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## About Executive Desk

### **Work Smarter Not Harder**

We all need more time, but there is never enough of it. Working longer hours does not mean more work accomplished. Executive Desk is a software for Smart Working -- a technique to organize you for better results.

### **Effectiveness v/s Efficiency**

Executive Desk is a complete system of Contacts, Schedules, Reminders, To-Do Lists, Notes, Phone Calls, Follow-Ups, Routine Correspondence, Phone Dialer, World Time and more. A typical productivity system focuses on efficiency: doing things right. Executive Desk emphasizes effectiveness: doing the right things at the right time and doing them right.

### **Better Results**

Executive Desk is based on Time Management Principle -- it provides you a system that supports: Delegation, Planning, Tracking at the same time automating routine tasks such as correspondence, filing, etc. The underlying principle is to help you make the best use of your time.

### [Working with Windows](#)

### [Working with Executive Desk](#)

### [Keyboard Shortcuts](#)

You can customize Executive Desk to suit your style of working. See help on Set-Up in the Table of Contents.

## **Working with Windows**

Executive Desk operates in the Windows environment, therefore you should first familiarize with Microsoft® Windows™. Refer to the chapter on [Windows Fundamentals](#) in the Microsoft Windows Users Guide and understand the following:

- Using Menus, Scroll Bars, Dialog Boxes.
- Selecting Command Buttons and Option Buttons.
- Working with Text Boxes, List Boxes, Check Boxes.

The mouse pointer in the Executive Desk takes the following shapes depending on the context of the function, as below:



Shows mouse position.



Shows edit cursor in dialog boxes.



Wait-for-processing signal.



Shows mouse position for touch-selection in Calculator & Phone Dialer.

## **Working with Executive Desk**

When you load Executive Desk the iconic representations of various sections are displayed on the right. **To use a section**, click on the appropriate **icon**. Alternatively, you can access the menu by typing **ALT +O**, which pulls down the option menu from which you can select the section you wish to use.

When you select a section, the main-screen of the section is displayed with command buttons at the bottom. **To enter into command mode**, click on the appropriate button. Alternately, you can use Keyboard Shortcuts to activate a command by pressing **ALT +Underlined letter** in the required command button.

Once you request a command, the corresponding dialog boxes will prompt you for the necessary inputs. **TAB** key allows you to move in the dialog boxes by jumping over the prompts.

**Note:** Commands that are **inactive** or not applicable automatically **turn gray** depending on the **context** and will not be available for selection. Similarly, confirmation buttons like **OK** and **CANCEL** in dialog boxes will become active or inactive depending on the context.

## **Keyboard Shortcuts**

While it is more convenient to use Executive Desk with a mouse, it also provides keyboards shortcuts for all the functions and commands.

### **General Keys**

ALT +O	Option Menu.
ALT +V	Day-At-A-Glance.
ALT +H or F1	Help.
ALT +SPACE	System Box.
ALT +F4	Close & Exit.
ALT +Underlined Letter	Option Selection in Individual Sections.
TAB	Move in the dialog box

*(Refer to help on individual sections for Keyboard shortcuts specific to that section)*

### **Clipboard Cut & Paste**

SHIFT +Left/Right Arrow	Mark Text in Notes and Edit Box.
Left/Right Arrow	Unmark Text.
CTRL +C	Copy to Clipboard.
CTRL +X	Cut to Clipboard.
CTRL +V	Paste from Clipboard.

### **Editing Keys**

INSERT	Toggle for insert/overwrite mode.
DEL	Delete character right.
BACKSPACE	Delete character left.
UP/DOWN Arrow	Line Up/Down.
ALT +Down Arrow in date	Pop-up Calendar.
LEFT/RIGHT Arrow	Right/Left one character.
CTRL+ LEFT/RIGHT Arrow	Right/Left one word.
HOME/END	Beginning/End of line.
PGUP/PGDN	Up/Down one screen.
CTRL+ HOME/END	Beginning/End of text block.
SHIFT+TAB	Backward one field.

## **DayView**

DayView is the Control Center of Executive Desk. It provides **at-a-glance view** of your complete schedule for a **given date** and is the first module loaded when you start Executive Desk. Apart from Date Caption, which shows day/date and holiday/event description, if any, DayView screen displays the following items:

- **Daily Schedule List**: shows the schedule for the day.
- **Calendar**: to select date for viewing and for rescheduling.
- **Buttons: Calculator, Dialer, ScratchPad, WeekView** and **Print**.
- **Notes**: You can view the Notes by clicking on the item in the list. The **note pad** displays:

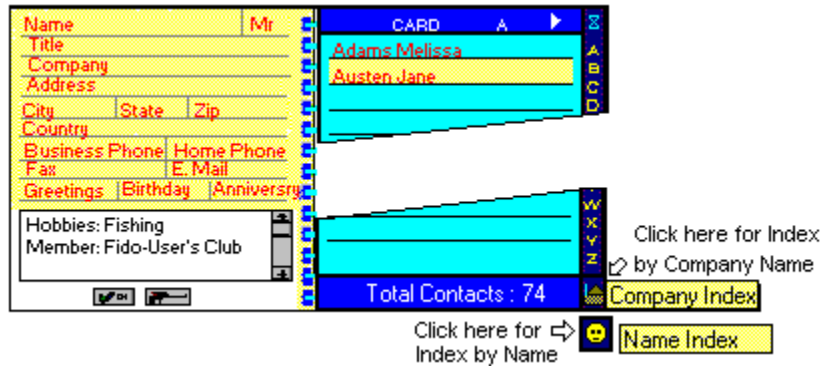
Status and Due Date for To-Do Tasks.  
Phone# and Due Date for Phone List.  
Due Date and Task Links for Follow-Up Items.

Besides, You can

- **Add Items to the schedule list**
- **Reschedule Items**
- **Convert To-Do into Follow-up** and vice versa
- **Archive Items** in DayView.

# Address Book

Address Book **Stores** names, addresses, phone/fax numbers, birth dates and anniversary dates of your contacts. It is the same information you find on a business card. You may classify this information into any number of address books **Files**. Besides, you may maintain Notes on your contacts to hold information like Habits, Professional Interests, etc. Address Book has two parts -- the index and the contact page. The **Index** displays contacts in alphabetical order and is used for quick location of contact information. The name of the Address Book appears at the top of the index and the number of contacts are displayed at the bottom. You can **Collapse** the index to display all the contacts as a single list. Address Book allows you to **Search** for contacts in the database, or to **Selectively** pick contacts from the index, which can be separated or grouped for further **Processing**. The information in Address Book can be **Printed** in various **Formats**. You can even activate autodial to **Phone** a person in the Address Book. You may **Export** contact information from the Address Book for use in another application or to mail-merge with Form Letters, alternatively, you can transfer data via **Clipboard** .



