display that would not be formatted correctly by the Dialer's default formatting. (The default formatting, depending on the Dialer's setup, may add least-cost routing prefixes, a "1", etc., to the number).

Calling Card Formats

The default calling card formats are preset for MCI, AT&T and Sprint. They may be replaced with other formats.

Setting Up Calling Cards

To enter or edit formats for calling cards:

- In Windows mode, select the **File/Setup/Calling Cards**... command.
- In Expert mode, select **Calling Cards**... from the **Setup** sub menu.
- Click the name of a calling card you want to edit.
- Enter a format string containing any keywords or characters. (Consult your Modem manual if you wish to enter modem command strings here.)

Note: Most Hayes-compatible modems can process a command string up to 40 characters in length. See that the number of characters in your command string does not exceed your modem's command buffer.

- Enter the information and click the **Ok** button to save the new entry, or...
- Proceed to edit one of the other calling card entries by clicking on its button.

You can dial the customer service number for the specified card by clicking the **Service** button. The dialog box will remain on the screen to provide you with the account number and other relevant information.

Placing Calling Card Calls

- Enter a number by typing it from the keyboard or selecting it from the Phone Book or Calendar.
- Select an appropriate Calling Card format from the **Dial** (or **Dial As**) menu. The message "Is Carrier Ready?" appears and the access portion of the number is displayed.
- Monitor the progress of the call by listening to the modem speaker, handset or speaker phone.
- When you hear the carrier tone or voice message, click the **Ok** button to send the calling card number.

Pager Formats

The Dialer allows you to call three different types of personal pagers. It can also send numbers and messages to these pagers directly from your computer.

Digital pagers

Digital pagers are standard pagers with dedicated telephone numbers. To send a message to a digital pager, you dial the number for the pager and then enter the number that you want to appear on the pager's display.

Digital pagers with private access codes

Some digital paging services have a common access number. To send a message to this type of service, you must first dial the paging service's access number, then dial the access code for the particular pager that you want to reach. You can then enter the number that you want to appear on the pager's display.

Alpha-numeric pagers

Some pagers are capable of displaying brief alpha-numeric messages. To send a message to one of these pagers, you would first dial the pager's access number, then either give the message to an operator who would forward it to the pager, or enter the message through a special keyboard.

The Dialer can access all of these pager types and automatically send the required access codes and messages.

Setting Up Pager Formats

To enter or edit the pager dialing formats:

- In Windows mode, select the **File/Setup/Pager formats...** command.
- In Expert mode, select **Pager formats...** from the Setup sub menu.

The pager formats can be edited in the same way as the regular dialing formats:

- Enter or edit the format for each type of pager. All of the available keywords are displayed in the top section of the dialog box.
- When you are through, click the **Ok** button to save the new formats.

To quickly insert one of the available keywords into a format line:

- Place the insertion point at the desired position in the format line. (Click the left mouse button at the desired position.)
- Click on one of the keywords in the top half of the dialog box.

The keyword will automatically be inserted.

Two prompts of special interest in the Pager formats dialog box are <PAGER#> and <QUERY>.

The <PAGER#> prompt will be replaced with the pager account number for the person whose pager you are calling. This information can be found in the Phone Book record for that person.

The <QUERY> prompt will cause a pager query dialog box to appear when you dial the pager number. In this box, you can type the number or message (for alpha-numeric pagers) to be sent to the pager automatically by the Dialer.

Placing Pager Calls

- Enter a number by typing it from the keyboard or selecting it from the Phone Book or Calendar.

- Select an appropriate Pager format from the **Dial** (or **Dial As**) menu.

If the selected pager format contains the <QUERY> prompt, a pager query dialog box will appear:

- Type the number or message (for alpha-numeric pagers) to be sent to the pager, and click the Send button.

Least-Cost Routing

If you have used more than one long-distance service, you might have noticed that calls to certain area codes are cheaper with one service than with another. The Dialer allows you to arrange a different long-distance service to use with each area code.

In New Jersey, for example, to make a long-distance call, you must dial 10288 before the number to use AT&T, 10222 to use MCI and 10652 to use NJ Bell. You may find that MCI is cheapest for calls to the West Coast, and New Jersey Bell is cheapest for calls to New York City.

Setting Up Least Cost Routing

To enter least-cost routing information:

- In Windows mode, select the **File/Setup/Least-Cost Routing...** command.
- In Expert mode, select **Least-Cost Routing...** from the **Setup** sub menu.

You may enter up to 50 area codes with corresponding prefixes and/or suffixes.

Area Codes

This section contains the area codes for which there is least-cost routing information. You can add to the list by clicking the **Add** button and entering the information in the dialog box that appears.

To enter long-distance call routing for an area code already on the list, select the code by clicking on it, then fill out the *Options* for that area code (see below).

To remove an area code from the list, select it, then click the **Delete** button.

Options

The Options area contains the prefix and suffix to be used for the selected area code.

- In the *Prefix* area, enter the number to be dialed before the telephone number.
- In the *Suffix* area, enter the number to be dialed after the phone number.

If you don't need least-cost routing for a particular area code, you can either delete the code from the *Area Code* list, or check the **Disable** box in the *Options* area.

Default

The *Default* area contains the prefix and suffix to be used for all area codes that are not listed in the *Area Codes* list box. Exceptions, such as 800 and 900 area code numbers, can easily be added by placing those numbers in the *Area Codes* list without any prefix or suffix specified in the corresponding *Options* areas.

If you don't want to use any prefix or suffix in default dialing, leave the Default area empty. If you travel back and forth between areas where you may or may not want to use a default dialing prefix/suffix, use the **Disable** button accordingly.

Touch-Tone® Services

The Dialer is equipped for use with telephone services that are controlled by Touch-Tone commands. These may be Bank-by-Phone, Voice Mail, paging and other services, as well as home answering machines, information services, home security systems, etc. The Touch-Tone service feature can be used as a reference guide even if your telephone is not connected to a modem. The Dialer can support a large number of services and commands per service.

Setting Up Touch-Tone Services

To enter a new service, or to edit existing commands:

- In Windows mode, select the **File/Setup/Touch-Tone Services...** command.
- In Expert mode, select **Touch-Tone Services...** from the **Setup** sub menu.

The *Touch-Tone Services* Setup dialog box appears:

- Click the **Add** button in the lower left to add a new service. Enter the descriptive name for this service, or...
- Select a service already on the *Services* List. Edit the service information and Touch-Tone commands.
- Click the **Add** button in the lower right to add a new Touch-Tone command, or...
- Select a command already on the *Commands* list to edit the command parameters.

Options

This section has general options for the Touch-Tone services. The command options are entered in the Send area. The options are:

Name

This field contains the name of the currently selected Touch-Tone service.

Account

This field contains the account number for the service. The entry is optional.

Password

This is the password (or Personal Identification Number) required to connect to the service. It is optional.

Note: The Account Number and Password must be entered as commands if you need to send them over the phone lines to the Touch-Tone service.

Phone Number

This area contains the service's access phone number. This number will be dialed to establish the connection with the selected service.

Command

This area contains the Touch-Tone Services command currently selected in the *Command* list. This name will appear on the list of available services.

Number

This area contains the Touch-Tone command sequence. The command will be sent to the service when selected during the on-line session. The command must be entered exactly as it appears in your Touch-Tone service reference guide (using 0 to 9, * and #).

Tone

Some Touch-Tone services can process fast Touch-Tone signals generated by auto-dialing devices. Others can only process commands that are input relatively slowly, as if by the human hand. The *Tone* option allows you to select between fast and slow modes. In the rare case when a slow method is still too fast for your service, insert commas between every digit in the command. The comma creates a one second pause between the digits as they are dialed.

Running a Touch-Tone Communication Session

- In Windows mode, select the **File/Services...** command.
- In Expert mode, select **Services...** from the main menu.

The Touch-Tone Services dialog box appears:

- Select a service from the *Services* list and click the **Dial** button to connect. You can also simply double-click on one of the services.

The *Services* list is replaced by the *Commands* list.

- Select a command from the *Commands* list and click the **Send** button, or just double-click on the command.
- To send a command that is not on the list, type the command in the edit field below the list and press the **Send** button.
- Click the **Service** button to terminate the session and return to the *Services* selection list.

Utilities

The Dialer provides several utilities to make using the phone a little easier.   After all, if you're going to use your expensive computer as a phone, it had better do a good job!

Related Topics:

Area Codes Directory

Logging calls

Area Codes Directory

The Area Codes dialog box is a convenient tool to find out the area codes and local time for states and major cities. To open the *Area codes* dialog box,

- In Windows mode, select the **File/Area Codes...** command.
- In Expert mode, select **Area Codes...** from the main menu.

Finding an Area Code

- Select a state in the States list. The Dialer displays all area codes and cities that are available for that state, or...
- Select the city's name in the Cities list, or...
- Select the area code in the Codes list to view all of the cities in that area code.

Searching for a State, City or Area Code

- Make the appropriate entries in the areas underneath each list.
- Click the **Search** button.

If the entry is not found, the Dialer highlights the entered text in the search area.

Adding a City or Area Code

- Select the desired state and click the **Add** button.
- Enter the city and area code information into the dialog box.

Changing an Entry

- Click on a state, city or area code to select it.
- Click the **Edit** button.
- Make the changes in the dialog box that appears, then click **Ok**.

The edited/added entries appear in the *Area Codes* dialog box the next time you open it.

Click the **555-1212** button if you want the Dialer to place a call to the Information operator for the currently selected area code.

Logging calls

The call logging features allow you to keep track of outgoing as well as incoming phone calls. For each call, the log keeps track of the date, time duration, caller information, call attributes, subject of conversation and the results of the call.

All call logging commands can be found on the **File** menu. For complete information on logging calls, see the section in the Phone Book chapter on **Attaching Information to Entries**.

Phone Book Integration

When you are running the DeskTop Phone Book and an entry is selected, the Dialer may access all the information about this entry by means of the **Dial** menu (Windows mode) or the **Number** menu (Expert mode).

Both menus will display the phone numbers (page, office, home, pager, fax and car) associated with the selected Phone Book entry. You can also select the entry name from the menu to view all of the record information.

To dial a number from the **Dial** or **Number** menu:

- Select the phone number from the menu. The number will appear in the Dialer's display.
- Select a dialing format command from the **Dial** menu, click the **Dial** button, or press the **ENTER** key.

Troubleshooting the Dialer

The Dialer is by far the trickiest DeskTop Set program to set up and operate properly (if tech. support calls are any indication).   It may seem like one of the simpler applications in the set, but it must interface directly with your computer's hardware (the modem), and indirectly with your phone company and a slew of other phone services.

We have tried to put together a few items to help you troubleshoot your Dialer.

Related Topics:

Common Problems

Error Messages and Conditions

Dialer Files

Common Problems

If Windows can dial a phone number on your system, then the Dialer will be able to dial it as well. Regardless of the problem, try to see if it can be repeated with the Windows Cardfile program. If the problem persists in Cardfile, you should contact Microsoft Corp. or your modem manufacturer for assistance. If there is no problem using Cardfile, then review the following common dialer problems:

A telephone company message requests that you dial 1 before the number

First, make sure that the '1' is appended to the number you wish to dial:

- Open the *Dialing Formats* dialog box (**File/Setup/Dialing Formats...** command).
- Check the **Enable Default** check box and make sure that the text in the *Default* field reads <PBX><DEFAULT>.
- Open the *Dialer Options* dialog box (**File/Setup/Dialer...** command) and make sure that the *Dial 1* check box is checked.
- Dial the number from the Dialer or from the Phone Book while holding the **Ctrl** key down.
- Review the **Setting Up Dialing Formats** section of this chapter to see how to select and change the dialing formats.
- Verify that the dialing format is the Default (message box caption bar should read <PBX><DEFAULT>). Verify that the dialing string contains "1" before the number.
- If the dialing format isn't the Default, and '1' is missing, edit the dialing format string to contain '1' before the number.

If everything above works, but you still get the dreaded "dial one" message, insert a ',' (comma) between the <PBX> and <DEFAULT> keywords. This will increase the pause before the telephone number is dialed.

- Open the *Dialing Formats* dialog box (**File/Setup/Dialing Formats...** command).
- Place the cursor in the *Default* field between the <PBX> and <DEFAULT> entries.
- Insert a "," between the entries.

You may also try to set a slower dialing speed (60 or 70). Your modem may be dialing '1' before the telephone company equipment manages to detect it.

- Open the *Dialer Options* (**File/Setup/Dialer...** command) dialog box.
- In the *Modem* section, set the *Speed* to 60 or 70.

You can't dial international numbers

- Enter all international numbers with the city code but not the country code.
- Enter the country code into the *Country Code* field in the *Business* dialog box.
- Apply the *International* dialing format as described in this chapter.

The Dialer already contains the international access code. Thus, when you dial a number, the Dialer will assemble a complete international phone number by combining Intl. Access Code-Country Code-Telephone Number with the city code.

The Dialer hangs up before you press the Talk button

Increase the value in the **Time-out** field of the *Dialer Options* dialog box.   The dialer time-out prevents the modem from seizing control of the telephone which can prevent the incoming calls from ringing.

The Dialer won't hang up

Click the **Talk** button or press the **Space** bar several times.   If this does not help, try enabling the **Problem Modem, wouldn't hang up** check box in the *Custom Initializers* dialog box.

The Dialer won't work with the COM3 or COM4 ports

Windows 3.0 supports up to four COM ports, but you need to know some tricks to make these extra ports work in 386 enhanced mode.   This is because Windows assumes default values for COM3 & 4 which are different from the common ones.

- Add the following lines (one or both depending on what port configuration you have) to the section of SYSTEM.INI headed **[386Enh]**:

  COM3Base=3E8h

  COM4Base=2E8h

- If you have both COM1 and 3 that use IRQ lines, or a COM2 and 4 that use them, then you'll also need to add the following line:

  COMIrqSharing=1

Error Messages and Conditions

Few error message are ever displayed by the Dialer. Most of them will involve problems with the communications adapter or modem. The errors are displayed vie the *Error Messages* dialog box or in the Dialer display area.

Here are some messages that may appear:

Cannot open communication device!

The communications port selected in the *Dialer Options* dialog box is not available.

- Try selecting a different port.
- Check to see if the system has a serial port installed.
- Check all connections.

Unable to initialize modem. Check if the modem is installed and select proper connection!

The Dialer tries to initialize the modem when you first launch it or when you click **Ok** after changing the *Dialer Options* dialog box.

- You may not have the modem on the communications port indicated.
- A cable may not be properly attached.
- The modem may be in need of repair.

Test the modem, computer, and connection with another program, such as Windows Cardfile, and then try to run the Dialer again.

Modem is not connected!

Reconnect the modem and try again.

Cannot Dial!

Check your modem and telephone lines, as well as the number you were trying to dial, then try to use the Dialer again.

Not enough memory to continue

Windows does not have enough memory to open the Dialer program. This rarely occurs, but it may happen due to the activity of some other Windows program. Close another Windows application, then launch the Dialer again.

Dialer Files

The following table shows the files that the Dialer needs to operate properly:

File	Description	Location
DIALER.EXE	Dialer executable program	Program directory
DIALER.DIR	Memory Pad numbers	Data directory
DIALER.OPT	Configuration info.	Data directory
DIALER.CDS	Area code directory	Data directory
DIALER.LOG	Phone log info.	Data directory

About the Calendar

The DeskTop Calendar keeps track of all your daily events.   Appointments, meetings, deadlines, dates, etc., can all be scheduled and viewed with speed and efficiency.

Related Topics:

- Features
- Mode Selection
- Year Mode
- Month Mode
- Day Mode

Features

With the Calendar you can:

- Enter events without ever touching the keyboard.
- Set up recurring events.
- View your schedule in Week- and Month-at-a glance formats.

  Draw custom calendar poster (wallpaper) on Windows desktop.
- Display the calendar for any year, in any century.
- Show national and major religious holidays for any year.
- Keep all of your appointment and date information within instant reach.
- Enter appointment times in 12- or 24-hour format.
- Show a full year calendar from which you can select any day just by clicking the mouse.
- Designate calendar entries as urgent, pending or completed.
- Set alarms as reminders to make calls or keep appointments.
- Be notified of alarms that occurred while the Calendar and PC were shut down.
- Integrate with the DeskTop Phone Book and the DeskTop Dialer.
- Print your schedules in different formats with comprehensive printer controls and formatting options.
- Keep multiple "to do" lists.

Note: Today's date and time are always displayed at the top of the calendar window. The date you have currently selected is displayed in smaller print beneath today's date. Thus, when we refer to the *current day*, we mean the day that you have selected on the calendar. Keep in mind that the date at the top of the window is always today's date, not the date you have currently selected

Mode Selection

The DeskTop Calendar features four modes: **Year, Month, Day** and **To do**. You may use the associated menu commands, control bar or the keyboard to select the desired mode.

Day

The **Day** command displays the **Day** mode for the current date. This command is disabled if the current date is outside of the calendar's 5-year range. You can also go directly to the **Day** mode in either of the following ways:

- While in the **Month** or **Year** modes, select a day and press the **Enter** key or double-click the mouse on that day.
- Press the **Alt-D** key while in any mode.

Selecting the **Day** mode command while already in the **Day** mode will cause the Calendar to turn to today.

