Now Up-to-Date & Contact

version 3.8 User's Manual

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Limitations on warranty & liability

Power On Software warrants that the disc on which this software is recorded are free from defects in material and workmanship, under normal use for 90 (ninety) days after the date of original purchase. If a defect occurs during the 90-day period, you may return the disc to Power On Software for a free replacement. **Power On Software will replace the disc provided that you have previously registered your product purchase with Power On Software.** The remedy for breach of this warranty shall be limited to replacement and shall not encompass any other damages, including but not limited to loss of profit, and special, incidental, or other similar claims. The software is licensed and delivered on an "as is" basis. Except for the express warranty set forth above, Power On Software makes no other warranties, either express or implied, by statute or otherwise, regarding the enclosed computer software product, its quality, its performance, its merchantability, or its fitness for any particular purpose.

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Introduction

Welcome to Now Up-to-Date & Contact™! This Introduction provides some basic information about this User's Manual, the product's online help, and technical support.

About this User's Manual

This User's Manual assumes that you know how to use the Macintosh to open applications, copy files, and open control panels and Chooser devices. A working understanding of basic Mac OS features is important as well.

Notes, Tips, and Online Help

We've placed special icons in the left margin throughout this User's Manual to draw your attention to important points about using the software.

Text accompanied by this icon indicates that you can find more detail on a topic in the Online Help.

Text accompanied by this icon indicates something that is important for you to know about the software in order to ensure that you're successful in using it, or to avoid problems.

Text accompanied by this icon informs you of a special or little-known feature, or of a particularly time-saving function.

Online Help

Context-sensitive online Help is available throughout Now Up-to-Date and Now Contact. You can click the Help button in major dialog boxes, or choose the Help command from the Window menu, to get information on the program feature you're currently using.

For more information on using Online Help, choose Help from the Window menu and select the Help on Help topic. In addition to online Help, the buttons in the Now Up-to-Date Toolbars include Tool Tips—short identifying labels that appear whenever you pass the pointer over the button.

The Help files copied to your hard disk during installation must be in the same folder as the Now Contact and Now Up-to-Date applications, or Online Help won't be available.

Technical support

If you can't find the answer to your question in this User's Manual or the online Help, you may wish to use one of our technical support options. When contacting us for technical support, please be prepared to provide the following (and be at your Macintosh when contacting us by telephone, if possible):

- Your product serial number, given to you at the time of purchase.
- A description of your problem—with as much detail as possible.
- A profile of your Macintosh. See the next section, "Creating a Profile," for more information.

The available technical support options are as follows:

- Visit our Web site (http://www.poweronsoftware.com), where you'll find helpful support information for all of our products, including a searchable KnowledgeBase on Now Up-to-Date & Contact. In addition, you'll find information on the most current versions and how to obtain them.
- Send e-mail to support@poweronsoftware.com. Please follow the instructions above for providing us with the necessary details in your message.
- Finally, you can call our Technical Support department for assistance, at 612-317-0344. Representatives are available to help you from 8:00 A.M. to 5:00 P.M. Central Standard Time.

Creating a Profile

The Profile option details your Macintosh hardware, your installed system software, extensions and control panels, and other information. Having a profile ready helps a technical support representative resolve your problem more quickly.

To create a profile:

1. Launch Now Contact or Now Up-to-Date.
2. Choose About Now Contact™ or About Now Up-to-Date™ from the Apple menu.
3. Click the Profile button at the bottom of the About dialog box.

   The application creates a profile of your Macintosh, and the Profile dialog box opens when the profile is complete.
4. Print or save your profile. Then click OK or Cancel to leave the Profile dialog box.

Chapter 1
Overview

This chapter provides an overview of Now Up-to-Date & Contact, including the basic concepts and terms unique to each application.

Now Up-to-Date is a powerful personal organizer that maintains your schedule, reminds you of upcoming events, manages your To-Do list and keeps your associates up-to-date, whether you're in the office, at home, or on the road. Now Up-To-Date integrates seamlessly with Now Contact—a fast, full-featured contact manager that gives you instant access to important names, telephone numbers and addresses, and lets you easily share Contact information with other users.

Now Up-to-Date

This section provides an overview of the concepts and terms used in Now Up-to-Date.

Events

Events are the basic building blocks of information in your Calendar File. An Event might be an appointment, a birthday, a holiday, or a task you need to complete, but all Events are part of your schedule. They can have titles, descriptions, attached Contacts, Reminders, and repeats. You can prioritize them and share them with other users if you're on a network. By assigning an Event to a Category, you can change the color or style of Events or display only those Events that relate to a particular topic.

Your Calendar File

Your **Calendar File** is the database that stores and maintains the Events in your schedule that you create, view, and modify. You need only one Calendar File to hold all of your Events, so once you've created one, all you have to do is open this Calendar File when you want to view, add to or print your schedule. You can also specify a Calendar File as your Primary File, so that it opens whenever you open Now Up-to-Date. For ease of access, we suggest you place an alias of your Calendar File or Now Up-to-Date in the Apple menu.

Contacts

With Now Up-to-Date you can attach Contacts to Events. Create an appointment, for example, and you can attach Contact information on the person you're meeting. You can also share Contact and Event information between Now Up-to-Date and Now Contact.

Ways of viewing your Events

Now Up-to-Date lets you view your schedule in several different layouts and time ranges. You determine *how* your Events are displayed by selecting one of several views for your Calendar File. You can quickly and easily switch to various views by clicking one of the view buttons in the Toolbar.

Categories

Categories let you group related Events together so that your Calendar File is more organized. Once you classify your Events into Categories, you can also apply distinct text styles and colors to the Categories so that you can tell at a glance which Category a given Event is assigned to. Your Calendar File initially contains a Personal Category by default, and new Events are initially assigned to that Category. In a way, the Categories are like overhead transparencies laid one on top of the other in your calendar (see Fig. 1).

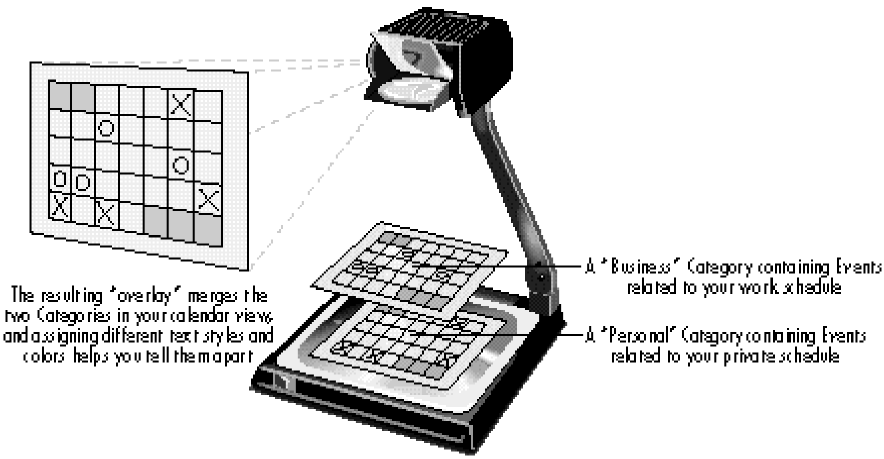


Fig. 1—Categories function like transparency overlays to let you see different groups of Events at the same time, but still tell them apart.

Private and Public Categories

Categories created and stored in your Calendar File are called **Private Categories** Information in these Categories is not shared with anyone, even if you're on a network.

Single users use only Private Categories. Users who are on a network can subscribe to **Public Categories**stored on a Public Event Server, in order to share Event information with other users. Public Categories allow any user to see the same Events as everyone else on the network; when one user modifies a Public Event, like moving an appointment to a different time, everyone else will see the change as well.

Sets

The Sets feature is a convenient way to filter your view of Events so that you see only certain Categories. You can create a different Set for each of the different ways you like to use your Calendar File. For example, you might create an All Set that includes all Categories and all the Events they contain, a Work Set for Categories containing Events related to work, and a Home Set for Categories containing Events that are non-work-related.

Once your Categories are grouped into Sets, you can switch quickly and easily between them to get the display of Events that you want at any given time. Sets are quite useful in allowing you to view or print out calendars or lists of Category-specific information—for example, at different times you may want to view or print a business schedule, a list of class assignments, or vacation periods.

Group Scheduling

If you're on a network with other Now Up-to-Date users, you can schedule group meetings automatically—specify who you want to attend, and Now Up-to-Date will find the times that you, the colleagues you're inviting, and even a meeting room are all available. When someone else on the network schedules a meeting and includes you as an attendee, you receive a notice in Now Up-to-Date. You can see more information about the meeting and then choose to attend or decline. If you're attending the meeting and someone reschedules it to a different day or time, you'll get notified of that, too.

Now Contact basic concepts

This section provides an overview of the concepts and terms used in Now Contact.

Contacts

Contacts are the essential building blocks in Now Contact. A Contact can be a person, a company, or both; in each case it's an individual entry in the database of people and companies (and attached information) maintained by Now Contact.

You may be accustomed to a Contact consisting of a person and/or company name, a couple of addresses and a few telephone numbers. However, with Now Contact, a Contact can be much more—you can incorporate more information into it *and* attach information to it.

Contact Files

A Contact File is the database that stores and maintains your collection of Contacts. The Contact File is where you create, view and modify your Contacts. A Contact File is much like a paper-based address book, except that it lets you view and use your Contact information in much more efficient and flexible ways.

Views

Now Contact provides two types of Views for you to create, display and modify your Contacts. You can view your Contact information in both the *Detail View* and the *List View* simultaneously.

The List View is a text-based, columnar window that displays Contact information as a list, sorted according to your preferences. List View Layouts are customizable, allowing you to sort and arrange Contact information depending on your needs.

The Detail View can display as much or as little Contact information as you want, including up to 12 telephone numbers or electronic mail addresses, two postal addresses, and all information associated with a single Contact. The Contact Log in the Detail View keeps track of your correspondence and other files relating to each Contact. Detail View Layouts are also easily customizable.

Categories

Now Contact Categories let you group related Contacts together so that your Contact File is more organized. You can also apply distinct text styles and colors to the Categories so that you can tell at a glance which Category a given Contact is assigned to.

Keywords

Like Categories, Now Contact Keywords let you organize your Contacts into groups. You can, however, assign as many Keywords to a Contact as you want, and the group defined by a Keyword can include Contacts from many different Categories.

Public Categories

If you're using Now Contact on a network, you can share Contacts with other users through Public Categories stored on a Public Contact Server. Public Categories let you include other network users' Contacts in your Contact File, and make Contacts from your Contact File available to others. This saves you from having to enter valuable Contact information into your Contact File when it's already available in another user's file.

Keywords defined for a private Contact are not available when the Contact is posted to a Public Category.

QuickAccess Features

Using the QuickAccess features of Now Up-to-Date and Contact, you can immediately view calendar and contact information, as well as add new Events and Contacts, without having to open the main applications.

QuickPad

QuickPad gives you the ability to enter new calendar and contact information in an intuitive and free-form way. QuickPad uses smart text handling to take cues from what you type and create events or contacts accordingly, and its support for multiple open windows lets you enter a lot of information quickly and then decide what to do with it at your convenience.

QuickDay

Now Up-to-Date's QuickDay adds a pull-down menu to your menu bar that provides instant access to your day's Events. **Reminders**for your Events appear here, whether or not Now Up-to-Date is running, and you can set Reminders to notify you before an Event occurs. You can configure how your Reminders appear—as alert dialog boxes or menu bar alerts, with or without an accompanying sound of your choice. The QuickDay menu can also be configured to display the date and time, and can be used as a timer.

QuickContact

QuickContact is a control panel that adds a pull-down menu of Contacts, telephone numbers and options to your menu bar. QuickContact can search for Contacts based on Contact Name, Company Name and Full Name, so you can always locate a Contact quickly and easily—whether Now Contact is running or not. The QuickContact menu appears as a telephone icon (☎) in your menu bar.

Chapter 2
Installing Your Software

Installing Now Up-to-Date & Contact is simple—the Installer application included with the software does all of the work for you, and puts everything where it belongs. We recommend that you follow the instructions in this chapter on using the Installer application, because it removes any previous versions of Now Up-to-Date & Contact, and places each component in the correct location on your hard disk.

To users of earlier versions: Before installing, be sure to read the "Read Me" file located in the same folder as the Now Up-to-Date & Contact Installer application. This file contains instructions for handling any unusual situations that may make it difficult for the Installer to complete its tasks properly. Under normal circumstances, the Installer handles upgrading to version 3.8, so you don't need to move, modify or delete any files before installing. Components from earlier versions are simply replaced by their version 3.8 counterparts, and your settings for those components are incorporated into the preferences of the new ones. The components that are new to version 3.8 are placed where they belong, with their default settings, and your earlier-version files are preserved so that you can use them in version 3.8.

System requirements

Now Up-to-Date & Contact are fully tested and designed to work on any Macintosh meeting these requirements:

- All 68030 processor or later Macintosh models (including all Power Macintosh, G3 and G4 computers)
- 16 MB of physical RAM
- 5 MB of available hard disk space
- Mac OS 7.1 or later, up to and including Mac OS 9

In order to use the Web lookup features of Now Contact, you must be running Mac OS 7.5.3 or later, with Open Transport installed and active.

Installing Now Up-to-Date & Contact

The Installer application included with the software is designed to place the components in their correct locations automatically.

If you are part of a workgroup of Macintosh users, you may be able to install from a network server. Consult your system administrator for details.

To install:

1. Restart your Macintosh while holding down the Shift key.

   This disables all extensions on your Macintosh.

   This step is very important—installing any new software product while other extensions are active may result in corrupted files and other problems.

2. Insert the disc into the CD-ROM drive.

   If you obtained the Now Up-to-Date & Contact software electronically by purchasing and downloading it from the Power On Web site, you will skip this step and simply locate the Installer application (after decompressing the downloaded software, if necessary).

3. Double-click the Installer icon to open the application.

   A splash screen appears, showing the name of the product you're installing.

4. Click Continue.

   A window appears, displaying the license agreement for the product. You need to accept the terms of the license agreement in order to use the product.

   You can also choose to print a copy of the license agreement, save it to your hard disk as a text file, or decline the license agreement. Note that if you click Decline, the Installer will quit, since you must accept the license agreement in order to use the product.

5. Click Accept.

   A new window appears, displaying the "Read Me" information for the product. This information is also available by opening the "Read Me" file found in the same folder as the Installer application. You should read this information now if you haven't yet done so, as it can be helpful during the installation process.

   You can also choose to print a copy of this information, or save it to your hard disk as a text file.

6. Click Continue.

The main Installer window appears.

The Installer defaults to a "Single User Install" setup, which installs the necessary items for an individual to use Now Up-to-Date & Contact on a single computer. If the computer is connected to a network, the user will be able to share events and contacts with others, as well as view shared events and contacts made available by others.

If your network isn't set up for sharing events and/or contacts and you want to install the Public Server software on this computer to enable these functions, choose "Custom Install" from the upper left pop-up menu and select an installation option that includes the Public Event Server or the Public Contact Server, or both. In most cases, it's best if a network administrator is involved in installing these items.

7. Click Install to begin the installation.

Before installation begins, a dialog box appears, asking whether you want to install a version of the software that will run only on the current computer (68K or PowerPC), or a version that will run on any computer ("fat binary").

8. Click "This Computer Only" or "All PowerPC & 68K" as desired.

A window appears displaying the progress of the installation process as the Installer places the product components in their correct locations.

When installation is complete, a dialog box appears, indicating that installation was successful and you should restart in order to use the new software.

In some cases, you may want to install the software onto another disk before restarting; if so, you can click Continue instead of Restart at this point.

9. Click Restart.

Your Macintosh restarts, and Now Up-to-Date & Contact are ready to use.

Registering your software

The first time you launch Now Up-to-Date & Contact after installing it, you have the option of using the product on a demonstration basis for 30 days, or personalizing the software with a valid serial number. If you want to use the product in demonstration mode, just click Demo in the dialog box that appears when you open the application.

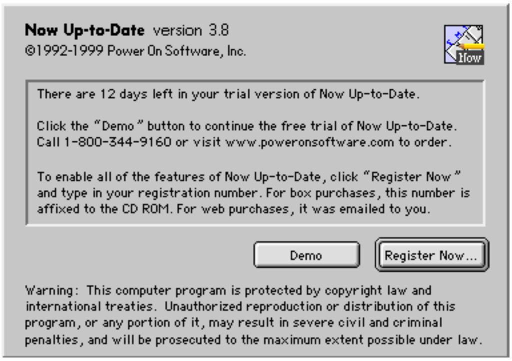
To register your software:

1. Purchase Now Up-to-Date & Contact from Power On Software.

   You can purchase the product by visiting the Power On Software Web site at http://www.poweronsoftware.com, or by calling our Sales line at 1-800-344-9160. Upon purchasing your product, you will receive a registration number.

2. Launch Now Up-to-Date or Now Contact.

   A dialog box appears, prompting you to choose between Demo mode and registering the software.

3. Click Register Now.

   A registration dialog box opens, prompting you to enter your name, organization (optional) and the registration number you received when you purchased the product.

4. Enter the required information, taking care to type your registration number correctly, then click OK.

   Your software is now registered, and you should no longer see the dialog box that appeared in step 2 when you open the application.

Removing Now Up-to-Date & Contact

Should you need to remove Now Up-to-Date & Contact from your hard disk for any reason, the Installer application can do it for you.

To remove the software, just follow the same steps you used for installing, through step 6. Choose “Uninstall” from the upper left pop-up menu, and then click “Uninstall” at bottom right. The Installer removes the software, then a message appears indicating that the removal won’t take effect until you restart. Click Restart, and your Macintosh will restart without the software items you removed.

When you use the Uninstall option, any calendar or contact files you have created are not *removed from your hard disk.*

Chapter 3
Working with Calendar Events

This chapter explains how to create and modify Events, set and respond to Reminders, attach Contacts to Events, and find Events.

Creating and opening a Calendar File

Whether you upgrade from a previous version or set up Now Up-to-Date for the first time, you need to select a primary Calendar File. This is the file that QuickDay scans for Events requiring Reminders, and the file that's automatically linked to Now Contact .

To upgrade from an earlier version of Now Up-to-Date:

1. Open Now Up-to-Date.
2. Choose Open from the File menu.
3. In the Open dialog box, locate and select your earlier-version Calendar File.

   A dialog box appears asking you to confirm that you want to convert the earlier version Calendar File to version 3.8. Click OK.
4. Select "Make this file the primary file."
5. Click Open.

   The file is selected as primary.

To create a new Calendar File to contain your Events (for new users):

1. Open Now Up-to-Date.

   An untitled Calendar File opens.
2. Choose Save As from the File menu.

   The Save As dialog box appears.

3. Select “Make this file the primary file.”

Designating the file as primary means that it will open automatically whenever you open Now Up-to-Date.

4. Enter a name and select a location for the file, then click Save.

Event Info window

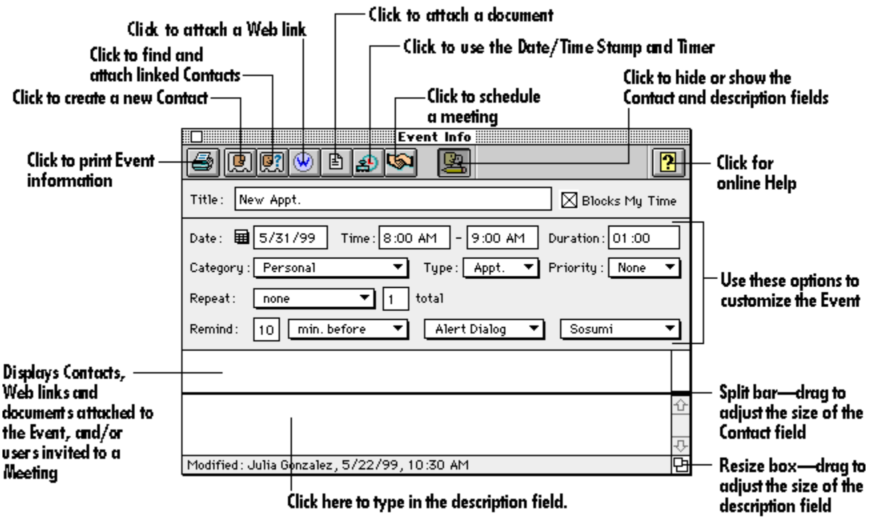
Now Up-to-Date’s Event Info window is the control center for creating and modifying Events. The Event Info window appears when you create any new Event except Notes and Banners, or when you double-click an Event in any view.

To prevent the Event Info window from opening automatically whenever you create a new Event, choose General Preferences from the Define menu and deselect this option.

The Event Info window displays information for the currently selected Event. Press Tab to move from field to field; press Shift-Tab to move to the previous field.

When the Event Info window is open, the calendar view behind it is inactive. Make the calendar view active by pressing the Enter key. When you do so, pressing Tab or Shift-Tab moves you between Events in your Calendar File, allowing you to locate another Event. Press the Enter key again to make the Event Info window active.

Refer to “Event Info” in Online Help for more information on using the Event Info window.



Creating Events

Once you've opened your Calendar File, you're ready to begin adding Events to your schedule.

You can also quickly create Appointments, Calls, and To-Dos and add them to your calendar using QuickPad. See "Using QuickPad" in Chapter 13, "QuickAccess Features," for more information.

Scheduling Appointments

An Appointment is an Event that occurs on a specific day at a specific time.

To schedule an Appointment in any view:

1. Select a day by clicking in its cell.
2. Choose New Appt. from the Event menu.

   The Event Info window appears with the default title of "New Appt." and the Event type set to Appt.
3. Change the Appointment's title by typing.
4. Change any other information in the Event Info window.
5. Close the Event Info window.

To schedule an Appointment in Multi-Day or Day View:

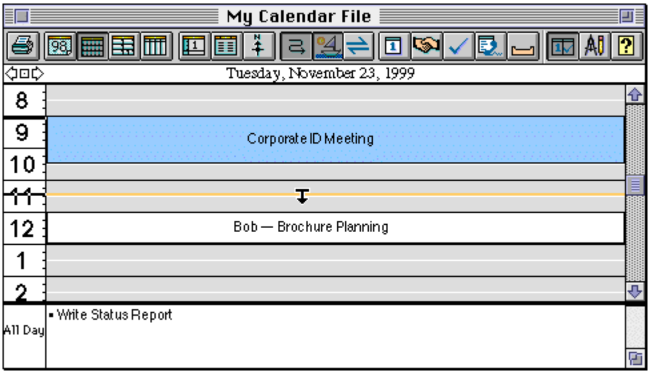
1. In the time grid for the day on which the Appointment occurs, position the pointer over the starting time.

   The pointer becomes a crosshair.
2. Drag the crosshair from the starting time of the Appointment to the ending time.

   The Event Info window appears with the default title of "New Appt." and the Event type set to Appt.
3. Change the Appointment's title by typing.
4. Change any other information in the Event Info window.
5. Close the Event Info window.