## Time Planner

The Time Planner is like a calendar and provides a monthly view of **Events**, **Holidays** and **Key Diary Items**. The planner displays current month with today's date highlighted. You can select a date in the Planner by clicking on it (or using arrow keys). You can **Leaf** through the planner pages by month or year. You can **Search** in diary from the planner and zoom into the searched appointment.

While the planner provides a monthly view, the **Diary** displays all the time-slots for the entire work day. In the diary pages you can schedule **Appointments** and **Non-diary items**. Once you schedule items in the diary, it automatically sets-up a reminder **Alarm**. You can **launch a program** at a scheduled time. Once scheduled, the program will be automatically activated at the specified time. Appointments can be **Rescheduled** to another date and time. You **Flip** through the diary pages and scroll within the page to view your schedule. The **Print** facility in the diary offers two formats: Month Planner and Appointment List. You can also **Customize** the diary page to suit your workday.

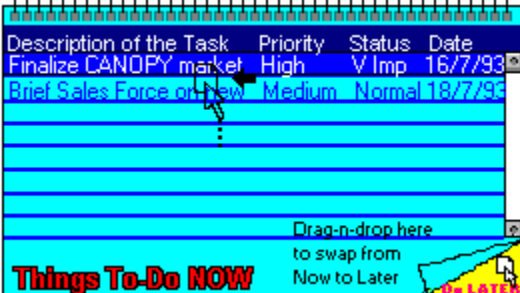
OCTOBER 1995						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	7
8	9	10	11 Audit Mtg.	12 Audit Mtg.	13	14
15	16	TUESDAY OCTOBER 10, 1995				
22	23	D 08:00 A To-Do Clear Mail				
29	30	09:00 A				
		10:00 A Meetings Meeting with the Auditor				
		11:00 A				



## To-Do List

To-Do List is the cornerstone of priority-powered time management. To this list, you can **Add** tasks you have to do and assign them **Priorities** and **due dates** based on their relative importance. The **Status** indicator is used to track the progress. You can drag-n-drop done items into the **Archival List** on the right hand tool bar. You can **Amend** or **Rearrange** the task list to reassign priorities and due dates to reflect your changing emphasis. For an elaborate description of the task, you can maintain **Notes**.

To enable you to focus on **current tasks**, you may bifurcate them into To-Do **NOW** and To-Do **LATER** lists. Typically, the NOW list will comprise of tasks to be accomplished in the next 7 days. The LATER list may contain tasks that are not due immediately, it could even be a **wish-list** you may attend to when you have the time. You view the specific list by **Flipping** from one list to another.



Description of the Task	Priority	Status	Date
Finalize CANOPY market	High	V Imp	16/7/93
Brief Sales Force on New	Medium	Normal	18/7/93

You can **Swap** tasks from one list to another. When you swap a task from NOW list to the LATER list, the due date is reassigned so that it is atleast 15 days from the current date. There is an automatic swapping of LATER tasks to NOW list, when they become due within a week from the current date.

To point out tasks that are **due**, they are **highlighted** in the list. You can also focus on target tasks by **Selectively** viewing the list based on a combination of priority, due date and status. The **Sort** option can rearrange the list by Priority, Due Date or Status.

The active To-Do list can be **Printed** in full or selectively along with the notes.

**Note:** You can schedule tasks from the To-Do list into your workday by selecting them in the Time Planner.

## Letter Writer

Letter Writing or Correspondence is perhaps an activity that occupies most of the time in any executive office and this is best handled using a professional word processing software. The Letter Writer allows you to **invoke the word processor** of your choice without leaving the Executive Desk.

You can set-up the word processor of your choice to be invoked as a Letter Writer by choosing the **Parameters Option in Setup**. The standard default is WRITE, which comes with Microsoft Windows.

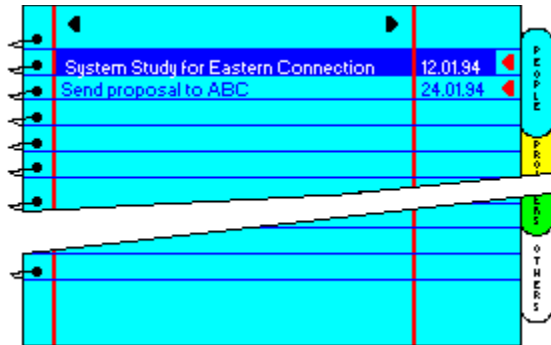
To **Mail Merge** form letters in your word processor with the Address Book data, you can use the **export feature in Address Book**. This will enable you to make identical copies of the letter with only the names, addresses and greeting names changing in each copy. Most Word Processors support the **Standard Data Format** for mail-merging.

## Follow-Up

The need for follow-up on tasks planned and delegated cannot be over emphasized. Executive Desk allows you to follow-up on **People** in the organization, **Projects** on hand, **Parties** such as Suppliers and Customers, **Personal** for your own personal follow up and **Other** items. The **Tabs** on the right show the **Category** of follow up. Follow-up categories for People and Project hold **list of tasks** (like the ToDo List) while other categories hold descriptive notes. The categories of People and Projects have a unique relation, they can be **linked**. The list appears alphabetically, if your items span multiple pages in a category, you can **Flip** the pages.

Follow-up items are driven by due-date and items that are due are highlighted in the list. Follow-ups are **Stored** as **Notes** for action and review, which you can view at the time of follow-up or **Print** as a list or in a memo format. You have the option of **Selecting** follow-up items to print.

After, or during, the follow-up you can **Amend** the notes for next follow-up and set a new due-date using the **Pop up Calendar**. You can **Search** on Task Description for People/Projects and on notes for the other follow-up categories.

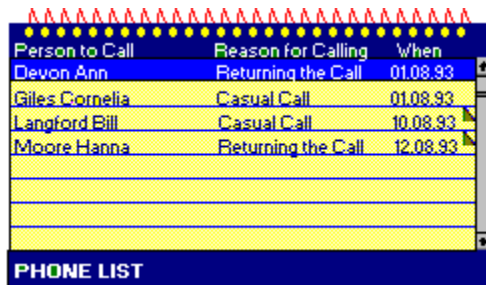


## Phone List

Telephone is the single most major interruption in an executive workday. The phone activity runs parallel to your schedule. While you have no control over the incoming calls, most certainly, you will be able to streamline your outgoing calls using the Phone List.