Month

The **Month** command displays the **Month** mode for the current month. You can also go directly to the **Month** mode in either of the following ways:

- While in the **Month** or **Year** modes, press the **Esc** key.
- Press the **Alt-◆** key while in any mode.

Selecting the **Month** command while already in the **Month** mode opens the *Day setup* dialog box.

If you would like to indicate in the Month view that you have entries in a day:

- ◆ Use **File/Setup/Calendar** command to select *Month highlights* option. When selected, you will see in the Month view daily events represented as colored blocks. The events without assigned color codes will be represented as gray blocks. All 19 events will fit into a day block.

Year

The **Year** command displays the **Year** mode for the current year. You can also go directly to the **Year** mode in either of the following ways:

- While in the **Month** mode, press the **Esc** key.
- Press the **Alt-Y** key while in any mode.

To do

The **To do** command displays the **To do** mode. You can also go directly to the **To do** mode by:

- Pressing the **Alt-T** key while in any mode.

Selecting the **To do** command while already in **To do** mode opens the list of all *To do* lists.

Year Mode

When you are in **Year** mode, the complete annual calendar is displayed. Weekends and major holidays are shown in red, while normal business days are displayed in black.

- Click any day once to select it as the current day.
- Double-click any day to enter the **Day** mode for that day, or click the current day once and press the **Enter** key.

  Note: You cannot select the **Day** mode if you are viewing a year that is more than 5 years after the day you created the calendar file.

  - To advance to the previous year, press the **Left Arrow** on the main menu, or the **PgUp** key.
  - To advance to the next year, press the **Right Arrow** on the main menu, or the **PgDn** key.
  - To go directly to a year, select the **Show/Year...** command, enter the desired year, and click **Ok**.

Month Mode

In the **Month** mode, the calendar for the current month is displayed.

- Click any day once to select it as the current day, or use the arrow keys on your keyboard to move among the days.
- Double-click any day to enter the **Day** mode for that day, or highlight the day and press the **Enter** key.
- While viewing in the **Month** mode, press the **Esc** key to return to the **Year** mode.
  - To advance to the previous month, press the **Left Arrow** on the main menu, or the **PgUp** key.
  - To advance to the next month, press the **Right Arrow** on the main menu, or the **PgDn** key.

Alternatively, you may advance to the current month in the next or previous year by pressing the **PgUp** or **PgDn** keys while holding down the **Shift** key.

If you would like to indicate in the Month view that you have entries in a day:

- Use **File/Setup/Calendar** command to select *Month highlights* option. When selected, you will see in the Month view daily events represented as colored blocks. The events without assigned color codes will be represented as gray blocks. All 19 events will fit into a day block.

Day Mode

In the **Day** mode, all scheduled events for the current day are displayed.   Use the **Day** mode for setting appointments, reminding you of telephone calls that you have made or need to make, or as a reminders list.

The **Day** mode window is divided into five columns: Alarm status, Time From, Time To, Event description and event status. See **Entering Events** for more details.

Entering Events

The Calendar has several ways of setting up events to allow maximum flexibility to the user.   You can enter events, including descriptions, without ever touching the keyboard. Or, you can enter events completely from the keyboard or using a combination of keyboard and mouse.

Related Topics:

In the Day Mode Window

In the Event Dialog Box

Event Options

Attaching Notes

Manipulating Events

Day Setup

In the Day Mode Window

To enter an event from the **Day** mode window:

- Switch the calendar to **Day** mode (**Day** menu command).

While in the **Day** mode:

Double-click the mouse in one of the *Event description* fields, or select the **Edit/Event...** command. The *Event* dialog box allows you to set up events without ever touching the keyboard (See Event Dialog section for more details), **or** using the keyboard...

- Select the desired field by clicking it or by pressing the **Tab**, **Up** or **Down arrow** keys.
- Use the **Right** and **Left arrow** keys to move the insertion point to the desired position in the field.
- Use the **Home** key to send the insertion point to the beginning of the selected field and the **End** key to send the insertion point to the end of the selected field.
- Use the **Backspace** and **Del** keys to remove the character to the immediate left or right of the insertion point, respectively.

- Place the cursor in the *Time from* field and enter the event start time. You can use 12 or 24 hour format (be sure to put a space between the time and the AM/PM indicator if you use 12 hour format).
- Place the cursor in the *Time to* field and enter the event ending time.
- Enter the event text in the *Event description* field.

The amount of text you can enter in a field is limited in the following ways: you can enter characters until you either reach the end of the field, or until you reach the maximum number of characters allowed, whichever comes first.

For example, a field might hold 20 capital "W"s, which are very wide characters, or 30 lower case "i"s, which are very narrow.

The following symbols may appear at the end of the event field:

The **recurring events** are indicated by the recurring event symbol (blue-red-green triangles) at the end of event description line. You may double-click on the symbol to advance to the next occurrence of the event, or... double-click while holding Shift key down to advance to the previous occurrence.

The **floating events** are indicated by the floating event symbol (blue arrow) at the end of event description line. You may double-click on the symbol to "float" this event to the next day.

The **records linked** from the Phone Books are indicated by the telephone symbol. You may double-click on the symbol to open Phone Book to page and position of the linked record. Use **Edit/Unlink** record command to remove the link

The **notes** attached to calendar entries are indicated by the yellow note symbol. You may double-click on the note symbol to open the note.

Setting an Alarm

To set an alarm to go off at the starting time of the event:

- Select the **Status/Set alarm** command, **or...**
- Click the *Alarm status* field.

A small bell will appear in the field to indicate that an alarm is set for that event.

Using the Clock Control

Instead of typing the *From* and *Until* times in their respective fields, you can enter these times using the mouse and the *Clock* control.

The *Clock* control is a circular window that resembles the face of a clock. This control appears in several places in the DeskTop Set applications, and it is used to enter times without touching the keyboard.

- Place the cursor in the *From* or *Until* time fields.
- Click the **Right** mouse button in that time field. The *Clock* control appears:

Imagine that the *Clock* control is the face of a clock and you have to set the hour and minute hands to the time of your event. Follow these guidelines:

- First, click the number that corresponds to the hour hand of the event (1,2,3, etc.)
- Then click the number that corresponds to the minute hand of the event (3 = 15 minutes, 5 = 25 minutes, 9 = 45 minutes, etc.). To move in 1 minute increments, first click the closest 5 minute interval; every subsequent click of that number will increase the time by 1 minute.
- Finally, click the AM or PM indicator to finish the time.
- Click the right mouse button again to complete the entry and close the *Clock* control.

To clear the time entry and start again, click the time indicator in the center of the clock. As an example, let's say you wanted to set a time field to 11:42 AM. You would:

- Click 11 once for the 11th hour
- Click 8 once for 40 minutes
- Click 8 two more times for 2 minutes
- Click AM to complete the time entry

In the Event Dialog Box

If anyone needs proof that skillfully developed Windows programs are superior to the way things used to be, let them witness the *Event* dialog box, and the speed and flexibility with which you can enter your daily schedule.

To open the *Event* dialog box:

- Double-click the mouse in one of the *Event description* fields, or select the **Edit/Event...** command.

The *Event* dialog box allows you to set up events without ever touching the keyboard.

Description

The event description can be entered in one of two ways:

- Select an event from the event template list box (left side of dialog box), **or...**
- Type an event description in the edit field at the bottom of the box.

Date

You can use the Mini-Calendar control in the center of the dialog box to enter the date for the event (see **Chapter 1, Installation and User Interface**, for complete instructions on using the Mini-calendar control). The event defaults to the current date. To select a new date:

- Select the new event date in the calendar control window, **or...**
- Type the event date in the *Date* field provided.

From & Until Times

The *From* and *Until* times can be set by typing the times in the corresponding fields or by using the *Time Ruler* on the top of the dialog box.

Using the Time Ruler

The *Time Ruler* assists you in the 'keyboardless' entry of the starting, ending and alarm times of events. The graphical representation of your day's schedule allows you t o quickly resolve and/or avoid conflicting commitments. The upper part of the ruler shows the active (selected) event. The bottom part shows color-coded blocks of time for other events. Double-clicking on a time block selects or de-selects it according to its position. The blocks can only be altered or moved on the upper ruler.

To enter a new event time:

- Place the cursor at the upper ruler position that corresponds to the event's starting time.
- Click and hold down the left mouse button.
- While holding the mouse button down, begin making the time block selection by dragging the cursor to a position that corresponds to the event's ending time.
- While the left mouse button is still down, you may click the right mouse button to advance the time block's ending boundary in 5 minute increments (Useful after a good party!).
- Release the mouse button when the block is complete.

To enter an alarm time:

- Place the cursor on the desired time position and click the right mouse button.

To adjust the time block position:

- Click and hold down the left mouse button over the time block
- Drag the block to the desired position.
- While the left mouse button is still down, you may click the right mouse button to advance the entry's time block in 5 minute increments (Also useful after a good party!).

To clear (remove) the time block

- Click the left mouse button outside of the active block boundaries.

To move another event's time block or edit event options and descriptions:

- Double-click on the desired event's time block in the lower ruler. The selected event becomes active and its block appears in the upper (active) part of the ruler.

Alarm Times

Alarm times can be enter in several different ways:

- In the *Time Bar*, place the cursor on the desired time position and click the right mouse button, **or...**
- Use the *Clock* control to set the alarm time (see earlier in this section for instructions on using the *Clock* control), **or...**
- Enter the alarm time in the *Alarm* field following normal time field conventions.

The alarm can be set at any time you wish, even after the event's ending. You may use this flexibility to remind you that a meeting is getting close to the end, for example.

Button Functions

There are several buttons along the bottom of the *Event* dialog box to help you set up your events

Clear

This button clears all the event fields.

Book

Opens the DeskTop Phone Book so that you can select an entry to which the event will be linked. See the next section, **Linking Events to the Phone Book**, for more details.

Options

Opens the *Event options* dialog box (see below).

Event Options
In the *Event options* dialog box you can set event attributes, reminder date, frequency, importance and alarm type. This dialog box is accessible from two places:

- From the *Events* dialog box, press the **Options** button.

This displays the options for the current event. Alternatively, you can:

- From the **Day** mode window, select an event (click on the event description).
- Select the **Edit/Options...** command.

This displays the options for the event you selected.

Options and alarm
This section contains event options and alarm tunes.

Public/Private
These radio buttons only have an effect in the network version of DeskTop Set. They are used to specify whether the event is viewable by other people on the network. You may set them if you like, but they will have no effect. However, if you ever switch to the network version, these designations will be valid.

Business/Personal
These designations are for your reference, and can be used as filters when you are printing the calendar. You can, for instance, print a calendar listing only your business events. Instructions on printing come later in the chapter.

Key event
This designates events of major importance. Key events will be displayed with a red flag in the *Status* field of the **Day** mode window.

Printable
Check this box if you want to be able to include this event when you do printouts of your schedule. It is checked by default, but you may occasionally have an event on your calendar that you don't want to show up in a printout.

Locked
A locked event may not be modified in any way. All of the fields on the **Day** mode window are disabled, as is the *Event* dialog box. It will remain this way until the event is unlocked by un-checking this box.

Hidden
This option is also only valid for the network version. It makes the event invisible to network users.

Alarm tune
Use the combo-box at the bottom of the *Options and alarm* section to select one of the available alarm tunes. This tune will then play when the alarm for this event (if one is set) goes off. You can use the different tunes as audible cues to help you distinguish which event has arrived without even having to look at the calendar.

Frequency
The options in this section describe how often an event occurs.

Recurring
This check box is informational only and can't be modified. It denotes whether an event is recurring or not. Recurring events are described completely in the **Recurring Events** topic of this section.

Floating
Check this box to designate the event as floating. Floating events from previous days will automatically be moved to today's schedule if they are not marked as completed. This is great for procrastinators. For example, you may set up an event on today's schedule that says "Make appointment to have wisdom teeth pulled." If you designate the event as floating, it will keep showing up on your schedule today, tomorrow, the next day... until you mark it as complete.

Importance
Use this combo-box to select the relative (or descriptive) importance of an event. This importance can later be used to determine whether an event can be rescheduled, canceled, etc., based on its importance.

Confirmation & Reminder
These fields are used to set up a reminder and to specify the reminder type.

Reminder date
This is the base date on which you want to be reminded about the event. Type the date in the provided field, or use the mini-calendar control to enter the date. Keep in mind that there are advance notices and grace periods associated with reminders.

When you check your reminders, the Calendar scans all scheduled events for reminders and displays only those that fall within a specific date range. The reminders are searched within a range that starts *Grace period* days before the current date and ends *Advance period* days after the current date.

Grace and *Advance period* are defined in the *Setup Options* dialog box (**File/Setup/Calendar...** command). For details, see **Customizing Calendar Options** later in this chapter.

Reminder message
The combo-box at the bottom of the *Confirmation & Reminder* dialog box provides reminder messages for you to choose from. Select the most appropriate message.

Color
The Calendar provides sixteen different colors that you can assign to each event. This color will be used in the **Day** mode *Status* field of normal (not key, not complete) events. It is also used in the time bars of the *Event and Alarm Message* dialog boxes, and in the *Month-at-a-glance* window.

You can use the event color as a visual cue to distinguish certain types of events. For example, you could use white for all your personal events, black for meetings, red for client contacts, etc. Then you would know what type of event was scheduled without even having to turn to that day.

Current Color
This is the color currently assigned to the event. The default for a new event is black.

The preset events in the *Event* dialog box have various different colors assigned to them.   To choose a new color, simply click on one of the sixteen color bars; the *Current Color* bar will reflect your selection.

- Click the **Ok** button to save the options and close the dialog box.

Attaching Notes

You can attach notes to any event or to do item on your daily schedule. These notes can be quickly viewed from the **Day** mode window and can be included in printouts.

- Select the event or to do item to which you want to attach a note.
- Select the **Edit/Notes...** command to open the *Note* window.

The *Note* window functions similarly to the Windows Notepad program. You do not, however, have to save your notes; They are saved automatically as soon as you close the window.

- Enter the notes for the current event.
- Double-click on the *Note* window system menu, or press the **Esc** key, or select the **File/Exit** command to exit and save the notes.

The note symbol will appear next to the description of the event or above the to do list when an item with the note is selected. To quickly view the notes again, double-click on the note symbol.

Removing Notes

To remove the notes associated with an event:

- Open the *Note* window.
- Delete all note text.
- Close the *Note* window.

The note symbol will no longer appear with that event.

If you wish to save the contents of the notes into a separate file, use the **File/Save as...** command in the *Notes* window.

Manipulating Events

Once an event is entered, it can be copied, moved or removed. These features allow you to "shuffle" your schedule.

Copying Events

Events can easily be copied from one position on the day to any other position, or from one day to any number of other days.

- Select the event you wish to copy.
- Choose the **File/Copy** command. This copies the event's information into the Calendar's internal clipboard (no information is copied to the Windows Clipboard Program).
- If necessary, turn the calendar to the day on which you want to copy the event.
- Select an empty line.
- Choose the **Edit/Paste** command. The event appears on the line.

If the copied event had attached notes, the new event will have an exact copy of those notes, but it will be independent of the original notes.

Copying is helpful if you want to replicate the event in just a few places. If you want the even to occur a large number of times and can define some date pattern for this event, use *Recurring Events* discussed in the next topic.

Moving Events

Events can easily be moved from day to day with ease. There are two methods of doing this, both of which start by selecting the event to be moved. Then:

First method

- Select the **Edit/Cut** command.
- If necessary, turn the calendar to the desired date.
- Select an empty line.
- Select the **Edit/Paste** command.

Second method

- Open the *Event* dialog box (**Edit/Event...** command).
- Use the mini-calendar window to specify the new date, or type the date in the provided field.

One method may be better than the other in a particular situation. However, they both perform the exact same function.

Removing Events

There are also two methods of removing a calendar event.

- Select the event.

First method

- Select the **Edit/Cut** command.

This cuts the event and places the information on the internal clipboard.   The advantage here is that if you made a mistake, you can still paste the event back.

Second method

- Select the **Edit/Clear** command.

This wipes out the event without placing the information on the clipboard; the event is 'gone forever.'   The advantage is that you can remove an event in this way without wiping out any information you may already have on the internal clipboard (such as another event).

Day Setup

The *Day Setup* allows you to specify two 'highlight' events for each day which are viewable in the **Month** mode. You can also specify what type a particular day is.

To open the *Day Setup* dialog box:

- From the **Day** mode, select the **Edit/Day...** command, **or...**
- From the **Month** mode, select the **Month** command.

The *Day Setup* dialog box opens for the current day. You can change the day you are setting up with the mini-calendar window.

Day Highlights

These are short text fields you can use to describe some important event. There are two highlights for each day. The advantage of these highlights is that they show up on the **Month** mode window as well as the month poster printout.

Holidays

In the *Holiday* field you can specify holidays that don't show up on DeskTop Set's default calendar. This holiday text will show up in the **Day** mode on the right side of the current day line.

Day Type

Use the *Day* area to specify the day type of the selected day. The day type will appear on the **Month** mode display as an icon representing the day type. The day type can be used to quickly spot vacations, holidays, etc., on your monthly calendar. It is also used to exclude certain days from recurring events.

The day type can also be set from the **Month** mode window. Simply select a day and click on the appropriate icon in the upper right corner of the calendar. The blank icon represents a regular day (business/weekend).