   The Appointment appears highlighted in the current View.

While in the Multi-Day or Day View, you can change the start and end times of the new Appointment by dragging the Appointment to a new start time. Change the duration of the Appointment by dragging the top or bottom edge of the box in which it appears.



Meetings

If you're using Now Up-to-Date with a network Public Event Server set up for Group Scheduling, you can use the Meeting Event type to schedule meetings for specific dates and times, reserve rooms and resources, and notify attendees.

To schedule a Meeting:

1. Select a day by clicking in its cell.

2. Choose New Meeting from the Event menu.

The Event Info window appears with the default title of New Meeting, and the Schedule Meeting dialog box opens.

3. Select the users, Groups, Conference Rooms, and/or Resources to include in the meeting.

Drag the desired items from the list on the left to the Invite list on the right. To remove an item, drag it back to the first list. To inform someone of a scheduled Meeting, but not invite them, drag the name to the Opt list.

4. Click either Group View or Auto-Pick to set the meeting date, time and duration.

Group View shows each invitee's schedule, including their available times. Any users you've placed in the Opt list appear in italics at the bottom of the list. The first available time for your meeting is highlighted.

Auto-Pick automatically checks the schedules of everyone you placed in the Invite list, and the availability of any Conference Rooms or resources you've included. The Auto-Pick dialog box displays the available meeting times.

5. Click OK.

The dialog box closes, and you see the Event Info window for your new meeting.

6. Fill in any necessary information for the meeting.
7. Close the Event Info window.

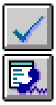
   The Meeting appears in your Calendar File and everyone on your Invite and Opt lists receives notification of the new meeting.

Scheduling To-Dos and Calls

To-Dos and Calls are similar types of Events. Use To-Dos to schedule tasks that you want to complete on a specific day. Use Calls for planning telephone calls that you need to make on a specific day.

To schedule a To-Do or a Call:

1. Select a day by clicking in its cell.



2. Choose New To-Do or New Call from the Event menu.

   The Event Info window appears with a default title and the Event type set to the selected Event.
3. Change the Event’s title by simply typing.
4. Change any other information in the Event Info window.
5. Close the Event Info window.

   The To-Do or Call appears highlighted on the selected day.

Marking To-Dos and Calls as In Progress or Done

A To-Do or a Call marked as Not Done (•) or In Progress (••) can be auto-forwarded to subsequent days until you mark it as Done ( ). When you mark a To-Do or Call as Done, it is attached to the date on which it was completed.

You can specify that when a To-Do or Call is marked Done it disappears from your view, or that it appears in the lower section of your To-Do List. See “Define Calendar Formats dialog box” in Chapter 4, “Viewing Calendar Events,” for more information.

To mark a To-Do or Call as In Progress or Done in the To-Do List:

1. Click once on the box to the left of the To-Do or Call to mark it as In Progress.

   A diagonal line appears in the box.
2. Click the box again to mark the To-Do or Call as Done.

   A checkmark appears in the box and the item moves to the bottom of the list.

   Option-click to mark a To-Do or Call as Done immediately instead of clicking twice. If you inadvertently mark a To-Do or Call as Done, simply click the box again to remove the checkmark. The item moves back into the upper part of the To-Do List.

To mark a To-Do or Call as Done in other views:

1. Select the To-Do or Call by clicking it once so it's highlighted.
2. Choose Done from the Event menu, or type Command-/.

   A checkmark appears next to the title of the To-Do or Call, indicating that you've completed it.

Special

A Special Event is a date-specific Event that spans an entire day. You can use a Special Event to indicate a special occasion or simply that you're out of the office for the entire day.

To create a Special Event:

1. Select a day by clicking in its cell.
2. Choose New Special from the Event menu.

   The Event Info window appears with New Special highlighted in the Title field and the Special Event type selected.
3. Change the Special Event's title by typing.
4. Change any other information in the Event Info window.

   If you're using Group Scheduling, you can use a Special Event to indicate that you are unavailable for Meetings for an entire day.
5. Close the Event Info window.

Holiday

A Holiday is a date-specific Event that's nearly identical to a Special Event, except that it represents a holiday. This Event type automatically changes the formatting of the date on which it falls to the format you've specified for weekends and holidays. (The Define Calendar Formats dialog box lets you specify unique appearances for weekends and Holidays. See "Customizing Calendar Views" in Chapter 4 for more information.)

To create a Holiday:

1. Select a day by clicking in its cell.
2. Choose New Holiday from the Event menu.

   The Event Info window appears with New Holiday highlighted in the Title field and the Holiday Event type selected.
3. Change the Holiday's title by typing.
4. Change any other information in the Event Info window.
5. Close the Event Info window.

Banner

A Banner is a graphic Event that spans one or more days. It appears as a Banner in the Month View; in all other views, it appears like a repeating Special Event. When Banners overlap, clicking the one in back brings it forward. If you're using Group Scheduling, you can use a Banner to indicate that you are unavailable for Meetings for a day or a series of days.

To create a Banner:

1. With the Month View displayed, choose New Banner from the Event menu.

   A new highlighted Banner appears across the current or selected day. If no day is selected, the Banner will appear in the upper left corner.

2. Drag the Banner to the desired position.
3. Resize the Banner, if necessary, to span the desired days.

   Click the right edge of the Banner and drag it to cover the span of days desired. The Banner can span multiple weeks or even months.

4. Enter the desired text in the Banner and then press the Enter key.

   Your Banner text is saved and the Banner is selected. Deselect it by clicking anywhere in the Month View.

The Define Calendar Formats dialog box lets you control the shape and appearance of Banners. See "Customizing Calendar Views" in Chapter 4, "Viewing Calendar Events," for more information.

Sticky Note

A Sticky Note lets you place an attention-getting message directly in your Month View.

To create a Sticky Note:

1. With the Month View displayed, choose New Sticky Note from the Event menu.

   A new highlighted Sticky Note appears across the current or selected day. If no day is selected, the Sticky Note will appear in the upper left corner.

2. Enter text in the Sticky Note by typing, then press the Enter key.

   Your text is saved and the Sticky Note is selected. You can deselect it by clicking anywhere in the Month View.

3. Move or resize the Sticky Note as desired.

   To move it, drag its top edge. To resize it, place the pointer over the bottom right corner—it changes to a double-headed arrow—then drag to the desired size.

To add a title to a Sticky Note, double-click it to open the Event Info window; type in the Title field, then close the Event Info window.

Graphics

Now Up-to-Date allows you to add bitmap or PICT graphics to your Calendar File to draw attention to specific days or Events, or to provide a unique background for your calendar display. You can do this by dragging and dropping graphics from the Graphics Palette, or by pasting graphics from the Clipboard. You can attach a graphic to a day in the Month View, or to any of five Event types: Appointments, To-Dos, Calls, Special Events and Holidays. The maximum number and size of Graphics is limited only by the available memory.

A graphic attached to a day (rather than to an Event) is actually a separate Event type, with a title, description, and repeat options. Any Graphic of this sort can be moved, resized, repeated, and, because it is an Event, shared with other users over a network.

A graphic attached to an Event appears next to an Event's title in the Multi-Day and Day Views, and at the top of the day on which the Event occurs in the Month and Week Views.

Event Graphics are automatically reduced in size for display, so smaller graphics like icons tend to work best. To increase the size of graphics, increase the size of the number text in the Define Calendar Formats dialog.

Graphics Palette

The Graphics Palette contains ready-made icon graphics that you can attach to days in the Month View or attach to individual Events in any View.

To...	Do this...
Open the Graphics Palette	Choose Open Graphics Palette from the Window menu.
Attach a graphic to a day in Month View	Drag the graphic from the Graphics Palette and drop it on the desired day.
Attach a graphic to an Event in any View	Drag the graphic from the Graphics Palette to the Event, and drop it when the Event is highlighted.
Add a graphic from the Clipboard	Click the Paste button in the Graphics Palette, or choose Paste Graphic from the Edit menu.
Remove a graphic from the Palette	Drag the graphic to the Trash icon in the Palette.

Pasting graphics from the Clipboard

To add graphics to your Calendar File that aren't available in the Graphics Palette, you can simply copy them to the Clipboard in any application and paste them into Now Up-to-Date. Once you've copied a graphic to the Clipboard and switched to Now Up-to-Date, you have the following options:

To…	Do this…
Attach a graphic to a day	Click in the day cell and choose Paste Graphic from the Edit menu.
Attach a graphic to an Event	Select the desired Event and choose Paste Graphic from the Edit menu.

Modifying Graphics in your Calendar File

You can modify graphics you've added to your Calendar File in several ways. When the Palette isn't open and you want to modify a graphic attached to a day, you must first hold down the Option key and click the graphic. When the Graphics Palette is open, you have the following options.

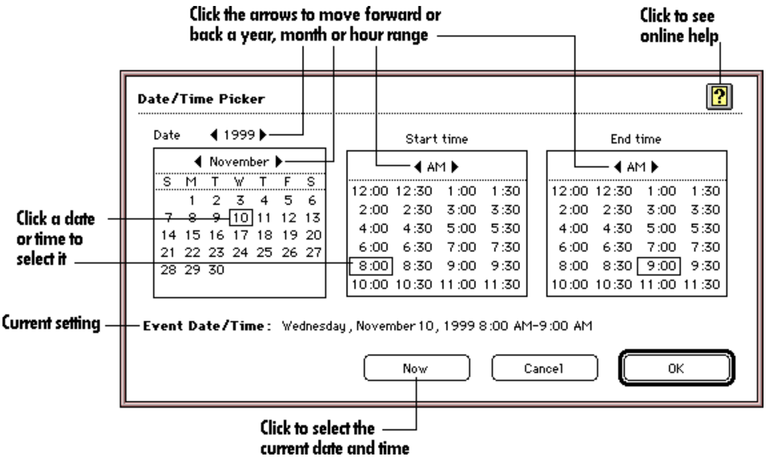
To…	Do this…
Move a graphic attached to a day	Drag it to the desired location.
Resize a graphic attached to a day	Place the pointer over its bottom right corner until the pointer changes to a double-headed arrow, then drag to the desired size.
Remove a graphic attached to a day	Select it and press Delete/Backspace, or choose Cut Graphic from the Edit menu.
Remove a graphic attached to an Event	Select the Event containing the graphic you want to remove, and then choose Cut Graphic from the Edit menu.

Customizing Events

You can customize an Event by setting repeats and reminders, changing its status, attaching Contacts and a description, and changing the Event's font size and color. Some of this customizing is done in the Event Info window, and some using menu commands.

Using the Date/Time Picker

The Date/Time Picker is a special dialog box that makes it extremely easy to set the correct date and time for the Appointment you're creating. To open the Date/Time Picker, just click the button shown at left in the Event Info window.



Using the Date/Time Stamp

The Date/Time Stamp function in the Event Info window lets you make an Event's description more informative by documenting the date and time that notes were added, or even elapsed time, which is very useful in the case of a Call Event.

To use this feature, click the Date/Time Stamp button in the Event Info window Toolbar. The current date and time are inserted at the top of the Description field. As long as you keep the Event Info window open to the same Event, clicking the button again will place a second date and time entry after the first, followed by the elapsed time in parentheses.

When the Event is a To-Do or a Call, the Timer that appears in the Event Info window for these Events counts elapsed time as it passes.

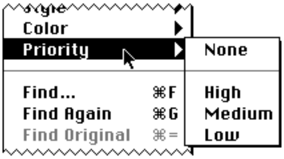
Using Priorities

The Priority setting causes To-Dos, Calls and Undated To-Dos to appear in order of Priority. Those with a higher Priority appear higher in the list. You can define up to ten different Priorities of any name. You assign a Priority using either the Event menu or the Event Info window.

If you're on a network, note that an Event's Priority is a private attribute, so any Priority you assign to a shared Event is not shared with other users.

To assign a Priority to an Event:

1. Select the Event.
2. Choose the desired Priority from the submenu attached to Priority on the Event menu.



or

Choose a Priority from the Priority pop-up menu in the Event Info window.

You can also prioritize by dragging items in the To-Do List. See Chapter 4, "Viewing Calendar Events" for more information.

Defining Priorities

You can easily customize the names and order of the available Priorities.

To define Priorities:

1. Choose Priorities from the Define menu.

   The Define Priorities dialog box opens.

2. Edit the existing Priority names or add new ones as desired.
3. Click OK to save your changes.

   The new or modified Priorities are now available in the Priority submenu.

Setting up repeating Events

You can create an Event once and then set it to repeat at a specified interval for any number of total occurrences. This makes it very simple to add weekly meetings or other regularly-occurring Events to your Calendar File. You can choose from a list of standard, preset repeat options, or set up custom repeats for more unique situations. Repeats are available for all Event types except Banners and Undated To-Dos.

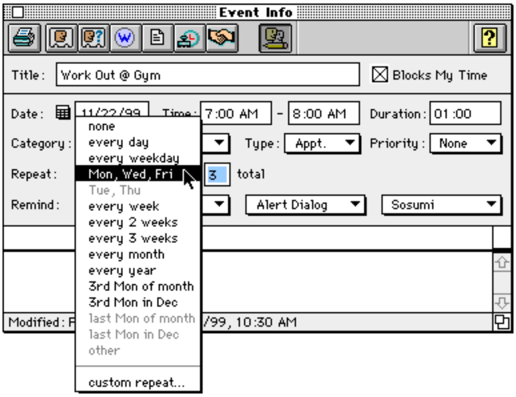
Standard repeating Events

The Repeat menu in the Event Info window provides a number of standard repeating intervals. The options available on this menu vary according to the day on which the Event is to occur.

To create a standard repeating Event:

1. Open the Event Info window for the Event that you want to repeat.
2. Choose the desired repeat option from the Repeat pop-up menu.

Because the options on the menu change according to the day on which the selected Event falls, this illustration may vary from what you see.



3. Save the repeat setting by pressing the Enter key or closing the Event Info window.

The repeating occurrences of the original Event have been added to your Calendar File.

You can create a repeating Event without opening the Event Info window by holding down the Option key and dragging the Event to the day on which you want the Event to repeat.

Custom repeating Events

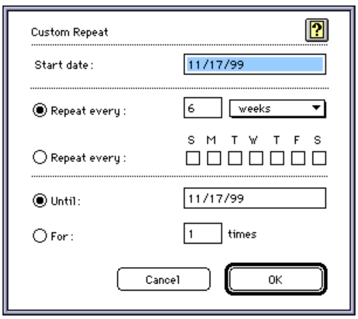
The custom repeat option lets you specify the details of more unique repeating sequences. It also lets you specify an ending date for a repeating sequence, rather than having to know exactly how many occurrences you want.

To create a custom repeating Event:

1. Open the Event Info window for the Event.

2. Choose custom repeat from the Repeat pop-up menu.

A dialog box opens for configuring custom repeating Events.



3. Set up the custom repeat frequency as desired.

Click the Online Help button to read a full description of the options in the Custom Repeat dialog box.

4. Click OK to save your settings.

   You're returned to the Event Info window. The Repeat menu displays custom repeat to indicate that you've set up a Custom Repeat.

5. Save your repeat settings by pressing the Enter key or closing the Event Info window.

Modifying repeating Events

You can modify the details of a repeating Event, and quickly transfer that change to all connected repeating Events, future repeating Events, or just selected Events in the series.

To modify a repeating Event:

1. Open the Event Info window for the repeating Event you want to change.
2. Modify the event information as desired.

   For example, you may want to change the start or end times for the Event, or change text in the description field to indicate a different meeting agenda.

3. Close the Event Info window.

   A dialog box appears with the following options.

Use this option…	To…
Future:	Change only future repeating Events to have the same characteristics as the Event you just modified.
All:	Change all past and future repeating Events to have the same characteristics as the Event you just modified.
One:	Change only the Event you have just modified, and leave past and future repeating Events as they were.

As you move your pointer over the Future, All and One buttons, notice the keyboard shortcut text displayed in the dialog box.

4. Click your choice.

   The repeating Events are updated accordingly.

Setting Reminders for Events from within Now Up-to-Date

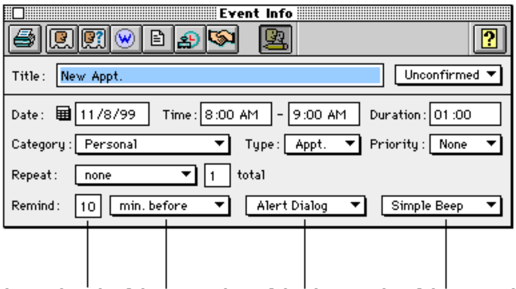
Reminders are managed by the QuickDay control panel that's installed with Now Up-to-Date. See "Using QuickDay" in Chapter 13, "Quick Access Features," for details on using QuickDay. This section describes how to set Reminders in the Event Info window.

You can't set Reminders for Undated To-Dos, Notes, Banners or Graphics.

To set a Reminder for an Event in Now Up-to-Date:

1. Open the Event Info window for the Event for which you want to set a Reminder.

   The Event Info window appears. Use the three pop-up menus that appear next to Remind at the bottom of the window to set a Reminder.



Enter the number of units of advance notification you want to receive.

Select a unit of time for advance notification, or "never" for no Reminder.

Select the type of notification you want to receive.

Select a sound to accompany the Reminder.

In order for you to receive Reminders in the form of menu bar alerts, the QuickDay Event menu must be turned on by selecting the "Bell" option in the QuickDay control panel. See Chapter 13, "QuickAccess Features," for more information.

2. Save the Reminder setting by pressing the Enter key or closing the Event Info window.
3. Save your Calendar File.

   The QuickDay control panel becomes aware of new Events requiring Reminders only after you save your Calendar File.

Responding to Reminders

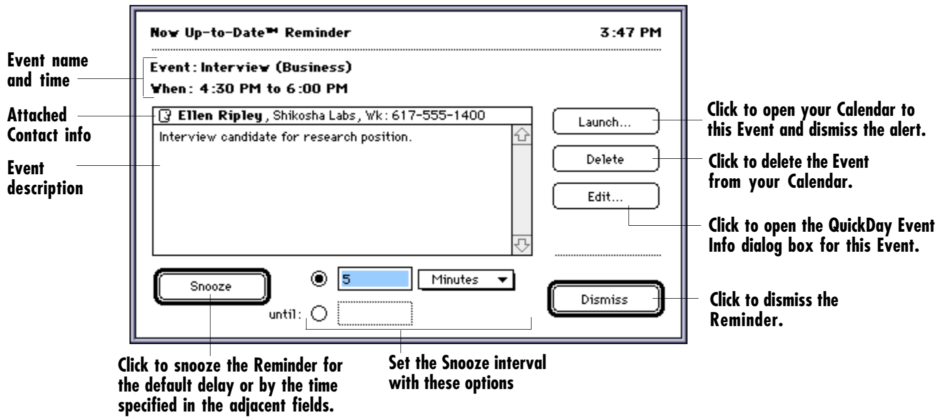
Now Up-to-Date offers many options for responding to Reminders.

When you dismiss an alert for a repeating To-Do, you dismiss only the current day's alert for that To-Do. If the To-Do is not marked as Done, you'll receive another alert for it on subsequent days until it is completed.

Alert dialog boxes

Alert dialog boxes offer the most options for responding to a Reminder. Because alert dialog boxes may interrupt background processes such as printing or modem downloads, however, some users may prefer the menu bar alert option described in the next section.

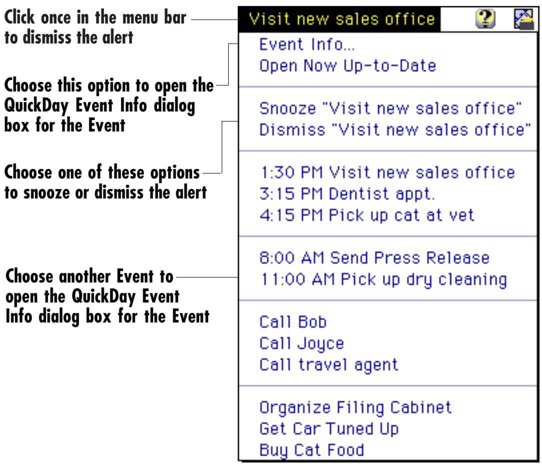
A typical Reminder alert dialog box is shown below.



*You can quickly snooze a Reminder by typing the desired amount of time, typing **m** for minutes, **h** for hours, or **d** for days, and clicking Snooze (or pressing Return or Enter).*

Menu bar alerts

When you set a menu bar alert, the Event name flashes where the QuickDay menu heading appears when the Reminder is due. This type of alert doesn't interfere with background processes, and continues to flash until it's dismissed or snoozed. Your options for responding to menu bar alerts are described in the illustration below.



To mark a To-Do or Call as Done, choose Mark [Event] as Done from the QuickDay menu (this command appears only when the alert is for a To-Do or Call). This marks the To-Do or Call as Done and dismisses the Reminder.

To either snooze or dismiss all currently due Reminders, hold down the Option key to change the Snooze [Event] and Dismiss [Event] commands to Snooze All and Dismiss All.

The Sets feature lets you control the kinds of Reminders you receive from Public Categories. See Chapter 5, "Organizing Events," for more information on Sets.

Attaching Contacts to Events

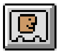
You can attach Contact information to any Event you create. The attached name, company and phone number of the Contact appears in the Event Info window. When you receive a Reminder for an appointment, you'll also see this Contact information.

The following procedure explains how to add Contact information to your Event without using Now Contact. By linking a Now Contact file to your Calendar File, you can attach existing Contacts to Events and add Contacts you create in Now Up-to-Date to your Now Contact file. See Chapter 14, "Linking Events and Contacts," for more information.

To attach a Contact to an Event:

1. Open the Event Info window for the Event to which you want to attach a Contact.

   Double-click the Event, or select it and then press the Enter key.

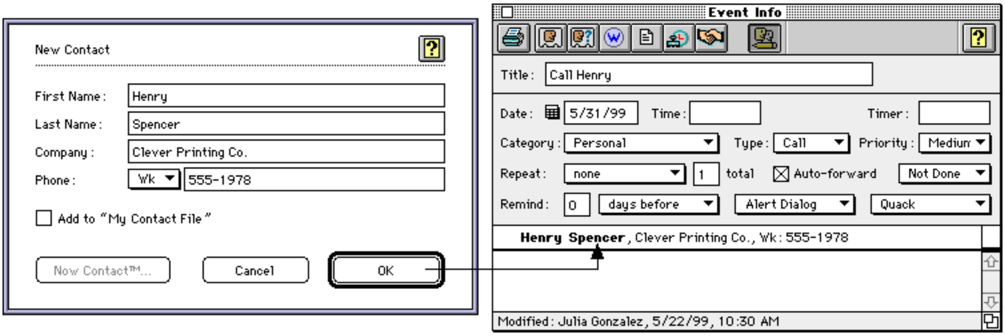


2. Choose New Contact from the Attachments submenu on the Event menu.

   The New Contact dialog box appears.

