

PC Secretary for Windows

User's Guide

Things To Be Familiar With Before Using PC Secretary

Below are some terms and conventions you should be familiar with before using the program:

Drag and Drop

Dragging is simply pressing and holding down the left button on the mouse, and moving the mouse to a desired location. An icon or outline shape will represent what is being dragged. To Drop what you are dragging, simply release the left button. Note that on some mouse configurations, the right button may be used for dragging.

Status Bar

The Status Bar is the three-dimensional gray bar that appears at the bottom of the Personal PC Secretary window. It will display helpful hints and messages about the status and usage of the program.

ToolHelp

ToolHelp is a feature found in such Programs as Microsoft Word 6.0 for Windows, Microsoft Excel for Windows, and many other popular programs. If the user passes the mouse over the button, a small yellow rectangle pops up providing a tip as to the functionality of the button.

Title Bar

The Title Bar of the main Personal PC Secretary window is used for activating the window, and (by dragging) moving the window.

Minimize

This button in the upper right hand corner of the window minimizes the main Personal PC Secretary window.

Menu Bar

Click on an item to show its menu. The menu bar appears at the top of the main window under the title bar.

Planner

Like its paper counterpart, the planner keeps a daily log of records.

P.I.M. Phonebook

A Personal Information Manager phonebook is used to store not only phone numbers and addresses but a variety of other information.

Dialer

A dialer is used to dial the phone to make outgoing calls.

MDB

An MDB file is a Microsoft ® Access database format. This type of file, along with text files can be imported into the P.I.M. Phonebook using the revolutionary Import Wizard.

Object Handle

The Object Handle () is used to drag objects like text files and calendar lists, and PIM entries which may not be able to be dragged as a whole. This handle is useful to delete a text file in DocPad, or clear a planner record. The Clock Placed in an ideal location, the clock can show US time format or 24 hour international time format. To Change Formats, Change the setting in the File menu. Planner Tab

Clicking this tab activates the planner.

P.I.M. Tab

Clicking this tab activates the PIM/Phonebook.

Dialer Tab

Clicking this tab activates the dialer.

Trash Can

Use this to drag and drop items you wish to delete. Either drag a list item, or use the object handle.

Context Sensitive Help

Changes the cursor so that you can click on anything and get context sensitive help on that topic. Getting Started - Installation To Install the program select "Run" from the File menu. Type "X:SETUP" where "X" is the letter of the drive that you are installing from. Follow the instructions on the screen to install the program.

Double click on the PC Secretary icon which will be created for you to start the program.

The Toolbar Buttons

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 Saves a DocPad document as text. Opens a text file for editing in DocPad. Creates a new DocPad document. Prints a DocPad document in the font chosen. Selects a DocPad font and point size. Searches the DocPad document for a text or numeric string. Activate the Run... dialog. Activates Event Master™ Activates the Week at a Glance... dialog. Activates the Personal Task List. Activates the Alarm Dialog. Launches File Manager. Launches Control Panel. Activates PIMCalc, the easy to use calculator. Displays the about box. Activates the Planner. Activates the P.I.M. Phonebook. Activates the Dialer. Runs Setup so that the user may change options and configuration. Selects either a Planner or Phonebook font and point size. Prints either a complete Phone/Fax Listing or Today's Events depending on whether the P.I.M. phonebook is active or if the Planner is active. Exits the program. 1 2 3 4 5 6 7 8 9 10 11 12 Add an entry to the phonebook. Change an existing entry in the phonebook. Delete an entry from the phonebook. Create a report of all entries in a phonebook. Dial the entry's home/primary number. Dial the entry's secondary/work/pager number. Print the selected entry's information. Create an envelope. Creates the beginning of a business letter in DocPad. Adds the entry's full data to DocPad. Runs Setup in which preferences can be set. Faxes the current DocPad or other text to WinFax Pro 4.0. Changes the cursor so that you can click on anything and get context sensitive help. Note that certain buttons listed on the previous page have multiple functions, dependent on which part of PC Secretary is active.

The Menus

File

New DocPad: Creates a new DocPad document. If changes have been made, prompts for saving.

Open Text File: Opens a text file for viewing/editing.

Save DocPad: Saves the DocPad document to the directory and filename you specify.

Print DocPad: Prints the current DocPad document.

Merge Print DocPad: Allows multiple documents to be printed with multiple addresses and salutations. See DocPad help for information on Merge Printing.