It is a simple date wise list of phone calls to make. When you **Add** an entry to this list you can specify details such as **Person to call** (WHO), **Reason for calling** (WHY), **Date of call** (WHEN) and **Notes** (WHAT) on key items to discuss. You may **Look-up** for a person in the Address Book, to automatically include phone numbers. You can always **Amend** the entries in the list later.

Your Phone List can be **Printed**, with or without the notes. While your list may contain calls due on various dates, you can selectively view or print **Today's Calls**. When you are ready to call, you can display the **Phone** numbers for the entry highlighted in the list. After the call is through, you can **Clear** the entry or drag-n-drop calls done into the **Archival List** on the right hand tool bar. If you assign the time of call, it will flash a **Reminder** at the designated time, and even **Dial** the number for you.



Person to Call	Reason for Calling	When
Devon Ann	Returning the Call	01.08.93
Giles Cornelia	Casual Call	01.08.93
Langford Bill	Casual Call	10.08.93
Moore Hanna	Returning the Call	12.08.93

**PHONE LIST**

## World Time

It displays **local time** (from the system clock) and corresponding time at four international locations of your choice. You can view time at over **160 locations** covering major cities and time zones across the globe. The world clock automatically adjusts time for daylight savings.



If you change the local city, that appears in the middle of the screen, the time display at the four locations automatically changes with reference to the local city and time.

To view time at other locations, for a **specific local time**, you can temporarily **Set** local clock for the new time. **Reset** will revert to the system time.

**Note:** Daylight savings are adjusted on 3rd Sunday of April and 3rd Sunday of September.

## Customize

You can customize Executive Desk with the following options:

- **Time Planner**
  - Begin and End Time for the Diary.
  - Resolution/Time-Slots for the Diary.
  - Weekly Offs for the Planner.
- **Holidays/Events**
  - Declare all annual holidays and events in a single list.
- **Password**
  - Define access password for the Executive Desk.
- **Parameters**
  - Address Book Format.
  - Alternate Phone as E-Mail, Mobile Phone or Telex.
  - Word Processor to be invoked as a Letter Writer.
  - Birthday/Anniversary display on start-up.
  - Alarm Sound.
  - Screen Resolution.
- **Dialer**
  - Modem Parameters : Dialing (Tone/Pulse), COMM Port and Modem Type.
  - Call Time Out : Time Interval to wait for successful dial.
  - Modem Type : Hayes Compatible or Multi-Tech.
  - Modem Init String : Initialization String.
  - PBX Prefix : Prefix to add while dialing through a PBX.
  - Local Exchange Code: Area Code of the local exchange.
  - Long Distance Code : Prefix to the Phone Number to make a long distance Non International Call.
  - International Dial Code : Prefix to the Phone Number to make a long distance International Call.

## Reorganization

This function reorganizes the database. It **purges** unwanted data and **packs** the indexes to improve the efficiency of access. It also **reconstructs indexes** corrupted due to accidental failure (crash) of the hardware.

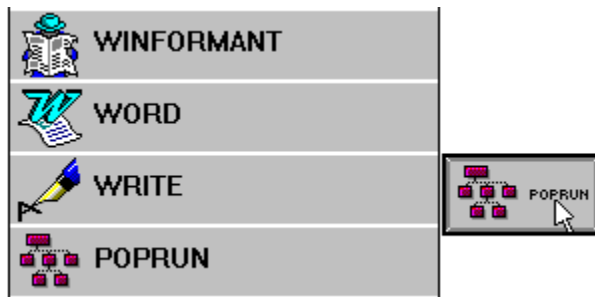
At the **start of day** the reorganization process begins by default. Similarly, when you load the Executive Desk, after a previous **abnormal exit**, the system forces re-organization. The progress of reorganization is shown on the **odometer**.

In an ideal situation, you may never have to use this option. However, if you discover a peculiar case of data corruption, reorganization will help you salvage your data in most cases.

## PopRun - Program Launcher

PopRun is a program launcher which allows you to integrate 12 external application programs and run them without leaving the Executive Desk. The applications are displayed along with their icons.

You can [launch](#) an application by [clicking it in the list](#). Applications thus invoked run concurrently with the Executive Desk as independent program tasks. Closing or exiting from the Executive Desk will not close the launched applications.

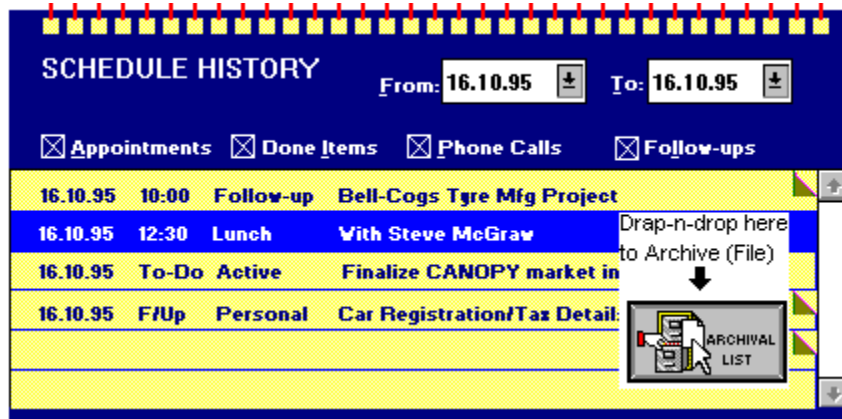


To [maintain the list](#) of applications, [click on POP-RUN](#).



## Archival - The Schedule History

You can archive completed schedules for future reference. Archiving completed schedules is as easy as dragging and dropping them into the Archival List Icon on the right hand tool bar.



Once archived, the history of your past schedules is available for viewing, searching, **printing** and more. Archival maintains them in a common format to facilitate a single point **search**. **Notes** attached to the archived items may be changed at any time to attach/revise specific comments.

You can archive all types of schedules and tasks from DayView. In addition, you can archive directly from the Diary, ToDoLists and Phone List. Archival of Follow-up items is possible only in DayView. Archived schedules are stored for the past one year (+90 Days). You can view archived items by category (ToDo, Phone, Follow-Up, Appointment) and for a date range by making a selection in the caption (header) of the list. Besides you can **delete** individual items in the list or a group of selected and searched items.

**Note :** Schedules like Appointments and Phone Call, which appear as pop-up reminders, are automatically archived when they are cleared.

There are two ways to archive a completed schedule. **Drag-n-Drop** : This files the item into the Archival system and flags the item as Done or Cleared in the primary section. **CTRL+Drag-n-Drop** :This in addition, deletes the item from the primary section from where it is archived.