3. Enter the Contact information in the appropriate fields.

   The Phone pop-up menu lets you specify whether the phone number you enter is a work (Wk), home (Hm), Fax (Fx), mobile (Mb), or other (#) number.



4. Click OK.

Attaching World Wide Web links to Events

You can attach Web page links to any Event. Web link attachments let you keep track of Web pages related to certain Events, and make it easy to open the corresponding pages in your Web browser. Web link attachments include the name of the linked page or site and its URL, or address. You attach Web page links by dragging them from a browser window, or by entering them directly in Now Up-to-Date.

To drag a Web page link to an Event:

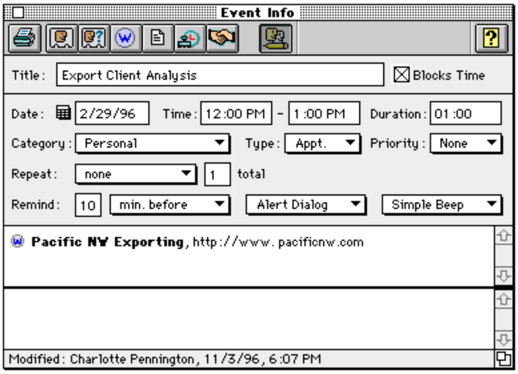
1. Make sure that Now Up-to-Date is open, and the Event you want to attach the link to is in the current Calendar View.

2. In your Web browser, select a link and drag it to the Event.

In some browsers, when you hold the mouse over a link for too long before dragging, a pop-up menu may appear. If this happens, just move the pointer off the menu and try again.

3. In Now Up-to-Date, open the Event Info window for the Event.

The Web link attachment appears in the same area as attached Contacts.



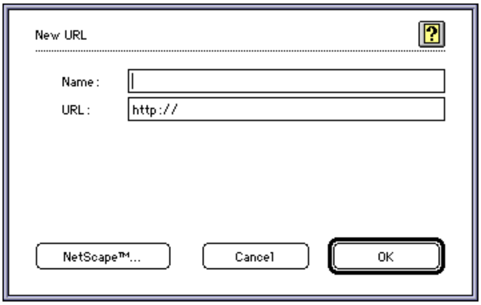
4. To open the linked Web page in your Web browser, double-click the attachment while holding down the Option key.

To create a Web page link in Now Up-to-Date:

1. Open the Event Info window for the Event to which you want to attach a Web link.

2. Click the New URL button in the Event Info window Toolbar.

The New URL dialog box appears.



You can also open this dialog box by selecting the Event in any Calendar View and choosing New URL from the Attachments submenu in the Event menu.

3. Enter the Web link information in the appropriate fields.

You can test the link by clicking the Web browser button in the lower-left corner of the dialog box. Your browser opens to the specified Web page.

4. Click OK to return to the Event Info window.

The Web link attachment appears in the same area as attached Contacts.

5. To open the linked Web page in your Web browser, double-click the attachment while holding down the Option key.

You can edit Web link attachments by selecting an Event and choosing Edit Attachments from the Attachments submenu in the Event menu. The URL Info dialog box that appears is identical to the New URL dialog box shown above.

Attaching documents to Events

Now Up-to-Date also lets you attach documents to Events. This allows you to keep track of any documents, such as letters and spreadsheets, that relate to particular Events.

To attach a document to an Event:

1. Open the Event Info window for the Event to which you want to attach a document.
2. Click the Attach File button in the Event Info window Toolbar.

   A directory dialog box appears.

   You can also open this dialog box by selecting the Event in any Calendar View and choosing Attach File from the Attachments submenu in the Event menu.
3. Locate and select the file you want to attach, then click Attach.

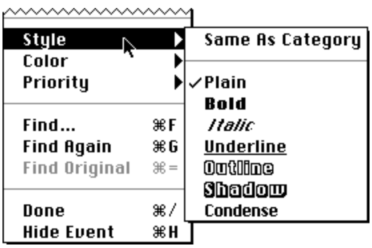
   The document is attached to your Event, and appears in the same area of the Event Info window as attached Contacts and Web links.
4. To open the document in the application that created it, double-click the attachment while holding down the Option key.

Changing Event text style and color

You can make certain Events stand out from others by applying contrasting colors and/or text styles to them. The style and color of Events are set according to their Category in the Define Sets dialog box, but you can do some customizing with menu commands.

To change the text style or color for an individual Event:

1. Select the Event.
2. Highlight the Style or Color command on the Event menu and from the corresponding submenu, choose the attribute you want to apply.



Choose…	To…
A style or color	Apply the selected style or color to the Event.
Same as Category	Return the Event to the style or color specified for the Event's Category in the Define Sets dialog box.

You can set an Event's style quickly by selecting it and then using a standard keyboard shortcut, as listed below:

Plain	*Command-Shift-P*	*Outline*	*Command-Shift-O*
Bold	*Command-Shift-B*	*Shadow*	*Command-Shift-S*
Italic	*Command-Shift-I*	*Condense*	*Command-Shift-C*
Underline	*Command-Shift-U*		

You can also set the text style or color for an entire Category. Select an Event that belongs to the Category whose text style or color you want to modify. Hold down the Option key while pulling down the Event menu. Then follow the steps above.

Moving, copying, and deleting Events

It's easy to move, copy, or delete an Event. There are some variations in these procedures where repeating Events are concerned.

Moving Events

To move a single Event, select it, choose Cut from the Edit menu, select the destination day, and choose Paste Event from the Edit menu.

In the Month, Week and Multi-Day Views, move an Event simply by dragging it to a different day within the current View.

To move a repeating Event:

1. Select the occurrence of the repeating Event that you want to move.
2. Choose Cut from the Edit menu.
3. Select the destination day.
4. Depending on the desired result, choose the appropriate command from the Edit menu.

Choose…	To move the Event to a new day and…
Paste Event	Disconnect it from the other repeating Events in the series.
Paste Repeat	Keep it connected to the other repeating Events.

To move multiple occurrences of a repeating Event:

1. Select one occurrence of the repeating Event.
2. Depending on the desired result, choose the appropriate command from the Edit menu.

Choose...	To cut the selected occurrence and...
Cut Future	All future occurrences of the repeating Event.
Cut All	All past and future occurrences of the repeating Event.

3. Select the destination day.
4. Depending on the desired result, choose the appropriate command from the Edit menu.

Choose...	To paste a series of repeating Events that is...
Paste Event	Disconnected from the original series and starts on the selected day.
Paste Repeat	Connected to the original series and starts on the selected day.

Copying Events

To copy a single Event, select it, choose Copy from the Edit menu, and select the destination day. From the Edit menu, choose Paste Event to create a new Event with the same name as the original. Choose Paste Repeat to create a repeating occurrence of the original Event.

To create a repeating occurrence of an Event, hold down the Option key while dragging the Event to a new day.

Deleting Events

To delete an Event:

1. Select the Event.
2. Choose Clear from the Edit menu, or press Delete/Backspace.

   The Event is deleted. If the Event is part of a repeating series, a dialog box appears asking if you want to remove the one occurrence, all occurrences, or only all future occurrences in the repeating series. Click the desired button in the dialog box.

To avoid the confirmation dialog box when deleting repeating Events:

- *Press the Command-Delete to delete only a single occurrence of a repeating Event.*
- *Press Command-Shift-Delete to remove all future occurrences of a repeating Event without a confirmation dialog box.*
- *Press Shift-Delete to remove all occurrences of a repeating Event.*

Hiding and unhiding Events

You can selectively hide all Event types. You can't print hidden Events, nor do you receive any Reminders for them. When you hide shared Events, they are hidden only within your Calendar File; other users will still be able to view them.

To...	Choose...
Hide an Event	Hide Event from the Event menu after selecting the Event.
View a hidden Event	Show Hidden from the View menu. ! *Any Events that you've previously hidden appear in a dithered, or dimmed pattern when you choose this command.*
Unhide an Event	Unhide Event from the Event menu after selecting the dimmed Event. This option is available only if the selected Event is hidden.

Finding Events and text in your Calendar File

Use Now Up-to-Date's Find command to locate an Event, Contact information attached to an Event, or any information entered in the description field of an Event. This command searches all Event titles, descriptions, and attached Contacts in your current Set of Categories, except in Events that are currently hidden (see Chapter 5, "Organizing Calendar Events," for more information on Categories and Sets).

To find text in your Calendar File:

1. Choose Find from the Event menu.
2. Type the text to search for in the text field.
3. Click Find or press Enter.

   Now Up-to-Date begins the search from the day that is currently selected or from the first day in the current view, and highlights the first Event that contains the specified text.

   To locate the next occurrence, choose Find Again from the Event menu (or type Command-G). To search backwards, select the Search Backwards checkbox in the Find dialog box before starting the search, or hold down the Shift key and choose Find Again.

The Find Original command is used only when working with Unreconciled Events from Public Categories. See Chapter 11, "Importing, Exporting & Synchronizing Contact Data," for more information.

Setting preferences for Now Up-to-Date

From setting preferences for new Events to general preferences for how Now Up-to-Date works, you have a great deal of control over the scheduling environment.

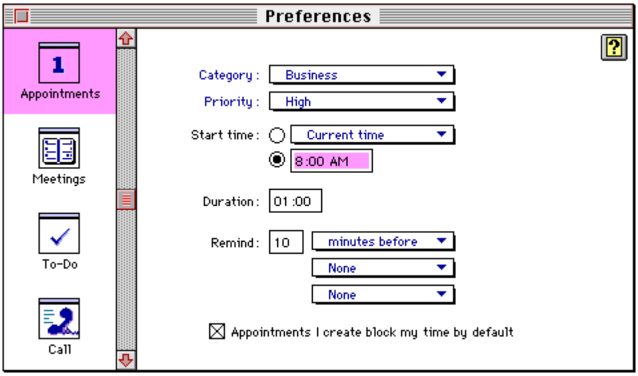
To set your preferences, highlight the Preferences command on the Define menu. A submenu appears, providing direct access to Preferences settings in several areas—choose the submenu command for the area of Preferences you want to modify, and the Preferences window opens to that pane. You can move to another pane by clicking its icon in the scrolling list on the left.


Refer to “Preferences” in Online Help for more information on the Preferences options.

Setting Preferences for new Events

You can automate some of the work involved in creating Events by setting default values for them.

For New Appointment you can set the default Category (see Chapter 5, “Organizing Events,” for more information), Priority, Reminder attributes, as well as the start time (at the current time; on the quarter-, half- or whole hour from the current time; or at a time you specify) and the duration of a new Event.

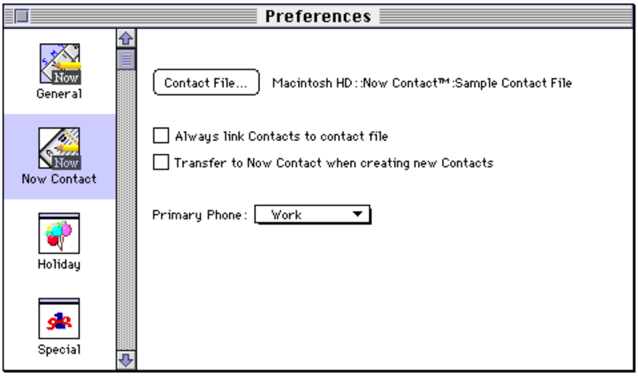


For New To-Do, and New Call you can set the default Category, Priority, and Reminder attributes, as well as the beginning time (at the current time; on the quarter, half or whole hour from the current time; at a time you specify; or none at all) and the duration of a new Event. You can also indicate if the To-Do or Call will be carried forward until it is marked as Done. For a Call, you can specify that its Timer will auto-start as soon as you create the Event.

For New Undated, New Note, New Banner and New Graphic, you can set the default Category and Priority. For New Holiday and New Special, you can set the default Category and Priority, as well as the default Reminder attributes.

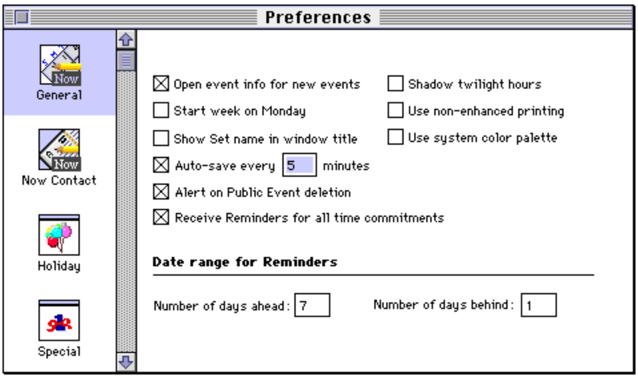
Choose Meetings to specify the default Category and Priority for new meetings that you create, the time interval for auto-picking a meeting schedule, what kind of Reminder you prefer, and the type of alert and sound to receive when you are invited to meetings. See Chapter 16, “Group Scheduling,” for more information.

Setting Now Contact preferences



Choose Now Contact to select which Now Contact file to link your Events to. You can also set the default phone title that will appear in the New Contact or Contact Info dialog box, and other options. See Chapter 14, “Linking Events and Contacts,” for more information.

Setting General Preferences



Choose General from the Preferences submenu to set general default preferences for your Calendar File.

Choose...	To specify that...
Open Event Info for new Events	The Event Info window will open automatically whenever you create a new Event.
Start the week on Monday	Weeks will start on Monday instead of Sunday in the Month and Multi-Day Views.
Show Set name in window title	The title bar of your Calendar File will display the name of the Set that is currently selected in the View menu.

continued next page

Choose…	To specify that…
continued from previous page	
Auto-save every x minutes	The Auto-Save function will be active, saving your Calendar File automatically at the time interval you specify.
Shadow twilight hours	In the Multi-Day and Day Views, the hours from 7 P.M. to 5 A.M. will appear “shadowed.”
Use non-enhanced printing	Now Up-to-Date’s full-featured printing will be reduced to very basic functions, in order to resolve the printing errors that are occasionally caused by some printers using custom Chooser devices. Fewer printing options will be available when this checkbox is selected.
Use system color palette	Now Up-to-Date’s custom color palette will be turned off, to avoid the minor and purely cosmetic effect that it can have on the appearance of your desktop and the Apple icon in the menu bar, only when Now Up-to-Date is running.
Date range for Reminders	Reminders will be presented only during a certain time range.
Alert on Public Event deletion	A warning dialog box will appear when you delete a Public Event. The warning alerts you that deleting the Event will also delete it from everyone else’s calendar.
Receive reminders for time commitments	Presents Reminders for all Events in Public Categories for which you’ve confirmed attendance. This preference applies only if you are set up for Group Scheduling.

Chapter 4
Viewing Calendar Events

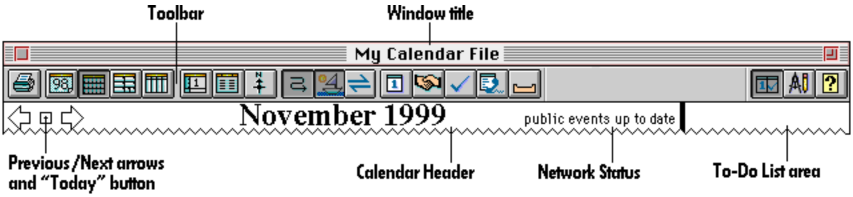
Now Up-to-Date offers a wide variety of Views, so you can examine and modify your schedule in the way that best suits you. You can also customize Views to fit the way you want to look at your schedule.

Using Calendar Views

This section provides specific information on each of the calendar-based views, showing you what's unique about each one and how it can help you view your schedule.

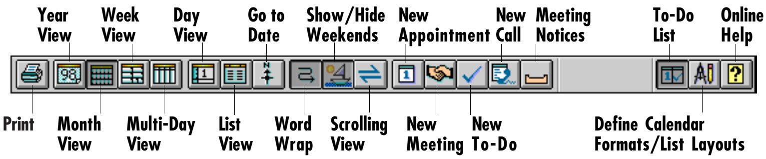
Elements in each View

Several elements are common to all views in Now Up-to-Date.



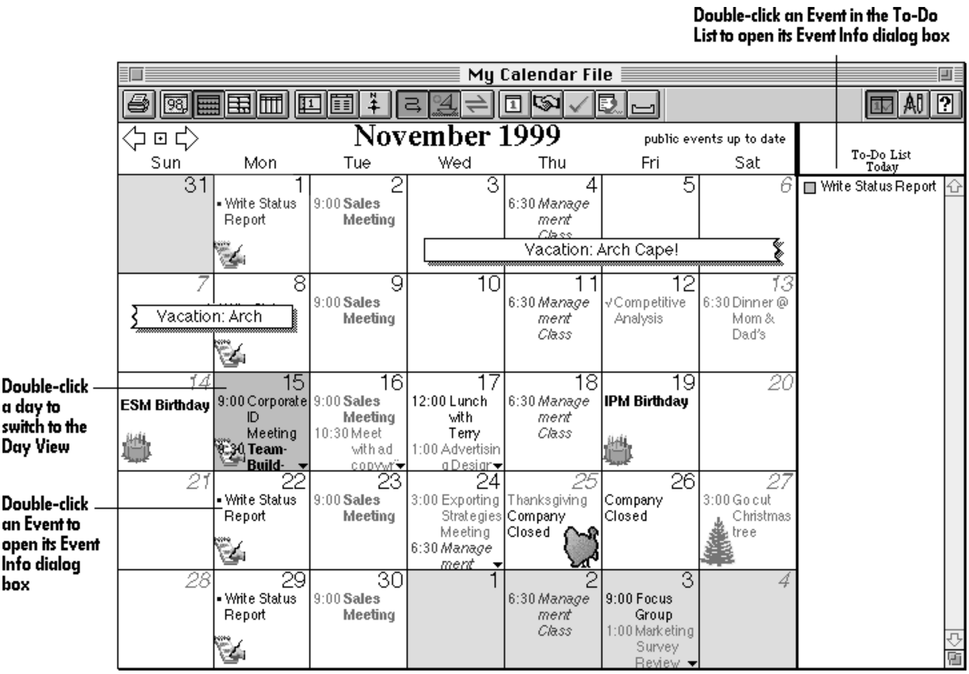
Toolbars

The buttons in the Toolbar provide immediate access to most common Now Up-to-Date functions.



Month View

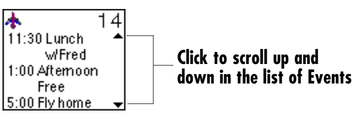
The Month View is Now Up-to-Date's default view; it displays all Event types except Undated To-Dos, and it's the only view in which Sticky Notes appear. Banners appear as graphic items in this view, and as repeating Special Events in other views.



For each day, Events are sorted in the following order:

- Holidays
- Special Events
- Appointments, Meetings, time-specific To-Dos and time-specific Calls—grouped together and sorted by their scheduled times
- Not Done dated To-Dos and Calls (sorted by Priority)
- In Progress dated To-Dos and Calls (sorted by Priority)
- Done dated To-Dos and Calls (sorted by Priority)

If you schedule more Events on a day than can fit into its cell at the current window size, the cell will scroll to let you see all of the day's Events. Upward- and downward-pointing arrows indicate that there are additional Events to which you can scroll.



Events that don't have titles do not appear in the Month View.

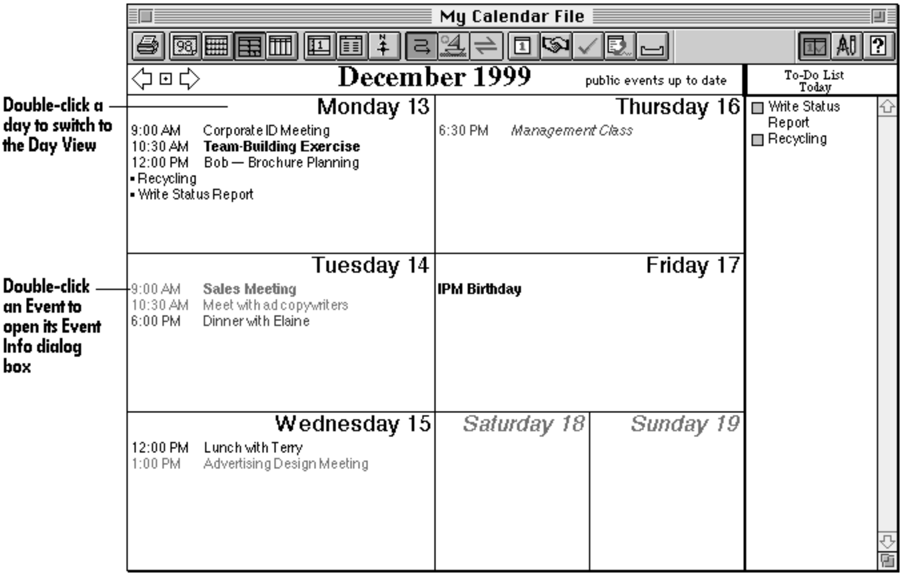
Scrolling Option in the Month View

The Month View has a scrolling option that you can toggle on and off. This option lets you move forward and backward by single weeks, instead of full months. When the scrolling option is active, the weeks move upward as you go forward in time and vice versa.

Also, the See-Thru Month feature (which displays day numbers and Events from previous and upcoming months in a dimmed pattern) is no longer active, as all days and Events in the current time range are displayed. The Calendar Header changes to reflect the time range being displayed.

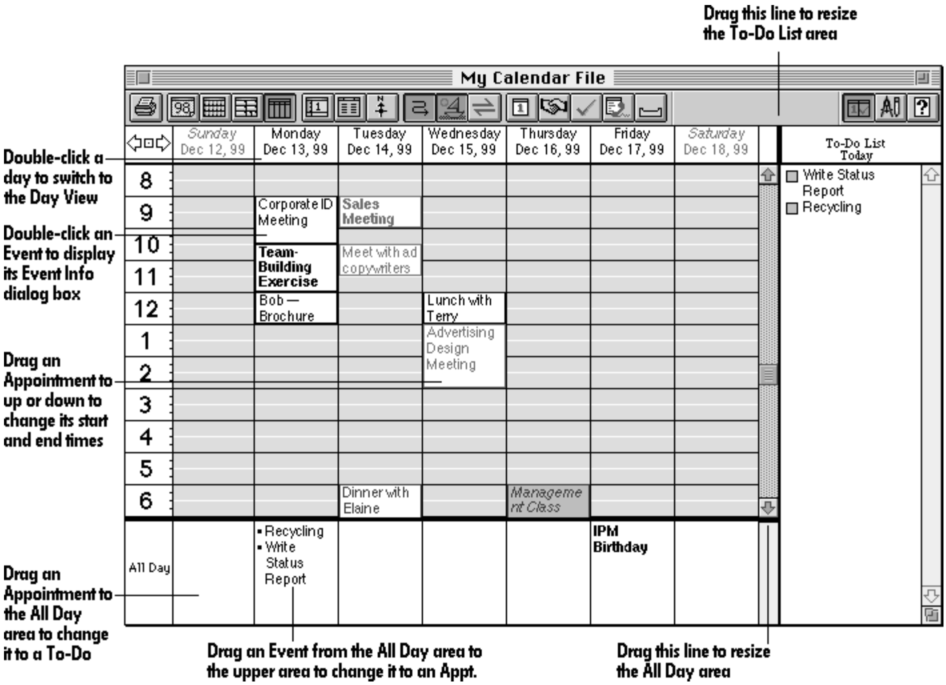
Week View

The Week View shows you a week at a time in a format similar to the Month View but with more space allotted for each day. This view displays all Event types except Sticky Notes, and includes scrolling cells as well.