Print Setup: Allows selection of options and the selection of the default printer. To make a printer the default printer, double click it.

Run: Allows the launching of programs from their command line. Works like File Manager's File Run.

24 Hour Clock: Makes the Clock show time in 24 hour format.

View Phone Log: Displays the phone log, phonelog.txt if you choose to log calls. This option can be specified in setup.

Exit: Ends the Personal PC Secretary Session.

Edit

Cut: Deletes the selected text and copies it to the clipboard.

Copy: Copies the selected text to the clipboard.

Paste: Pastes the selected text to the clipboard.

Search: Searches the current DocPad document for a specific test or numeric string. See DocPad's help.

Font: Note that the fonts are useful for viewing and printing only.

Choose Font– DocPad: Allows choice of font and point size.

Choose Font– Planner: Allows choice of font and point size for the Calendar/Planner List.

Choose Font– P.I.M. List: Allows selection of the font for the Phonebook display.

Planner

Print Events of the Day: Prints the Planner's Contents in the specified font and point size.

Insert Times: Inserts times in the Planner for a half-hour delimited itinerary. Hours inserted can be set in setup.

Week at a Glance: Displays the Week at a Glance Screen.

Event Master: Displays the Event Master Dialog Box which controls anniversary, birthday and other reminders.

Purge All Data Before Today: Allows the deletion of old data before the current date. Data should be purged at least once a year.

PIM

Activates the PIM Phonebook/Addressbook.

Print Current Entry: Prints the information for the current entry.

Print Phone Listing: Prints an alphabetic listing of all entries' phone and fax numbers.

Print Report: Prints a Report of all entries' information in alphabetical order. Leaves space to fill in missing information.

Dial Phone Number: Dials the entry's first, or home phone number.

Dial Work Number: Dials the entry's work/other phone number.

Add Entry: Adds an entry to the database.

Change Entry: Changes the entry's information.

Import Data: Allows the importation of an Access Database, MDB, file into the PIM's phonebooks.

Export Data: Data from the phonebooks will be exported into a text file to your specifications.

Search Database: Displays the search dialog which allows full searches of the PIM's databases.

Envelope: Creates an envelope for the current entry or for other uses. Uses standard sized envelopes only.

(Size 10 = Approximately 9.6" X 5.2")

Setup PIM: Allows changes to the current PIM setup.

Dialer

Activates the Dialer.

Calculator

Activates the calculator.

Alarm

View and Set: Displays a list of currently set alarms. Also allows entry of a new alarm, or a removal of an old one.

Task List: Displays the Task List Dialog which contains today's personal tasks.

Help

Contents: Activates this help file's table of contents.

Help on Help: Displays help on using the Microsoft Windows help system.

Context Sensitive: Temporarily changes the mouse cursor so that you can click on anything and get help on it. It works the same as the context sensitive help button on the toolbar.

Search: Allows searches by keywords or topics in the help file.

Turn Tool Tips Off: Disables the tool tip help boxes which float over toolbar buttons.

About: Shows the about box.

The Planner

The Planner is a very versatile Windows tool. It allows the user to enter an appointment from the current date to the year 9000. Up to 64K of plans may be entered per day. The Planner works together with the Perpetual Calendar. Clicking on a date on the calendar automatically updates the Planner's schedule. To enter data, simply type, like you would with any word processor. The planner is free form: Organize your data by priority or by time, or with no order at all— it's your choice.

To Enter Data in the Record, do so as you would any word processor. As soon as you enter text, it is automatically saved. To delete the record, drag the handle to the trash can.

List of Events This box shows the events for the date listed above the box. Use the scroll buttons to change the display.

The Date Display

This text displays on what day, date, and year that the To-Do List/Planner is open.

The Perpetual Calendar

The Perpetual Calendar goes from the year 0 to the year 9000. It is integrated with the To-Do List/Planner.

To change the picture on the calendar, simply click anywhere on the picture and select a picture from the directory tree and file lists.

The Day Buttons Clicking on one of these buttons will change the date displayed in the To-Do List/Appointment Book, provided that the date is in the future. Otherwise, it will have no effect.

The Month Buttons

These set of buttons allow jumping from month to month. The letter is the first letter in each month of the year.

Select a Calendar Picture

Click the picture to change it to one of your choice. It can be a WMF (Windows Metafile), BMP, and any other standard Windows Bitmap-Style Picture.

Month Advance

Select this to move ahead one month at a time. The Planner will also move to the date you select.