Appointments		↑
09:15	-> 10:15 Meeting Edge Communciations	
Things To-Do		
Finalize C&NDPY market introduction	ACTIVE High	
Phone Calls		
11:45	Phil McCormick / Business Call	
Follow Up		
Bob: Order Furniture		
Weekly Checklist		↓

This integrates all the schedules for the day into a single list. It includes all the uncompleted schedules of the earlier days for ToDo, F/Up and Phone Calls, except for appointments since they are for fixed date and time. When you click on the item in the list the attached note is displayed in the NotePad, along with other details like date, links, phone number as applicable.

#### Straight Dialing to a Phone List Item

The Phone Call items for the day will pop-up a reminder to dial at the scheduled time unless the time has lapsed. The same is true for carry forward Phone Calls from the previous day. To straight dial, double click on the Phone Call item. It will display the Phone Number and also allow you to dial. If the Phone Call party is selected from the address-book, it will also display the Title and Company Name for your reference.



To view the schedule for another day, simply click on the date in the calendar. You can use the navigation keys (arrow buttons) at the bottom of the calendar to display the required month/year and then click on the day to view the schedule for that day. If you click on the

 button at the bottom of the calendar, it will switch to Today's date.

**Note:** Event Highlighters are also shown in the calendar.

## **Managing Contacts in the Address Book**

You can **Insert** a new contact in the address book, regardless of the index page on which you are located. This will accept the address details in the contact page and the name will appear in the index. You may also attach descriptive Notes on the contacts.

To **Amend** contact information in the Address Book, first select the corresponding entry in the index. The changes can now be carried out in the contact page.

To **Remove** a contact from the Address Book, first click on the name in the index, confirm the contents in the contact page and then confirm deletion.

To **Duplicate** addresses for multiple contacts in the same organization, change the name of a contact and the program will prompt to check whether it is a change of name or a duplicate is to be created.

## **Quick Location of a Contact**

You may click on an alphabet in the index to move to a given page in an Address Book. Click on the arrows on the top to flip pages within the index for a selected alphabet. The arrows will appear only when there are multiple pages.



### **Keyboard:**

*Ctrl+PgDn/Up* - Move to next/previous alphabet in the index.

*PgDn/Up* - Flip pages within an alphabet in the index.

*Up/Dn Arrow Keys* - Scroll within a page.

The highlighted entry in the index is displayed in the contact page.



Keyboard - *Alt+B*

You can use the clipboard feature to cut the address of the current contact in the index to the clipboard and then paste this information into other applications like word processing.

## **Processing Searched/Selected Contacts**

Once you have selected/searched contact, you can process them:

**Copy** to duplicate these contacts into another Address Book.

**Extract** to remove these contacts and transfer them into another Address Book.

**Delete** to simply remove these contacts from the Address Book.

**Export** to copy into another format for use in another application or to mail-merge with Form Letters in the word processor of your choice.

**Print** to print a selective list of searched/selected contacts.

**Note:** Copying or Extracting contacts to an existing Address Book will have the effect of **merging** the selected contacts with the target Address Book.

## **Print Formats of Address Book**

You can print an Address Book in four formats

- Phone Index (Alt +P) - Lists Name, Title, Company and Phone/Fax#s.
- Address Directory (Alt +D) - Lists Phone Index with Address.
- Complete Contact Information (Alt +I) - List Address Directory with Notes.
- Birthday List(Alt +B)
- Anniversary List (Alt +A)
- Mailing Labels (Alt +M). Prints Labels in two different styles.

The Address Label prints Name, Title, Company Name and the Address, whereas the Contact Label, in addition, prints the Phone and Fax numbers.

Contact Labels provide the user a convenient way to print a compact address book with as many as 44 addresses per page (4-across and 11-down) on a Letter or A4 size paper. If these are printed back-to-back, a single sheet can hold 88 contacts.

There is a selection of pre-defined labels:

- > 5xxx series, the US standard Avery format
- > L7xxx series, the European standard Avery format
- > DMP 4603 and DMP 16LBL for the Dot Matrix

In addition, there is a provision for user defined labels. The layout of these labels can be set to match specific label stationery. The dialog box displays a diagram that shows various label parameters to facilitate user defined label setting.



## **Exporting Contact Information from Address Book**

You can export data from the Address Book for use in another application or to a file that your word processor can use in a [Mail-merge](#). You can mail-merge a letter template with the data exported from the address book, to print identical copies of the letter with only the names, addresses and greeting names changing in each copy. You may export [all](#) or [selected/searched](#) contact addresses.

When you specify the filename to hold the exported addresses, do not use file-extensions, standard defaults are used depending on the format selected.

Address Book supports two [formats](#) for data export:

xBASE format [.dbf files](#) -- for use in applications like dBASE, Clipper and FoxPro.

Standard Data Format [.sdf files](#) -- most other applications would support this format.

**Note:** SDF is an ASCII text format where fields start and end with double quotation marks, separated by commas. The records (group of fields in contact data) are separated by CR\_LF (carriage return and line feed). SDF data includes field names as the first record. The list of fields and the sequence in which they are written to the target file is as below:

- Mr/Ms + Name.
- Title (Designation).
- Company Name.
- Address Lines (1 through 4).
- Greeting Name (in a letter to address the person, typically starting with Dear).
- Fax Number.

### **Mail-merge with Word for Windows (Version 6.0)**

### **Mail-merge with WordPerfect for Windows**

**PS:** If you are using **AmiPro**, specify the file type as Comma delimited.

### **Using SDF file for Mail-merge with Word for Windows (Version 6.0)**

- 1.** Create your letter template using MS-WORD for Windows.
- 2.** Select **Mail-merge** from **Tools** menu.
- 3.** In step 1. From **Main Document** choose **Create/Form Letters**.
- 4.** In step 2. From **Data Source** choose **Get Data/Open Data Source**.
- 5.** Enter/Select the filename containing your exported addresses.
- 6.** Locate the cursor in form letter where you want to insert a mail-merge field.
- 7.** Choose **Insert Merge Field** from the ruler.
- 8.** Select **mail-merge field name** in the dialog box.
- 9.** Repeat this for the fields you want to merge into your letter.
- 10.** Select **Mail-merge** from **Tools** menu again and select **Merge**.

## **Using SDF file for Mail-merge with WordPerfect for Windows**

- 1.** Choose **File/New**.
- 2.** Choose **Tools/Merge** to display the Merge dialog box.
- 3.** Select/Enter filename containing the letter as **Primary File**.
- 4.** Select/Enter filename containing exported addresses as **Secondary File**.
- 5.** Select **ASCII Delimited Text** (DOS) option and specify the following:
  - Field Delimiters Begin as double quote character (").
  - Field Delimiters End as double quote character and comma (",).
  - Record Delimiters End select the LF after CR from the pop-up list.
- 6.** Choose **OK** to create a new document containing the merged letters.