Multi-Day View

The Multi-Day View displays a week in a time-grid, columnar format, allowing you to see free time slots at a glance. Only Appointments and Meetings appear in the upper, timed section; To-Dos, Calls (including time-specific To-Dos and Calls), Special Events and Holidays appear at the bottom in the All Day area. You can drag Appointments to the All Day area where they become To-Dos, and drag All Day Events to the timed area where they become Appointments. As the day progresses, the hours listed along the left side become shaded to indicate that they're in the past.

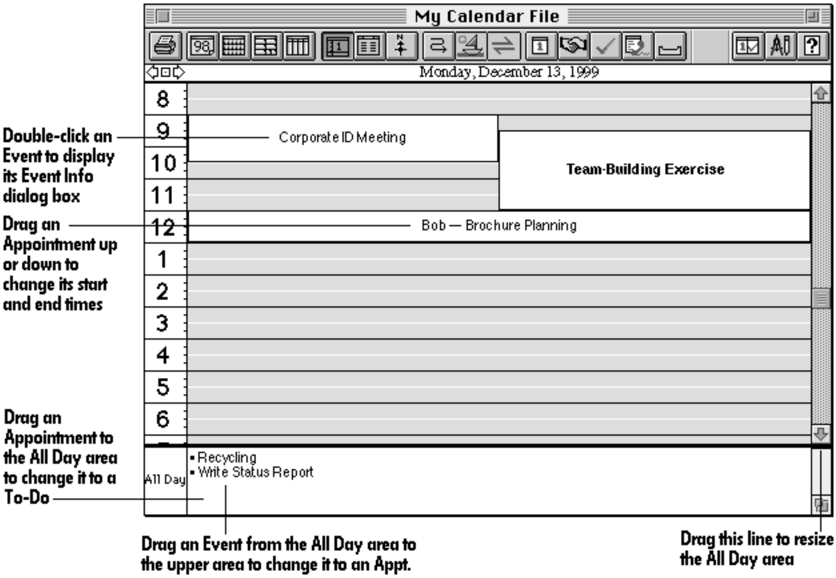


Scrolling Option in the Multi-Day View

Like the Month View, the Multi-Day View also has a scrolling option that you can toggle on and off. This option lets you move forward and backward by single days, instead of full weeks.

Day View

The Day View resembles the Multi-Day View, with a time-grid columnar format and a split window, but it displays one day only. The Day View is a separate window from the Month, Week, or Multi-Day View; you can have the Day View open at the same time that you have one of the other views open, and arrange the two windows on your screen so that you can use them simultaneously. Overlapping Appointments are also tiled in this view so you can spot conflicts easily.



Zoom commands in Multi-Day and Day View

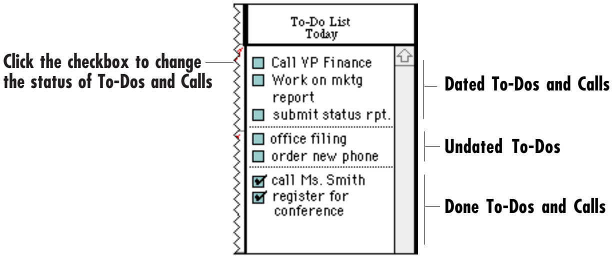
The Zoom In and Zoom Out commands in the View menu are available only in the Multi-Day and Day Views. These commands allow you to see the time displayed in increments other than the default 15 minutes. Each command has five levels of magnification. Choosing Zoom In magnifies the time grid and allows you to read or create Appointments that start or end at smaller time increments. With the Zoom Out command you can go back to the preset 15-minute increment scale, or zoom out one more level to 30-minute increments.

Year View

The Year View provides an overview of a given year; it does not display any Event types. You can select a month number using the number keys (1-12), move between months using the arrow keys, and open the Month View by double-clicking the desired month, or selecting a month and pressing Return or Enter.

To-Do List

The To-Do List is available as a split window in all views except the List View and the Year View. To see the To-Do List, just click the button at the right end of the Toolbar. The To-Do List opens and displays the To-Dos and Calls for the current day.



All Calendar Format and other view-related settings (Event text size, Word Wrap, etc.) apply to the To-Do List as well.

The To-Do List displays To-Dos and Calls in three groups: dated To-Dos and Calls for the currently-displayed day, Undated To-Dos, and any Done To-Dos and Calls that were completed on the currently-displayed day. The first two groups are sorted by Priority, Time (if any) and Title. The last group is sorted by the date and time that items were marked as Done, then by their titles.

Changing the status of To-Dos and Calls

Change the Done/Not Done status of To-Dos and Calls in the To-Do List by clicking the checkbox that appears next to each one. When a To-Do or Call is Not Done, the checkbox is blank; click the checkbox once to mark the item as In Progress (a single line appears in the box); click it again to mark the item as Done (a checkmark appears in the box). When you mark an item as Done, it moves to the bottom section of the To-Do List.

Option-click an item to mark it as Done, skipping the In Progress setting.

Modifying To-Dos and Calls by Dragging

Change the Priority of an item in the To-Do List by dragging it to a new location in the list. To make an item a higher priority, drag it higher in the list; to make it a lower priority, drag it lower in the list.

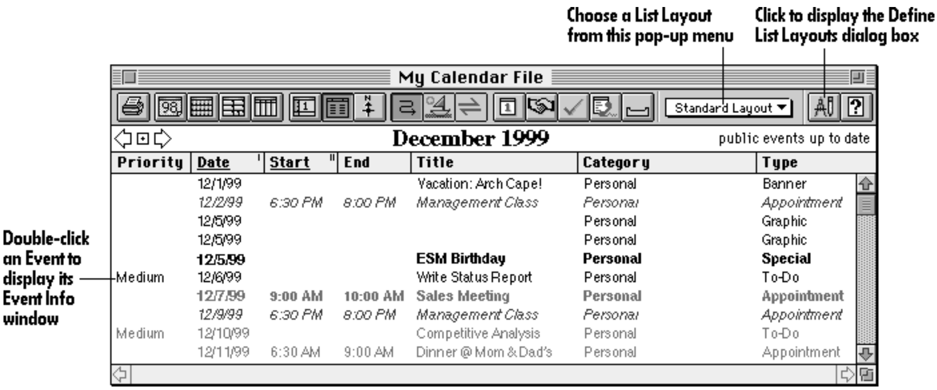
Dragging a dated To-Do or Call into the Undated section of the To-Do List changes it to an Undated To-Do, and vice versa. Dragging a To-Do, Call, or Undated To-Do into the Done section marks it as Done at the current date and time; dragging an item from the Done section into the Dated or Undated section changes its status accordingly.

Dragging an item from the To-Do List and onto a day cell (or the All Day section of the Multi-Day or Day View) changes its date accordingly, and if the item is an Undated To-Do, its type is changed to a dated To-Do as well. If the date is in the past, the item is marked Done on that day; if the date is in the future, the item is simply moved.

Dragging an Event from a calendar View into the To-Do List changes its type to either a To-Do or an Undated To-Do, depending on which section it is dragged to.

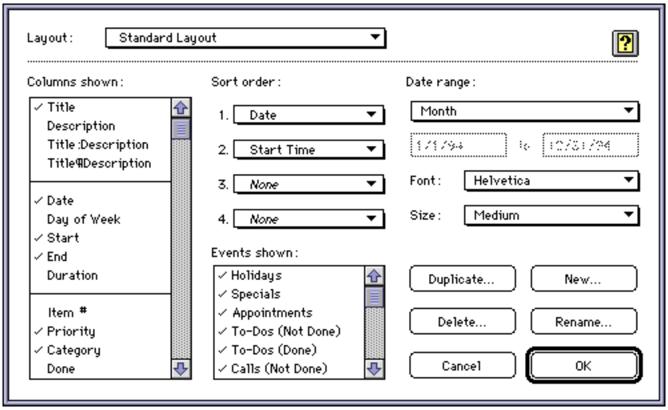
List View

The List View displays all Event information in a columnar, text-based format. You can set up the List View so that only certain Event types or certain information contained in Events is displayed.



Customizing the List View

Use the Define List Layouts dialog box to create and modify List Layouts. To open it, click the Define List Layouts button in the List View, or choose List Layouts from the Define menu. The List Layouts dialog box appears.



Refer to "Layout" in Online Help for more information on using the List Layouts dialog box.

When you create a new List Layout, it appears in the submenu attached to the Use List Layout option of the Window menu, and also in the pop-up menu found in the List View's Toolbar.

Creating Events

You can create Events in the List View the same way you do in other Views. There are a few differences in how the Events are displayed and the ways that you change Event attributes.

To create an Event in the List View:

1. Choose the desired Event type from the Event menu, or click the corresponding button in the Toolbar.

   The new Event appears on the current day, or if the displayed time range does not include the current day, on the first day in the displayed range.

   You can create only those Event types that you've selected to be displayed in the current List Layout.

2. Change the new Event's title by typing.
3. Change other attributes of the Event by tabbing through the columns displayed in the List View and typing where desired or choosing from pop-up menus.
4. Open the Event Info window if you want to set other attributes of the new Event.

   Open the Event Info window by selecting the Event and pressing the Enter key, or by double-clicking the Event.

Sorting Events

A very useful feature of the List View is its ability to sort Events. You can choose a primary column by which to sort Events, and up to three additional sub-sort columns.

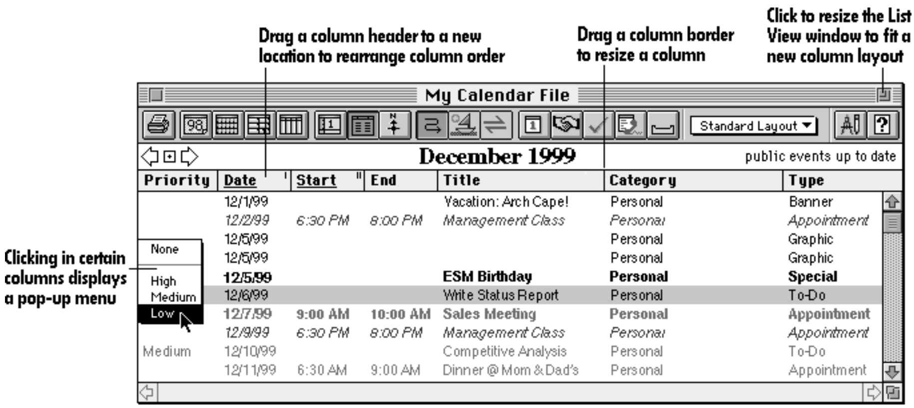
You can set Sort orders in the Define List Layouts dialog box using the numbered Sort Order menus provided there, or you can set Sort orders directly in the List View. The following table explains the ways that you can set sorting directly within the List View.

Do this in the column header…	To…
Click	Make the column's Event attribute the first-level, or primary sorting criterion. The column title is underlined and a small Roman numeral I appears to its upper right.
Shift-click	Make a column besides the primary sort column a second, third or fourth sort column. The column name is underlined and a small Roman numeral II, III or IV appears to its upper right.
Option-click	Sort the column in reverse order. A downward-pointing arrow appears below the column's Roman numeral.
Option-click again	Turn off reverse sorting for the column.

Modifying the Events in List View

Certain columns in the List View (Priority, Category, Type, Done, and Confirm) provide pop-up menus for changing their corresponding Event attributes. Clicking in one of these columns causes a menu to pop up and display a list of options, allowing you to make changes without opening the Event Info window.

You can also move and resize columns in the List View by dragging.

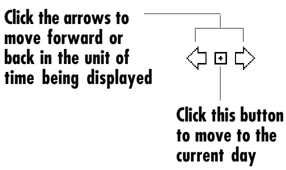


Navigating through Calendar Views

All of Now Up-to-Date's views offer many ways to move between Events and days and switch views. Use the Toolbar buttons to switch Views. Press Tab to move to the next Event. You can also use the arrow keys to move between days, or use number keys to select individual days.

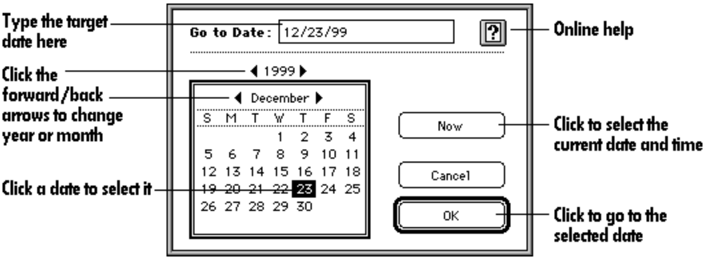
Using the Previous/Next Arrows

All views have the Previous/Next arrows and the Today button shown below.



Navigating Using the Go to Date function

Use the Go to Date function to move to a different date in your Calendar File. To use this function, just click the Go to Date button in any View's Toolbar, or choose Go to Date from the View menu.

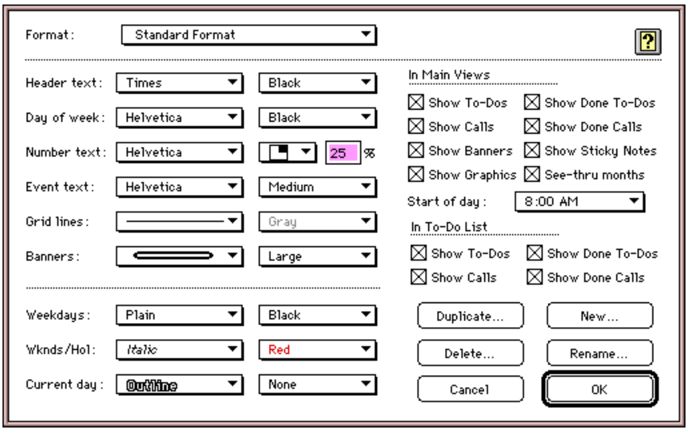


Customizing Calendar Views

Customize how your schedule will be displayed with the Define Calendar Formats dialog box, and by using commands in the View menu.

Define Calendar Formats dialog box

You can store different settings as Calendar Formats and switch between them easily. The Define Calendar Formats dialog box is where you create and modify Calendar Formats. Click the Define Calendar Formats button in any calendar view or choose Calendar Formats from the Define menu to open the dialog box.



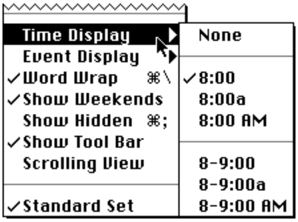
Refer to "Format" in Online Help for more information on using the Define Calendar Formats dialog box.

Once you've created a Calendar Format, it appears in the submenu attached to Use Calendar Format in the Window menu. Select Formats from this submenu to switch between them.

The name of the month and days of the week, as well as the current date and time, are controlled by the system software. As a result, it's not possible to modify the name of the month or the names of the days of the week in Now Up-to-Date (displaying them in French, for example).

View-specific customizing

Several commands in the View menu let you determine the appearance of your Calendar File in a particular view. You can toggle each function on and off by choosing it from the View menu—if a checkmark appears next to the command, it's turned on; if no checkmark appears, it's turned off. Some of these commands are available from the Toolbar or with a keyboard shortcut.



Choose…	To…
Time Display	Specify how Appointments appear in your schedule: with no time; with the start time only; or with both start and end times in one of three formats.
Event Display	Specify whether Descriptions and Marks will be displayed with Events. Choose Descriptions to display the text from an Event's description. Choose Marks to display special marks attached to Events. These include: … an Event that contains a description = an unread Public Event + a Public Event that has been created or edited offline - the original version of a Public Event that has been edited offline (not visible unless Show Hidden is active) ? an Unreconciled Public Event > a Public Event that was created or edited offline and is currently being sent to the Public Event Server after you have reconnected ¬ an Event with attached Contacts * a Meeting you are invited to

continued next page

Choose…	To…
continued from previous page	
Word Wrap	Specify that text in Event titles and descriptions wraps to subsequent lines until all text is displayed. When you turn off Word Wrap, Event titles and descriptions are restricted to one line per Event. (Keyboard shortcut: Command-\).
Show Weekends	Display or hide weekends in the Month and Multi-Day Views.
Show Hidden	Display Events that you've previously hidden. To unhide an Event when Show Hidden is turned on, select the Event and choose Unhide Event from the Event menu. (Keyboard shortcut: Command-;).
Show Toolbar	Display or hide the Toolbar in the current View.
Scrolling View	Turn the scrolling option on or off in the Month and Multi-Day Views.

Using Duplicate windows

Another way to customize your Views is to choose Duplicate Window from the Window menu, which will create an exact duplicate of the active window. You can then set the duplicate window to another time period, allowing you to see two different time periods simultaneously. Each Window can display its own date range and its own View.

When you quit Now Up-to-Date, all open windows and their sizes and locations are remembered, and will be opened in the same orientation the next time you open your Calendar File.

Chapter 5
Organizing Calendar Events

Categories and Sets allow you to filter your calendar information so you can view or print only certain Events. Using Categories, you can classify related Events together in specific groups and display them in a distinctive style or color. With Sets, you can control which Categories are displayed in your calendar.

Using Categories

Every new Calendar File contains one default Personal Category and one default Standard Set. This one Category and Set may be sufficient for all your needs, particularly if you're not using Now Up-to-Date on a network. If you fill your Calendar File with lots of Events, however, you may find it quite useful to create multiple Categories and Sets so you view or print only certain Events.

There are two different types of Categories: Private and Public. Private Categories, which you create and store in your Calendar File, are not shared with other users, even if you're on a network. In contrast, Public Categories are stored on a Macintosh running the Public Event Server software, so that network users can share the Events contained in the Public Categories. For information on sharing Events and Contacts with Public Categories, see Chapter 15, "Using Now Up-to-Date and Contact Together on a Network."

If you're working with a new Calendar File, any Events you've created up to now have been assigned to the default Personal Category.

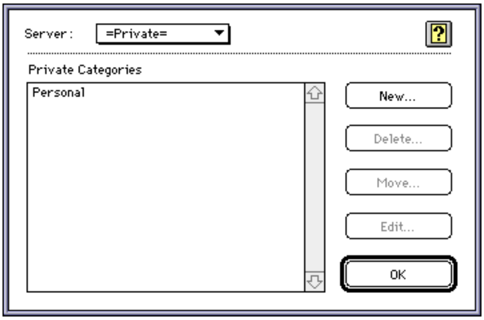
Creating Categories

Create a new Category whenever you want to classify and view a related group of Events.

To create a Category:

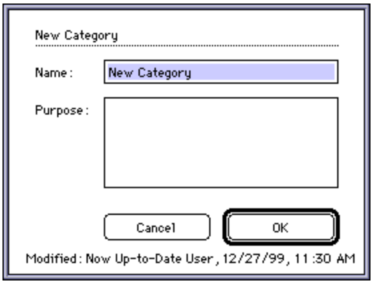
1. Choose Categories from the Define menu.

The Define Categories dialog box appears. Notice that =Private= appears next to Server:—this indicates that any Categories that exist already, or new ones you create, are Private Categories stored locally in your Calendar File (and not available on the network, if you're connected to one).



2. Click New.

The New Category dialog box appears.



3. Type a name for the Category in the Name: field and a description in the Purpose: field.

Press Tab to move between fields; typing text in the Purpose field is optional.

4. Click OK.

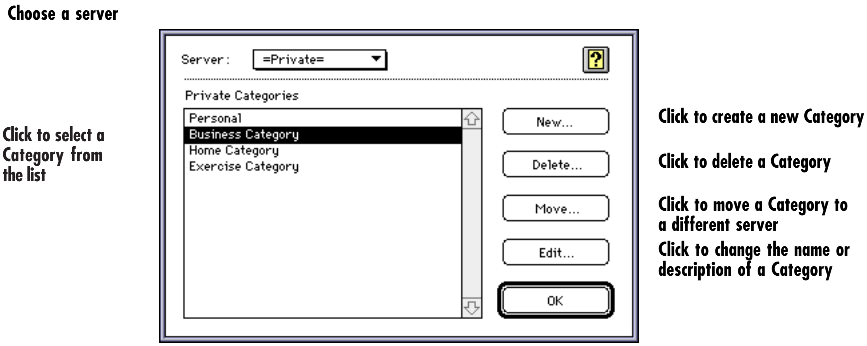
You're returned to the Define Categories dialog box; notice that the new Category appears in the Private Categories list.

5. Click OK.

You're returned to the calendar display.

Modifying Categories

It's easy to make changes to an existing Category. The Define Categories dialog box lets you modify information for a Category, delete a Category, or move it.



Assigning Events to Categories

Assigning an Event to a Category is quite straightforward. Open the Event Info window and choose the desired Category from the pop-up menu.

You can set different colors and text styles for individual Categories, so that Event titles will appear differently in the calendar display according to which Category they belong to. See "Setting styles and colors for Categories" later in this chapter.

Using Sets

Sets offer additional flexibility in dealing with Categories. You can group Categories into Sets to establish several displays, each with a particular purpose. For example, your Standard Set could display all available Categories, while a Work Set might display only those Categories that relate to your work.

All existing sets are listed at the bottom of the View menu. You can switch between Sets by choosing them from this menu, or by pressing the keyboard shortcuts shown next to their names. When you switch Sets, you'll see a difference in the Events displayed in your calendar, depending on the Categories subscribed to in the new Set. You can create up to 31 Sets. Deleting a Set does not delete any Categories or Events.

The Sets feature also allows you to specify which Categories you want to receive Reminders from. If you want to receive a Reminder about your 2:00 P.M. meeting, make sure this Appointment is in a Category that you've selected to receive Reminder alerts.

You can have the name of the currently-active Set appear in your Calendar File's title bar by selecting this option in the General pane of the Preferences dialog box.

Creating a Set

Create a new Set whenever you want to set up a new group of Categories to view in your calendar display.

To create a Set:

1. Choose Sets from the Define menu.

   The Define Sets dialog box appears. Use it to create new Sets or modify existing Sets.

2. Click the New button in the Define Sets dialog box.

   Or, if you want to use the same configuration as an existing Set, choose the name of the Set from the Sets pop-up menu and click the Duplicate button.

   We recommend subscribing to the Personal Category (or whichever Category is specified as your default Category for new Events in the Preferences window) in any new Sets you create. See “Sets and your default Category” later in this chapter for more information.

   If you are logged on to a Public Event Server, the Sets dialog displays the Include all Events that block my free time checkbox. When this checkbox is selected, you will see Meetings in your Calendar that you’ve marked as Attending, whether you subscribe to that Meeting’s Category or not. See Chapter 15 , “Using Now Up-to-Date & Contact Together in a Workgroup,” for more information.