Back Month

Select this to move back until the current day in the current month.

Today

Select this to move both the calendar and the Planner to the current day.

Year Advance

Select this to move ahead one year at a time. The Planner will also move to the date and year you select.

Back Year

Select this to move back a year at a time. The Planner will also move until the current date.

Day Advance

Allows scheduling of appointments in the future. Also works by clicking on the calendar.

Day Back

Allows the To-Do List/Appointment Book to return to the current date one day at a time.

DocPad

The Handy Text File Editor and Note Taker

DocPad can be used at anytime, because it's always visible. Take notes while you're on the phone, or take down a phone number or directions. It works just like any other text editor-- and even lets you save and print. You can use the standard menu commands to control DocPad, or the toolbar commands, found just beneath it.

Make sure you save changes, for DocPad does not support an autosave feature.

DocPad's text will automatically wrap on screen, but when printing, it will print normally.

DocPad prints the filename, date, and current page number as a header, the rest of the document is how it looks on screen (WYSIWYG). You can change the font and point size as well. You can Maximize DocPad by pressing the DocPad maximize button, and minimize DocPad using the DocPad minimize button located on the lower right corner of DocPad.

To search for text in DocPad, press the text search button, enter a specific numeric or text string and press search. Results will be highlighted. Match Case searches only for exact duplicates of the search string that was entered.

Saving Procedure: After accessing the save button, enter a path and filename, or select one and type a filename. **YOU WILL BE PROMPTED TO CONFIRM OVERWRITING OF FILES.** Deletion

Procedure: To Delete the File, simply drag the file handle () to the Garbage Can (). Opening

Procedure: Select a path and filename to open. **New Procedure:** A New DocPad clears the contents of the old DocPad. You will be asked to save the current document if changes were made.

Print Procedure: As with all printing procedures, clicking on the Printer Icon on the status bar will abort the print job.

Merge Printing in DocPad: To Merge Print, first create or open the document you wish to print in DocPad. Then, from the menu, select Merge Print DocPad. DO NOT ADD ADDRESSES OR SALUTATIONS TO THE DocPad DOCUMENT. Select an Address Book or Both when prompted.

For each entry in your phonebook(s), a letter with the entry's business address and salutation (default, if necessary) will be printed.

The printed copies are in alphabetical order by address book.

PIMCalc

All the normal buttons plus C–Clear; CE–Clear Entry, Door– Exit. Easy to use and convenient, too. This calculator will perform all normal ten–key type calculator functions and will display results in decimal form with or without exponents, denoted as E. Telephone Dialer To use, just key in the number and press the send button. The comma (,) is a standard 2 second pause between digits. The Multiple Alarm The Alarm is useful for reminding you of appointments and deadlines. The alarm allows up to one alarm per minute for every minute in a 24 hour period. To set an alarm, select the time you wish to have it go off, by using the scroll bars. Then, enter a message in the box. Finally, press the Add/Change button and the alarm is set. To remove an alarm, select one of the preset alarms, and press the remove button. To change the alarm's text, select the alarm, edit the text, and press the Add/Change button.

Alarms can be set for the current day only and will be deleted at the end of the day.

The P.I.M./Phonebook

The PIM/Phonebook proves to be very useful, supporting up to 21,000 entries, with a full drag & drop interface and a rolodex–style interface.

Exporting Data to text can be done simply by choosing PIM, Export Data from the menu. Data will be exported with a separator character between columns of data. Usually, text databases are tab-delimited, meaning that a tab separates data entries, but you can specify a custom separator should you require it.

Adding an entry is as easy as clicking on the add button on the toolbar and entering the information.

Changing the entry's information is just as easy as clicking on the change button, and modifying the data.

To Delete an entry, drag the entry to the trash can or press the cut button on the toolbar.

To Print an entry press the print button on the toolbar.

To create a business letter, drag the entry to DocPad, or press the Business Letter button on the toolbar.

To add the full data of the entry to a DocPad document, press the Insert Full Data button on the toolbar.

To call the selected entry, press the call button on the toolbar. Note: The telephone number must be filled in.

To fax the selected entry the current DocPad Document or another document, press the fax button on the toolbar. Note that Delrina's WinFax Pro 4.0™ is the only fax program supported, although you may change the printer to the fax driver of your choice.

To view a list of all associates within a company, click the company profile button.

Rolodex

Click a letter on this rolodex to display all entries beginning with that letter.