Recurring Events

Recurring events are events that happen more than once over a period of time and usually follow some kind of repeating pattern. Examples are:

- Regularly scheduled meetings;
- Events that occur over a range of days, such as trips, trade shows, training classes, etc.;
- Periodic events; events that occur every 3 days, or every 2 weeks, etc.

With the Calendar's *Recurring events* features, you can schedule any event that follows some kind of repeating pattern. DeskTop Set allows you to define 3 such patterns: *daily*, *weekly* and *monthly*. In addition, each calendar file has its own holiday table, so you can customize calendars to fit various needs.

Daily recurring events can be used to schedule events that:

- Occur every x number of days;
- Occur across a range of days, such as a trip that runs from the 23rd through the 27th.

Weekly recurring events can be used to schedule events that occur every so many weeks, but cannot be related to calendar dates; a meeting every 3 weeks, for example.

Monthly recurring events can be used to schedule events whose recurrence is based on calendar dates or days, for example:

- A meeting on the first of every month;
- A report due on the first and third Friday of every month;
- A quarterly report;
- An event on August 14th of every year.

Of course, you can configure *Daily* events to occur weekly (every 7th day), or *Weekly* events to occur monthly (every 5th week), or *Monthly* events to occur weekly (Monday of every week). So, keep in mind that these definitions are symbolic - use the one that allows you to most easily do the job.

Note: The recurring events support Windows' international date conventions.

Related Topics:

Daily Recurring Events

Weekly Recurring Events

Monthly Recurring Events

Deleting Recurring Events

Daily Recurring Events

The *Edit periodic recurring event* dialog box lets you schedule an event which occurs every x number of days, or across a range of days.

- Create a regular calendar event in the **Day** mode.
- Select the **Edit/Recurring/Daily...** command to open the *Edit periodic recurring event* dialog box.

Period

In the edit field provided, place the number of days between occurrences of the event.

Range

The *Range* section of the dialog box specifies the range of dates in which the event will appear on the calendar, and how many occurrences of the event the range will contain.

From

The starting date for occurrences of the event. This field defaults to the current date, but can be modified at any time. You can use the Navigator to enter/edit this field.

Until

The ending date, or last date on which the event will occur. You can use the Navigator to enter/edit this field.

Total events

The number of events that fit within the date range, based on the *Period* (see above).

> **Note:** The *Range* section of the dialog box can be used in two different ways. You can enter a *From* date and an *Until* date and let the program calculate the total number of events, or you can enter a *From* date and fill in the *Total events* field and let the program calculate the *Until* date.

Exclude

There may be certain types of days or days of the week on which you do not want this event to occur. Check any of the appropriate boxes for days on which you **do not** want the event to occur.

Examples

To schedule an event that occurs every 10 days for the next years:

- Schedule one occurrence of the event in the **Day** mode on the first day you want the event to occur.
- Select the **Edit/Recurring/Daily...** command.
- Enter 10 in the *Period* field.
- In the *Range* section, the *From* field should already contain the date of the first occurrence of the event. In the *Until* field, enter a date which is one year after the *From* field.
- Press the **Tab** key. The *Total events* field will display the total number of events

based on your recurrence criteria.

- Press the **Ok** button to schedule the events.

As a slight variation on the above example, to schedule an event which occurs every 10 days which you want to occur a total number of 15 times, and which you don't want to schedule on a day off, weekend or vacation day:

- Schedule one occurrence of the event in the **Day** mode on the first day you want the event to occur.
- Select the **Edit/Recurring/Daily...** command.
- Enter 10 in the *Period* field.
- In the *Exclude* section, check the *Days off, Vacations, Saturday* and *Sunday* boxes.
- In the *Range* section, the *From* field should already contain the date of the first occurrence of the event. In the *Total events* field, enter 15.
- Press the **Tab** key. The *Until* field will display the last date on which the event will occur based on your recurrence criteria and excluded days.
- Press the **Ok** button to schedule the events.

To schedule an event that occurs every day over a range of days, such as a training class, conference, business trip, etc.:

- Schedule one occurrence of the event in the **Day** mode on the first day you want the event to occur.
- Select the **Edit/Recurring/Daily...** command.
- Enter 1 in the *Period* field.
- In the *Range* section, the *From* field should already contain the date of the first occurrence of the event. In the *Until* field, enter the last date of the event.
- Press the **Tab** key. The *Total events* field will display the length of the event in days.
- Press the **Ok** button to schedule the events.

Weekly Recurring Events

The *Edit weekly recurring event* dialog box lets you schedule events that occur every so many weeks, but cannot be related to calendar dates; a meeting every 3 weeks, for example.

- Create a regular calendar event in the **Day** mode.
- Select the **Edit/Recurring/Weekly...** command to open the *Edit weekly recurring event* dialog box:

Period

In the edit field provided, place the number of weeks between occurrences of the event.

Range

The *Range* section of the dialog box specifies the range of dates in which the event will appear on the calendar, and how many occurrences of the event the range will contain.

From

The starting date for occurrences of the event.   This field defaults to the current date, but can be modified at any time.   You can use the Navigator to enter/edit this field.

Until

The ending date, or last date on which the event will occur.   You can use the Navigator to enter/edit this field.

Total events

The number of events that fit within the date range, based on the *Period* (see above).

> **Note:** The *Range* section of the dialog box can be used in two different ways. You can enter a *From* date and an *Until* date and let the program calculate the total number of events, or you can enter a *From* date and fill in the *Total events* field and let the program calculate the *Until* date.

Exclude

There may be certain types of days on which you do not want this event to occur. Check any of the appropriate boxes for days on which you **do not** want the event to occur.

Day of week

Use this section of the dialog box to indicate the day or days of the week on which you want the event to occur.   Use the *Select all/Days of week* box to quickly select all the check boxes.

Example

To schedule a meeting that occurs on Monday of every 3rd week:

- Schedule one occurrence of the event in the **Day** mode on the first Monday you want the event to occur.

- Select the **Edit/Recurring/Weekly...** command.
- Enter 3 in the *Period* field.
- In the *Day of week* section, check *Monday*.
- In the *Range* section, the *From* field should already contain the date of the first occurrence of the event.   In the *Until* field, enter a date that is 3 months after the *From* date.
- Press the **Tab** key.   The *Total events* field will display the length of the event in days.
- Press the **Ok** button to schedule the events.

Monthly Recurring Events

The *Edit monthly recurring event* dialog box lets you schedule events whose recurrence is based on calendar dates or days, for example:

- A meeting on the first of every month;
- A report due on the first and third Friday of every month;
- A quarterly report;
- An event on November 9th of every year.

To open this dialog box:

- Create a regular calendar event in the **Day** mode.
- Select the **Edit/Recurring/Weekly...** command to open the *Edit weekly recurring event* dialog box.

Month

Check the box(es) in this section to indicate the month(s) in which you want the event to occur.

Week Number

These items represent the week number, relative to the start of the month, in which you want the event to occur. For example, if you have a meeting on the first and third Monday of every month, you would check the *First* and *Third* boxes in this section.

Day of week

Use this section of the dialog box to indicate the day or days of the week on which you want the event to occur.

Select all

Use these check boxes to quickly select all of the *Months*, *Week numbers* and/or *Days of the week*.

Day Selection Grid

Use the blue day selection grid to select a day or days of the month on which you want the event to occur. The "Last" box can be used to automatically select the last day of any selected month(s); it will automatically adjust to the varying number of days in different months.

Range

The *Range* section of the dialog box specifies the range of dates in which the event will appear on the calendar, and how many occurrences of the event the range will contain.

From

The starting date for occurrences of the event. This field defaults to the current date, but can be modified at any time.   You can use the Navigator to enter/edit this field.

Until
The ending date, or last date on which the event will occur.   You can use the Navigator to enter/edit this field.

Total events
The number of events that fit within the date range, based on the *Period* (see above).

> **Note:** The *Range* section of the dialog box can be used in two different ways. You can enter a *From* date and an *Until* date and let the program calculate the total number of events, or you can enter a *From* date and fill in the *Total events* field and let the program calculate the *Until* date.

Exclude

There may be certain types of days or days of the week on which you do not want this event to occur.   Check any of the appropriate boxes for days on which you **do not** want the event to occur.

> **Note:** It is not necessary to make a selection in each of the *Week number, Day of week, Exclude,* and *Day selection grid* sections of this dialog box.   Some of these items are mutually exclusive, and the appropriate options will be disabled as you make your selections.

Examples

To schedule a meeting that occurs on the first day of every month for the next year:

- Schedule one occurrence of the event in the **Day** mode on the first day of the next month.
- Select the **Edit/Recurring/Monthly...** command.
- Check the *Months* box in the *Select all* section to select every month.
- Click on the '1' box in the day selection grid.
- In the *Range* section, the *From* field should already contain the date of the first occurrence of the event.   In the *Until* field, enter a date that is 1 year after the *From* date.
- Press the **Tab** key.   The *Total events* field will display the length of the event in days.
- Press the **Ok** button to schedule the events.

To schedule a meeting on the first and third Friday of every month for the next year except for August:

- Schedule one occurrence of the event in the **Day** mode on the nearest Friday.
- Select the **Edit/Recurring/Monthly...** command.
- Check the *Months* box in the *Select all* section to select every month.
- Un-check the *August* month box.
- In the *Week number* section, check the *First* and *Third* boxes.
- In the *Day of week* section, check the *Friday* box.
- In the *Range* section, the *From* field should already contain the date of the first

occurrence of the event. In the *Until* field, enter a date that is 1 year after the *From* date.

- Press the **Tab** key. The *Total events* field will display the length of the event in days.
- Press the **Ok** button to schedule the events.

To schedule a quarterly report that is due on the last day of every quarter:

- Schedule one occurrence of the event in the **Day** mode on the last day of March.
- Select the **Edit/Recurring/Monthly...** command.
- In the *Month* section, check *March*, *June, September* and *December*.
- In the *Day selection grid*, check the *Last* box.
- In the *Range* section, enter March 31 in the *From* field and 4 in the *Total events* field.
- Press the **Tab** key. The *Until* field will display December 31.
- Press the **Ok** button to schedule the events.

To schedule an event that occurs on August 14th of every year for the next 5 years:

- Schedule one occurrence of the event in the **Day** mode on August 14th.
- Select the **Edit/Recurring/Monthly...** command.
- Check the *August* box in the *Month* section.
- Click on the '14' box in the day selection grid.
- In the *Range* section, enter August 14th in the *From* field. Enter 5 in the *Total events* field.
- Press the **Tab** key. The *Until* field will display November 9th five years from the current date.
- Press the **Ok** button to schedule the events.

Deleting Recurring Events

Deleting Recurring EventsTo delete a previously scheduled recurring event:

- In **Day** mode, select a future occurrence of the particular event (don't select an occurrence of the event that falls on today's date, or has already passed).
- Select the **Edit/Recurring** sub menu.
- The only selection that is enabled on this sub menu should correspond with the type of recurrence of the particular event.   Select that command.
- In the *Edit recurring event* dialog box that appears, press the **Delete** button.
- A message box will appear; verify the delete.

Event Templates

Event templates speed up and simplify the use of the Calendar's numerous options. Templates contain an event description, color codes, miscellaneous options, information about event importance, the type of reminder and alarm, and the frequency.

When you use an event template to set up an event, all you have to do is specify the event date and time and you have a completed event.

In addition, templates facilitate integration with the Phone Book and the 'keyboardless' use of the Calendar.   For example, you'll find templates quite helpful for setting up events while you are on the phone.

Related Topics:

Setting Up Templates

Phone Book Integration

Setting Up Templates

To open the *Setup Events* dialog box:

- Select the **File/Setup/Events...** command.

Please review the templates that are already entered. It will help you to better understand the concepts behind these facilities.

Options

The following options can be selected for the event templates:

Event description

This field describes the event name as it appears in the selection list.

Entry template

The entry template field contains text that will be entered into the Calendar event description field whenever this template is selected. The text may contain merge keywords related to the Phone Book (see **Appendix B** for a complete list of keywords). If the template is selected and the Phone Book is not available, the *Event description* is used instead of the *Event template*.

Color Code

You may select a color code for the event template. This color will be used whenever the day or month is represented graphically.

Public/Private

Designates whether or not the event will be visible to those network viewers with permission to view your schedule. While this option has no affect on the single-user version, if you ever switch to the network version, this option will be valid.

Business/Personal

Designates the event as being related to your business or personal life. These designations do not affect the visibility of your calendar to others.

Key event

Designates a major event. *Key events* are marked with a red flag in the **Day** mode status field. Additionally, when printing monthly posters, you may indicate that only the *Key events* should be printed.

Printable

This option is enabled by default. You may want to turn it off to prevent certain events from being printed.

Locked

When this option is enabled, the event description and options can't be modified until it is 'unlocked'. To prevent an unauthorized person from unlocking the event, enter a password in the *Setup* dialog box.

Hidden

This option removes events so designated from the public's view. This is great for dates, doctor visits, personal affairs during business hours, etc. (Okna does not encourage these activities, we just give you the means to do it.) Hidden events are displayed using blue text until turned off with the **Show/Hide...** command.

Importance

This option allows you to designate event importance in relative (or descriptive) terms.

Confirmation & Alarms
If the *Remind* box is checked, a reminder date will automatically be set whenever this event is selected. If the *Alarm* box is checked, an alarm will automatically be set for this event. Use the combo-box to specify the reminder text.

Adding an Event Template

- Click the **Add** button.
- Enter an event description, such as "Business Lunch" into the query field.
- Select desired options.
- Click on the desired color box to select a color code.
- Enter an event template, such as "Business Lunch with <TITLE> <FIRST NAME> <LAST NAME>". Later, when you use this event template to set up an event with a person in the Phone Book, the merge keywords will be replaced with the associated information from the person's record. For a complete list of available keywords, see **Appendix B**.

If you precede template text with a "+" symbol, its formatted contents will be appended to any text that is already in the event field. Alternatively, a "-" symbol will insert the formatted template text in front of any existing event text.

Editing a Template

To edit an existing template:

- Select the template name from the list of available templates.
- Make the appropriate changes.
- To save the changes, click the **Ok** button to close the dialog box or select another template name.

Button Functions

In addition to those already described, there are several other buttons to help you manage your templates.

Delete
This removes the currently selected template.

Up
This moves the currently selected template up one position on the list of templates. Use this to re-order your template lists and place the templates you use most frequently at the top of the list.

Down
Moves the currently selected template down one position on the list of templates.

Copy
Use this function to copy templates from another calendar file into the current calendar. Please note that the copied event templates will over-write any existing templates in the current calendar.

Phone Book Integration

Event templates facilitate the integration of the DeskTop Phone Book. With a few clicks of the mouse, you can set up complete events with any entry from the Phone Book. Here's how:

- Open the DeskTop Phone Book (if it isn't already running).
- Select the entry for which you want to schedule an event. Be sure that this entry has relevant information entered in the *Business* or *Residence information* dialog box, and is not just an 'empty' page entry.
- Switch over to the DeskTop Calendar.
- In the **Day** mode, select a blank event line and open the *Event* dialog box (Double-click description field or select **Edit/Event...** command).
- Click on one of the event templates. You will see that the event description line at the bottom of the dialog box gets filled in with the appropriate information from the Phone Book entry. For example, the template "Business meeting with <FIRST NAME> <LAST NAME>" gets file din with "Business meeting with John Doe."
- Select a time range for the event.
- Make any fine-tuning to the event or options.
- Click the **Ok** button to close the dialog box.

The complete event appears on the line in the calendar. A small telephone symbol will appear at the end of the event description field to indicate that the event is linked to a Phone Book entry (see the next section for details).

Linking Events to the Phone Book

There are several advantages to linking calendar events to the phone book:

- The entry's name, company, address and other information can automatically be inserted into the event description when you use templates (you don't have to touch the keyboard).
- You will have access to the entry's information via a *View* window directly from the calendar, without having to look in the phone book.
- You can view and dial any of the entry's phone numbers with the DeskTop Dialer directly from the Calendar.
- Linked information can be included in printouts.

Related Topics:

Creating Links

Viewing Link Information

Dialing Linked Entries

Creating Links

There are several ways to 'link' calendar events to Phone Book entries. Using event templates while the Phone Book is open can create a link to the current record. You can also explicitly link to the Phone Book with the **Link to...** command, or "drag & drop" a name from the book to create the link.

Event Templates

As we saw in the last section, when you use an event template to set up an event using information from the Phone Book, that event is automatically linked (see the last section for details). The event description will have a telephone symbol to indicate the link.

Explicit Links

You can explicitly link a new or existing event to the Phone Book with the **Link to...** command.

- In the Phone Book, select the record to link to.
- In the Calendar, select the event you wish to link.
- Select the **Dial/Link to [*page name*]...** command.

The link will be created, and the telephone symbol will appear on the far right of the description line. The *Event* dialog box will automatically be opened for you to make any necessary changes. In the case of a new event, you can set up the event options at this time.

Drag & Drop

Explicit links can also be created using the 'Drag & Drop' method. This method is a little more elegant than the **Link to...** command, but it only works with new (blank) events.

- In the Phone Book, click and hold the left mouse button down on the page entry for the record you wish to link. The cursor shape will change (for more information on the shape of the cursor, see the **Manipulating Entries** section of the Phone Book chapter).
- While holding the mouse button down, 'drag' the cursor to the Calendar window. If the Calendar is iconized, drag the cursor over the icon and let go of the button.
- Move the cursor over a blank event line and click the left mouse button.