3. Type a name for your new Set and click OK.

4. Click OK to return to the calendar display.

   Now Up-to-Date returns you to the calendar display; the Set that was last selected in the Define Sets dialog box is active.

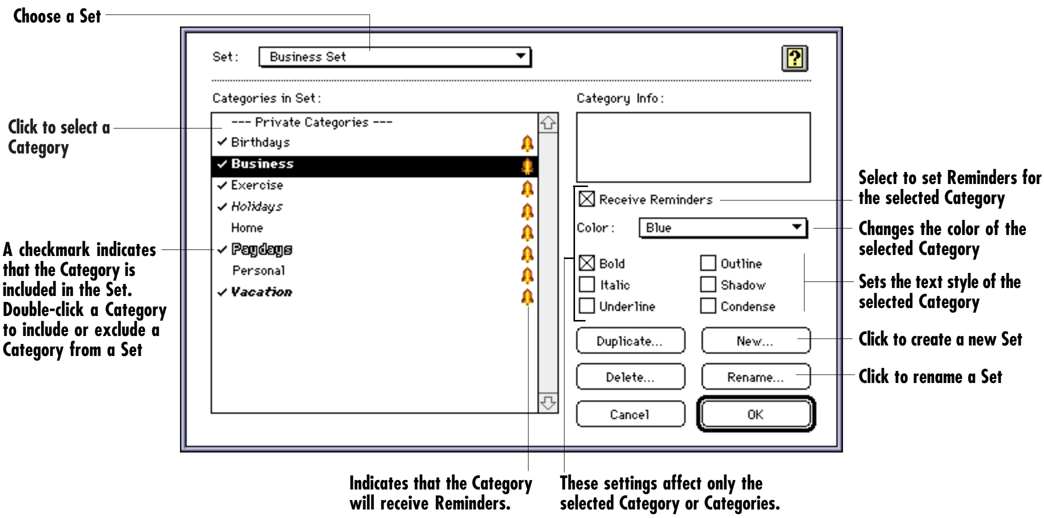
Modifying a Set

You can also use the Define Sets dialog box to change the configuration of any Set. You can add or remove Categories associated with a Set, you can change the color and font style of any Category, and you can indicate the Categories for which you will set reminders.

To modify a Set:

1. Choose Sets from the Define menu.

The Define Sets dialog box appears.



2. Choose the name of the Set to modify from the Sets pop-up menu.

3. Double-click any Category in the Categories in Set list box to add or remove it from the Set. A checkmark to the left of the Category name indicates that it is included in the Set.

4. Click any Category in the Categories in Set list box, then select the Receive Reminders checkbox if you want to receive reminders for the selected Category.

5. Click any Category in the Categories in Set list box and choose any color or style settings that you want to apply to the Category.

6. Click OK to return to the calendar display.

Setting styles and colors for Categories

You can set the default style and color of the font for Events in a Category using the Define Sets dialog box, as described in the previous section.

You can also use the Style and Color commands on the Event menu to override a Category's style and color setting for a single Event or to set the default style and color for a Category.

To...	Do this...
Set the style and color for a single Event	Select the Event and choose the desired style and color settings from the Style and Color submenus of the Event menu.
Set the default style and color of a Category	Select an Event from the Category you want to configure, hold down the Option key, and choose the desired style and color from the Event menu's Style and Color submenus.

Now Up-to-Date

When you use the Define Sets dialog box to assign unique color and text styles to Categories, it doesn't matter which Set is selected; the settings apply to each Category globally, no matter which Set is active.

Setting Reminder options for Categories

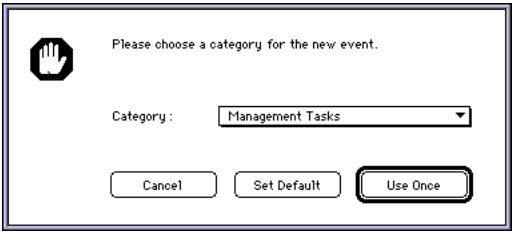
When you select the Receive Reminders checkbox, you must be subscribed to the selected Category or Categories in at least one Set—not necessarily the current one—in order to change the setting.

The Receive Reminders settings controls only whether or not you'll receive Reminders for Events in the selected Category or Categories—not what kind of Reminder or when you'll receive it. You determine these attributes in the Event Info window. For more information, see Chapter 3, "Using Now Up-to-Date."

Sets and your default Category

When you create a new Event, Now Up-to-Date assigns the Event to a Category by default. This default Category is usually Personal, but you can use the Preferences command on the Define menu to specify a different default Category.

If you create a new Calendar File and use a Set that does not include the Personal Category (or whatever your default category is for new Events), then this dialog box will appear every time you create a new Event:



You can respond to the dialog box in the following ways:

To:	Do this:
Override the default Category for this Event	Choose a Category from the pop-up menu and click Use Once.
Select a default Category for this and future Events	Choose a Category from the pop-up menu and click Set Default.
Avoid future appearances of this dialog box	Use the Preferences command to change your default category for each Event type to one that is subscribed to in the current Set.

To avoid frequent switching of your default Category or interruption by this dialog box, it's usually easiest to settle on one Category to assign as the default for new Events, and then subscribe to that Category in all of the Sets you create.

Chapter 6
Printing Calendars

Now Up-to-Date lets you print your Calendar File to fit your specific needs. You can print on the standard paper size that you normally use in your printer, or you can print in page sizes that fit many popular appointment books such as Day-Timer®, DayRunner®, Franklin Planner®, and FiloFax®. You can also print your Calendar File to one of three wall chart sizes for public posting.

The Now Up-to-Date printing functions are compatible with the standard Apple printer drivers, and support QuickDraw and PostScript printers.

Printing your Calendar

There are many different possibilities for printing your Calendar File. Depending on your needs and preferences, you might choose very basic printing formats and page sizes, or you might take the time to customize your print settings carefully and precisely. The following is a basic overview of how to proceed when printing your Calendar File.

To print your Calendar File:

1. Open the calendar View that you want to print.

   Select from the Month, Week, Multi-Day, Day, Year or List Views.

2. Modify the appearance of the current View, if necessary, for the desired output.
3. Choose Print Options from the File menu.

   The Print Options dialog box appears.

4. Choose the desired View to print from the View: pop-up menu.

   The current View is selected by default. The preview graphic in the dialog box changes to reflect your selection.

5. Choose the desired page format from the Format: pop-up menu.

   The preview graphic in the dialog box changes to reflect your selection.

6. Choose a different Event font and size from that of the current Calendar Format or List Layout, if desired.

   Make your selections from the Event Font: and Event Size: pop-up menus.

7. Set the time range for printing, if you're printing a time-based format.

   If you're printing the Multi-Day or Day View, choose a starting time and an ending time from the two Hour Range to Print: pop-up menus.

8. If you chose an appointment book page size in step 5, make any changes desired to the appointment book settings in the bottom portion of the dialog box.

9. Set the other options in the dialog box as desired.

   For instance:

   - Select the appropriate checkboxes to determine whether standard headers and/or custom headers and footers are printed.
   - Click Headers if you want to create or modify custom headers and footers for your printed output.

10. Click Print.

    The Print dialog box appears. Your format, page size, and page orientation selections are reflected here.

11. Specify the beginning of the period to print by typing a date in the appropriate fields.

    The text will read Month Starting:, Week Starting:, or Starting Date: depending on the View you selected.

12.. Specify the number of months, weeks, or days to print.

    Type a number in the [Period]s to Print: field.

13. Select other options as desired.

    Click Headers or Print Options to change options in those areas, or select the Print to PICT File checkbox. Select Manual Feed if you're printing double-sided output.

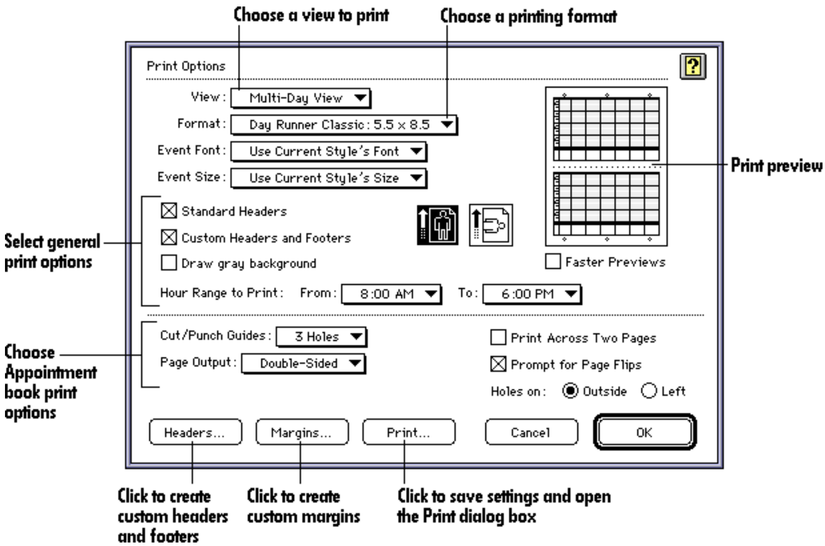
14. Click Print.

    Your Calendar File is printed. If you're printing an appointment book with double-sided page output, a series of dialog boxes will appear prompting you to reinsert your pages into the printer.

Now Up-to-Date remembers the settings you enter for the print job, so that you can simply choose Print from the File menu the next time you want to print the same output (though the Period to Print area will always reflect the current date).

Setting printing options

To configure your printing options, choose Print Options from the File menu. The Print Options dialog box appears.



Not all of the Print Options dialog box components shown in the above illustration are available for every type of printing.

You can print any of the calendar Views that are available in your Calendar File. Just set up any Calendar Format or List View Layout you like, then print exactly what appears on screen.

Any of the printing formats can be printed to the page size of your choice. Now Up-to-Date prints on standard paper sizes such as Letter (8.5" x 11"), Legal (8.5" x 14"), and A4 (21 cm. x 29.5 cm.). Select the desired paper size using the Page Setup command in the File menu.

Use this option…	To…
View	Select a view for printing. Choose from Views as they appear on your screen, or Current Event, which prints information for the currently selected Event.
Format	Control the format of the printed page on the page size of your choice. Choose from one, two, and four per page; wall chart; or an appointment book size. Appointment book size formats offer additional formats, described below.
General printing options	Control various additional formatting options.
Appointment book options	Control appointment book printing when you've selected one of the appointment book sizes from the Format: pop-up menu.

Appointment book printing

Now Up-to-Date includes several page size options that let you print the selected View to pages that fit your paper appointment book. Now Up-to-Date supports the following appointment book sizes:

- Day Timer Sr. Desk, Jr. Desk, Sr. Pocket, and Jr. Pocket
- Day Runner Classic, Entrepreneur, Running Mate
- Franklin Classic, Monarch, and Compact
- FiloFax

Appointment book options

Options specific to appointment book printing are available when you've selected one of the appointment book sizes from the Format: pop-up menu. These options appear at the bottom of the Print Options dialog box.

Choose…	To…
Cut/Punch Guides	Set cutting guidelines and hole punch guides.
Page Output	Determine the order in which pages are printed.
Print Across Two Pages	Print the selected View across two appointment book pages.
Prompt for Page Flips	Specify that a dialog box will prompt you to flip the printed page and reinsert it each time a page has been printed.
Holes on Outside	Print the hole orientation that matches the paper you're using. Select Outside when you're printing on plain paper, since you can use it to simulate double-sided printing with the Folding Pages setting in the Page Output: pop-up menu. It offers a larger print area since the holes are in the margins.
Holes on Left	Print the hole orientation that matches the paper you're using. For sheets with pre-punched holes on the left of each page, select Left.

Page Output options

The options in the Page Output: pop-up menu determine how each page is placed, and the order in which pages are printed. These options are listed in the following table.

Choosing…	Produces this…
Double-Sided	True double-sided output that requires turning over each printed sheet and re-feeding it into the printer. See "Printing double-sided output easily" later in this chapter for more information on this feature. *When you choose this feature, turn off Background Printing in the Chooser, and select Manual Feed in the Print dialog box. A dialog box prompts you to turn the sheet over and reinsert it into the printer.*

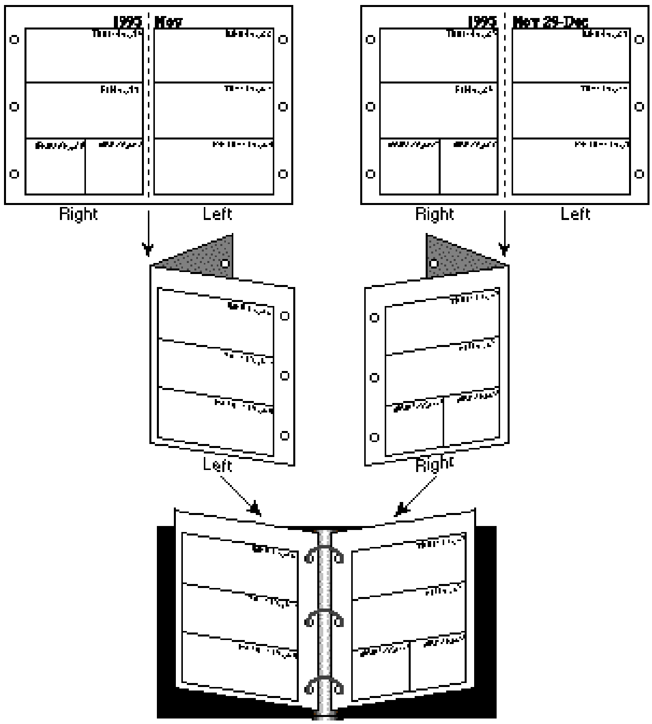
continued next page

Choosing…	**Produces this…**

continued from previous page

Folding Pages

Simulated double-sided printing for use with the appointment book page sizes available in the Format: pop-up menu. Pages are printed two at a time, with hole punch guides appearing in the outside margins of the full sheet printed. When the two pages that appear on a sheet are folded down their middle guideline, the hole punch guides meet and can be punched once. The result is one simulated double-sided page that is actually two sheets thick.



Week View printed Across Two Pages on Folding Pages

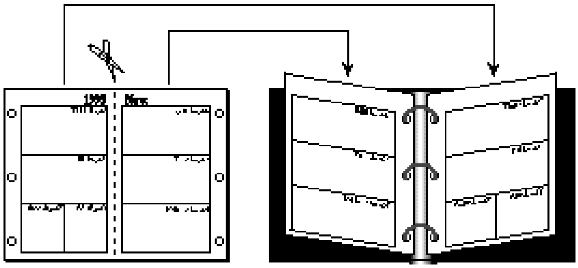
Single-Sided (Reversed)

Prints the pages with hole punch guides in the outside margins of the full printed sheet. When the two pages are cut out and placed in an appointment book, they form a two-page spread, as shown below.

continued on next page

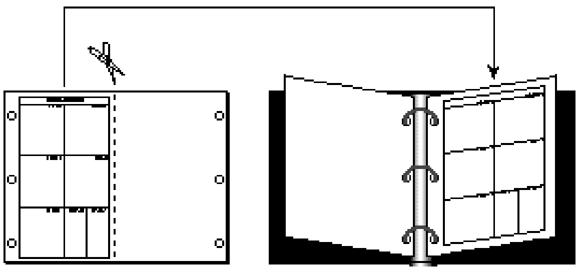
Choosing…	Produces this…

continued from previous page



Week View printed Single-Sided, Across Two Pages

Left or Right Page Only	Prints only left-hand or right-hand pages according to your selection, with hole punch guides on the left or outside. Printing the right page only with holes on the outside, for example, causes the output to appear on the left side of the printed sheet (as shown in the illustration below). As a result of the hole orientation, however, this is actually a right-hand appointment book page.



Week View printed Right Page Only

Printing double-sided pages easily

You can avoid traveling back and forth between your Macintosh and printer when printing double-sided output by using the following procedure.

To set up double-sided printing:

1. Open PrintMonitor.

   PrintMonitor is located in the Extensions folder in your System Folder.

2. Choose Preferences from the PrintMonitor File menu.

   The PrintMonitor Preferences dialog box appears.

3. Select Give no notification under When a manual feed job starts: and click OK.
4. Switch to Now Up-to-Date.

   PrintMonitor automatically quits.

5. Choose Print Options from the File menu.

   The Print Options dialog box appears.

6. Deselect the Prompt for Page Flips checkbox and click OK.

7. Choose Print from the File menu.

   The Print dialog box appears.

8. Select Manual Feed from the Paper Source pop-up menu.

9. Click Print.

10. Insert the first page for printing.

    After this page is printed, the printer's Insert Paper indicator light lets you know that you should flip the page and reinsert it.

11. Reinsert the page in the printer.

    The printer prints the reverse side.

12. Repeat steps 10 and 11 until the job is finished.

Offsetting double-sided printing

You can correct paper-feeding inconsistencies with your printer that sometimes cause the front and back of a double-sided page to be misaligned.

To accurately align double-sided printing:

1. Choose Print Options from the File menu.

   The Print Options dialog box appears.

2. Choose Double-Sided from the Page Output pop-up menu.

3. Click Margins.

   The Margins dialog box appears.

4. Enter the distance by which you want to offset the printing in the Margins dialog box. You can estimate the amount to offset by holding a misaligned page up to a bright light.

5. Click OK.

6. Click Print to produce a test print.

   If the new test print aligns properly, you should be able to continue to use the same offset on all of your double-sided printing. If the new test print is still slightly misaligned, you should repeat the steps above using a new estimate for the offset.

Creating custom headers and footers

You can add custom headers and footers to your printed Calendars. Custom headers and footers can appear in addition to or place of the standard headers that are part of the normal Views.

For example, you can print a calendar for the month of November showing your company's staff meetings with only the standard header (November 1999), the standard header and an additional custom header (November 1999-Company Staff Meetings), or only a custom header (Company Staff Meetings for November 1999).

To configure custom Headers and Footers:

1. Select Print Options from the File menu or click Print Options in the Print dialog box.

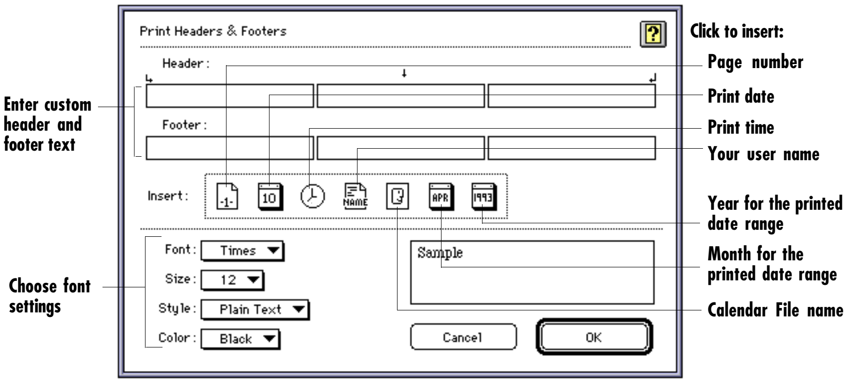
   The Print Options dialog box appears.

2. Select the header and footer options you want.

   Select the Standard Headers checkbox if you want the standard headers for the current View to appear on your printout. Select the Custom Headers and Footers checkbox if you want custom headers.

3. Click Headers.

   The Headers and Footers dialog box appears.



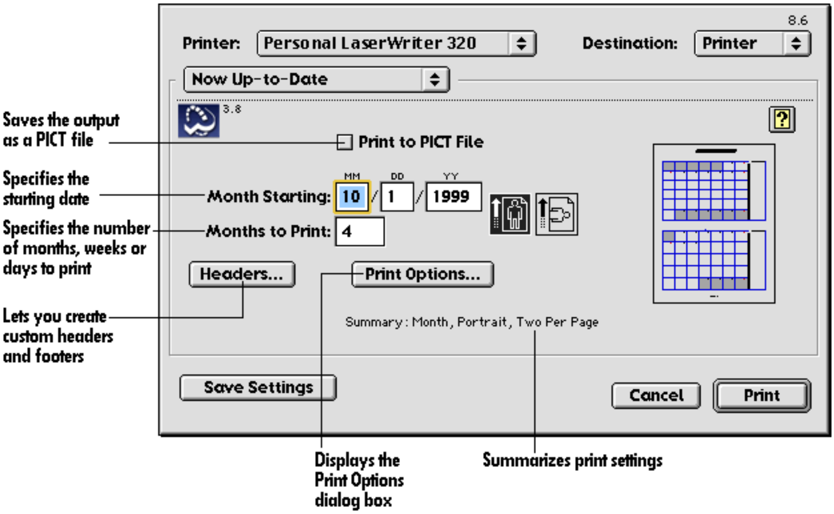
4. Enter any text that you want in the Header and Footer fields provided.

5. Click the appropriate icons to automatically insert the current page number, date, time, calendar file name, user name, month or year at the current location of the insertion point.

6. Click OK.

Now Up-to-Date print settings

When you choose Print from the File menu or click the Print button on the Toolbar, the standard Print dialog box for your printer appears. The bottom half of the Print dialog box contains additional options for printing your Calendar. The settings in this area are listed below; for information on the options contained in the standard portion of the dialog box, consult your Macintosh documentation.



Printing problems

Some third-party printer manufacturers include custom Chooser devices for use with their printers. In some cases, these Chooser devices (drivers) are nonstandard and have difficulty working with the enhanced printing available in Now Up-to-Date. If you have trouble using the settings available in Now Up-to-Date's Print Options dialog box with your printer, or if you notice lines missing from your printed output, you may need to select the Use non-enhanced printing checkbox in the General pane of the Preferences window. Fewer printing options will be available to you, but you should have more success in printing your Calendar File.

Chapter 7
Importing, Exporting and Archiving Events

Now Up-to-Date's flexible Import function makes it easy to bring schedule information into your Calendar File—from a different Calendar File, or from any application that can create a tab-delimited text file. The Export function allows you to create a text file containing event information that can be opened and used by a word processor, spreadsheet, or database application. With the Archive function, you can remove old Events from your Calendar File to improve performance, and then easily restore them, if necessary, at another time.

Importing data into your Calendar File

Before importing data into your Calendar File, examine the file you wish to import to determine what data it contains and in what order the data appears. Then, use this information to select or create an Import Template, as described below.