List of Entries

The listbox lists all entries under the letter clicked on in the virtual rolodex. By dragging the entry to various places, you can perform various functions like scheduling appointments, deleting entries, etc..

Information View

This lists all the entered information on the specified entry.

Yellow Pages

This address book is used primarily for business references, and works like its paper counterpart. Click the Yellow Button to access its "pages." See Also: White Pages.

White Pages

This address book is used primarily for personal/friend references, and works like its paper counterpart. Click the White Button to access its "pages." See Also: Yellow Pages.

Envelopes and Labels

To create an envelope automatically, click on an entry in the phone book, and click the envelope button. The entry's name and address will automatically be inserted.

Each button will change the font and point size of each line of the envelope. Note that this program changes the printer's orientation temporarily to landscape, and then returns it to what it was originally. It is assumed that size 10 envelopes will be used. Use the save as default button to save the return address so that it is inserted every time you create an envelope. Specify envelope location in Setup. Insert your envelope as follows: , in the envelope feeder of your printer, or in the paper insertion area of your printer. You can specify the location of that feeder or insert in setup. When ready to print, insert an envelope, label sheet or just use regular paper. PIM Setup Telephone Settings: COM Port: Select the COM port which has your modem connected to it.

This modem will be used for dialing and faxing. Tone/Pulse: Select either Tone or Pulse for the type of phone system you have.

Dialing Prefix: If necessary, enter a dialing prefix which will be used for all calls made.

Default Salutation: Used when a salutation for a specific entry is not entered.

Include Phone Number with Reports: Includes the phone number with reports if checked.

Include Fax Number with Reports: Includes the fax number with reports if checked.

Insert Times: Inserts times in half-hour increments from the beginning time to the end time.

Always Insert Times: Inserts times for each new day selected.

Envelope Printing: Determines location of printer envelope feeder or insertion area.

Modem Initialization String: Used to reset the modem each time you make a new call.

Week at a Glance

The Close button will close the Week at a Glance view. The Print button will print the contents of the Week at a Glance screen. Use the Day Scroll Buttons to scroll through your schedule, and print the week that you want printed. Context Sensitive help is always available by clicking . You will be given the option to print smaller sizes to accommodate a variety of planners.

Search Database

Using an extremely efficient search engine, the PIM can search through its databases in any of the fields that you want, for any text string or number.

To use, simply enter the text string or number string in the text box at the top, make your selections of the fields to search and click the search button. A field is an area to search in which you have previously entered data. An example of a field is the "Title Field."

The Clear List button clears the list of previous matches.

The Close button ends the Search.

The Print List button prints the entry and its match on your printer.

The context sensitive help toolbar button () activates context sensitive help. The Personal Task List The Remove Task button allows you to remove a task that has been completed. Just select the task and click the button. To Add a Task to the list, enter text in the text box at the bottom of the windows, and click the Add Task button.

To Print the Tasks, press the Print Tasks button.

Event Master™

Event Master is a unique way to help stop you from forgetting important dates. When running the PIM on one of the dates you specify as an Event, a message box comes up and reminds you of this date.

}Use the scroll bars to change the month and date, enter text in the text box at the bottom of the window, and click the Add button. To remove an event, select the event and press Remove. To close the Event Master™ window, press the close button.

The Show button will produce the "show screen," shown below. The show screen will always be shown at startup:

Print: Prints the events listed in the show screen. Event Master: Shows the Event Master. Close: Closes the show screen. Event Master will alert you three days in advance until the actual day of the event by inserting the event information in the current planner. Launching Other Applications Using Run... Browse: Allows you to find and select a file to run. Run: Launches the program or file.

Cancel: Closes the Run... dialog.

Run Minimized: Forces the program to run as an icon; minimized.

Data Import Wizard

The Import Wizard will guide you through the importation process. First, select an MDB, Microsoft Access Database, format file or a text file which is either comma-delimited (CSV) or tab-delimited. Then choose the table you wish to import from. The Import Wizard will then ask a series of questions. Simply double-click a field that answers the question, or double-click None when that choice is available.

The Field Names are gathered from your data file.

Select an address book you wish to import to, Yellow Pages or White Pages.

When finished with the questions, click the Import! button.

All previously existing entries will be overwritten.

In order to import Access Databases, the following files must be located in your WINDOWS\SYSTEM directory: VBDB300.DLL, MSAJT112.DLL, and MSAJT200.DLL. Access 1.1 and Access 2.0 formats are supported.