As with the **Link to...** command, the link will be created and the telephone symbol will appear on the far right of the description line. The *Event* dialog box will automatically be opened so you can set up the event options.

If the mouse cursor changes back to its normal shape at any time before the operation is complete, you have done something wrong; go back and try again.

Viewing Link Information

To access information from the linked record, the Phone Book program must be running. Select the linked event and open the **Dial** menu. The name and phone numbers of the linked record are displayed on the menu.

The top line of the menu shows the *page name* of the linked record. To view the record's information, select this command.

This window is similar to the Phone Book's *View* window, except that it lacks some of the functionality.

Dialing Linked Entries

Once the link between the Phone Book and the Calendar has been created, you can use the Calendar's **Dial** menu in exactly the same way as you would the Phone Book's **Dial** menu.   Also, the Phone Book does not have to be open.

To dial one of the phone number for a linked entry:

- Open the **Dial** menu.   All of the available numbers for that entry are displayed. Numbers for which that phone book record has no information are grayed.
- Select the desired number.

The Dialer will be launched and the selected number will automatically be dialed.

Finding and Viewing Events

The Calendar provides several methods for you to find (or navigate to) specific dates and for searching your calendar for specific events. There are also ways to view many events at once to help you get an idea of your schedule, or to help you zero in on a particular event.

Related Topics:

Finding a Date

Finding Events

Week-at-a-glance

Month-at-a-glance

Group Chart

Day Highlights

Finding a Date
There may be times when you want to quickly turn your calendar to a certain date, be it 2 months from now or 2 years from now.

Year & Month Modes
The **Year** and **Month** mode windows can help you find a specific date. Hopefully, you are already familiar with these modes.

The **Month** mode can be used to find a date within the current month. Just double-click on the date, and the calendar will automatically switch to the **Day** mode page for that day.

The **Year** mode is useful for finding just about any other date. The **Year** mode window displays every single day for the current year. All you have to do is locate the day to which you want to go and double-click it.

You can use the **Right** and **Left arrow** menu symbols, or the **PgUp** and **PgDn** keys to move the year calendar one year forward or backward. In addition, the **Show/Year...** command lets you type in a year, so you can jump ahead or back many years with little effort. Although the daily calendar only extends five years from the year in which you installed it, you can still view the yearly calendar for any year.

The Navigator
The *Navigator* is a mini-calendar window that can be displayed along with your main calendar window. It always stays open until you close it, and if you have the *Navigator* open when you quit the Calendar, it will be re-opened when you start the Calendar again.

To open the *Navigator*:

- Select the **Show/Navigator...** command.

You can instantly move into another day page just by selecting it's date in the *Navigator*. It functions just like any other mini-calendar window. For complete instructions, see the **Common Controls** topic of **Chapter 1**.

Finding Events

Need to find a meeting with someone quickly? Can't remember the person's name? Do you have a reminder coming up within the next couple weeks, and you want to see it now? The Calendar has features designed to assist you in your search.

Phonetic Search

The Phonetic Search helps you find events based on the description field. What's more, it can search your entire calendar in a few seconds (a lot faster than you could).

The Phonetic search requires that you only enter an approximate word or just the first few letters of any word in the description of the event you are looking for. It works like a spelling checker by weighting the similarity of the search word to the words it finds in the event descriptions. It then creates a list of the nearest matches.

For example, say you have a meeting with Okna Corp., but you don't remember how to spell it. You could enter "Oakna" (which is how it is pronounced) in a phonetic search, and it would come up with your meeting event. However, don't be surprised if it also comes up with events such as "Polish the old oaken table."

To open the *Phonetic Search* dialog box:

- Select the **File/Find...** command.
- Enter the search text in the *Find* field.
- Enter the search range (optional). If no range is specified, the entire calendar is searched. If you know that an event falls within a certain range, you can speed up the search by specifying that range.
- Click the **Search** button, or press the **Enter** key.

The list of closest matches is displayed in the list box. Double-click (or press **Enter**) on any of the events to move the calendar to that event.

There are several rules that apply to the phonetic search:

  - Numeric and punctuation characters are not allowed.
  - Only one word per search (no spaces allowed). Don't worry, the word will be compared to every word in every event description in the specified range.
  - The search word is case-insensitive (upper case letters match the same lower case letters).

Showing Reminders

Reminders are a convenient way of jogging your memory about an upcoming (or recently passed) event. As you may recall, reminders are entered in the *Options* dialog box (**Edit/Options...** command, or press the **Options** button from *Event* dialog box).

To view pending reminders:

- Select the **Show/Reminders...** command.

The Calendar program scans the date range specified by the *Reminders scan range* options in the Calendar's *Setup options* dialog box. The current day is used as the base for this date range.

Clear
Press the **Clear** button to cancel the currently selected reminder. This does have any effect on the event other than to remove the reminder option.

Select
The **Select** button advances the Calendar to the day page of the selected reminder's event. This has the same effect as double-clicking on a reminder in the list.

Cancel
Closes the *Reminders* dialog box.

You can configure the Calendar to automatically scan your reminders when you start the program. These options are located in the *Setup options* dialog box. See the section on **Customizing the Calendar** for details.

Week-at-a-glance

The **Day** mode is great for viewing your daily schedule, and the time bar in the *Event* dialog lets you see the entire day's events graphically. What if you want to see more than just one day?

The Calendar's Week-at-a-glance window displays an entire week's events in an easy-to-read format. To view the Week-at-a-glance:

- Select the **Week...** command.

The *Week-at-a-glance* window is completely re-sizable. Or, you can use the **Zoom** menu command to expand the window to full-screen. To view event details:

- Position the cursor over an event description and press and hold the left mouse button to display the details of the event.
- Double-click on any event description to proceed to that event in the Calendar's day mode.

Configuring Week-at-a-glance

The *Week-at-a-glance* window has several options that affect how it displays your events.

- Select the **File/Setup...** command from the *Week-at-a-glance* window's menu.

This dialog box interacts with the *Week-at-a-glance* display, so you can see the changes as you make them.

Show events

These options control which types of events are displayed in the window.

Display options

These options control which of the events time fields are displayed, and whether or not event colors are used.

Display direction

Use these radio buttons to control the direction of the flow of days in the window.

Exclude events

You can choose not to display events that don't have time fields or alarms. This may help you to show only important scheduled events in the *Week-at-a-glance* window.

- Press the **Ok** button to save your changes and close the dialog box, or the **Cancel** button to close the dialog box without saving any changes.

Month-at-a-glance

To find free time fast or to review an entire month's schedule in just one glance, use the *Month-at-a-glance* window. Want to find out which night you are free next week? Simply scan across the evening section of the chart to spot free time. What are you doing two weeks from Wednesday? Find that day on the chart and review each event with the click of a button. Sound good? Read on...

◆ Select the **Show/Month chart...** command.

The *Month-at-a-glance* window displays an entire month in a graphical format, like having a month's worth of time bars stacked together. The window is moveable and resizeable.

There are several buttons at the bottom of the window:

Zoom
Expands the window to full screen size. Click the **Zoom** button again to un-zoom. (The window may also be resized manually.)

Prior
Turns the chart one month back.

Next
Advances the chart one month forward.

Cancel
Closes the *Month-at-a-glance* window.

The chart itself has built-in functionality:

- To view an event's time and description, click and hold down the left mouse button on the event's time block.
- Double-click the event block to open the day page and select the event related to that block.
- Double-click an empty time slot to open that day page and enter a new event.

The time range of the *Month-at-a-glance* window can be changed in the Calendar's *Setup Options* dialog box. For details, see the **Customizing Calendar Options** section near the end of this chapter.

Group Chart

The *Group chart* provides you with an easy way to view the schedules of several different calendars.   You may, for instance, have both a business and a personal calendar, and you would like to find your free time.   Or, for example, the calendar may be used in a doctor's office.   The receptionist may keep track of each of the doctor's appointments in a separate calendar file.   One glance at the group schedule would tell the receptionist when each doctor was free.

To open the group chart:

- Select the **Show/Group chart...** command; a selection list appears displaying the owner names of all the calendar files;
- Select the people's names whose schedules you would like to view; you can select all names by pressing the **All** button;
- Press **Ok** or **Enter**;   the *Group Schedule* window appears:

The *Group chart* functions just like the Month-at-a-glance window.   Click and hold the left mouse button on any event bar to see a description of the event.

Day Highlights

One quick way to view important events for the month is to use day highlights. A day highlight is a short event description that appears on the **Month** mode window. You are allowed 2 highlights per day.

Highlights are set using the **Edit/Day...** command (from **Day** mode) or the **Month** command (from the **Month** mode). (Setting up day highlights was fully discussed in the **Day Setup** topic of the **Entering Events** section earlier in this chapter.)

Say, for example, you have just scheduled an important event. The event has a reminder and it is marked as a key event, but you really want this event to stand out. Make a highlight for the event.

- In **Day** mode, go to the day of the event, **or...**
- in **Month** mode, select the day.
- Open the *Day setup* dialog box.
- Enter a day highlight for the event.

Now, when you are scanning your schedule for important events, you can switch to **Month** mode and quickly spot this (and other) highlights.

To Do Lists

The Calendar has a handy **To Do** mode in which you can create task lists. You can use this list for unscheduled items, tasks needed to complete a project, checklists or whatever else you would use a paper list for. The **To Do** mode can:

- Have an unlimited number of lists.
- Enter up to 38 items per list.
- Assign a due date and priority to every item.
- Sort the lists by due date, priority or alphabetically.
- Automatically highlight all due/over-due items.
- Attach lengthy notes and Phone Book entries to each item.
- Attach data files to each item and launch the program that processes the data file right from the to do list.
- Consolidate multiple to do lists into one report based on the selected due date and priority range.

To enter **To Do** mode:

◆ Select the **To Do** menu command, **or...**

◆ Press the **Alt-t** key.

The To Do list may contain up to 38 items. Each item may have a priority, description text and a due date. You can attach a Phone Book record, a data file or a Notepad-style document to each item. Each list may have its own options and attributes.

Related Topics:

Creating To Do Lists

Changing To Do List Options

Selecting Other Lists

Entering To Do Items

Attaching Notes, Files and Phone Book Entries

Manipulating Lists

Creating To Do Lists

You may have as many To Do lists as you like. The lists, like any other data file, are stored in the DeskTop set data directory (\WINDOWS\DESKTOP by default). The To Do list files are assigned unique names by the program. You will, however, refer to each list by its descriptive name.

To create a new list:

- Select the **File/Create...** command.

The *List Options* dialog box appears:

The following options are available:

List Name

Assign a descriptive and unique name to your list. This name is later used to open the list. It is always displayed at the top of the *To Do* window.

Show by

This selection instructs the program to sort and open the list in the selected order; by priority, due date, entry name (alphabetical) or none (not sorted).

Print by

This selection instructs the program to print the list in the selected order (same as *Show by*, but for printing).

Options

The options selected here will determine the following program features:

Include in status check

Select this item if you want this to do list to be checked for due items when producing a consolidated report.

Highlight due items

Check this box if you want the due items to be displayed in red text.

Include in search

Select this option if you want the list to be included in global searches for items.

Advance & Grace

These values determine the date range in which items will be flagged as due/past due. Any item that falls within *Grace* days prior to and *Advance* days past today's date will be marked as due/past due, and will be highlighted if the *Highlight due items* option is checked.

Access

The *Access* options determine who gets to see your list.

Private list

This option is only valid for the network version.   If this box is checked, only the creator of the list (you) will be able to see and open it.

Password
If a password is entered here, it will be required before the list can be opened.

Changing To Do List Options

To change the current list's options, select the **File/Options...** command.   Select the options as explained in the previous topic, **Creating To Do Lists**.

Selecting Other Lists

To open another to do list:

- Select the **File/Open...** command.

The *To do lists* dialog box opens:

To open another list:

- Select one of the available lists.
- Double-click the list name, press **Enter**, or press the **Open** button.

You don't have to worry about saving the previous list; it is done for you. automatically.

Entering To Do Items

As with entering calendar events, there are two ways to enter to do list items; directly on the **To Do** list, or in a dialog box.

On To Do List

First, set the priority field. Click the mouse button over the field to increment the priority value from 1 to 10 (and complete). Hold the **Shift** key down while clicking to decrement the value. From the keyboard, use the **F3** key to increment, **Shift-F3** to decrement, and **F2** to enter a "completed" check mark.

The item description field is second. It can accept a relatively small amount of text to describe the item. Don't view this as a limitation, however; remember, you can attach lengthy notes to each item.

The date field is last. You can enter the date either as mm/dd/yy or as MMM dd, yy. For example, 06/01/92 or Jun 1, 92. You may find it easier to read the list in one format rather than the other.

From the Dialog Box

Probably the best way to enter the to do list items if from the *Item Options* dialog box. To open this dialog box:

- Select the **Edit/Item...** command, **or...**
- Double-click or press **Enter** in the date field of the item.

The *Item Options* dialog box is 'modeless'; in Windows talk, that means you can select another to do list item while it is still open.

Use the edit field on the bottom of the dialog box to enter the item description field.

Priority

Set the to do item priority just by clicking on the appropriate button.

Complete by

The due date is set by clicking on the day in the mini-calendar window. See Chapter 1 for details on using the mini-calendar.

Attaching Notes, Files and Phone Book Entries

Notes

You can attach a Notepad-like document that may contain free-style notes to each *to do* item. The document can contain up to 32,000 characters.

To attach or open a note:

- Double-click on the item description line or select the **Edit/Note...** command.

Use the *Note* window the same way as you would use Windows' Notepad. You do not, however, have to worry about saving the note; It is saved as soon as the *Note* window is closed.

You may open as many *Note* windows as you wish. The **Windows** menu will assist you in managing multiple windows with ease.

When you select a *to do* Item with a note attached, the note symbol will appear on the list's status line (upper left, just above the first item).

Phone Book Entries

Phone Book entries can be linked to *To Do* list items in exactly the same way as they are linked to Calendar events. You may dial phone numbers, review record information, etc., in the same way.

To attach a Phone Book entry:

- In the Phone Book, select the record to link to.
- In the Calendar, select the *to do* item you wish to link.
- Select the **Link/Link to book (*page name*)...** command.

Links can also be created using the 'Drag & Drop' method.

- In the Phone Book, click and hold the left mouse button down on the page entry for the record you wish to link. The cursor shape will change (for more information on the shape of the cursor, see the **Manipulating Entries** section of the Phone Book chapter).
- While holding the mouse button down, 'drag' the cursor to the Calendar window. If the Calendar is iconized, drag the cursor over the icon and let go of the button.
- Move the cursor over a blank *to do* list item and click the left mouse button.

When you select a *to do* Item with a Phone Book entry attached, the Phone Book symbol will appear on the list's status line (upper left, just above the first item).

Data Files

You may attach data files to each *to do* list item. If the attached file can be opened by a Windows compatible program, you may run that program with the associated data file right from the *to do* list.

For example, you may be working on a expense sheet using Microsoft Excel. You could place an item on your *to do* list that says "Finish expense account" and then attach your Excel file (EXPENSE.XLS) to the *to do* item. Later on, when you are reviewing your *to* *do* items and you see "Finish expense account," you could launch Excel to work on the expense sheet directly from the Calendar.

To attach a file:

- Select the **Link/Link to file...** command.
- Select the desired file from the *Select File* dialog box and click the **Attach** button. The *Attach file* dialog box opens:
- Enter a descriptive file name; edit the other fields, if necessary.
- Click the **Ok** button to complete the attachment.

When you select a *to do* Item with a file attached, the File Attachment symbol will appear on the list's status line (upper left, just above the first item).

To review and revise the attachment information, select the **Link/Edit file link...** command.

To open an attached file:

- Select the item with the attached file.
- Select the **File/Open file (*file name*)...** command, **or...**
- Hold down the **Shift** key and double-click the *to do* item description field.

Note: The Calendar's ability to open a data file that is associated with a Windows compatible program is one of the integral and fundamental Widows functions. The associations between data files and programs are established at the time those programs are installed, or by using the Windows' File Manager program, **File/Associate...** command. Regrettably, older versions of Microsoft Excel and Word only support this functionality in a limited way. If these programs are already running, you cannot open associated data files.

Manipulating Lists

Now that you have created your *to do* list, you may want to sort them, 'shuffle' the *to do* items or make a consolidated report of all your lists.

Cutting & Pasting

To Do list items can be cut, copied, pasted and cleared just like Calendar events. All of the commands necessary to carry out these functions are on the **Edit** menu. Briefly:

Cut
This removes the currently selected event and places it in the Calendar's internal clipboard.

Copy
Makes a copy of the currently selected event in the Calendar's internal clipboard.

Paste
Copies item information from the internal clipboard onto the currently selected item line.

Clear
Removes the currently selected item without placing the information in the clipboard; the item is gone 'forever.'

Copy to day
Move to day
You may copy or move to do items including notes and phone book links (but not attached file) into the calendar's day mode. To move or copy a to do item into day mode:

- Select to do item
- Select **Edit/Copy to day...** or **Edit/Move to day...** command.
- Calendar will switch into the day mode and the cursor will turn into a U-Haul truck. To complete copy or move select an empty calendar line and click over it.