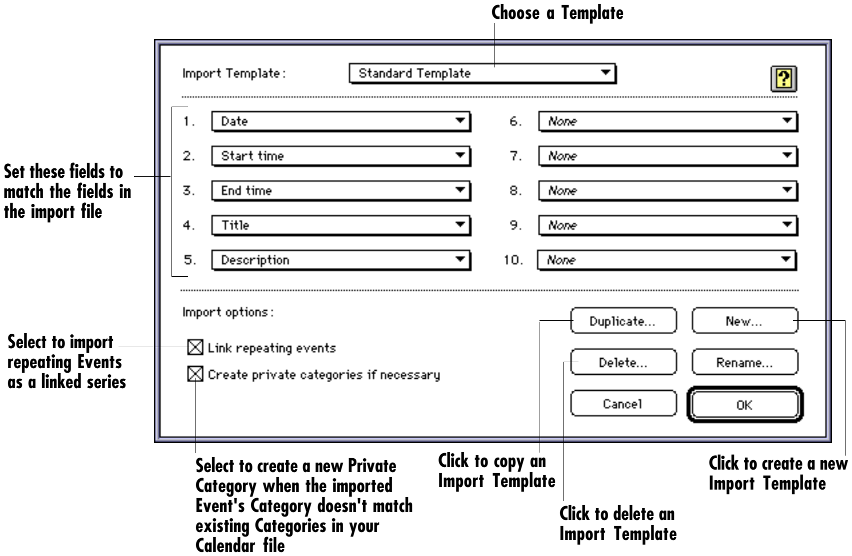
When you use the Import function, we recommend that you first import your information into a new, untitled Calendar File. This way, if any problems occur, your regular Calendar File is unaffected.

The Sample Calendar included with your software contains Templates for importing data from other calendar applications.

To import data into your Calendar File:

1. Choose From Text File from the Import submenu of the File menu.

The Import dialog box appears. It contains a Template menu and numbered data field menus that you set up according to the fields in the import file.



2. Select a Template from the Standard Template menu, or create a new Template by clicking New.

3. Set the import fields to match the order of the data fields in the import file.

   If your import file contains data that's not applicable to or usable by Now Up-to-Date, choose Ignored from the pop-up data field menus for fields containing such data.

4. Set the desired option for importing repeating Events.

   Repeating Events are normally linked in Now Up-to-Date.

5. Set the desired option for creating Private Categories on-the-fly.

   Select this option to create a Private Category each time Now Up-to-Date encounters a Category in the imported file that doesn't match an existing Category in your Calendar File. Deselect to place Events from a non-matching Category in your Default Category.

6. Click OK.

   A directory dialog box appears, prompting you to locate and select the file to be imported.

7. Locate and select the desired file, and click Open.

A progress bar appears as the file is imported. When it is finished, the new Events from the imported file appear in your Calendar File.

If any problems or errors occur while Now Up-to-Date is importing the file, a dialog box will appear indicating the nature of the problem. The error message will usually tell you where in the import file the problem occurred, so that you can open the file in a word processor or spreadsheet application and double-check the field order against the incoming field order you have specified in the Import dialog box.

Exporting data from your Calendar File

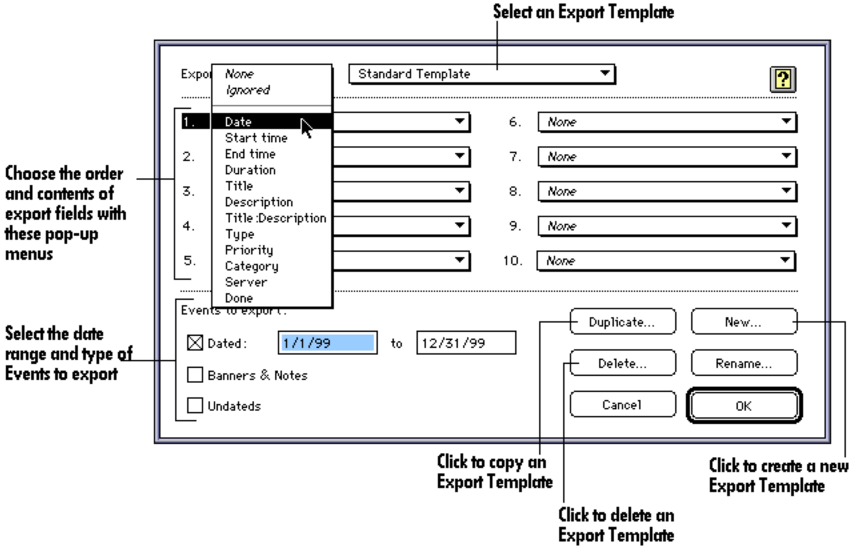
Exporting calendar information from Now Up-to-Date allows you to use it elsewhere. The Export function creates a tab-separated text file that contains Events and their selected attributes within a date range that you specify.

Using the functions available in the Export dialog box, you can also control which Event attributes are exported, as well as the order in which the corresponding data fields will appear for each Event.

To export data from your Calendar File:

1. From the View menu, choose a Set that includes only the Categories you want to export.

All Events contained in the Categories (both Private and Public) that you're subscribed to in the current Set will be exported. Be sure that the Categories included in the current Set contain Events that you want to export.



2. Choose To Text File from the Export submenu of the File menu.

The Export dialog box appears.

3. Choose a Template from the Export Template: menu.

   The names Standard Template and Calendar Archive appear on the menu. These are built-in Templates that are included in every new Calendar File.

4. Modify the attributes of the pop-up menus, if desired.

   Five Event attributes are selected for exporting by default; these are the most commonly-used attributes. For each exported Event, these attributes will appear in the Export text file as tab-separated data fields. The numbered items in the dialog box indicate the order in which the data fields will appear in the Export text file for each Event.

   Choose attributes from these menus to include them in the Export file and set their field order, according to your requirements. Choose None from the pop-up menus for any remaining fields.

5. Select checkboxes as desired to determine which Event types will be included in the Export file.

6. Click OK.

   A directory dialog box appears, prompting you to select a destination for the Export file and name it.

7. Choose a location for the Export file, enter a name, and click Save.

   A progress bar appears as the Export file is created. When the operation is completed, you can open the Export file in the application of your choice.

   If you created a new Template or modified an existing one, the Export Template has been saved, and will be the selected Template the next time you open the Export dialog box. Any Templates available in the Export dialog box will also be available in the Import dialog box, so that you can easily import data of the same format.

Archiving data from your Calendar File

The Archive function allows you to decrease the size of your Calendar file by removing all Event data that's older than a specified number of months and saving it in a text file. The text file allows you to retrieve this information at a later date should you ever need to do so. You can archive Events from all of your Private Categories, as well as from Public Categories whose Owner Passwords you know.

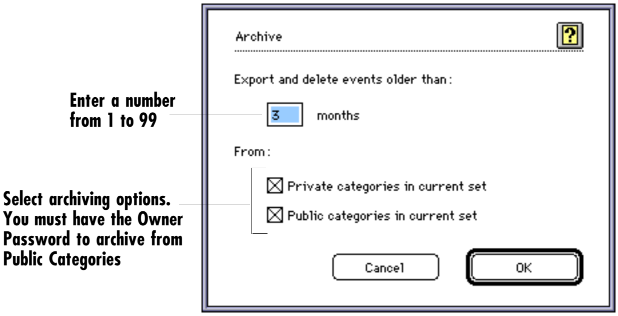
To archive data from your Calendar File:

1. From the View menu, choose a Set that includes only the Categories you want to archive.

In general, be sure that the Categories you're subscribed to in the current Set contain Events that you really want to archive. Only Events from Public Categories for which you can provide the Owner Password will be archived.

2. Choose Archive from the File menu.

The Archive dialog box appears.



3. Type the number of months for the minimum age of the Events you want to archive.

4. Depending on the desired result, select the checkbox(es) for the appropriate Categories you want to archive.

5. Click OK.

A directory dialog box appears, prompting you to select a destination for the Archive file and name it. The default name for the Archive file includes the date of the most recent Events it contains.

6. Choose a location for the Archive file, enter a name, and click Save.

If you're archiving any Public Categories, you'll be asked to enter their Owner Passwords now. In the password dialog box, click Cancel to cancel the Archive operation entirely, or click Skip to cause the Category to be skipped, while allowing the Archive operation to continue.

Once the Archive file has been created and saved, Now Up-to-Date deletes the archived Events from your Calendar File and from the Public Event Server.

Chapter 8
Working with Contacts

Now Contact makes it easy to create new Contacts, modify existing ones, and attach other information to them, like documents, Events, and date and time stamps. Now Contact also provides flexible options for finding and selecting Contacts from your Contact File.

Creating a Contact File

Before you begin creating Contacts, you need to create a Contact File.

To create a Contact File:

1. Open Now Contact.

   A standard directory dialog box appears.

   To users of earlier versions: *If you're upgrading to Now Contact from version 1.0 through 3.6.5, you can continue to use your existing Contact File. Just locate and select the file you want to use, then click Open to update it to the current format. An unchanged copy of the old file is saved in case you ever need to use the older version.*

2. Click New.

   A second directory dialog box appears.

3. Select the location for your new Contact File.
4. Type a name for your Contact File in the "Save Contact file as" field.
5. Select "Make this my primary file," if desired.

   Designating the file as primary means that it will open automatically whenever you open Now Contact.

6. Click Save.

   Your file is saved, and Now Contact opens. You can now begin creating Contacts.

Setting a primary Contact File

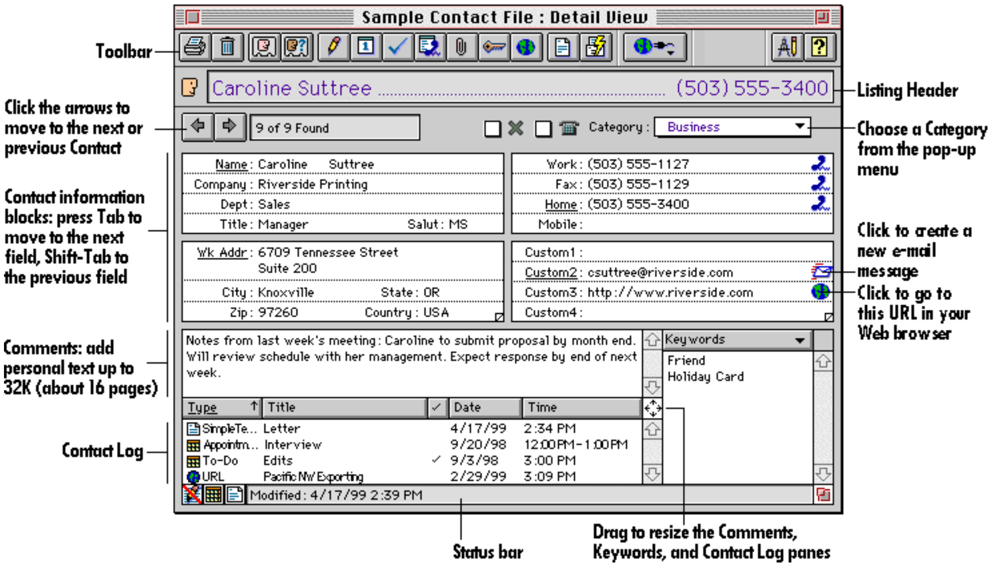
Make the Contact File you use most often your primary file. Your primary file opens automatically whenever you open Now Contact, and is the file whose selected Contacts display in the QuickContact pull-down menu (see Chapter 13, “Quick Access Features,” for more information on QuickContact). Your primary Contact File also serves as the source for Contacts you link to Calendar Events from within Now Up-to-Date; see Chapter 14, “Linking Events and Contacts,” for details on linking Now Contact and Now Up-to-Date.

Creating a new Contact

Creating a Contact is simple: just choose New Contact from the Contact menu, or click the New Contact button in either the List View or Detail View Toolbar. The Detail View opens and displays a new Contact record with blank fields.

Entering Contact information

Once you’ve created a new Contact, you can enter information into its various fields. Press Tab to move forward through the fields, or Shift-Tab to move backward. When you finish entering Contact information, close the Detail View to save the new Contact.



You can configure how your new Contacts are set up in the New Contacts pane of the Preferences window. See “Setting New Contact preferences” later in this chapter for more information.

Using data entry aids

AutoType™, Now Contact's set of data entry aids, makes creating new Contacts (and modifying existing ones) fast and simple. Automatic Address Entry and Automatic Typing scan the other Contacts in a Contact File and determine if they contain data that could apply to new Contacts. It works for numbers as well as for text.

Automatic Address Entry and Automatic Typing are both configured in the Data Entry Aids pane of the Preferences window. See "Setting Data Entry Aids preferences" later in this chapter for more information.

Drag and drop editing is available with all of the fields in the Detail View, including the Contact Log and the Contact information blocks. Simply select text in one field and drag it to another field.

To use Automatic Address Entry:

1. Enter a company name in the Company field.

   If an existing Contact works for the same company, that Contact's work address automatically appears in the new Contact's Work Address block. If there are multiple addresses for that company in the Contact File, Now Contact enters the address that occurs most often and a small arrow (▼) appears in the upper-right corner of the Work Address block.

2. If the address entered in step 1 is incorrect, click the arrow in the Work Address block.

   A pop-up menu of the various addresses defined for that company in the Contact File appears; the number of Contacts who use each address appears in brackets next to the address.

3. Choose the work address you want to use for the new Contact from the pop-up menu.

   If none of the addresses applies to the new Contact, tab into the Work Address fields and type over the information.

4. Complete the other fields in the Name block as desired.

To use Automatic Phone Entry:

1. Enter the work telephone number for your new Contact in the Detail View Work field.

   When you tab into the Fax field, Now Contact automatically displays the area code and prefix from the entry in the Work field. The area code is also automatically entered in the other phone entry fields you've defined. You can either accept the entry and add the remainder of the number, or remove the automatic entry and type in the correct area code or prefix. Tabbing out of the field removes the automatic entry.

2. Accept the automatic entry, type in a new area code and prefix, or simply tab out of the field.

To use Automatic Typing:

1. Enter information for your new Contact in the Detail View fields.

   Now Contact looks for the most frequently occurring match in other Contacts.

2. Accept the automatic entry, or continue typing.

   Other suggestions may appear as you type more letters, depending on the other entries in the Contact File. To reject an entry, just keep typing.

   The following table lists other options for the automatic entries that appear.

Press...	To...
Tab	Accept the entry and move to the next field.
Command-+ (plus)	Display the next similar entry. When you press this key combination, similar entries appear in the field according to the next alphabetical match.
Command-- (minus)	Display the previous similar entry.
Backspace/Delete	Delete the highlighted suggestion.

Customizing Contacts

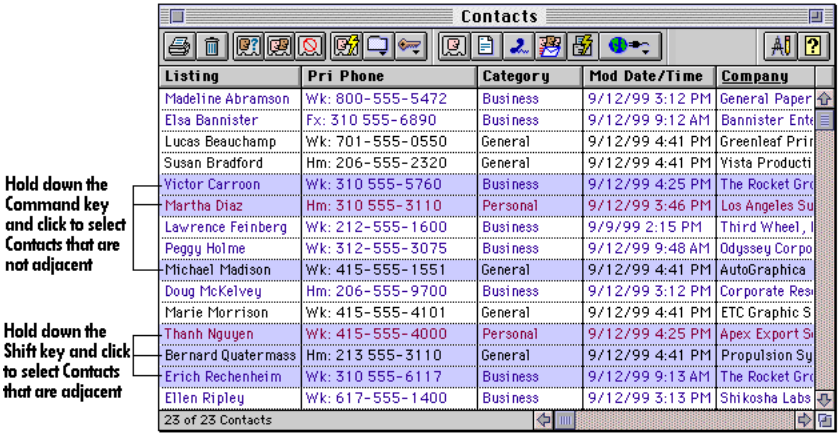
Now Contact lets you add different types of information to a Contact. You can attach Notes, Comments, documents and Web links; add Events such as Meetings or To-Dos; and date- and time-stamp Notes and Events.

Selecting Contacts

Select a single Contact in the List View by clicking once on any of its fields; double-click a field to open the Contact's Detail View. To select all of the Contacts in the List View, choose Select All from the Edit menu.

To select Contacts that are all adjacent to each other, hold down the Shift key as you click Contacts. You can click each Contact individually, click and drag to the last Contact you want to select, or click the first Contact you want to select and then the last one.

To select Contacts that are not all adjacent to each other, hold down the Command key as you click Contacts. You can click Contacts individually or drag through any adjacent Contacts that you want to select.



Attaching Comments to a Contact

Using the Comments field in the Detail View, you can add personal comments for each of your Contacts. The information you enter in the Comments field can be up to 32K (about 16 pages) long.

To attach Comments to a Contact:

1. Click in the Comments field.

   You can also press the Tab key from the last entry field in the Contact information blocks to move to the Comments field.

2. Enter any comments you want to make about this Contact.

   The information you enter in the Comments field cannot be shared with networked Now Contact users. To share the information, drag the portion of the comment you want others to view into the Contact Log window and attach it to the Contact as a Note.

3. When you are finished typing your comment, close the Detail View.

Attaching Notes to a Contact

Now Contact allows you to attach Notes to each Contact in your Contact File; each Note can be up to 32K (about 16 pages) in size. Notes include a timer and date/time stamp to help you keep track of Contact activities, such as telephone conversations.

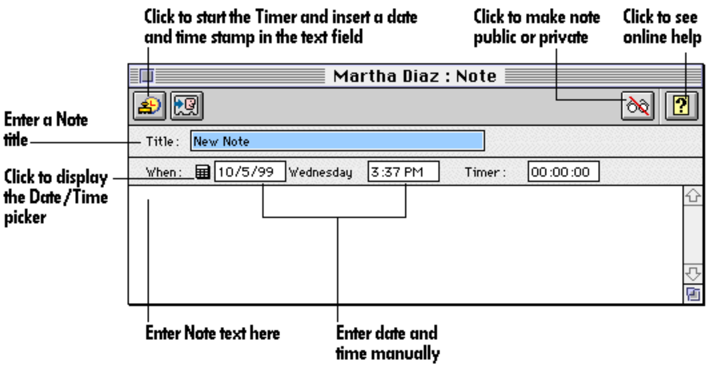
You can create a new Note by selecting text in the Comments field or in an open text file and dragging it to the Contact (in either the Detail or List View).

To attach a Note to a Contact:

1. Open the Detail View for the Contact to which you want to attach a Note, or select the Contact in the List View.

2. Choose New Note from the Contact menu.

   The Note window appears with the Title: field selected.



3. Type a descriptive title for your Note in the Title field.

   If you don't enter a title, your note will be labeled New Note in the Contact Log.

4. Click in the text field and type the text that you want to attach to the Contact.

5. When you're finished typing text, close the Note window.

   The new Note is attached to your Contact.

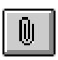
To copy a Note between Contacts, drag it from a Contact Log and drop it on a Contact in the List View.

Attaching documents to a Contact

Now Contact lets you attach documents to a Contact. Attached documents appear as entries in the Detail View Contact Log; double-click an entry to open the document in the application that created it.

To attach a document to a Contact:

1. In the List View, select the Contact to which you want to attach a document, or open its Detail View.



2. Choose Attach Document from the Contact menu.

   A standard directory dialog box appears.

3. Locate and select the document you want to attach, then click Attach.

   The document is attached to your Contact, and an entry is added to the Contact Log. Contact Log document entries are sorted in reverse chronological order by the date they were attached, so that the documents attached most recently appear at the top.

You can also attach a document to a Contact by dragging it from the Finder and dropping it on the Contact (in either Detail or List View).

Attaching World Wide Web links to a Contact

You can attach Web page links to any Contact. Web link attachments let you keep track of Web pages related to a Contact, and make it easy to open the corresponding pages in your Web browser. Web link attachments include the name of the linked page or site and its URL, or address. You attach Web page links by dragging them from a browser window, or by entering them directly in Now Contact.

To drag a Web page link to a Contact:

1. Make sure Now Contact is open.

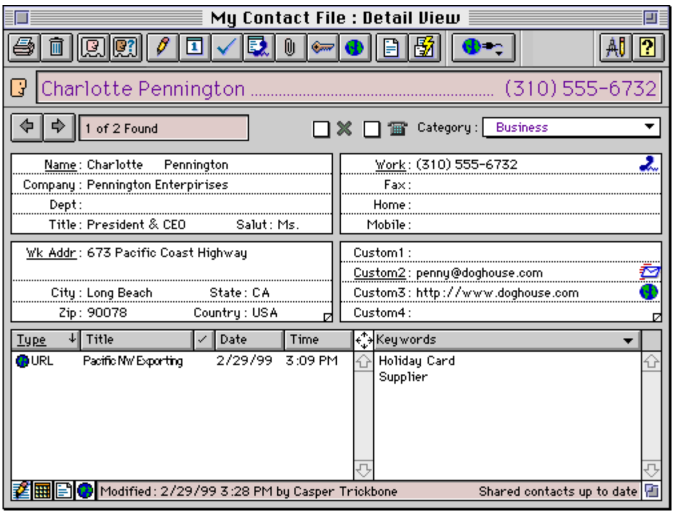
You can drag a Web link to a Contact in the List View, or to the Contact Log in a Contact's Detail View. If you drag to the List View, make sure that the Contact you want to attach the link to is displayed.

2. In your Web browser, select a link and drag it to the Contact.

> *In some browsers, when you hold the mouse over a link for too long before dragging, a pop-up menu may appear. If this happens, just move the pointer off the menu and try again.*

3. In Now Contact, open the Contact's Detail View if it isn't already open.

The Web link attachment appears in the Contact Log, along with attached Notes, documents and Events.

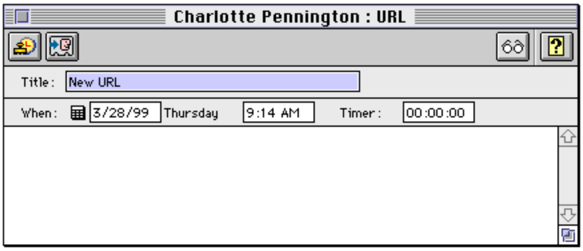


4. To open the linked URL in your Web browser, double-click the attachment while holding down the Option key.

To create a Web page link in Now Contact:

1. Open the Detail View for the Contact to which you want to attach a Web link.
2. Click the New URL button in the Detail View Toolbar.

   The URL window appears.



You can also open this window by selecting the Contact in the List View and choosing New URL from the Contact menu.

3. Enter the Web link information in the appropriate fields.
4. Close the window to return to the Detail View.

   The Web link attachment appears in the Contact Log, along with attached Notes, documents and Events.

5. To open the linked Web page in your Web browser, double-click the attachment while holding down the Option key.

You can edit Web link attachments by double-clicking them in the Contact Log. The Edit URL dialog box appears, where you can change Web link attributes.

Creating Calendar Events for a Contact

Now Contact provides the ability to track your interaction with your Contacts by creating and logging Calendar Events. All of the Calendar Events you create for a Contact are listed in the Contact's Contact Log so that you can easily view your history with the Contact.

Now Contact integrates seamlessly with its companion calendar product, Now Up-to-Date. For more information on how the two applications can communicate, see Chapter 14, "Linking Events and Contacts."

Calendar Event types

Now Contact provides six Event types for you to choose from, each of which has a specific purpose for your Contacts.