You can have multiple Address Books, to classify your contacts into categories like Customers, Prospects, Business Contacts and Friends. The number of Address Books is limited only by the disk space.

Your Address Book should be labeled with a **six letter name** to cryptically describe its contents. For example, BUSIN for Business Contacts or PERSNL for Personal Friends.



Keyboard - *Alt +F*

Files displays the list of Address Books. Here you can **add** a new Address Book by **double clicking** on <<New File>> (Keyboard *spacebar*). To **load** an existing Address Book or to **delete** (remove), first select it in the list. Deleting an address book will remove all the addresses contained in it.

Insert adds new entries:  
contacts in an Address Book  
appointment in a Diary  
task in a To-Do List  
items for Follow-Up  
entries in Phone List.



Keyboard - *Alt + I*.

To enter the **Amend** mode,  
double click on the item.

Keyboard - *Enter Key*

You can **Delete**  
contacts from Address Book  
appointments from Diary  
tasks from To-Do List  
items from Follow-Up  
entries in Phone List.



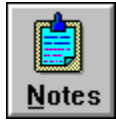
Keyboard - *Alt +D*

To rearrange the task list, you can drag an item from its current place and drop it into its new position in the list.

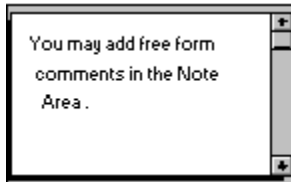
Keyboard - *Alt-C* to cut

*Alt-A* to paste

You can attach or view Notes on  
Appointments  
To-Do tasks  
Follow-ups  
Phone Calls  
Archived Items.



Keyboard - *Alt + N*





You can click on the system box for  
clipboard cut, copy and paste.



You can Delete  
contacts from Address Book  
appointment from Diary  
tasks from To-DO List  
items from Follow-Up  
entries in Phone List  
items from Archival List.



Keyboard - *Alt +D*

Click on  **Keyboard - F3** to collapse the index.  
This is a toggle switch which allows you to expand  the index.  
You can also expand by clicking on the index while in collapsed mode.  
Particularly when you are in the select/search cards, you won't have to  
browse through every index letter.

You can Search for  
contacts in an Address Book  
appointments in Diary  
notes or task description in Follow-up  
items in Archival List. .  
Search is not Case Sensitive.

When searched, only the matching items  
are redisplayed for further processing.  
Undo or Cancel will reset to original list.



Keyboard - *Alt +E*

You can Select  
contacts from the Address Books  
tasks from To-Do List  
and Follow-up items.

Selection in To-Do list is based on criteria.

In Address Book and Follow-Up  
you may select items by clicking on them.

*Keyboard - Spacebar to select*

The selection click is like a toggle,  
re-click (or spacebar) on a selected item  
to unselect it.

Undo or Cancel will reset to original list.



*Keyboard - Alt +S*

You can Print: Lists and Reports.  
All the printouts are designed such  
that they can be printed either in  
Potrait or Landscape mode.

**Note** : Labels can be printed in the Potrait  
mode and Weekview in Landscape mode only.

Some printers have preset left margins, you can  
void this by setting the check box of the left margin  
to blank.



Keyboard - *Alt +R*.

Displays phone numbers for the person selected in the list.

You can autodial, .with a modem connected to your system.The modem should be configured using the Dialer Setup.

Dial is the request for autodialing. When the phone rings pick-up the handset and press Clear or Cancel to talk.

You may Edit phone #s before you dial. In the case of phone list when you dial the new number is stored for re-dial.

Alphabetic dial codes 800-CALL-ABC are automatically converted to numbers.

The dialer setup has the option to set the Long Distance and International Dial prefix. The international dial prefix is used with numbers containing + sign.

In PBX systems to access services such as call transfer use the hook flash dial modifier feature. To call a party where the PBX supports direct extension dialing, you may construct the phone # as: <Phone #>!<Extn#>. The hook (!) will hangup the modem for 1/2 second and dial the extension after the dial tone is received.



Keyboard - Alt +P

**Note** : You can Schedule a Call directly from the Address Book. Click on Phone and then on schedule - this will create an entry in the Phone List.

Dialer provides quick memory dialing. You can store frequently dialed numbers and long distance codes in memory and select from an alphabetically arranged list.

### Dialer Operation

<u>M</u> EM	(ALT+M) Memory list of Phone #s.
<u>L</u> G DIST	(ALT+G) Long Distance Dial Codes.
<u>D</u> IAL	(ALT+D) Dial the phone.
<u>C</u> LEAR	(ALT+L) Clear the current Phone #.
<u>C</u> ANCEL	(ALT+C) Exit Dialer.



Keyboard - Alt-+A

You can rearrange the task lists periodically, to reflect the changing priorities. To shift/move a task entry, select the task entry by positioning the selection bar on the required task and click on the cut button.



Keyboard - *Alt +C*.

Now position the selection bar on the line where you want to insert the particular task in the list and click on the paste button.



Keyboard *Alt +A*

The selected task entry is shifted to the line where the selection bar is placed by reshuffling all the other task list

A simpler way to rearrange tasks is by dragging an item from its current place and dropping the item into its new position in the list. You can also rearrange tasks by using the SORT option to rearrange them by Priority, Due Date or Status.



You can swap tasks in To-Do from Now to Later or vice versa by dragging the item and dropping it in the right bottom flap of the list. The title on the flap indicates the list to which the task will be swapped.

Tasks in To-Do Later are automatically swapped to To-Do Now when they are due within a week.

When you swap tasks from Now to Later the due date is automatically increased by a fortnight.



Keyboard - *Alt +W*

You can re-arrange tasks in To-Do List by resequencing them in the order of priority, status or in the order of due date.



Keyboard - *Alt +T*

Events are important dates like: Birthdays, Travel Dates, Board Meetings etc.

Event description for a given day can be defined or amended by selecting it in the planner and clicking on the event button.

Events can also be defined for a range of dates. For example, you can flag an event Foreign Tour and set it from Oct 1, 95 to Oct 7, 95.

In addition, you can set a **Highlighter** for this event in the planner to enhance visibility of such time-periods. There are four shades of highlighting, White, Blue Green and Yellow. You can assign shades for various categories of events. For example, Blue for Tour, Green for Seminars/Training Sessions and Yellow for Vacations.