Clear completed
Clears (see above) all items that are marked as complete (have a check mark in the priority column).

Sorting

The *To Do* list can be sorted at any time by selecting one of the three commands from the **Sort** menu.

- The **Sort/Date** command will sort the list by due date. Those items without due dates will appear at the end of the list.
- Use the **Sort/Priority** command to sort the list by priority. Checked (completed) items and items without any priority will appear at the end of the list.
- The **Sort/Entry** command sorts the list alphabetically (using the description field).

Consolidating

The ability to consolidate multiple *to do* lists into one report makes it possible to keep track of all due items, regardless of their parentage (in which list they reside). To view the report:

◆ Select the **File/Status...** command.

To make a consolidated report:

◆ Select the range of priorities to be included in the report.

◆ Select the range of due dates to be included in the report.

◆ Click the **Scan** button.

The list box will display all the items that met the scan criteria you specified. *To do* list titles are shown in all capital letters, with the items belonging to each list displayed underneath.

You can open the *to do* list associated with a particular item:

◆ Select the item.

◆ Double-click on the item, press the **Open** button, or press the **Enter** key.

Printing the Calendar

The Calendar can print in several formats.   In each of these formats, you have control over fonts, margins, orientation, headers & footers and many other options.   In addition, the Calendar uses a multi-tasking print engine, which means that you can work in other programs while you are waiting for the Calendar to finish its printing.

Related Topics:

Itinerary Formats

Month Poster

Year Poster

To Do Lists

Week-at-a-glance

Month Chart

Combo Folder

Itinerary Formats
This type of printout consists of a list of all your events (an itinerary) for the date range that you specify. Each day's events begin with a header for that day. The events can contain text from attached notes and Phone Book entries.

Setting Up
Before you can print an itinerary, you must select the options that are appropriate for your printer and reflect your preferences:

- Place the Calendar in **Day** mode (all options for itinerary formats must be set while the Calendar is in **Day** mode).
- Select the **File/Print/Page setup...** command.

When you open this dialog box for the very first time, none of the options are selected. It is essential that you select at least font names and sizes for all elements of the printout.

Button functions
Select Printer
The first thing you want to do is select the printer you want to use to print the itinerary. Since Windows allows you to have any number of printers connected to your system, you must pick one. Press the **Select printer** button to view the list of available printers. Select one of the printers and press the **Ok** button, or double-click on the selected printer.

Printer Setup
This opens the *Printer Setup* dialog box for the printer you selected. You can check to make sure that your printer paper is in the proper orientation, that the correct paper size is selected and other printer options. The *Printer Setup* dialog box is part of your printer's driver and has nothing to do with DeskTop Set.

Margins
Use the fields in this section to define the margins you wish your printer to use for your printout. You can also set the paper orientation (portrait or landscape) using the provided radio buttons.

Print
These options specify what elements will be included in the printout.

Header/Footer
Check these boxes to include a header and/or footer in your printout. The header and footer are defined in the *Headers & Footers* dialog box, which will be explained shortly.

Address
If this box is checked, the business address of any attached Phone Book entries will be printed beneath the events to which they are attached.

Notes
Check this option to print any attached notes beneath the events to which they are

attached.

Calendar
If you check this box, a 3-month reference calendar will be printed at the top of the page.

Options

This section contains miscellaneous printing options.

Skip blanks
If this option is checked and you have blank lines in your schedule, they will be skipped. Otherwise, the blank lines will appear in the printout just as they appear on your **Day** mode window.

Day per page
Check this option if you want the printer to start a new page for each day in your itinerary. It may use more paper, but some people find it easier to read this way.

Sort entries
Your events will be sorted by starting time if this box is checked.

No label
By default, the Calendar will print a heading (not head*er*) at the top of each day to identify the columns in the printout (time from, time to, event, etc.). If you don't want this heading, check this box.

Printer & Fonts

This section specifies the printer you want to use to print the itinerary, the font type, size and style. You must choose a font name and size for each of the elements of the printout. The *Bold* and/or *Italic* modifiers are optional.

Title
This specifies the font used to print the title that appears at the start of each day on your itinerary.

Events
The events font is used to print the daily events.

Attachments
This is the font used to print event attachments, such as notes or Phone Book entry addresses (if you have chosen this print option). You may want to use a relatively small font here, especially if you have a lot of notes.

Headers & Footers
This is the font that will be used to print the header & footer for each page of your itinerary (if you have chosen this print option). The header and footer text are defined in the *Headers & Footers* dialog box, which will be explained shortly.

Once you have set up the page characteristics and chosen the options, press the **Ok** button to close the dialog box and save your changes, or the **Cancel** button to close without saving the changes. Alternatively, you can press the **Print** button to print out your itinerary now, but keep in mind that we haven't defined the header & footer yet.

Header & Footer

The header and footer contents and options apply to all types of calendar prints except the year poster (it has no header or footer).

- Select the **File/Print/Header/Footer...** command to open the *Headers & Footers* dialog box.

The *Header* and *Footer* options and fields are identical, and are as follows:

Draw line
A horizontal line will be drawn under the header or above the footer.

Zero Margin
The header/footer will be printed at the very top/bottom of the page, regardless of the top/bottom margin.

Space
For the header, this defines the distance between the bottom of the header and the beginning of the text. For the footer, *Space* defines the distance between the top of the footer and the end of the text.

Begins from page
Defines the page number at which the header and footer will begin printing. If this field is left empty, the header and footer will start on the first page.

Header and Footer contents
The header and footer text fields are broken into three sections; left, center and right. Text or keywords placed in these sections will be left justified, centered or right justified, respectively. You can enter any text you like, or any of the keywords listed in the top of the dialog box. The keywords will be expanded at print time.

Bear in mind that, if you enter a lot of text in any of the header or footer fields and you have a relatively large font selected, the text fields may over-run each other when they are justified.

Printing

You can print your calendar in itinerary format at any time and may select between a particular day, week, month or range of dates.

- Select the **File/Print/Daily itinerary...** sub menu to open the *Print Range* dialog box
- Select the *From* and *Until* print range by clicking on the desired dates in the Calendar control.
- You may change the options (originally selected in the *Calendar Print Options* dialog box) as you like. These changes remain in effect only for the current printing.
- Press the **Print** button to send the specified print range to the printer.

Month Poster

You can print out your monthly events on one page in an attractive grid format. The *Month poster* looks just like a page from a hanging calendar, with month heading, day headings and a box for each day.

There are some limitations with the month poster. The amount of text you can fit for each day is limited by the size of the boxes (use the smallest practical font size). The ideal setup is a laser printer with legal size (8½" x 14") in landscape orientation. If you have a dot-matrix printer, be prepared to wait a bit for the output, unless, of course, you have a speed demon of a printer.

Setup

To open the *Monthly Poster print options* dialog box:

- Switch the Calendar to **Month** mode.
- Select the **File/Print/Page setup...** command.

Note: The Calendar must be in **Month** mode to open the *Monthly Poster print options* dialog box. If it is in **Day** mode, the above command will open the *Calendar print options* dialog box instead.

When you open this dialog box for the very first time, none of the options are selected. It is essential that you at least select font names and sizes for all elements of the printout. Other options include:

Button functions

Select Printer

The first thing you want to do is select the printer you want to use to print the poster. Since Windows allows you to have any number of printers connected to your system, you must pick one. Press the **Select printer** button to view the list of available printers. Select one of the printers and press the **Ok** button, or double-click on the selected printer.

Printer Setup

This button opens the *Printer Setup* dialog box for the printer you selected. You can check to make sure that your printer paper is in the proper orientation, that the correct paper size is selected and other printer options. The *Printer Setup* dialog box is part of your printer's driver and has nothing to do with DeskTop Set.

Print

These options specify what elements will be included in the printout.

Holidays

Prints system-wide and user-defined (**Edit/Day...** command) holiday names.

Highlights

Prints day highlights (**Edit/Day...** command) as they appear in the **Month** mode window.

Day status

Prints each day's status (vacation, business trip, sick day, etc.) using icons, just as it appears in the **Month** mode window.

Business
Prints events designated as business related (**Edit/Options...** command).

Personal
Prints events designated as personal (**Edit/Options...** command).

Key events
Prints events designated as *Key events* (**Edit/Options...** command).

Event shows

You can include events' starting and/or ending times, or no times at all, in your printout. Keep in mind that you are limited by space, and printing both time fields can cost a lot of room.

Exclude

These options designate the portions of your calendar that can be excluded from the printout. Since you are limited by space, it is important that you examine these options carefully for each printing and exclude those items that you don't need.

Saturdays/Sundays
The *Saturday* and/or *Sunday* column will not be printed if these boxes are checked. This gives your poster more room horizontally.

Empty rows
Some monthly charts may have the first or last row of days (week) completely blank, especially when *Saturday* and/or *Sunday* are excluded from printing. This option instructs the program not to print these blank rows. This gives your poster more room vertically.

Misc. options

This section specifies miscellaneous printing options.

Headers/Footers
Check these boxes to include a header at the top of the poster and/or a footer at the bottom of the poster. The header and footer for all printouts, including the *Monthly poster*, are defined in the *Headers & Footers* dialog box (**File/Print/Header/Footer...** command). Setting up the header and footer was explained in the previous topic.

Print events that didn't fit
All events that didn't fit into the grid (day boxes) will be printed in list form on pages following the poster.

Blank poster
Prints an empty monthly poster with no events, highlights, holidays or status.

Margins & Orientation

Use the fields in this section to define the margins you wish your printer to use for your printout. You can also set the paper orientation (portrait or landscape) using the provided radio buttons.

Printer & Fonts

This section specifies the printer you want to use to print the poster, the font type, size and style. You must choose a font name and size for each of the elements of the printout. The *Bold* and/or *Italic* modifiers are optional.

Heading

This specifies the font used to print the centered heading of the poster (i.e. "Calendar for April, 1992"), the column headings (Monday, Tuesday, etc.) and the day numbers. For best results, choose a relatively large, bold font.

Events

The events font is used to print the daily events. You will be able to fit more event text if you use a relatively small font.

> **Hint:** For sharpest and fastest printing, choose fonts that are resident in your printer (see your printer guide). For example, HP LaserJet III owners could use the *CG Times* font. Also, LaserJet orientation works best for *Monthly posters*.

Headers & Footers

This is the font that will be used to print the header & footer for the poster (if you have chosen this print option). The header and footer text are defined in the *Headers & Footers* dialog box (**File/Print/Header/Footer...** command).

Once you have set up the page characteristics and chosen the options, press the **Ok** button to close the dialog box and save your changes, or the **Cancel** button to close without saving the changes. Alternatively, you can press the **Print** button to print out your poster now (have you defined the header & footer yet?).

Printing

To print the *Monthly poster*:

- Select the **File/Print/Month poster...** command.

The *Monthly Poster print options* dialog box opens. Yes, this is the same dialog box that is used to set up the *Monthly poster* options. You can adjust any of the options as you like and then:

- Press the **Print** button to begin printing your *Monthly poster*.

Year Poster

The *Year poster* is a 12-month reference calendar that resembles the Calendar's **Year** mode display.   The *Year poster* uses the margins and *Event* font type and size specified in the *Calendar print options* dialog box (**File/Print/Page setup...** command).   There are no other options for the *Year poster*.

Printing

To print the year poster:

- Select the **File/Print/Year poster...** command.

The year poster will immediately be sent to the printer.

To Do Lists

The printing of each *To do* list can be custom-tailored. That is, for each *To do* list you have, the printer setup is independent of the others.

Setup

To set up the print options for the current *To do* list:

- Make sure the Calendar is in **To do** mode.
- Select the **File/Print/Page setup...** command.

The print options and settings are similar to those outlined for the Calendar's itinerary printouts.

Button functions

Select Printer

The first thing you want to do is select the printer you want to use to print the current list. Since Windows allows you to have any number of printers connected to your system, you must pick one. Press the **Select printer** button to view the list of available printers. Select one of the printers and press the **Ok** button, or double-click on the selected printer.

Printer Setup

This opens the *Printer Setup* dialog box for the printer you selected. You can check to make sure that your printer paper is in the proper orientation, that the correct paper size is selected and other printer options. The *Printer Setup* dialog box is part of your printer's driver and has nothing to do with DeskTop Set.

Margins

Use the fields in this section to define the margins you wish your printer to use for your printout.

Paper orientation

Set the paper orientation (portrait or landscape) using the provided radio buttons.

Print

These options specify what elements will be included in the printout.

Notes

Check this option to print any attached notes beneath the events to which they are attached.

Link records

If this box is checked, the business address of any attached Phone Book entries will be printed beneath the events to which they are attached.

No label

By default, the Calendar will print a heading (not head*er*) at the top of each page to identify the columns in the printout (priority, item and due date). If you don't want this heading, check this box.

Header/Footer
Check these boxes to include a header and/or footer in your printout. The header and footer are defined in the *Headers & Footers* dialog box, which is explained in the **Itinerary Format** topic of this section.

Printer & Fonts

This section displays the printer you want to use to print the itinerary, and specifies the font type, size and style. You must choose a font name and size for each of the elements of the printout. The *Bold* and/or *Italic* modifiers are optional.

Title
This specifies the font used to print the title that appears at the top of the list.

"To do" items
This font is used to print the list items.

Attachments
This is the font used to print event attachments, such as notes or Phone Book entry addresses (if you have chosen this print option). You may want to use a relatively small font here, especially if you have a lot of notes.

Headers & Footers
This is the font that will be used to print the header & footer for each page of your list (if you have chosen this print option). The header and footer text are defined in the *Headers & Footers* dialog box (**File/Print/Header/Footer...** command).

Once you have set up the page characteristics and chosen the options, press the **Ok** button to close the dialog box and save your changes, or the **Cancel** button to close without saving the changes. Alternatively, you can press the **Print** button to print out your *To do* list now (Have you specified your header & footer?).

Printing

To print the current *To do* list:

- Be sure the Calendar is in **To do** mode.
- Select the **File/Print/Current list...** command (this command will not appear on the sub-menu unless you are in **To do** mode).

The current list will immediately be sent to the printer; there are no options to select before printing.

Week-at-a-glance

Setup
To set up the week-at-a-glance print options:

- Select the **File/Print setup/Week-at-a-glance...** command.

Printer
The options in this section of the dialog box allow you to select the printer and adjust the printer setup.

Duplex
Some printers can print in duplex mode, which just means that they can print on both sides of one page. This option allows you to select the duplex mode of your printer.

In addition, the DeskTop Set allows you to 'emulate' duplex printing on printers that don't support duplex. It achieves this by printing the first page of your output and then pausing. It instructs you to take the first page of the printout, flip it over, and re-insert it into the printer's paper tray. It then prints the second page of the printout.

Font Options
In this section of the dialog box, select the font type and size you wish to be used to print the event text. Optionally, you can specify the **Bold** or *Italic* styles.

Page Layout
Specify the layout of your page in this section of the dialog box. The *Left* and *Top* margin values (in inches) specify the positioning of the printout on the page. The *Width* and *Height* values specify the size of the printout (in inches).

Pre-defined
There are several pre-defined page setups which can be selected using this combo-box. These will automatically select the page margins and size.

Rows
This specifies how many rows of 'day-blocks' will be used to print the week-at-a-glance. Each week consists of 6 day-blocks; one for each of the weekdays, and one for Saturday and Sunday combined.

Columns
This specifies how many columns of 'day-blocks' will be used to print the week-at-a-glance.

Keep in mind that the *Rows* and *Columns* fields are related. The number of rows multiplied by the number of columns must equal six. Therefore, the only allowable values in either one of these fields is 1, 2, 3 or 6. As you enter a value in either the *Rows* or the *Columns* field, the other of the two fields will automatically be updated.

Print options
This section of the dialog box displays additional printing options which control the

layout of the printout and the number of pages you print.

Copies
To print multiple copies of your week-at-a-glance, type the number of copies in this field. You may want extra copies of your schedule for your boss or secretary, for example.

Weeks
This field specifies how many calendar weeks will be printed. The default is 1, which prints just the current week. You can place 2 in this field if you want to print this week and the following week, or 3 if you want to print this week and the following two weeks, etc.

Direction
These radio buttons specify the direction in which the 'day-blocks' will flow on the page. For example, in *Top-down* mode, Tuesday is below Monday; in *Left-right* mode, Tuesday is to the right of Monday.

Week from
You can choose to have the week-at-a-glance printout start with *Today* (the current day) or with the *Monday* of the current week.

Print
To print a blank week-at-a-glance page, check the *Empty form* box. This may be useful for filling in by hand. The *Header* and *Footer* boxes specify whether or not those page elements will be printed. (See below for the Header/Footer setup.)

Include
These check boxes specify which event types will be printed. It also allows you to include a status bar, which shows event status (completed, key event, etc.), event time from and time to fields.

Header/Footer Setup
To specify the settings for the Header and Footer of your printout:

- Press the **Header** button.

The top section of the dialog box displays the key fields which can be used in the header and footer. You can type any one of these fields, or text of your own, into any of the Header or Footer edit fields below. Or...

- Place the cursor in one of the Header/Footer edit fields;
- Click on one of the prompts in the top section of the dialog box.

The prompt will automatically be inserted at the cursor position.

Header/Footer
These sections of the dialog box allow you to set up the layout and content of the header and footer.