Event Type	Purpose
Call	A telephone call to be made on a specific date and time.
Appointment	A date- and time-specific task, such as a meeting or interview, that has a start time and an end time. Both the start and end times can be set in one-minute increments.

continued on next page

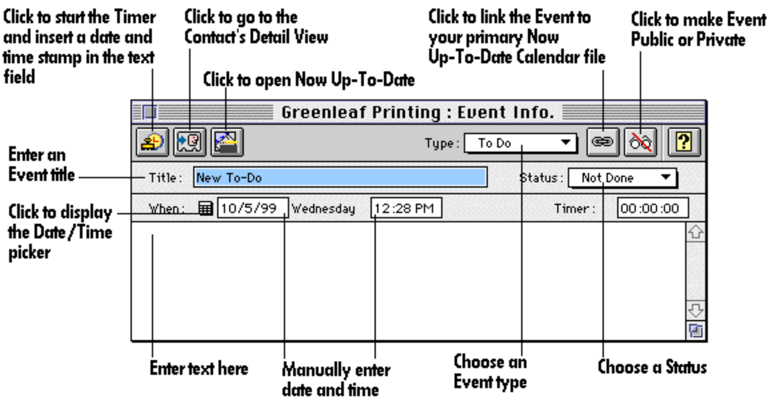
Event Type	Purpose
continued from previous page	
To-Do	A task to be done on a specific date and time.
Undated To-Do	A task that has no specific deadline and is not date-specific.
Special	A task that spans an entire day rather than being attached to a specific time on a day.
Holiday	Like a Special Event, only designed to represent a holiday.

You create Calendar Events by choosing the appropriate command from the New Event submenu in the Contact menu, or by using the Event buttons in the Detail View Toolbar. (See “Detail View” in Chapter 9, “Viewing Contacts,” for information on Calendar Event buttons.)

To create a Calendar Event for a Contact:

1. Open the Detail View for the Contact to which you want to attach a Calendar Event.
2. Choose the Event type you want to attach from the Contact menu or Toolbar.

   The Event Info window for the Event appears. You can enter information for the new Event.



The Event Info window differs slightly for each Event type. A To-Do window appears above (it contains all Event Info window components).

3. Use the options in the Event Info window to set up the new Calendar Event.
4. Click OK.

   The Calendar Event you created now appears in the Contact Log of the Detail View. Double-click a Calendar Event in the log to open the Event Info window for that Event.

Now Contact

Using the Timer and Date/Time Stamp

Using the Timer in your Notes and Calendar Events lets you keep track of the time it takes to perform a Contact-related activity, such as a telephone conversation. In addition, the Date/Time Stamp allows you to time more than one activity per Note or Event.

To time an activity and place a date/time stamp:

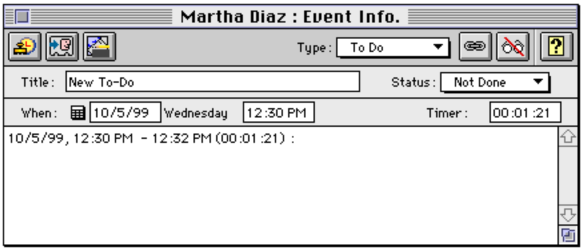
1. Click in the text field of the Note or Event Info window.

2. Click the Timer button in the upper-left corner of the window.

   The current date and time are inserted at the top of the text field, whether or not it contains text. The Timer field begins counting down the elapsed time.

3. To stop the Timer and place a second Date/Time Stamp in the text field, click the Timer button again.

   Now Contact inserts the current time to the immediate right of the previous date/time stamp, followed by the elapsed time between the initial date/time stamp and the second one.



You can click the Detail View window to return to the Contact without stopping the Timer.

4. Enter any additional text for the Note or Event, then close the window.

Defining Custom Fields

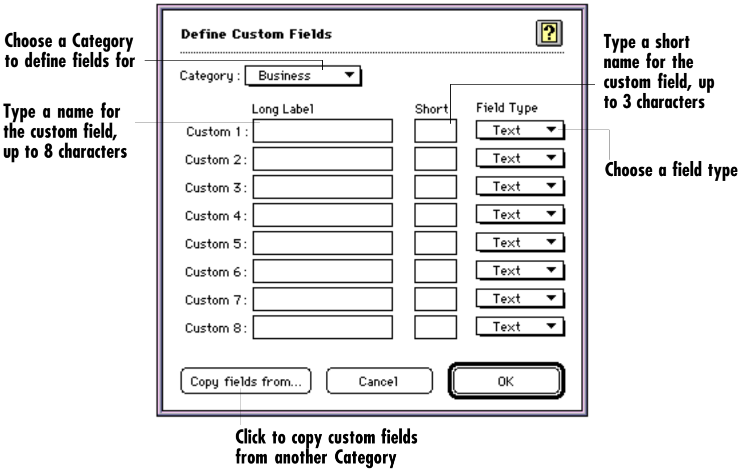
Now Contact provides you with eight Custom Fields that you can set up to hold whatever additional Contact information you like.

Custom Fields are Category-specific, meaning that a Contact can have different Custom Fields available depending on which Category you assign it to (including the Contacts in Public Categories). This allows you to have different Custom Fields for personal friends than you might for business associates. For more information on using Categories, see "Using Categories" in Chapter 10, "Organizing Contacts."

To define Custom Fields:

1. Choose Custom Fields from the Define menu.

   The Define Custom Fields dialog box opens.



2. Choose a Category from the Category pop-up menu.
3. Type the Long field name that you want to appear in the Custom Field block of the Detail View.
4. Type the short field name that you want to appear in all locations other than the Detail View (such as the List View).
5. Select the type of field you want the Custom Field to be from the Field Type pop-up menu.

   Choose from one of five available field types.

Field type	Attributes
Text	Text entry. This is the default type for all Custom Fields.
Phone	Telephone numbers, using the format specified in the Data Entry Aids pane of the Preferences window.
Date	Date entries. Adheres to the format set for your Macintosh in the Date and Time control panel.
Money	Monetary figures. The Money field format is $00,000,000.00 (the dollar sign is entered automatically).
Number	Non-monetary figures. The Number field format is 00,000,000.00.

6. Click OK.

   Your Custom Field settings are saved.

Adding URLs and E-mail addresses in Custom Fields

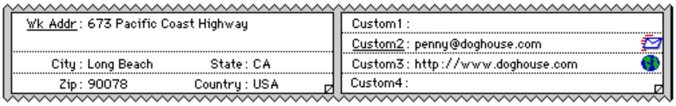
You can include World Wide Web page URLs and e-mail addresses in any Custom Field. This lets you easily keep track of a Contact's home page and e-mail address. You can manually enter URLs or e-mail addresses in Custom Fields, or you can drag them there from Web pages.

Like telephone numbers, URLs and e-mail addresses have icons at the end of their fields. When you click a URL icon, the corresponding Web page opens in your Web browser; when you click an e-mail icon, your e-mail application opens and creates a new message pre-addressed to that Contact.

To enter a URL or e-mail address in a Custom Field:

1. Open the Contact's Detail View.
2. Type the URL or e-mail address in an empty Custom Field.

   Now Contact recognizes the URL and e-mail address format, and automatically places the corresponding icon at the end of the field.

   Custom Field E-mail addresses in earlier Now Contact files are recognized as such when you open the files in version 3.8. The appropriate icon is added to the field(s).

3. Click the icon at the end of the field to open the corresponding Web page (for URLs) or your e-mail application (for e-mail addresses).

To drag a URL or e-mail address to a Custom Field:

1. Open the Contact's Detail View.
2. In your Web browser, select a link and drag it to the Contact.

   You can drag Web page links or linked e-mail addresses (addresses that appear in the same color text as page links).

3. Drop the link on a Custom Field.

   The URL or e-mail address appears in the field. Now Contact automatically places the corresponding icon at the end of the field.

Selecting primary e-mail addresses

If you enter more than one e-mail address for a Contact, you can specify a primary address. The primary address you select determines how the Contact's E-mail is addressed when you're in the List View.

By default, the first address you enter is primary. To change the primary address, just place the pointer over the proper address; when the pointer changes to the Primary Field Selector (≙), click the address. The address becomes underlined, and is now primary.

Addressing e-mail from the List View

You can select one or more Contacts in the List View and create e-mail messages for them in your e-mail application.

Once you've selected the Contacts, just click the Send E-Mail button in the Toolbar or choose E-Mail from the Contact menu. Your e-mail application opens with a new, pre-addressed message for each of the Contacts you selected.

If a Contact has more than one e-mail address defined, the primary address is used; see the preceding section for details.

Duplicating Contacts

Duplicate a Contact when you want to create a new Contact that is nearly an exact copy of an existing one. You can duplicate Contacts from the List View or the Detail View.

When you duplicate a Contact, the original Contact's Notes, Comments, attached Documents, attached Calendar Events and Keywords are not included.

To duplicate a Contact:

1. Select the Contact you want to duplicate in the List View, or open the Contact's Detail View.
2. Choose Duplicate Contact from the Edit menu.

   The Contact is duplicated, and the duplicate version now appears in the Detail View for you to edit.

Deleting Contacts

You can easily delete Contacts that are no longer useful in your Contact File.

Be very careful when deleting Contacts; the deletion cannot be undone.

To delete a Contact:

1. Select the Contact you want to delete in the List View.

2. Choose Delete Contact from the Edit menu, or click the Delete Contact button in the Toolbar.

   A dialog box appears, asking you to confirm that you want to delete the selected Contact.
3. Click OK.

Using Copy Contact Info

Use the Copy Contact Info function to copy a Contact's name and address or other information into a different type of application. Now Contact allows you to modify the format of the information to suit your needs.

Copying Contact information

Copying Contact information is as simple as selecting the desired Contact and using the Copy Contact Info command in the Edit menu.

To copy Contact information:

1. Open the Detail View for the Contact whose information you want to copy, or select the Contact in the List View.
2. Choose the appropriate command from the Copy Contact Info submenu of the Edit menu.

   Each submenu option of the Copy Contact Info command offers a different format for the copied information. See "Setting Copy Contact Info preferences" later in this chapter for more information.

   The Contact information is copied to the Clipboard. You can now switch to another application and paste the formatted Contact information in a document.

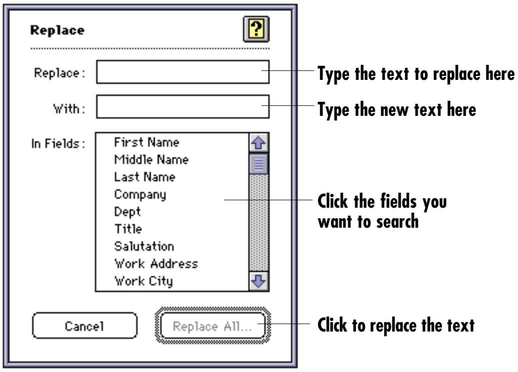
Replacing text

You can quickly replace Contact information in a number of Contacts, without having to open the Detail View for each individual Contact. The Replace function is available only in the List View.

To replace Contact information:

1. In the List View, choose Replace from the Edit menu.

   The Replace dialog box appears.



2. Type the text you want to replace in the Replace field.

   Enter the text as it appears in your Contacts, with the proper capitalization, punctuation and spelling. You must enter the entire contents of a field for a match to occur.

3. Type the replacement text in the With field.

   Enter the text exactly as you want it to appear in your Contacts, with the proper capitalization, punctuation and spelling.

4. In the scrolling list of fields, select the fields where you want to replace the text.

   To select the fields, place the pointer over the appropriate field name and click. A checkmark appears to the left of the fields you select. Now Contact replaces the Contact information only in the fields you select.

5. Click Replace All.

   A dialog box appears, asking you to confirm the replacement.

6. Click OK.

   The Contact information is replaced in your Contact File.

Changing addresses

When you change a Contact's address in the Detail View and other Contacts in the Contact File have the same address, the dialog box below appears.

You have the option of changing only the current Contact's address, all Contacts with that address, or all Contacts with the same company name. Select the appropriate radio button and click Change.

Swapping addresses

The Swap Addresses function swaps the Work and Home addresses in one quick step. It's also handy when you're dealing with Contact information you've just imported. The Swap Addresses function is available only in the Detail View.

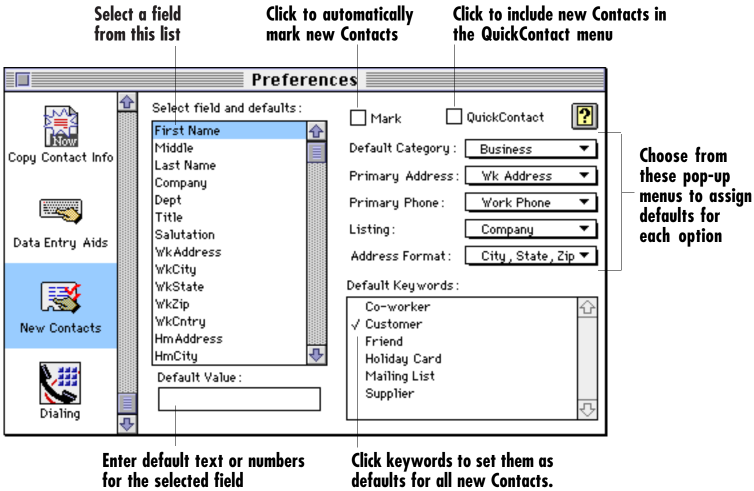
Setting preferences for Now Contact

Use Now Contact preferences to tailor its operations to your work style.

Refer to "Preferences" in the Online Help for more information on the Preferences options.

Setting New Contact preferences

New Contact preferences provide you with control over how your new Contacts are set up when you create or import them.

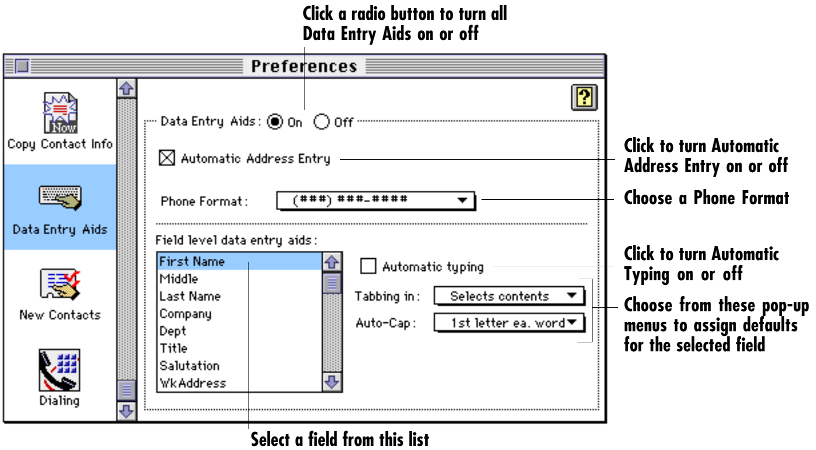


To tailor your new Contact primary address information for international Contacts, choose one of the options that includes the Postal field, which refers to postal codes for international addresses (the equivalent of U.S. ZIP codes).

You can also specify an address format for a new Contact by choosing the appropriate command from the Address Format submenu of the Contact menu. This allows you to override the default format for specific Contacts. (The Address Format submenu is available only when you're in the Detail View.)

Setting Data Entry Aids preferences

Automatic Address Entry and Automatic Typing are configured in the Data Entry Aids pane of the Preferences window.

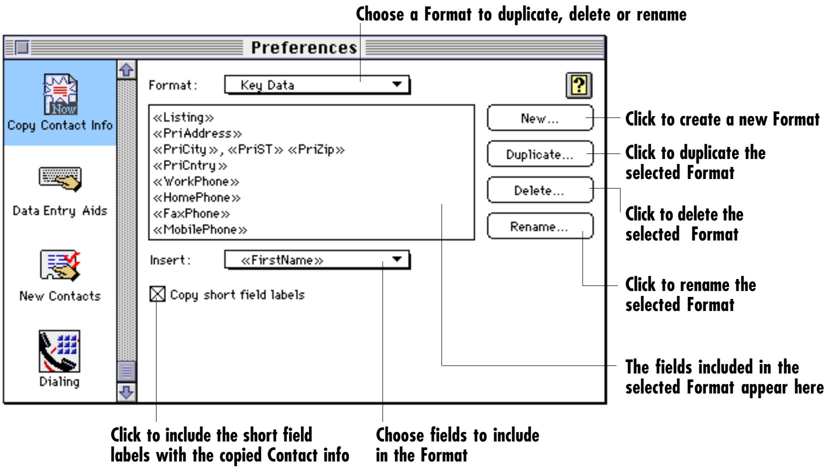


All of the data entry aids, except automatic typing, are turned on by default; you can turn them all off by selecting the Off radio button at the top of the pane, or you can turn them off selectively using the checkboxes.

! *When you're defining phone formats, use the symbol # to signify the numbers entered in a Contact's phone field. Any other letters, numbers or symbols you type in a phone format (such as hyphens and parentheses) are treated literally, and are auto-entered for all phone numbers when that phone format is active.*

Setting Copy Contact Info preferences

You can create multiple Contact Info Formats that are available from the Edit menu's Copy Contact Info submenu. Three predefined Contact Info Formats are available in every new Contact File.



Now Contact

All of the items in the Insert pop-up menu correspond to the Contact information fields in the Detail View, except for the following:

Field	Contents
«Listing»	The name (Contact or Company) that you've selected as Primary for a given Contact. See "Primary Fields" in Chapter 9, "Viewing Contacts" for more information.
«PriAddress»	The street address field from the address block (Work or Home) you've selected as Primary for a given Contact.
«PriCity»	The City field from the address block you've selected as Primary.
«PriST»	The State field from the address block you've selected as Primary.
«PriZip»	The ZIP Code field from the address block you've selected as Primary.
«PriCntry»	The Country field from the address block you've selected as Primary.
«PriPhone»	The telephone number (Work, Home, Fax, Mobile, or any Custom Field defined as a telephone number) you've selected as Primary for a given Contact.
«FullPriAddress»	All of the Primary Address fields you've assigned for a given Contact (PriAddress, PriCity, PriST, PriZip and PriCntry).

Setting General preferences

The General preferences settings control several aspects of Now Contact's general operations. To set your General preferences, choose General from the Preferences submenu of the Define menu. The General pane of the Preferences window appears.

Use this pop-up menu…	To…
Date Stamp format	Choose the format for the Date/Time stamp in your Notes and Calendar Events. You can stamp the date only, the time only, or both the date and time (the default) in the text field of Notes and Events when you start the Timer or choose Date/Time Stamp from the Contact menu.
Full Name Format	Choose to have a Contact's full name appear in the First Middle Last or Last, First Middle order when you insert the «FullName» merge field in a Copy Contact Info Format, a Template, a Word Processor document and so on.

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Use this pop-up menu…	To…
continued from previous page	
Listing Format	In Listings, show only the name (person or company) that you selected from the Listing pop-up menu in the New Contacts pane of the Preferences window; or, show that name with the unselected name (again, person or company) from the Listing pop-up menu, with the two separated by a carriage return or colon. *This option is useful in the List View, where it can cut down on the number of fields you need to display.*
Date Format	Choose the format for the date that appears in Date/Time stamps in your Notes and Calendar Events, and in the Modification Date/Time field in the List View.
Time Format	Choose the format for the time that appears in Date/Time stamps in your Notes and Calendar Events, and in the Modification Date/Time field in the List View.

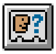
Other options permitting you to customize your Now Contact file also appear in the General pane of the Preferences window. These options are listed in the following table.

Select…	To…
Auto-save every x minutes	Automatically save your Contact File. Type the desired save frequency in the text field.
Use system color palette	Use the standard system color palette instead of Now Contact's custom color palette, which provides special colors for certain functions.
Closing last window quits	Quit the Now Contact application when you close the last open window of a Contact File.
Show Tool Tips (Button Help Text)	Display short identifying labels beneath each Toolbar button when you pass the pointer over the button.

Finding Contacts

Now Contact's Find function works independently of Categories and Keywords. When you perform a Find operation, all matching Contacts are displayed in the List View regardless of the Categories you've assigned them to or the Keywords you've defined for them. To search for Contacts based on their Categories and Keywords, use the Find Category and Find Keyword Toolbar buttons, or use QuickFind; see "Using QuickFind" later in this chapter for details.

To perform a basic Find:



1. Choose Find from the Find menu, or click the Find Contact button in the Toolbar.

   The Find dialog box appears.

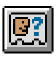
2. Type the text that you want to find in a Contact or Contacts.

You can also perform a search by entering the initial letters of the Contact's first and last name, with a space in between.

3. Click Find.

   Now Contact displays the Contacts that were found in the List View. If the Detail View is active, it displays the first Contact in the found list.

To perform a detailed Find:

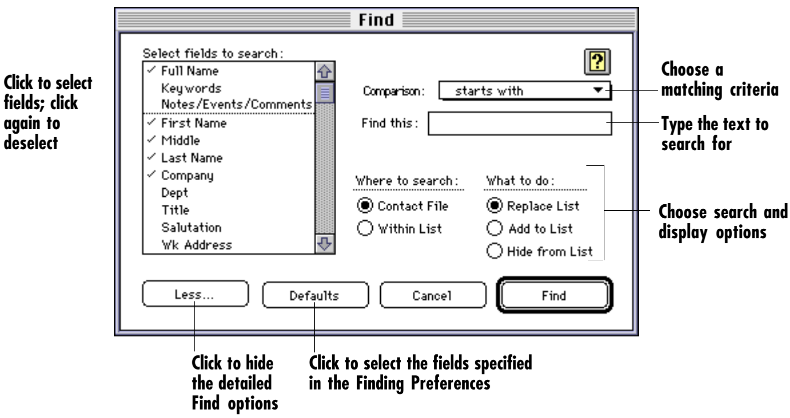


1. Choose Find from the Contact menu, or click the Find Contact button in the Toolbar.

   The Find dialog box appears.

2. Click the More button in the lower-left corner of the dialog box.

   The Find dialog box expands to show additional options.



3. In the scrolling list on the left, select the field(s) in which you want to search for the specified text.

   The Full Name option combines the first, middle (if specified) and last name fields. Selecting this search field allows you to search for Contacts simply by typing the first letters of their first, middle and last names, with a space in between; you may also need to choose the Starts With option in step 4.

   All of the other options specify searching in a single field at a time.

4. From the Comparison: pop-up menu, choose the criteria to determine how the text will be matched.

5. Type the text you want to search for in the Find this field.

   If you selected is between from the Comparison pop-up menu in step 4, type text into the second text field as well.

6. Select a Where to search radio button to specify where Now Contact should search for the text.

   Contact File searches the entire Contact File for matches, while Within List limits the search to the Contacts currently displayed in the List View. Use Within List when you've already performed one search and you want to narrow the found list.