Keyboard - *Alt +N*.

**Recurring events**, which repeat every year, are prefixed with an asterisk (\*) in the description.

Holidays are defined or amended by selecting the day in the planner and clicking on the holiday button.



Keyboard - *Alt +A*.

Recurring holidays, which repeat every year, are prefixed with an asterisk (\*) in the description.

Regular weekly-offs, like Sunday, should be defined in the Time Planner Setup.



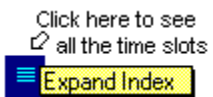
Keyboard - *Alt +D*

Diary shows your appointments for the day.

The toggle switch at the bottom of the Diary List allows you to collapse the Diary Slots to show only those which are occupied.



Once collapsed you can click on it to expand and show all the diary slots.



You can zoom into the diary by double clicking on the Planner or using the diary button.

Click on the Month and Year buttons to move in the planner.

To move by dates	Keyboard	<i>Arrow Keys</i>
To move by month	Keyboard	<i>PgUp/Dn</i>
To move by year	Keyboard	<i>CTRL+PgUp/Dn</i>

## **Key Appointments**

This is the [single most important appointment](#) for the day, displayed in the Planner along with Events and Holidays. You can [flag any appointment as key item](#) while recording or amending an appointment [in the diary](#).

**Note:** If you define multiple key appointments for the day, only the last appointment flag is stored.

### **Scheduling Non-Diary Items**

To-Do tasks and Follow-Ups are driven by due-dates and not specific time slots, hence they are called non-diary items. However, before attending to such tasks, you may want to schedule them into your work day by assigning a time slot to them.

**To schedule** such tasks select an **empty time slot** in the diary page and click on the appropriate button and select the **item from the pop-up task list** and select **Schedule**.



Keyboard - *Alt +S*

To display TO-DO list for scheduling



Keyboard - *Alt +T.*

To display FOLLOW-UP list for scheduling



Keyboard - *Alt +F.*

**Note:** The **TO-DO** list provides the option to select tasks from **NOW** and **LATER** lists. You also have the option to view/select from **Overdue** or **All** items. The **FOLLOW-UP** list provides the option to select items from **PEOPLE**, **PROJECTS**, **PARTIES**, **PERSONAL** and **OTHERS**.



To reschedule an appointment to another date and time, select the appointment and click on the reschedule button. To reschedule an appointment for another time slot [for the current day](#) keep the mouse clicked on the appointment and simply drag it to another time slot.



Keyboard - *Alt +S*

If the target time-slot is occupied, the system will flash a warning and abort the process.

**Note:** You cannot reschedule an appointment to dates before the current date.

## **Appointment Reminder**

Appointment Reminder tracks your schedule and **pops up** on the screen to alert you **five minutes** before the schedule. You can take the reminder off the screen by selecting **CLEAR** to accept it or **SNOOZE** to remind you again **after two minutes**. If you **SNOOZE** repeatedly, the reminder will eventually time-out and will be set for the next item in the diary.

Reminders **sound an alarm** when they PopUp, the sound can be disabled by selecting the Alarm Disable option in the Customize section.

**Note:** The Appointment Reminder is **active** even when you are in **another application**, provided the Executive Desk is running in the **background** or is **minimized**.

## **Program Launch**

There is a new appointment category called PROGRAM, which allows you to launch a program from EDESK at a scheduled time by including the program path + program name as description. For example, to activate your fax program at 4:00PM, define an appointment at this time with Description as C:\WINDOWS\FAXDIR\FAXPRG.EXE and Category as PROGRAM (\WINDOWS\FAXDIR is the Program Directory, and FAXPRG.EXE is the program name).

## **Flipping the Diary Pages**



You can browse through the diary pages by clicking on the arrow buttons. **Keyboard - F2**  
*Next F3 Previous.*

## **Recording Appointments**

The diary page displays your appointments along with empty time-slots in your work day, where you can **Record** or **Amend** appointments in the required time-slot. You can **block** a range of Time Slot for a given appointment. The appointment entry dialog shows Time Upto which the appointment should be blocked. You can highlight the starting time and enter Time Upto as higher than the starting time or you can highlight the ending time and enter Time Upto as lower than the ending time. You can **classify** the appointment into predefined **categories** such as: Meeting, Visit, Letter, Personal, Seminar, Travel, Transit, Party, Lunch and Dinner. You can flag your appointment type as **Key** so that it appears in the planner for a quick view.

The appointments you record are, by default, for a single day, to enter a **recurring appointment**, set the **frequency** to repeat the appointment at pre-defined time intervals. Such appointments are flagged with an alphabet indicating the frequency as: **D**aily, **W**eekly, **B**i-Weekly, **M**onthly, **Q**uarterly or **Y**early. You can set end-date for such recurring appointments after which they will stop repeating in the diary/planner. You cannot block a range of Time Slot for such recurring appointments. You can override a recurring appointment for a specific day, by making another entry for the same time-slot. When you delete a recurring appointment, all recurrence are deleted.

You can make **Notes** on appointments to describe the purpose of a given schedule, such notes are indicated by a fold mark in the diary page against the time-slot. Notes on To-Do and Follow-Up items are automatically copied into the diary when you schedule such items from the respective lists.

**Note** : You can drag-n-drop completed appointments into the archival list, this will show a **strike-out** on the appointment indicating that it is done.

Priority levels indicate the importance of a task, they can be set as [High](#), [Medium](#) or [Low](#).

Status indicators can be defined by the user while adding a task. Here you can add **new** status indicator by double clicking on <<New>> (**Keyboard spacebar**)  
Typical status values are:

WAITING	To be started.
ACTIVE	Scheduled/Being attended to.
HOLD	Keep it pending.
DELAYED	Behind Schedule.
DONE	Completed.

Status indicator **DONE** will strike off the task in the list, there will be no delete confirmation for such tasks, when you delete them. Such tasks will not appear in Time Planner or DayView.

**Note:** Optionally, you may use status values to indicate departments or persons responsible for accomplishing the task.

Drag-n-drop here  
to Archive (File)



You can drag-n-drop done To-Do Items and Phone Calls into the archival list on the right hand tool bar.

In To-Do, this will show a strike-out on the task description indicating that it is done and change the status to Done and the due date will be changed to the system date to indicate when the task was completed.

To remove the completed tasks from the To-Do list and send to the Archival List use CTRL+Drag-n-Drop. Hold the CTRL key down and then drag-n-drop the task into the Archival List, this will remove the completed task from the list.

In Phone List , this will strike-out on the description and reflect the date when the call was done.



To switch between NOW and LATER lists  
click on the list-flip area.