Print
If this box is checked, the header/footer will be included in the printout. Otherwise, it will not.

Line

Check this box to print a ruler line between the header/footer and the rest of the printout.   This can add a nice touch to the appearance of your page.

From edge
This value specifies the distance (in inches) from the edge of the page at which the header/footer will be printed.

From page
This specifies the distance from the margin of your printout at which the header/footer will be printed.

You can also specify the font type and size you wish to be used to print the header/footer.   Optionally, you can specify the **Bold** or *Italic* styles.

- Press the **Ok** button when you are done setting up the Header/Footer.

Printing the week-at-a-glance

To print the week-at-a-glance:

- Select the **File/Print/Week-at-a-glance...** command;
- Use the mini-calendar control to select the date from which to start printing, **or...**
- Type the starting date in the *From* field;
- Select the number of weeks you wish to print, with week number 1 being the week containing the *From* date.   (This field overrides the *Print options/weeks* field in the *Week-at-a-glance setup* dialog box described earlier in this topic.);
- Press **Ok** or **Enter**.

  Note: The print may take some time to format, but keep in mind that the Calendar uses a multi-tasking print engine, so you may use other programs while you are waiting for the print to complete.

Month Chart

To set up the month chart print options:

- Select the **File/Print setup/Month chart...** command.

Printer

The options in this section of the dialog box allow you to select the printer and adjust the printer setup.

Duplex

Some printers can print in duplex mode, which just means that they can print on both sides of one page.   This option allows you to select the duplex mode of your printer.

In addition, the DeskTop Set allows you to 'emulate' duplex printing on printers that don't support duplex.   It achieves this by printing the first page of your output and then pausing.   It instructs you to take the first page of the printout, flip it over, and re-insert it into the printer's paper tray.   It then prints the second page of the printout.

Font Options

In this section of the dialog box, select the font type and size you wish to be used to print the event text.   Optionally, you can specify the **Bold** or *Italic* styles.

Page Layout

Specify the layout of your page in this section of the dialog box.   The *Left* and *Top* margin values (in inches) specify the positioning of the printout on the page.   The *Width* and *Height* values specify the size of the printout (in inches).

Pre-defined

There are several pre-defined page setups which can be selected using this combo-box. These will automatically select the page margins and size.

Print options

This section of the dialog box displays additional printing options which control the layout of the printout and the number of pages you print.

Copies

To print multiple copies of your week-at-a-glance, type the number of copies in this field. You may want extra copies of your schedule for your boss or secretary, for example.

Months

This field specifies how many calendar months will be printed.   The default is 1, which prints just the current month.   You can place 2 in this field if you want to print this month and the following month, or 3 if you want to print this month and the following two months, etc.

Month-chart range

Specify the number of day columns/rows you would like to be included in the printout. The default is 30.

Time from/to

Specify the beginning and ending time for the chart display. Each hour in the range will appear as a column in the chart.

X-axis
You can specify whether you want the horizontal axis of the chart to display the day values or the time values. The y-axis will display the other of the two fields.

Y-axis
The vertical axis of the chart can be formatted in either ascending or descending order.

Chart started from
You can choose to have the month-chart printout start with *Today* (the current day) or with the *First day* of the current month.

Print
To print a blank month chart page, check the *Empty form* box. This may be useful for filling in by hand. The *Header* and *Footer* boxes specify whether or not those page elements will be printed. (See below for the Header/Footer setup.)

Include
These check boxes specify which event types will be printed.

Header/Footer Setup
To specify the settings for the Header and Footer of your printout:

- Press the **Header** button.

The top section of the dialog box displays the key fields which can be used in the header and footer. You can type any one of these fields, or text of your own, into any of the Header or Footer edit fields below. Or...

- Place the cursor in one of the Header/Footer edit fields;
- Click on one of the prompts in the top section of the dialog box.

The prompt will automatically be inserted at the cursor position.

Header/Footer
These sections of the dialog box allow you to set up the layout and content of the header and footer.

Print
If this box is checked, the header/footer will be included in the printout. Otherwise, it will not.

Line
Check this box to print a ruler line between the header/footer and the rest of the printout. This can add a nice touch to the appearance of your page.

From edge
This value specifies the distance (in inches) from the edge of the page at which the header/footer will be printed.

From page
This specifies the distance from the margin of your printout at which the header/footer

will be printed.

You can also specify the font type and size you wish to be used to print the header/footer. Optionally, you can specify the **Bold** or *Italic* styles.

- Press the **Ok** button when you are done setting up the Header/Footer.

Printing the month-chart

To print the month chart:

- Select the **File/Print/Month chart...** command;
- Use the mini-calendar control to select the data from which to start printing, **or...**
- Type the starting date in the *From* field;
- Select the number of months you wish to print, with month number 1 being the month containing the *From* date. (This field overrides the *Print options/months* field in the *Month-chart setup* dialog box described earlier in this topic.);
- Press **Ok** or **Enter**.

  Note: The print may take some time to format, but keep in mind that the Calendar uses a multi-tasking print engine, so you may use other programs while you are waiting for the print to complete.

Combo Folder

Setup
The Calendar can print just about all of your events and to-do list items on one page. The combo folder is a tri-fold, bi-fold or full page printout which can combine appointments, to-do lists, calendars, month charts, schedules and the week-at-a-glance.

To set up the combo folder print options:

- Select the **File/Print setup/Combo folder...** command.

Printer
The options in this section of the dialog box allow you to select the printer and adjust the printer setup.

Duplex
Some printers can print in duplex mode, which just means that they can print on both sides of one page. This option allows you to select the duplex mode of your printer.

In addition, the DeskTop Set allows you to 'emulate' duplex printing on printers that don't support duplex. It achieves this by printing the first page of your output and then pausing. It instructs you to take the first page of the printout, flip it over, and re-insert it into the printer's paper tray. It then prints the second page of the printout.

Font Options
The *Schedules/Appointments, Calendar* and *ToDo list* sections of the dialog box allow you to specify the font types and sizes that you wish to use to print the associated items. There are also options which control how each of these items will print.

The *Event row height* fields denote the height of the row that will be used to print the associated item. In the *Combo style setup* dialog box example above, the row height is set to 18 points. This leaves plenty of room to hand-write new events directly on the printout.

Margins and Page Size
Specify the layout of your page in this section of the dialog box. The *Left* and *Top* margin values (in inches) specify the positioning of the printout on the page. The *Width* and *Height* values specify the size of the printout (in inches).

Pre-defined
There are several pre-defined page setups which can be selected using this combo-box. These will automatically select the page margins and size.

Print Options
This section of the dialog box displays additional printing options which control the layout of the printout and the number of pages you print.

Copies
To print multiple copies of the combo folder, type the number of copies in this field. You

may want extra copies of your schedule for your boss or secretary, for example.

Days
This field specifies how many days worth of combo folders will be printed. The default is 1, which prints just the current day. For example, if you want to print a combo folder for each day of the entire upcoming week, place a 7 in this field.

Enable next/reverse page
The combo folder can print two pages at once for a total of up to 6 columns of information. This is particularly useful if you print in duplex mode (see earlier in this topic), as you will be able to neatly fit just about every piece of information about your schedule on one piece of paper.

Information on setting up the second page is discussed in a topic below.

Page layout

The page layout section describes what items get printed in the combo folder. You can print up to three items, in columns, on the first page of the folder. If all three columns are defined, the printout will be tri-fold. If only two columns are defined and one is set to *None*, the printout will be bi-fold. If only one column is defined, it will produce a full-page printout.

You can select any one of the following for each column of the folder:

Appointments - Lists all of your events for the specified day; events without times appear at the top of the list.

Appointments/To do - Lists all of your events in the top half of the column and all of your 'To do' items in the bottom half.

Calendar - Prints 12 mini month calendars for your reference.

Month chart - Prints the Month-at-a-glance information. This can also list the holidays for the current month.

Schedule - Prints an entire day's schedule, inserting your events in the proper time slots. The difference between the *Schedule* and *Appointments* is that the *Schedule* includes lines for each half-hour time period of the day, even if you don't have an event scheduled for that time; you can fill this in later by hand, for example.

To do list - Lists all of your 'To do' list items.

Week-at-a-glance - Prints the week at a glance.

Note: Please keep in mind that there is a limited amount of space in which to print the selected information. Some of the lists, particularly the 'To do' list, may be truncated. You can increase the amount of information in the lists by decreasing the font size used, and by minimizing the *Event row height* field.

Advance
The *Advance* fields allow you to specify how many days in advance (from the current day) the associated column will print. For example, to print a combo folder which contains all of your appointments for today, tomorrow and the following day, set each of the columns to *Appointments* and enter 0, 1 and 2 in the *Advance* fields for columns 1, 2 and 3, respectively.

Setting Up the Second Page

If you checked the *Enable next/reverse page* option, you can set up a second page for the combo folder. If you are printing in duplex mode, the second page is referred to as the *reverse* page. Otherwise, it is referred to as the *next* page.

To set up the second page:

- Press the **NextPage** or **Duplex** button.

The *Combo style - next page setup* (or *reverse side setup*) dialog box will appear. This dialog box is identical to the *Combo style setup* dialog box pictured above, and the second page is configured in the same manner as the first. Some of the fields are disabled, as this information has already been specified in the first page setup (the *Printer*, for example).

Header/Footer Setup

To specify the settings for the Header and Footer of your printout:

- Press the **Header** button.

The top section of the dialog box displays the key fields which can be used in the header and footer. You can type any one of these fields, or text of your own, into any of the Header or Footer edit fields below. Or...

- Place the cursor in one of the Header/Footer edit fields;
- Click on one of the prompts in the top section of the dialog box.

The prompt will automatically be inserted at the cursor position.

Header/Footer

These sections of the dialog box allow you to set up the layout and content of the header and footer.

Print

If this box is checked, the header/footer will be included in the printout. Otherwise, it will not.

Line

Check this box to print a ruler line between the header/footer and the rest of the printout. This can add a nice touch to the appearance of your page.

From edge

This value specifies the distance (in inches) from the edge of the page at which the header/footer will be printed.

From page

This specifies the distance from the margin of your printout at which the header/footer will be printed.

You can also specify the font type and size you wish to be used to print the header/footer. Optionally, you can specify the **Bold** or *Italic* styles.

- Press the **Ok** button when you are done setting up the Header/Footer.

Printing the combo folder

To print the combo folder:

- Select the **File/Print/combo folder...** command;

Print range
Use the *From date* and *Until date* fields to specify a range of days for which to print a combo folder. For example, you can print an entire week's worth of folders by specifying the appropriate dates in these fields.

- Use the mini-calendar control to select the date range, **or...**
- Type the appropriate starting and/or ending date in the *From date* or *Until date* fields

Select to do lists
Use this multi-selection list box to select the to do lists that you want to be included in the printout. The first item on the list, *CONSOLIDATED LIST* will include all of your to do lists. If your combo folder setup doesn't include a to do list printout, then this option has no effect.

Include
Use these options to determine which items from your to do lists will be included in the printout.

- Press the **Print** button or **Enter** when you are ready to print.

  Note: The print may take some time to format, but keep in mind that the Calendar uses a multi-tasking print engine, so you may use other programs while you are waiting for the print to finish.

Customizing the Calendar

You can change the Calendar's default parameters, such as the file extensions, password protection, alarm options, event templates, etc., to suit your needs.

Related Topics:

Calendar Options

Calendar Name

Event Templates

Setting Up Holidays

Creating & Opening Other Calendars

Calendar Options

Most of the Calendar's default settings can be modified in the *Setup Options* dialog box:

- Select the **File/Setup/Calendar...** command.

Alarm Options

These options define the actions that the Calendar will take when an alarm goes off.

Message

The *Alarm message* dialog box will be opened. This gives you the opportunity to snooze, cancel or reschedule the alarm.

Sound

If this box is checked, the alarm will make an audible sound using the tune specified in the *Event options* dialog box (**Edit/Options...** command).

On top

The Calendar window (or icon) will be forced into the "top" window position. In other words, it will be made visible over any other window you might happen to be in when the alarm goes off.

Maximize

If the Calendar is iconized, it will be restored when the alarm goes off.

Sound duration

If you don't want to annoy your colleagues with the "sounds of music," you may indicate here the maximum length of time that an unattended alarm will sound.

Access

To protect the Calendar's contents from unauthorized persons, enter a one-word password in the *Password* field. You may use any combination of letters, numbers and punctuation marks (no spaces allowed). Try to make the password hard to figure out. The Calendar encrypts your password when storing it so that it cannot be located by anyone inspecting the program files.

> **Note:** Write your password down and keep it in a safe place (preferably away from your computer, but in an easy to reach place). Remember where it is! If you forget your password, you will not be able to access the Calendar, and there is no way Okna can help you unless you send us your files.

When you open a Calendar that is password-protected, only the **Year** mode is available. All relevant menu commands are disabled. To unlock the calendar:

- Simply type the password while viewing the **Year** mode screen. The characters you type will not be displayed, and there is no window asking for the password (this is to further confuse potential pranksters).

The Calendar switches to **Day** mode as soon as the correct password has been entered. If you make a typing mistake while entering the password, press the **Enter** key and start typing again.

User Interface

Depending upon your comfort with the Calendar commands, you can switch between the Windows or Expert interface. When you change the user interface, the program must quit and be re-loaded to start the new interface. See **Chapter 1** for details on Expert vs. Windows user interfaces.

Month view time range

You may set the range of time displayed in the *Month-at-a-glance* window here. The *From* and *To* times can be set in either 12- or 24-hour format. Only whole hours are accepted. If you want a full 24-hour range, enter 0:00 in the *From* field and 24:00 in the *To* field.

Day scale time range

You may set the range of time displayed on the time ruler in the *Event* and *Alarm Message* dialog boxes here. The same rules apply as to the *Month view time range* (above).

Reminders scan range

The reminders scan range determines the starting and ending dates for the reminder scan. This range is calculated by subtracting the value in the *Grace* field from the current day and by adding the value in the *Advance* field to the current day. Reminders are then scanned within this date range. Keep in mind that this range is based on the current day, not today (unless today is selected as the current day).

Auto scan

The Calendar will automatically scan for reminders every time you start the program. If any reminders are found, the *Reminders* dialog box will be displayed.

Once a day

The auto scan will be carried out only once every day. Enabling this option may save you some time when starting the Calendar for the second or third time in a day, but with Windows 3.1, you should be able to keep the Calendar running all day long.

Extensions

These are the filename extensions that the Calendar uses when creating or listing files. You may want to change these extensions to suit your particular needs.

> **Note:** It is best to change these extensions when you first create or use a calendar. If you change them for a calendar that has already been in use, you will have to also change the filenames of any existing files accordingly.

Data file

This refers to the file which is used to store the event information. The default extension is "CAL."

Note file

The *Note file* stores the free-hand text that you can attach to each event in the Calendar. The default extension is "CNT."

To do file

This file is used to store the *To do* list information. The default extension is "TDO."

To do notes
These files are used to store the notes that you attach to *To do* list items.   The default extension is "TDN."

Sort
Check the *On opening* box to have your calendar events automatically sorted every time you start the program.

- Press the **Ok** button to save your changes and close the dialog box, or the **Cancel** button to quit without saving changes.

Calendar Name

To assign an owner and a name to the current calendar:

- Select the **File/Setup/Calendar name...** command;
- Enter an *Owner name* and a *Calendar name* in the fields provided;
- Set the *Access options* as desired;
- Press **Ok** or **Enter**.

The calendar name will be used in the caption of the DeskTop Set Calendar winow so that you know which calendar you are using. It will also be used in the *Available calendars* dialog box (**Show/Calendars...** command) so that you can easily open the calendar you need.

The calendar owner name is used in the *Group Schedule* window (**Show/Group schedule...** command) to differentiate different people's calendars.

Event Templates

Event templates speed up and simplify the use of the Calendar's numerous options. Templates contain an event description, color codes, miscellaneous options, information about event importance, the type of reminder and alarm, and the frequency.

When you use an event template to set up an event, all you have to do is specify the event date and time and you have a completed event.

See the **Event Templates** section earlier in this chapter for complete instructions on setting up event templates.

Setting Up Holidays
The DeskTop Set Calendar has a very flexible holiday scheduling system. It comes pre-configured with the standard national Holidays; you can edit/delete any of these, and add any number of your own holidays. These holidays support Windows' international date conventions.

To edit the Calendar's holidays:

- Select the **File/Setup/Holidays...** command. The *Setup Calendar Holidays* dialog box appears.

Month
The check boxes in this section indicate the month in which the holiday occurs.

Week Number
These items represent the week number, relative to the start of the month, in which the holiday occurs. For example, Mothers day is the *Second* Sunday in May.

Day of week
These check boxes indicate the day of the week on which the holiday occurs. For example, Mothers day is the second *Sunday* in May.

Day Selection Grid
The blue day selection grid displays the day of the month on which the holiday occurs. The "Last" box is used to automatically select the last day of the selected month; it will automatically adjust to the varying number of days in different months.

Color Bars
Click on one of these colored bars to choose a color for the currently selected holiday. Whenever that holiday is displayed on the calendar, it will be in the selected color.

Holiday
The edit field in the top of this section of the dialog box shows the text used to describe the holiday. There are several other options in this section:

Type
This list box displays the type of the currently selected holiday. You can specify which type of holidays are displayed in the Calendar (see **Selecting Holidays**below for details).

Duration
This specifies the duration of the holiday; some holidays, especially religious, may span over several days.

Day off
This option indicates that you don't work on the holiday. You may want to modify this

option for some of the pre-set holidays. The *Day off* status of any particular day is relevant when recurring events are scheduled, as days off can be excluded from the schedule.

Note: Select a few of the pre-set holidays from the list to see how they are configured. See the difference between New Year's Day and Mother's Day, for example.

Button Functions

There are several buttons along the bottom of the dialog box which function as follows:

Help
Opens the Calendar's on-line help to this topic.

Test
Opens a mini-calendar window which displays the occurrence of the selected holiday for the current year.

Reset
Resets the Calendar's holidays to the pre-set holidays. This will remove any holidays that you have added and revert any changes you made to the pre-set holidays. Use this function with care.

Delete
Deletes the currently selected holiday.

Add
Adds a new holiday to the list. See **Adding New Holidays** below for more information.

Ok
Closes the *Setup Calendar Holidays* dialog box and saves any changes/additions you made.

Cancel
Closes the *Setup Calendar Holidays* dialog box without saving any changes.

Adding New Holidays

To add a new holiday to the DeskTop Set Calendar:

- Select the **File/Setup/Holidays...** command to open the *Setup Calendar Holidays* dialog box.
- Press the **Add** button to open the *Add Holiday* dialog box.
- Enter the holiday's name in the edit field provided.
- Select the holiday *Type* and *Duration*, and check the *Day off* box if appropriate.
- Press the **Add** button.
- At this point you will be returned to the *Setup Calendar Holidays* dialog box. The holiday you have just added will be selected. Use the date options to specify the date for the holiday. These options are described fully in the **Setting Up Holidays** section above.
- Press the **Test** button to verify the date of your new holiday.
- Press the **Ok** button to save the holiday, or add/edit another.

Example

To add Flag Day (a very popular holiday) to your calendar:

- Select the **File/Setup/Holidays...** command to open the *Setup Calendar Holidays* dialog box.
- Press the **Add** button to open the *Add Holiday* dialog box.
- Enter "Flag Day" in the edit field provided.
- Select *National* holiday type, specify a 1-day duration, and un-check the *Day off* box.
- Press the **Add** button. You will be returned to the *Setup Calendar Holidays* dialog box.
- In the *Month* section, select *June*.
- Click on '14' in the *Day selection grid*.
- Select a holiday color, if desired.
- Press the **Test** button to verify the date of your new holiday (June 14th).
- Press the **Ok** button to save the holiday.

Selecting Holidays

Use the *Show Holidays* dialog box to choose which types of holidays are displayed on your calendar. To open this dialog box:

- Select the **File/Setup/Enable Holidays...** command.

Simply check the boxes of the holiday types you would like to display. Holiday types for each of the Calendar's holidays can be viewed/edited in the *Setup Calendar Holidays* dialog box. See the **Setting Up Holidays** section above for details.

Copying Holidays

If you have already set up your holidays in a DeskTop Set Calendar, and you would like to copy them into another existing or newly created calendar:

- Select the **File/Setup/Copy holidays...** command to open a *File selection* dialog box;
- Select the file from which you want to copy the holiday setup;
- Press **OK** or **Enter**.

The holiday setup will be copied from the selected file into the currently loaded calendar.

Creating & Opening Other Calendars

The DeskTop Calendar program allows you to have as many independent calendars as you like. You could have one calendar for business, and one for personal affairs, for instance. Each calendar is stored in a calendar file (*filename*.CAL).

Creating New Calendars

To create a new file, and hence a new calendar:

- Select the **File/Setup/New calendar...** command.

The *Create new calendar* dialog box will open. This dialog is a version of the standard Windows *Select file* dialog.

- In the *File name* field, type in the name of a new calendar file. The file name must follow regular DOS file naming conventions, and should have a ".CAL" extension.
- Press the **OK** button.

The new calendar will be created using the options from the currently open calendar. Once the calendar is created, you can change its options of any of your other calendars.

Opening Calendars

To display/open other calendar files:

- Select the **Show/Calendars...** command.
- Double-click on one of the listed calendars, or select a calendar and press **Open** or **Enter**.

Alternatively, you can use the *Open calendar file* dialog box to open other calendar files:

- Select the **File/Open...** command.
- Select the file name of the desired calendar, or type the name in the *File* field.
- Double-click on the file name, press the **Enter** key, or press the **OK** button to open the selected file.

The specified calendar will be opened.

Utilities

The DeskTop Calendar has several utilities to help you manage your calendar data.

Related Topics:

Export

Transfer

Downloading to the Wizard & B.O.S.S.

Export

You can export your event data to several different popular formats.   This is helpful if you want to use your data in a spreadsheet, database, document or some other type of application.

- Select the **File/Utilities/Export...** command.

The *Export* dialog box provides all the options for you to specify what gets exported and how.

Export events

This section contains the event types to be exported.   Check all the types that you wish to be exported.   The event types for any particular event are specified in the *Event options* dialog box (**Edit/Options...** command).

Export fields

These are the fields from each event that you wish to be exported.   The *Date*, *Time from*, *Time to* and *Description* options will export the associated fields just as you see them on the **Day** mode of the calendar.   The *Total time* option exports the duration of each event, and the *Nature* option will export whether an event is "Business" or "Personal."

Check any of the fields that you want to be exported.

Range

These fields allow you to specify the date range from which events will be exported.   In this way you can limit the part of your calendar that gets written to the export file.   The default range is the current month.

File

This section allows you to specify the export file name and format.

Once you have selected all the desired options:

- Press the **Export** button to begin exporting your events to the specified file.

Once the export is complete, a message box will pop up and display the number of events exported.

Setup Windows desktop poster calendar

The Calendar program can display a "wallpaper" calendar poster on Windows desktop. The Windows desktop is visible when all running programs are minimized (in the iconic state) and it is not obscured or replaced by any other Windows shell (such as Norton Desktop, NewWave, etc).

The desktop poster calendar is a very handy navigation and reference aid for the Calendar program. The poster can display from one to sixty four days worth of calendar events. Every aspect of the calendar poster is customizable to allow you to achieve the most optimal display quality and to account for the specifics of your system, such as color, size of the monitor, etc.

The poster calendar is completely functional. With it, you can:

Scroll calendar in either direction;

Open Calendar program in any desired mode;

Open Week-at-a-glance and Month Chart windows;

Select a day in the Calendar (double-click);

Review an event's details (click);

Advance directly to any day with the help of the Navigator tool (right mouse click).

The desktop poster calendar is not displayed when the calendar program is started for the very first time. To display on or remove the calendar poster from the Windows desktop:

- Select the **File/Setup/Desktop Calendar...** command. The *Setup Windows desktop calendar* dialog box will open.
- Click the **Show** button to display the poster. To remove the calendar poster, click the **Hide** button.

The desktop poster calendar is only displayed when the Calendar program is running. It will be displayed as soon as you start the program. Quiting the Calendar program will also remove the desktop calendar poster.

Unless Windows desktop color is light-gray, the icons that are displayed over the calendar poster will be highlighted using the pattern and color of your desktop. To accomplish the visual consistency, please use the **Control Panel's** *Colors* section to set the desktop's color to the light-gray, and use the *Desktop* section to remove any desktop wallpaper or pattern.

The optimize the usefulness of the desktop calendar poster on your particular system, select the **File/Setup/Desktop Calendar...** command. The following options are available:

Desktop Options

Columns

The desktop calendar poster can display from one to eight columns. You should determined the maximum acceptable number of columns based on the amount of the event description text that can be reasonably fit into a day cell. It may vary based on the size and resolution of your monitor. The default number of columns is four.

Rows
The desktop calendar poster can display from one to eight horizontal rows. You should determined the maximum acceptable number of rows based on the number of events that can be reasonably displayed in the resulting day's cell. It may vary based on the size and resolution of your monitor. The default number of rows is four.

Grace
The *Grace* value determines the number of days displayed on the poster before the today's date. It can be set from zero to the whatever number you fancy. The today's date cell caption is black. The *Grace* option is used when the poster is displayed for the first time.

Margins

Left, Right, Top, Bottom
To display the desktop calendar poster in the different location on the screen, or to give more room to the programs' icons, you may change the margins in this section.

Show Events

Depending on its size, the desktop poster day cell may not be able to display all events that are entered for that particular date. If you wish to fine-tune the type of events that are displayed, you may either include or exclude certain classes of events. Please review the *Event Options* and *Week-at-a-glance Setup* sections for more details.

Display options

Time from, Time to
Enables the display of events *Time to* and *Time from* information. These options are used to maximize the amount of information that can fit into the day cell.

White Background
When selected, the background of the days' cells is white.

Use event colors
When un-selected, all events are displayed using black color. Use this option to improve the display legibility.

Enable word-wrap
When this option is un-selected, the event text is printed on one line. To review the complete event description, click on the event text.

Show control bar
When un-selected, control bar is removed.

Exclude events

Without times
When selected, the events that are entered without *To* or *From time* are not displayed.

Without alarms
When selected, the events without the alarm field set on are not displayed.

Transfer

The Calendar Transfer utility is intended to transfer the contents of one calendar file to another. You may use this function when:

> You wish to archive the current calendar and transfer all future events into a new file;
>
> The current calendar has grown-considerably in size and you would like to begin a new file;
>
> The current file has reached its boundaries and you need to begin a new file that will contain all recurring and floating events from the previous file. (at present DeskTop Set calendar files can store events for five (5) years beyond their creation year.
>
> The calendar file is damaged and you would like to transfer events to a new file.

The transfer utility will transfer all events and notes within the indicated range, including month's notes, holiday symbols, floating and recurring events. You must create a destination (**File/Setup/New Calendar...**) file before beginning the transfer.

To execute the file transfer:

- Select **File/Utilities/Transfer...** command. The Transfer dialog box will show default *From* and *To* dates. The *From* date shows a starting date of current calendar, the *To* date shows the ending date of current calendar.
- Select transfer dates either by using the keyboard or by selecting a date from the calendar control.

You will not be able to transfer events to a calendar that was created in a year greater than the last permissible year in the current calendar.

Similarly, if you select a range in the current calendar that begins with the year less than the creation year of destination calendar, the transfer will begin from the year the destination calendar was created.

If you need to create a destination calendar which begins in an earlier year, use Control Panel to set your computer's current year to the desired year. Create a new calendar file and set your computer back to the proper date.

Note All events in destination calendar will be overwritten with the transferred events. The mouse and keyboard are disabled during the transfer. The transfer status is reflected on the range selection calendar.

Importing Calendar files

The Calendar program imports the following four types of files:

- Lotus Organizer import file;
- Microsoft Scheduler+ import file;
- Windows Calendar file;
- Generic CSV (comma-separated values) file;

Because the internal structures of these data files are so different from the DeskTop Set's format, certain aspects of the calendars' information, such as the data about the recurring events (although the events themselves are imported), colors, sounds, meeting participants, etc. can't be imported.

To import a file:

- Prepare an intermediary import file (except when importing Windows Calendar)
- Select the **File/Utilities/Import** command to open the *Import Files* dialog box;
- Select a desired import format in the **Source Format** combo box;
- Select the starting and ending dates of the import range;
- Click the **File** button and select the file you wish to import;
- Click the **Import** button to complete the import.

To prepare the *Lotus Organizer's* file for import you have to first export the information from the program:

- Open the Organizer's *Calendar* section;
- Select the **File/Export** Command;
- Select the Export format **ASCII (CSV);**
- Enter the export file name with the extension .**CSV**
- Click the **Ok** button to complete the export.

To prepare the *Microsoft's Scheduler+* file for import you have to first export the information from the program:

- Select the **File/Export Appointments** Command;
- Select the export format **Text;**
- Select the desired export range;
- Check-off the **Include Daily Notes** button;
- Click the **Ok** button to complete the export.

To import the information from any other source, you must prepare the CSV file (referred above to as generic) in the following format:

"Event Date","Time from","Time to","Event description","Alarm time"
"12/15/92","12:00 PM","1:00 PM","Meeting with Okna","11:45 pm"

The header isn't necessary and it appears above for the illustration only. The records must be separated by the Carriage Return/Line Feed characters. The *Time* and *Date* fields can be formatted in accordance with the Windows' international settings. The *Alarm* time can be substituted with any value ("1" , for example) to set the alarm on the event's starting time.

Downloading to the Wizard & B.O.S.S.

The Calendar supports transfer of itinerary data to the Sharp Wizard and Casio B.O.S.S. electronic organizers. In order to communicate with the organizer, you must have:

- A PC interface cable;
- An available communications port on your PC.

To execute the transfer:

- Select the **File/Utilities/Sharp Wizard...** or **File/Utilities/Casio B.O.S.S...** command to display the *Events scheduling* dialog box;
- In the *Events range* section of the dialog box, click in the *From* date field and use the mini-calendar window to specify the starting date for event transfer;
- Repeat for the *To* field;
- Check the types of events that you wish to be transferred;
- ***Wizard*** - Set the *Communications*, *Transfer target*, and *Mode* of transfer;
  B.O.S.S. - Set the *Communications* settings (check your B.O.S.S. settings first);
- Set the Wizard/B.O.S.S. into receive mode (see the unit's documentation);
- Press the **Ok** button to begin transfer.

  Note: The Casio B.O.S.S. transfer does not work reliably at 9600 baud. Please be sure to set the baud rate to 4800. Casio also advises users to replace older PC-Link calbles with new ones (with gold-plated connector).

Menu Reference

The following section briefly describes the main Calendar menu commands as they appear while in the **Day** mode (the mode you will use most).

Related Topics:

File Menu

Edit Menu

Status Menu

Dial Menu

Show Menu

File Menu

The **File** menu contains the commands for managing your calendar files, printing, setting the program options and accessing the utilities.

Open...

Opens the *Select file* dialog box which you can use to create or open calendar files. See the **Customizing the Calendar** section.

Find...

Opens the *Phonetic Search* dialog box where you can search the current calendar for specific text. Refer to the **Finding & Viewing Events** section for details.

Print

The **Print** sub menu contains commands for setting up and printing every type of output available from the DeskTop Calendar. Depending on the calendar's mode, the sub menu contains different commands. See the **Printing the Calendar** section for more details.

Setup

The **Setup...** command opens a sub menu that contains commands for setting up the Calendar options and event templates. See the **Customizing the Calendar** section.

Utilities

Opens a sub menu that contains commands for transfering and exporting your calendar files. See the **Utilities** section of this chapter for details.

Copyright...

Opens the *Copyright* window, showing the DeskTop Calendar version number and other information about the application.

Click the mouse button or press the **Enter** key to close the *Copyright* window.

Exit

Closes the Calendar program. You can also execute this command by pressing the **Alt-F4** key on your keyboard.

Edit Menu

The **Edit** menu helps you manage calendar entries when you are in the **Day** mode.

Day...

This command opens the *Edit day* dialog box to allow you to annotate day cells in the **Month** mode, and to set up day types, highlights and holidays. See the **Entering Events** section for details.

Note...

This command opens the *Note* window to allow you to enter notes about the current event. See the **Entering Events** section for details.

Event...

Opens the *Event* dialog box where you can set up an event's characteristics. This is the equivalent of double-clicking the event text field. See the **Entering Events** section for details.

Options...

Opens the *Event options* dialog box where you specify an event's options. This is the equivalent of double-clicking the event's time field. See the **Entering Events** section for details.

Recurring...

Opens the *Recurring submenu*, where you specify how & when an event will recur. See the **Entering Events** section for details.

Sort

The **Sort** command sorts the day's events on the *From* time field. Events without time information will appear at the bottom of the schedule.

Insert

Inserts a blank event line above the currently selected line. This command is not available if all the event lines for the day are full.

Cut

Removes the currently selected line (including alarm information) and places it in the internal clipboard so that it can be pasted elsewhere.

Copy

Copies the currently selected line (including alarm information) into the internal clipboard without removing it. It can later be pasted elsewhere.

Paste

Places a previously **Cut** or **Copied** event from the clipboard onto the currently selected line, deleting whatever was previously on the line (if anything).

> **Note:** The Copy, Cut and Paste commands on the Edit menu are internal only and do not place or remove any information to/from the Windows Clipboard.

Clear

Removes the currently selected line without placing it in the clipboard. The information is gone 'forever.' This is useful if you have something in the clipboard that you don't want to be over-written.

Status Menu

The **Status** menu allows you to modify the status of a line, as well as to set or clear an alarm for the line. The first three items on the menu set the status for the current event line. These commands are the equivalent of clicking the mouse in the status field for the event. The last four are for setting, canceling or snoozing an alarm. These are equivalent to clicking the mouse in the alarm status field.

Pending

This is the default event status. This is represented in the status column by a colored square. The color used is that chosen in the *Event options* dialog box.

Urgent

Emphasizes the importance of the event, and is exactly the same as designating the event as a *Key event* in the *Event options* dialog box. The red flag is displayed in the status field of urgent/key events.

Completed

Assign this status to an event that you have completed, but that you don't want to remove from the calendar. A check mark is displayed in the status field of competed events.

Set alarm

Turns on an alarm for the selected line and displays the bell symbol in the Alarm field. The alarm time will be set to the event's starting time, regardless of any previous alarm times for this event.