Keyboard - F3

### **Adding items to schedule list in DayView**

You can add items to the schedule list on display without going to the respective sections. In the schedule list, the four categories of schedules like Appointments, To-Do, Phone Calls and Follow-up -- are indicated by green category title bars to separate different schedule types. To add an item to a given category, double-click on the respective title bar.





### Keyboard - *ALT-W*

You can view your weekly schedule by clicking on the WeekView button. WeekView combines all the schedule items (the To-Do, Follow-up and Phone List Items) and displays them on a single screen. It automatically carryforwards uncompleted schedules to the current date.



You can change the view to display Weekly View for the next or previous week by clicking on the arrow buttons. **Keyboard - *F2* Next *F3* Previous**

You can also print out the weekly schedule in a single page format by clicking on the Print button.



Keyboard - *Alt +R*.

You can Print: Lists and Reports.  
All the printouts are designed such  
that they can be printed either in  
Potrait or Landscape mode.

**Note** : Labels can be printed in the Potrait  
mode and Weekview in Landscape mode only.

Some printers have preset left margins, you can  
void this by setting the check box of the left margin  
to blank.



### Keyboard - *ALT-N*

This is a scratch pad provided to make notes without having to switch sections or programs. To jot down simply click on the ScratchPad button and it opens up the familiar Windows NotePad.

The text in the ScratchPad may later be blocked, cut and pasted, where required, using the standard windows clipboard operations like CTRL+C (Copy), CTRL+X (Cut) and CTRL+V (Paste) keys.



### Keyboard - *Alt D*

Dialer provides quick memory dialing. You can store frequently dialed numbers and long distance codes in memory and select from an alphabetically arranged list.

#### **Dialer Operation**

<u>M</u> EM	(ALT+M) Memory list of Phone #s.
<u>L</u> G DIST	(ALT+G) Long Distance Dial Codes.
<u>D</u> IAL	(ALT+D) Dial the phone.
<u>C</u> LEAR	(ALT+L) Clear the current Phone #.
<u>C</u> ANCEL	(ALT+C) Exit Dialer.

## Rescheduling items in DayView

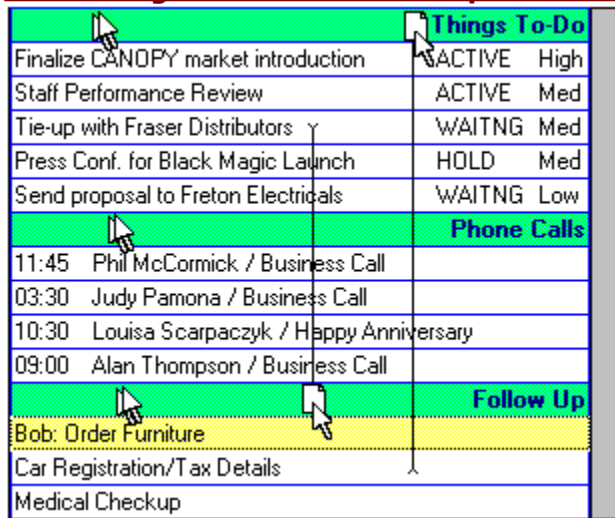


You can reschedule any item from the DayView to another date by dragging the item from the list and dropping it into the given date on the calendar. Normally, the calendar is displayed for the current month, but you can use the navigation keys (arrow buttons) to move forward/backward in the calendar. Rescheduling means moving the schedule from the current date to another date.

You can copy the schedule to another date and flag the current item as done. This is done by using CTRL+drag-n-drop. This will copy the item to another date, flag the current item as done and also archive it.

**Note:** You cannot schedule items to past dates Drag-n-drop of an appointment to the current date will allow you to assign a fresh time-slot to it.

## **Converting To-Do into Follow-up and Vice Versa**



<b>Things To-Do</b>	
Finalize CANOPY market introduction	ACTIVE High
Staff Performance Review	ACTIVE Med
Tie-up with Fraser Distributors	WAITNG Med
Press Conf. for Black Magic Launch	HOLD Med
Send proposal to Freton Electricals	WAITNG Low

<b>Phone Calls</b>	
11:45 Phil McCormick / Business Call	
03:30 Judy Pamona / Business Call	
10:30 Louisa Scarpaczyk / Happy Anniversary	
09:00 Alan Thompson / Business Call	

<b>Follow Up</b>	
Bob: Order Furniture	
Car Registration/Tax Details	
Medical Checkup	

You can convert To-Do task into a Follow-up by dragging the To-Do task and dropping it on the category Title Bar in the schedule list for follow-up. This will flag the To-Do task as done and allow you to add this to the required Follow-up category. If you do not want the done To-Do task to be displayed, simply use CTRL+drag-n-drop. Similarly, you can convert a Follow-up into a To-Do task by dragging the Follow-up and dropping it on the To-Do Title Bar.



## **Archiving items in DayView**



You can drag-n-drop items into the archival list on the right-hand tool bar, this will show a strike-out on the item description indicating that it is done.

You can delete the completed tasks from the schedule list after they are archived by using CTRL+Drag-n-Drop. Hold the CTRL key down and then drag-n-drop the schedule item into the Archival List, this will remove the completed item from the list.

To select the category of follow-up click on the appropriate Tab.

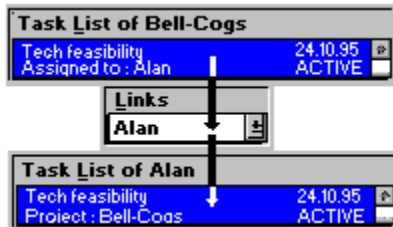
Keyboard      *CTRL + PgUp/PgDn*

Follow-up tasks for Projects can be assigned to people and follow-up tasks for People can be linked to Projects. Thus a single task linked for People/Project will appear in both categories.

Each task here carries a Follow-up Date and Status. The next follow up for the group item is the date of the earliest follow-up task. The status field takes values of status defined in the ToDo list because the tracking is in no way different from that of the ToDo list.

You can attach notes to the tasks, the note is saved as it is entered, clicking on the OK button returns you to the main follow-up list.

The categories of People and Projects have a unique relation, they can be linked. For example, a project may be broken down into tasks which are assigned to multiple people. Similarly, a person could be working on multiple projects simultaneously. When you follow-up on a person you are following up tasks handled by that person for various projects.



To avoid duplication of tasks in People and Projects, you may link a task from Project to People and vice versa. Thus a single task will appear in both the categories as linked.

Rescheduling or deleting a linked task affects both the categories. Some tasks may not require linking, in such cases the link may be specified as <none>.