Make call

This is the same as setting an alarm (above command), but it displays a telephone symbol instead of a bell. This simply reminds you to call someone.

Cancel alarm/call

Cancels any alarm for the event and clears either the bell or the telephone symbol from the alarm field.

Snooze

This command opens the *Alarm message* dialog box that allows you to cancel, reschedule or 'snooze' (postpone) a sounding alarm. This command is only available when the currently selected event has an alarm that is presently going off. (The *Alarm message* dialog box opens automatically upon alarm when the *Message* option is enabled in the *Setup Options* dialog box.)

Dial Menu

The Calendar's **Dial** menu is similar to the Phone Book's **Dial** menu.

[Contact]

If the select event is linked to a Phone Book entry, the first item in the **Dial** menu displays the page name of that entry. Selecting this item will open a *View* window for the entry which is similar to the Phone Book's *View* window.

[Numbers]

The next several items in the menu display all of the available phone numbers for the linked entry. Selecting any of these numbers will launch or activate the DeskTop Dialer which will automatically dial the number.

Phone Book...

Launches or activates the DeskTop Phone Book program.

Dialer...

Launches or activates the DeskTop Dialer program.

Link to [contact]

Links the currently selected Calendar event to the currently selected Phone Book entry. The Phone Book program must be running for this command to be available.

Show Menu

The show menu provides several ways to quickly access various facets of your calendar.

Today

This switches the calendar to the **Day** mode for today's date.

Chart...

Opens the *Month-at-a-glance* window.   See **Viewing Events** in the **Finding & Viewing Events** section of this chapter.

Reminders...

Scans the calendar file for reminders and opens the *Reminders* dialog box.   See **Finding an Event** in the **Finding & Viewing Events** section of this chapter.

Navigator...

Opens the *Navigator* mini-calendar window.   See **Finding a Date** in the **Finding & Viewing Events** section of this chapter.

Year...

Opens a dialog box that allows you to display any other year:

- Enter the desired year, then click **Ok.**

About the Calculator

The key features of the Calculator are:

- Looks and functions like a regular accounting/printing desktop calculator.
- Can save and recall tapes from previous sessions.
- Prints transactions.
- Remembers a user-defined number of entries that are available the next time you use the calculator.
- Labels transactions with the date and time.
- Can be controlled with the keyboard or mouse.
- Entries and transactions can be revised, copied, deleted or inserted.
- Entries on the tape can be annotated for easy reference.
- The tape window can be positioned on the top or side of the calculator.
- Tapes can be transferred via the Clipboard to other Windows applications such as word processors and spreadsheets.

To open the Calculator:

◆ Double-click the **Calculator** icon in the Program Manager, or...

◆ Double-click the **TAPECALC.EXE** file in the File Manager.

Note: The term "current transaction" used in this chapter indicates any series of entries on the tape up to and including the *TOTAL* line. To make a transaction current, scroll the tape until any line in the transaction appears in the entry window.

The Calculator can be controlled entirely from the keyboard. You can use the numeric keypad on your keyboard as the equivalent of the numeric and character buttons on the calculator. The following table displays the keyboard equivalents of the other calculator buttons:

Related Topics:

Calculator Keyboard Equivalents

Tape Control

Modifying Transactions

Annotating Entries

Calculator Keyboard Equivalents

Button	Keyboard	Function
MT	F1	Displays the total (contents) of the memory register
MS	F2	Stores the current entry in the memory register
M-	F3	Subtracts the current entry from the number in the memory register
M+	F4	Adds the current entry to the number in the memory register
T	Enter	Totals the current transaction
S	Shift-Enter	Subtotals the current transaction
C	Esc	Clears the current entry (entry mode)
CE	Esc	Clears the current transaction (correction mode)
[No equivalent]	Shift-Del	Deletes the current entry (correction mode)
[No equivalent]	Shift-Ins	Inserts a new entry at the current cursor location (correction mode)
[No equivalent]	Backspace	Correct typing errors

Note: Except for Backspace, functions with no button equivalents can be executed using menu commands.

Tape Control

The calculator tape can be controlled using the scroll bar on it's right side, or with the following keys:

Keyboard Command	Function
Up Arrow	Scrolls the tape up one entry
Down Arrow	Scrolls the tape down one entry
PgUp	Scrolls the tape up one transaction
PgDn	Scrolls the tape down one transaction
Home	Moves to the beginning (top) of the tape
End	Moves to the end (bottom) of the tape

Modifying Transactions

You can use the tape display to modify an existing transaction to see a new result. This is useful for asking "What if?" questions, such as "What if that account were budgeted $10,000 less?" or "What if I were to save $100 more each month?"

To modify an existing transaction,

- Scroll the tape until the desired entry is visible in the display area.
- Enter the new number and operator key (+, -, etc.)
- Click the **T** (total) button, or press **Enter** to see the new result.

To insert a new entry into the transaction after (below) the current line:

- Press the **Shift-Ins** key. A new line with a value of 0 (zero) will be inserted.

To remove the line currently in the display:

- Press the **Shift-Del** key.

Annotating Entries

To add a comment or note to an entry, such as "Taxi fare" or "Car insurance," just type the comment on the keyboard. It will appear in the left half of the calculator window.

The Calculator automatically differentiates between letter and number keys, routing the numbers to the transaction area and the letters to the comment area. If you want to place numbers in your comments or notes, hold the control key down while pressing the numbers.

Commands

In Windows mode, the Calculator's commands are available from menus at the top of the window.
In Expert mode, the commands are available either from the expert menus, or by pressing the expert buttons at the bottom of the Calculator's keypad. While in expert mode, the **Main** menu can be opened by clicking the right-hand mouse button over any non-active (non-button) area of the keypad.

Related Topics:

File Menu

Edit Menu

Expert Mode Button Controls

File Menu

The **File** menu has commands to save, open and print tapes, as well as commands to tailor the calculator's appearance.

Open tape...

Use this to open previously saved tape files. This command opens a *Select file* dialog box which displays all tape (.TAP) files. At least one file, **LAST.TAP**, is displayed. This file is used to store your transactions when you close the program, and is re-loaded when you start the program again.

Save tape as...

Opens a dialog box that allows you to save the current tape in a file.

Print transaction

Prints the current transaction (if a printer is connected).

Tape off

Closes the calculator tape window. Use this option if you don't need a running record of your transactions. The tape is continually updated even when it is closed. You can open it at any time to see your past transactions. When the tape is closed, this command changes to **Tape on**.

Keyboard off

Removes the button pad from the Calculator window. If you are strictly using your PC's keyboard, you can save screen space by turning the calculator buttons off. When the keyboard is off, this command changes to **Keyboard on** so you can turn the buttons back on if desired.

Setup...

Opens the *Calculator Setup* dialog box with which you can customize certain aspects of the Calculator. See the **Customizing the Calculator** section of this chapter.

Copyright...

Opens the DeskTop Set *Copyright* window. Use this to find the version number and other information about Okna. Click the mouse button or press the **Enter** key to close this window.

Quit

Closes the Calculator program. The program may be closed at any time; the tape will automatically be saved if you have selected this feature in the *Calculator Setup* dialog box.

Edit Menu

The **Edit** menu provides commands to help you modify the tape. The expert mode **Edit** menu can be opened by clicking the right mouse button over the Calculator's display or by pressing the **Alt-E** key. It is also available as a sub-menu of the **Main** expert menu.

Copy as text

Copies the current transaction to the Clipboard. The copied transaction can then be placed in a word processing or other text document. This is equivalent to the **Copy** button in the expert mode.

Copy as values

Copies the current transaction to the Clipboard in a format suitable for spreadsheets. In expert mode, you can also hold the **Shift** key while pressing the **Copy** button to issue this command.

Copy total (value)

Copies the result (total) of the current transaction into an internal clipboard. The stored value is shown on the command line in parentheses.

Insert Entry

Inserts a new entry into the current transaction below the current line.

Delete Entry

Deletes the entry from the current transaction.

Paste total (value)

Pastes the total from the last transaction into the current transaction.

Expert Mode Button Controls

The button controls are only available while in expert mode, and appear along the bottom of the calculator screen. They control the non-mathematical operations of the program, such as printing and saving. These commands are equivalent to menu commands you could execute if you were in Windows mode.

Setup

Opens the *Calculator Setup* dialog box. The dialog box can also be opened by selecting the **File/Setup...** command. See **Customizing the Calculator** for details.

Tape

Opens and closes the tape window.

Print

Prints the current transaction on the default printer.

Copy

Copies the current transaction to the Windows Clipboard. The copy can then be pasted into other Windows programs.

Save

Opens a Windows file selection dialog box that allows you to save a copy of the current tape.

Open

Opens a Windows file selection dialog box that displays previously saved tape files. The list should show at least one file - **LAST.TAP** - in which the transactions are automatically saved when you exit the program.

Icon

Minimizes (iconizes) the Calculator window.

Customizing the Calculator

Use the *Calculator Setup* dialog box to customize the DeskTop Calculator options.

- Select the **File/Setup...** command.

The *Calculator Setup* dialog box is 'interactive,' which means that as you make changes to the options, the Calculator window immediately reflects these changes.

Tape Location

The calculator tape can be placed on the top or side of the calculator window. The top is best if you want to read annotated entries, while the side is best if you only want to see the transaction's numbers.

Decimal Points

Use these options to specify the number of decimal points you want displayed.

Entry mode

The entry modes specify how the decimal portion of numbers will be entered and displayed.

+

All numbers can be entered without having to type a decimal point. The last *2* numbers entered will be the decimal portion of the entry.

This is similar to entering numbers into an automatic teller machine. For example, to enter the number "1501.89", you simply type "150189". The Calculator automatically inserts a decimal place before the "89".

2

In this mode, all numbers that you enter will automatically have ".00" added to them. (The actual number of zeroes depends on your selection in the *Decimal Points* option.) If you do enter a decimal point, the number will be displayed with the digits you typed after the decimal.

For example, to enter the number "1501.00", you only need to type "1501". The Calculator automatically adds the ".00" to the end of the number. However, to enter the number "1501.89", you must explicitly enter it as "1501.89", including the decimal point.

F

In this mode, no automatic formatting will be applied to the numbers you enter. You must enter all decimal points and trailing zeroes.

Misc. options

You can further customize the calculator with the following options:

Highlight on

Select this option if you want the Calculator keys to flash as the corresponding keyboard keys are pressed. This gives you visual confirmation that you pressed the right key.

Show last session

Causes the Calculator to automatically load and display your last session's tape when you launch the program. For this option to work, you must have the *Save Session* option selected too.

Show date and time
Each new transaction will be stamped with the current date and time.

Save session
Select this option if you want the Calculator to save the last *N* number of entries from the tape when you exit the program. (The number of entries, *N*, is specified in the *Save entries* field.)

Save entries
The number of entries saved when you exit the program. The default is 100.

Default ext
This three-character filename extension will be used to name saved tape files. The default extension is "TAP".

Mode
Like all DeskTop set programs, the Calculator can be used in Windows or Expert mode (see **Chapter 1** for details on Windows vs. Expert mode).

Once you change the interface mode, the program will close. You must re-start it to see the changes.

Appendix A: Phone Book Field Lengths

The following is a list of all the major Phone Book information fields and their lengths. The fields are listed alphabetically using the labels by which they are most commonly referred to in dialog boxes. When determining field lengths, all characters count towards the total, including hyphens, spaces and tabs.

To save you some time hunting through the table; all phone numbers can have a maximum length of 14 characters.

Entry	Maximum Length
Account	19
Additional Address (Business)	49
Additional Address (Home)	49
Assistant [Phone]	14
Assistant's Extension	7
Assistant's Name	39
Business Name	44
Business Telephone	14
Car [Phone]	14
City, State, Zip Code (Business)	49
City, State, Zip Code (Home)	49
Country	39
Country Code	9
Custom Field (Any)	39
Date of Birth	8
Date of Birth (Spouse)	8
Department	39
Department Number	14
E-mail Access [Phone]	14
E-mail Address	39
E-mail Name	19
Employee Number	14
Extension	7
Fax [Phone]	14

First Name	24
Home [Phone]	14
Last Name	34
Location	29
Middle Initial	5
Notes (Business)	299
Notes (Home)	299
Page [Phone]	14
Page Name	29
Pager [Phone]	14
Pager Account #	11
Position	39
Salutation (Business)	39
Salutation (Home)	39
Spouse's Name	24
Street, Suite, P.O.Box (Business)	49
Street, Suite, P.O.Box (Home)	49
Title	14
Toll-free [Phone]	14
Toll-free [Phone]	14
Zip Code (Business)	10
Zip Code (Home)	10

Appendix B: Merge Keywords

This appendix lists all the available keywords, their location within the Phone Book and a short description of each. Locations refer to the following:

- Business Record - The *Business Information* dialog box (**Edit/Business...** command)
- Home Record - The *Residence Information* dialog box (**Edit/Residence...** command)
- Misc. Dialog - The *Miscellaneous Information* dialog box (**Edit/Miscellaneous...** command)
- System - Information is provided by the program and is not directly modifiable by the user
- Phone Book page - The page of the phone book on which the entry is listed

Many of the fields, such as phone numbers and name information, can be found in several locations. This listing displays the most commonly accessed location. Keep in mind that many of your records won't have information in all of these fields.

<? *Query Text*>	System - This merge field is used to pause during a merge and prompt for user input (see **Printing with the Phone Book, Letters & Mail Merge,** *Input Prompt* in the Phone Book chapter for details)
<ACCOUNT>	Business Record - The entry's account number
<ADDR ONE>	Business Record - Street, suite and P.O. Box of the entry's company
<ADDR THREE>	Business Record - Additional business address information
<ADDR TWO>	Business Record - Business city, state and zip code
<ASST EXT>	Misc. Dialog - The phone extension of the entry's assistant
<ASST NAME>	Misc. Dialog - The name of the entry's assistant
<ASST PHONE>	Misc. Dialog - The phone number of the entry's assistant
<BILLING RATE>	Misc. Dialog - The rate at which the entry bills you or you bill the entry
<BIRTH DATE>	Misc. Dialog - Entry's date of birth
<BUS PHONE>	Business Record - Entry's business telephone number
<CAR PHONE>	Business/Home Record - Entry's car telephone number
<COMPANY>	Business Record - Name of entry's company
<COUNTER>	System - Keeps running count of records processed; use in merge to consecutively number records
<COUNTRY>	Business/Home Record - Entry's country
<DATE>	System - The current date
<DEPARTMENT>	Business Record - The department in which the entry works
<DPT NO>	Misc. Dialog - The number of the department in which the entry works
<EMAIL NAME>	Misc. Dialog - The name or ID used to refer to the entry on their E-mail system
<EMAIL PHONE>	Misc. Dialog - The telephone number used to access the entry's E-mail system
<EMAIL ROUTE>	Misc. Dialog - Routing address of the user on E-mail system
<EMPL NO>	Misc. Dialog - The entry's employee number
<EXT>	Business Record - The entry's phone extension

<FAX PHONE>	Business/Home Record - The entry's fax number
<FILE>	System - The name of the phone book address file in which the entry is stored (i.e. "WHITE.ADR")
<FIRST NAME>	Business/Home Record - The entry's first name
<FREE PHONE>	Misc. Dialog - The entry's toll-free telephone number
<HOME ADDR1>	Home Record - The entry's home street/P.O. Box information
<HOME ADDR2>	Home Record - The entry's city, state and zip code
<HOME ADDR3>	Home Record - Additional home address information
<HOME NOTE>	Home Record - Personal notes about the entry
<HOME SALUT>	Home Record - Salutation used when writing personal correspondence to the entry
<HOME ZIP>	Home Record - The entry's home zip code
<HOME PHONE>	Home/Business Record - The entry's home telephone number
<INITIAL>	Business/Home Record - The entry's middle initial
<INTL CODE>	Business Record - Entry's international telephone code
<LAST NAME>	Business/Home Record - Entry's last name
<LETTER>	System - The phone book page letter under which the entry is listed
<LOCATION>	Business Record - The business location at which the entry works, for example, "London branch office"
<NOTE>	Business Record - business related notes about the entry
<PAGE NAME>	Phone Book page - The entry's name as it appears on the phone book page
<PAGE PHONE>	Phone Book page - The entry's phone number that is listed on the phone book page
<PAGE>	System - The number of the page being printed, for example, if you were printing a 2 page letter, this field would be "1" for the first page and "2" for the second page
<PAGER ACCT>	Misc. Dialog - The entry's pager account number
<PAGER PHONE>	Misc. Dialog - The entry's pager phone number
<POSITION>	Business Record - The entry's position in his/her company, i.e. "Vice President" or "Gofer"
<RECORD NO>	System - The entry's database record number; This number is guaranteed to be unique for each entry
<SALUTATION>	Business Record - Salutation used when writing business correspondence to the entry
<SPOUSE BIRTH>	Misc. Dialog - The entry's spouse's birthday
<SPOUSE>	Home Record - The entry's spouse's name
<TIME>	System - The current time
<TITLE>	Business/Home Record - The entry's title, i.e. "Dr.," "Mrs.," etc.
<USER FIRM>	Design Cover Dialog - The program owner's (your) company name

<USER NAME>	Design Cover Dialog - The program owner's (your) name
<YOUR RATE>	Misc. Dialog - The rate at which you (the user) bill
<ZIP CODE>	Business Record - Entry's business zip code