To leaf through the pages of  
Address Book Index and Follow-Up List  
click on the [page flip](#) marks.



*Keyboard PgUp/PgDn*

While entering or amending dates  
you can [click on the combo-box](#) or use  
**Alt + Down arrow key** to pop up a calendar.

Events are shown in blue and holidays in red.

Use the VCR panel to browse through the calendar.



To move by dates  
Keyboard  
CTRL+PgUp/Dn

Keyboard  
PgUp/Dn

Arrow Keys

To move by month  
Keyboard

To move by year

You can change the local time by using the set button.



*Keyboard None*

Time thus selected is temporary and does not affect the system clock. You can reset the time by using the reset button.



*Keyboard None.*

This will set back the local time to the current time (from the system clock).



Keyboard - Alt+C

DayView provides you a simple calculator which has a built-in **Currency** Converter which is activated by clicking on



Keyboard - @

### Keyboard Operations

ALT+	Memory+ (M+).
ALT-	Memory- (M-)
ALT M	Memory Recall (MR).
ALT C	Clear (C).
ALT A	All Clear (AC).





The currency converter provides conversions for most international currencies. It stores the date on which the currency factor (rate) was inserted/amended.

**To change the factors** for latest conversion rates click on **Insert**. Now **select the two currencies** and enter the **new rate**. If the program finds an earlier conversion, it replaces this with the new rate and the system date.

You can **delete** the conversions which do not interest you, to have an active list of frequently used conversions.

## **Time Planner**

You can customize the Time Planner using the following options:

**Resolution** is the time interval between two appointments- it can be set at intervals of 15, 30 or 60 minutes.

**Begin Day** and **End Day** define the start and end time for a work day on the diary pages.

**Weekly Offs** are regular weekly holidays, like Sundays and Saturdays. You can set two weekly-offs or leave them blank.

## **Holidays/Events**

You can declare all annual holidays and events in a single list by specifying the date and the description. Recurring holidays and events, which repeat every year, should be prefixed with an asterisk (\*) in the description. The holidays and events thus setup will automatically appear in the Calendar.

Regular weekly-offs, like Sunday, should be defined in the Time Planner Setup.

## **Password**

You can [restrict access](#) to your Executive Desk by defining a [six letter password](#). You must confirm the password by [retyping](#) it. When you load the Executive Desk next time, you will be asked for this password, before granting you the right to access the software. To [void](#) the password, simply set it up as spaces. The old password is verified before accepting a new password or any change in the password.

## **Parameters**

This option is to set up parameters specific to your country and to set up Letter Writer.

**Address Book Format:** You can set the Address Book format either to International or American.

International Format supports four Address lines whereas American Format supports two Address lines and city, state, zip and country.

**Alternate Phone:** Address Book stores two phones : Business and Home. In addition there is an Alternate Phone field which can be set to store **Telex, E-Mail or Mobile Phone**.

**Letter Writer:** You can specify the Word Processor of your choice to be used as the Letter Writer, the standard default is **WRITE** which comes with Microsoft Windows.

**Birthday/Anniversary check on start-up:** You can **Enable/Disable** the display on start-up.

**Alarm:** You can **Enable/Disable** the alarm sound **On/Off**.

**Screen Resolution:** - You can set the screen resolution to either Default or Full screen. Default Setup will not cover the Task Bar of Win 95.

## **Dialer Setup**

This option defines your modem configuration and other communication parameters for use in phone dialing.

**Dial Mode:** Tone or Pulse.

**Comm Port:** Serial Port on which the modem is connected COM1 to COM4.

**Modem Type:** Hayes Compatible or Multi-Tech.

**Modem Init String:** The string used to initialize the modem. In case no string is specified, standard Hayes Compatible Modem is assumed.

**Call Time Out:** Time Interval to wait for successful dial response.

**PBX Prefix:** Prefix to add while dialing through a PBX. Enter blank, if your modem is connected to a direct phone line.

**Local Area Code:** Area code of the local exchange to identify whether the call is local or long distance.

**Long Distance Code:** This is the prefix to the phone number to make a long distance non International call.

**International Dial Code:-** This is the prefix to the phone number to make a long distance International call.

Clear strikes off an entry in the phone list. There will be no delete confirmation for such entries when you delete them. Cleared entries will not appear in DayView.



Keyboard - *Alt +L*

When you autodial, CLEAR should be used to hang-up the modem and connect the phone line to your hand-set for talk.

Reason for calling can be defined by the user while inserting entries in the Phone List. Here you can add new reasons by double clicking on <<New>>. (Keyboard *spacebar*)  
Typical Reasons for calling are:

- Casual Call.
- Birthday Greetings.
- Payment Reminder.
- Schedule a Meeting.
- Return the Call.
- Confirm Appointment.



**Today's** displays calls scheduled for the current date.



Keyboard - *Alt +T*

**Calls** will revert to full list.



Keyboard - *Alt +C*

Looks-Up contact information in the Address Book

select the [Address Book File](#).  
select the [Person To Call](#).  
specify [Where To Call](#) (Office, Home or Other).

This information is transferred into the Phone List entry, all you have to do is assign the reason and set the date of call.



Keyboard - *Alt +L*

The Phone Reminder **flashes** on the screen at **scheduled time** of call. It can **sound an alarm** when the reminder Pops Up, the sound can be disabled by selecting the Alarm Disable option in the Customize section. You can request autodialing by selecting **DIAL** followed by **CLEAR** when you hear the phone ring.



**Keyboard - Alt +H**

If the reminder is an interruption on your current activity you can put it on **HOLD**, this will **defer the call** until the next scheduled time (default 5 minutes later). This facility is also useful when you want to reschedule the call if you cannot get through the number or to the person.

**NOTES** allow you to view key items to discuss and note down points discussed during the call, which you can paste into a To-Do or a Follow-Up list later.

**Note:** The Phone Reminder is **active** even when you are in **another application**, provided the Executive Desk is running in the **background** or is **minimized**.

## **Program Launcher List**

The dialog box for Program Launcher list maintenance is similar to the file menu of Windows.

To **ADD** applications to the list:

- select the **type** of file (EXE, COM, PIF or BAT)

- select the **path** (drive and directory) for the program

- select the **program file** from the directory list

The selected application appears as PopRun Description, you can change the program description to assign another name (maximum 10 characters) to the application. You can also specify the **program parameter** to be used while invoking the program. The parameters could be program switches, file names etc. Click on **Add** (Keyboard - **ALT+A**) to add this program to the application list in alphabetical order.

To **DELETE** an application from the list, **select** it in the list and **click on Delete** (Keyboard - **Alt+D**).