7. Select a What to do radio button to specify how found Contacts will affect the Contacts in the current List View.

   The options available are:

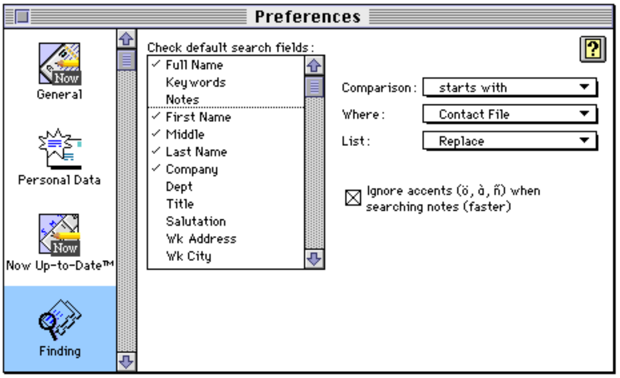
Select this option…	To…
Replace List	Replace the Contacts in the current List View with the found Contacts.
Add to List	Add the found Contacts to the Contacts in the current List View.
Hide from List	Remove any Contacts that match the search criteria and already appear in the current List View (doesn't delete the Contacts from your Contact File).

8. Click Find.

   If Now Contact finds Contacts that match the search criteria, the contents of the current List View change according to the options you set in step 7.

Setting Finding preferences

Now Contact lets you set your own Finding preferences so that you can always use the Find function in a way that's convenient to you. Use the Finding pane from the Preferences dialog box to set your preferences.



The fields you select in the Finding Preferences dialog box are the fields that Now Contact automatically selects when you click the Default button in the Find dialog box.

If you select the Notes field, select the Ignore accents when searching notes checkbox at the bottom of the pane to make your search more precise by ignoring text containing diacritical marks. For example, if you're searching for a Note containing the word resume, Notes containing the word résumé are not considered a match.

Other Find menu commands

In addition to the Find command, Now Contact provides several other search-related commands in the Find menu.

Choose this command…	To…
QuickFind…	Find Contacts based on their Categories and Keywords. See "Using QuickFind" later in this chapter for details.
Find All	Find all of the Contacts in the Contact File.
Find Marked	Find Contacts you've marked in the Contact File.
Find Selected	Find Contacts you've selected in the List View.
Find QuickContacts	Find the Contacts you've selected to include in the QuickContact menu in your primary Contact File. See "Using QuickContact" in Chapter 13, "Quick Access Features" for details.
Find Duplicates	Find duplicate information among the Contacts in a Contact File. See "Finding duplicate Contacts" later in this chapter for details.
Hide	Remove selected Contacts from the List View. See "Hiding Contacts" later in this chapter for details.

Finding duplicate Contacts

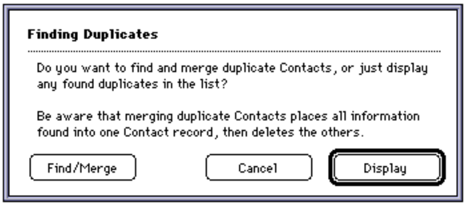
Now Contact lets you search for duplicate Contacts in your Contact Files, and provides various options for resolving them.

Use the Duplicate Handling pane of the Preferences dialog to specify which fields to compare before searching for duplicate Contacts.

To find duplicate Contacts:

1. Choose Find Duplicates from the Find menu.

   The Finding Duplicates dialog box opens, asking you whether you want to find and merge duplicate Contacts or simply display them in the List View.

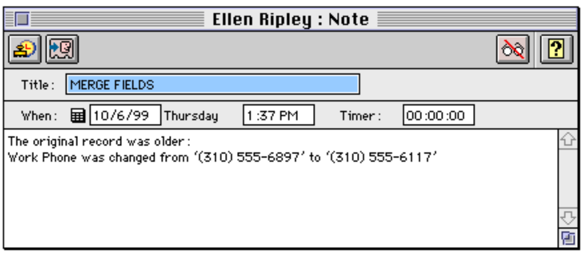


   The dialog box contains the following duplicate handling options.

Choose this option...	To...
Find/Merge	Update the last-modified copy of the Contact (if necessary) and delete the older version.
Display	Display all found duplicate Contacts in the List View without merging them.

2. Click Find/Merge or Display.

   If you clicked Find/Merge, the duplicate Contacts are combined and only one copy of that Contact appears in the Contact File. If the older Contact had Notes, documents or Calendar Events attached to it, they are added to the more recent Contact before the older one is deleted. Additionally, a new Note similar to the one illustrated below is attached to the merged Contact, indicating which copy was older and listing the changes made to the merged Contact.



Find/Merge finds only two duplicates per Contact. If you suspect that more than two copies of a Contact exist in a Contact File, use the Find Duplicates function a second time.

Now Contact

If you clicked Display, all found duplicates appear in the List View. You can examine them in the Detail View to see if they are actually duplicates and, if they are, choose Find Duplicates again and merge them.

Using QuickFind

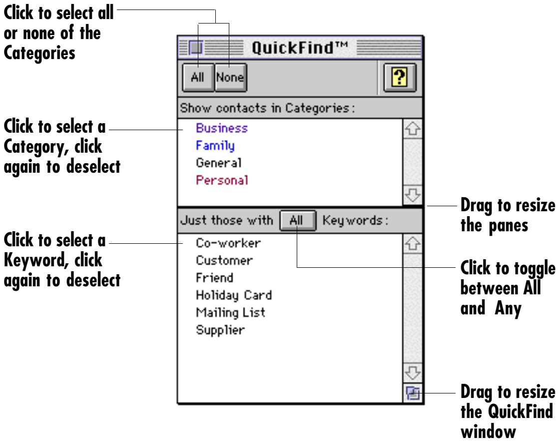
The QuickFind feature filters the Contacts in your Contact File based on their Categories, Keywords, or both, and lets you view specific Contacts while hiding any Contacts you don't want to view.

To Now Contact 1.x users: *QuickFind takes the place of Now Contact version 1.x's Sets feature. QuickFind functions in much the same way as Sets, but also lets you narrow the Contact list based on the Keywords assigned to your Contacts.*

To use QuickFind:

1. Choose QuickFind from the Find menu, or click the QuickFind button in the List View Toolbar.

The QuickFind window opens.



The scrolling list at the top of the window shows all Categories defined for the current Contact File, while the list at the bottom shows all Keywords defined for the file.

The QuickFind Categories and Keyword lists work independently—that is, you don't need to select a Category in order to filter your Contacts using Keywords. However, using the lists in combination with one another allows you to be more specific in your search.

2. In the Categories list, click the Categories whose Contacts you want to include in the List View, or click the All or None buttons.

Contacts assigned to the Categories you select appear immediately in the List View.

3. In the Keywords list, select the Keywords whose Contacts you want to include in the List View.

Contacts who have been assigned the Keywords you select, and who are assigned to the Categories you selected in step 2, appear immediately in the List View.

The Keywords list operates in two modes: All and Any, described in the following table.

Choose this mode…	To find…
All	Only those Contacts with all the selected Keywords.
Any	Contacts with any of the selected Keywords, regardless of other Keywords assigned to them.

4. Close the QuickFind window.

You're returned to your Contact File, where only the matching Contacts appear in the List View.

The QuickFind window can remain open while you work in your Contact File.

Hiding Contacts

You can remove Contacts from the found list by selecting them and choosing Hide from the Find menu, or clicking the Hide Contact button in the List View Toolbar.

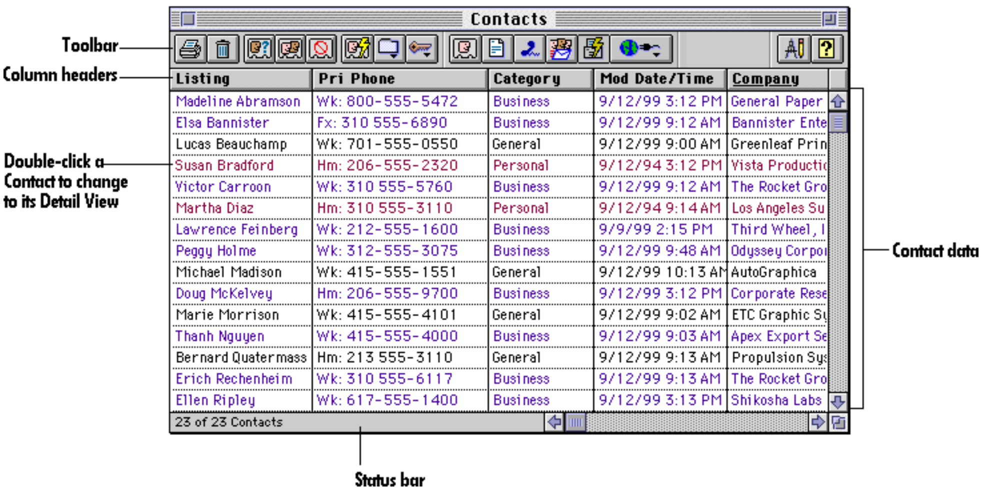
To return hidden Contacts to the List View, simply choose Find All from the Find menu or click the Find All button in the Toolbar.

Chapter 9
Viewing and Dialing Contacts

Now Contact makes it simple for you to view, browse, and modify Contact information in either the List View or the Detail View, and gives you extensive control over the appearance and formatting of both Views. In addition, you can use Now Contact to dial the phone numbers of your Contacts from either the List View or the Detail view.

List View

The List View is the first view you see when you open a Contact File. It has two main components: the columns in which Contact data is displayed and the Contact data itself.



Each column has a header at the top that shows the name of the Contact data field whose information it displays; special symbols in the column's header also reflect sorting attributes that have been assigned to it.

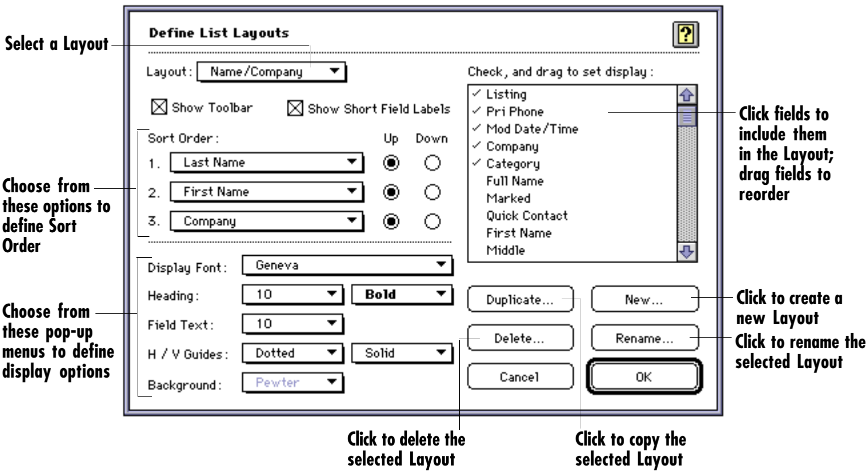
The Toolbar at the top of the List View provides immediate access to the most commonly used Now Contact functions. The status bar at the bottom tells you how many Contacts of the total number in your Contact File are currently displayed in the List View.

The List View Toolbar

The buttons in the List View Toolbar provide immediate access to most common Now Contact functions. While each of the buttons has a corresponding menu command, clicking a button is often faster than choosing the command from the menu.

Defining List Layouts

List Layouts determine how your Contacts appear in the List View. With Now Contact, you can modify predefined List Layouts or create your own. Click the List Layouts button in the List View Toolbar or choose List Layouts from the Define menu to open the following dialog box.



Refer to "Define List Layouts" in Online Help for more information on determining how your Contacts look in List View.

When you define a new List Layout, it appears in the Use List Layout submenu of the Window menu.

Sorting List View columns

Now Contact lets you sort the List View to control how your Contact information is displayed. You can choose a primary column on which to sort your Contacts, plus up to four additional sub-sort columns.

Set the sort order for a List View in the Define List Layouts dialog box, described in the previous section. You can create a new sort order directly in the List View, but the new order does not affect the current List Layout definition. Now Contact uses the new sort order until you choose the original List Layout from the Use List Layout submenu of the Window menu.

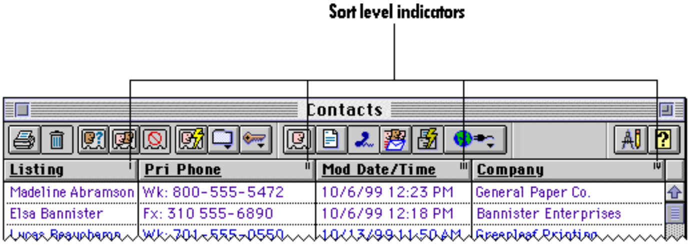
To sort columns in the List View:

1. Click any column header to make it the primary column by which Contacts are sorted.

   The column name becomes underlined, and a small Roman numeral I (the sort level indicator) appears above and to the right of the column name.

2. To define sub-sort columns, hold down the Shift key and click other column headers.

   A Roman numeral II appears in the second column you click, a III appears in the third column, and so on up to the fifth column.

   If you Shift-click one of the defined Sort columns, it is removed from the group and the remaining columns are renumbered accordingly. Shift-click another column header to add it to the Sort group.

   Click any column header without holding down the Shift key to cancel all previous Sort columns and makes it the new primary Sort column.

3. To sort a column in reverse order, hold down the Option key while clicking the column header.

   A downward-pointing arrow appears below the column's assigned Roman numeral to indicate a reverse sort order for the column. To turn off reverse sorting for a column, Option-click the column header a second time.

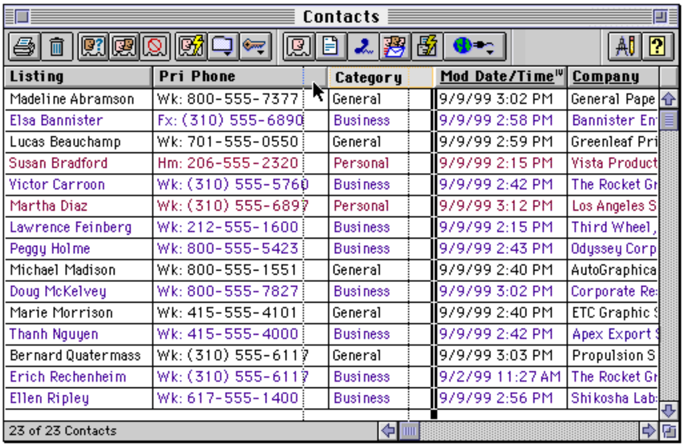
Moving List View columns

Drag columns in the List View to reorder them.

To move columns in the List View:

1. Click the header of the column that you want to move and hold down the mouse button.
2. Drag the column to the desired location.

   Two vertical dotted lines represent the borders of the column as you drag.



3. When you've dragged the column to the desired location, release the mouse button.

   The column appears in its new location.

   When you move a column directly in the List View, the new column order is saved immediately in the current List Layout.

Resizing List View columns

Now Contact makes it easy for you to resize the List View columns, making them wider or narrower as necessary.

To resize columns in the List View:

1. Place the pointer over the right border of the column you want to resize.

   The pointer changes to a double-headed arrow (◀▶).

2. Drag the border to the left or right, depending on whether you want to make the column wider or narrower.

Dotted lines appear at the left and right sides of the column, reflecting the borders.

3. Release the mouse button when you've resized the column to the desired width.

   The column border changes from a dotted line back to a solid line in the top row of the List View.

Modifying Contacts in the List View

You can edit the information in many of the List View columns without opening the Detail View.

Editing text

Columns in the List View that display basic Contact information can be edited by clicking and typing. The pointer turns into the No Edit symbol (⊘) when you pass it over columns whose contents can't be edited.

To edit text fields in the List View:

1. Select a Contact by clicking it.
2. Place the pointer over a column that offers direct text editing.

   The pointer changes to the standard text-editing I-beam cursor (I) when it's positioned over one of these columns.

3. Click once in the field that contains information you want to edit.

   The Contact is no longer highlighted, and the cursor blinks in the text field.
4. Make the desired changes to the text.
5. Move to other fields and modify text if desired.

   You can move from the current field to the next editable text field by pressing the Tab key, or to the previous text field by pressing Shift-Tab.
6. When you're finished editing text, press the Enter key.

   This confirms your changes to the Contact and selects it again in the List View.

Now Contact

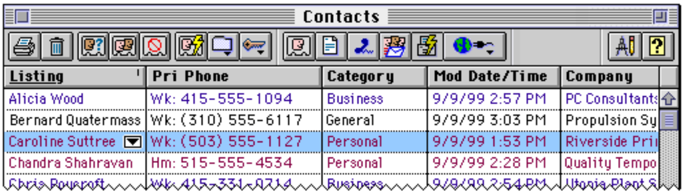
Pop-up menus

Clicking in certain columns in the List View opens a pop-up menu that contains a list of options for that field. The Category, Listing and Pri. Phone columns all include pop-up menu capabilities.

To use a pop-up menu in the List View:

1. Select a Contact by clicking it.
2. Place the pointer over a column that offers pop-up menu capability.

   The pointer changes to a downward-pointing arrow (▼) when it's positioned over one of these columns.



3. Click over the column and hold down the mouse button.

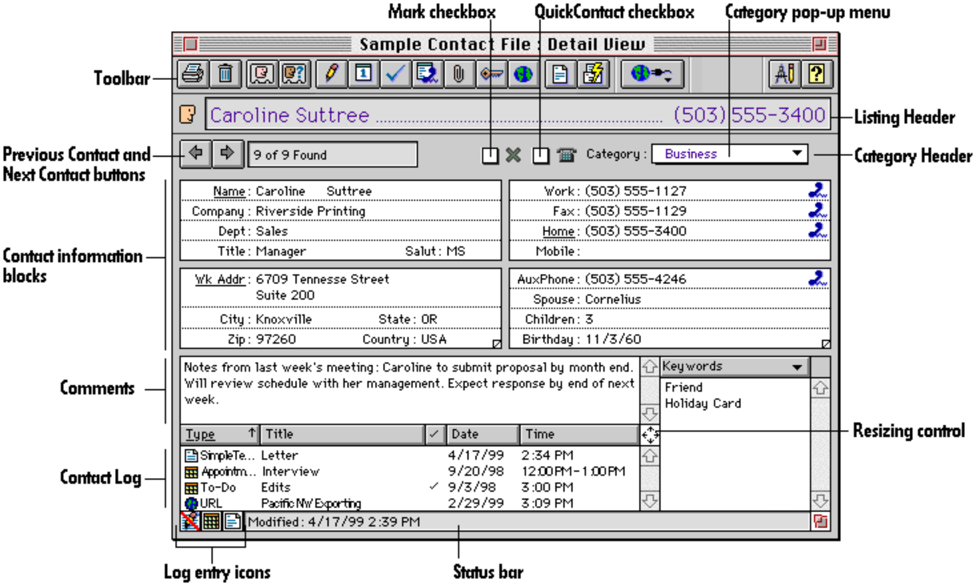
   A pop-up menu appears, listing the options for that column.

4. Choose the desired item from the pop-up menu and release the mouse button.

   The item you chose now appears in the column.

Detail View

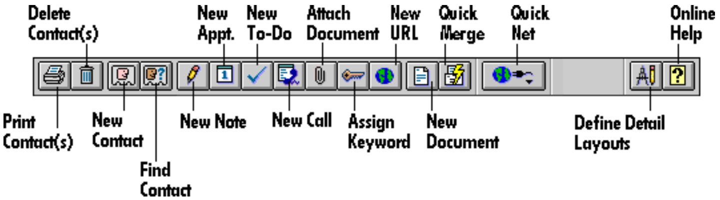
The Detail View is where you create new Contacts, enter Contact information, and view information that isn't included in your current List View. You can create Detail Layouts that specify display font, orientation of the various fields, tab order and more.



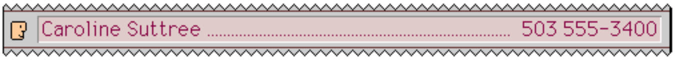
Since all of the components described in the following sections can be included in or excluded from the Detail View according to the current Layout, the illustration above shows a Layout that includes all components; see the next section, "Defining Detail Layouts," for more information on Detail View Layouts.

The Detail View Toolbar

The buttons in the Detail View Toolbar let you perform many common Now Contact functions. While each of the buttons has a corresponding menu command, clicking a button is often faster than choosing the command from the menu.



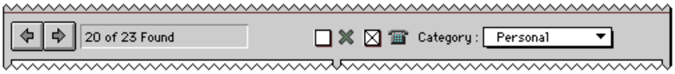
Listing Header



The Listing Header shows the name and telephone number of the current Contact according to the Primary field selections you've set. See "Primary Fields" later in this chapter for more information.

Use the Contact icon to the left of the Contact name for Now Contact drag-and-drop operations, such as copying Contacts, pasting Contact information in a text file and so on. Click and hold the mouse button on the icon (or anywhere in the Listing Header) and drag it to the desired location.

Category Header

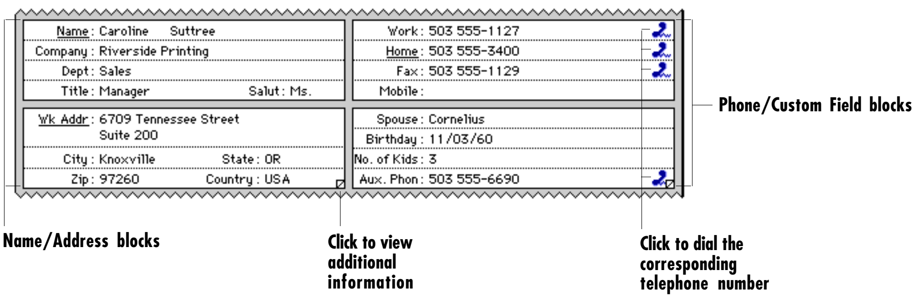


The Category Header lets you navigate through your Contact File and make changes to the Contacts. Click the arrow buttons to move forward or backward through the Contact File.

Pressing Command–Right Arrow or Command–Left Arrow on the keyboard also moves you forward or backward through the current List View; pressing Command–Up Arrow or Command–Down Arrow moves you to the first or last Contact in the current List View.

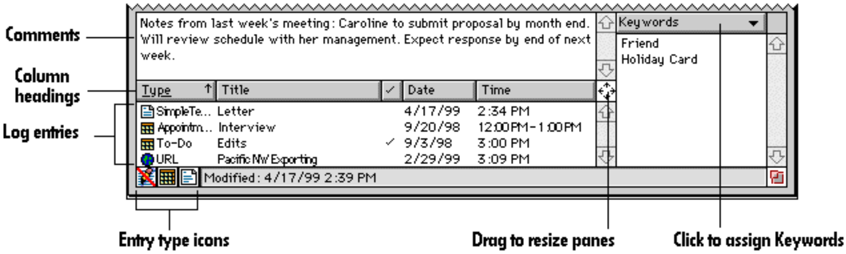
The numbers next to the arrows indicate the position of the current Contact in the Contact File. The Mark checkbox ( ) lets you mark or unmark the current Contact, and the QuickContact checkbox ( ) lets you include the current Contact in the QuickContact pull-down menu for quick reference. Finally, the Category pop-up menu indicates the Category to which the current Contact is assigned; you can change a Contact's Category by choosing one from the pop-up menu.

Contact information blocks



The fields in the Contact information blocks contain the name, address and telephone number information for the current Contact, as well as information for any Custom Fields you've set up in your Contact File.

Contact Log



All Contact attachments, Calendar Events and your personal Comments appear in this section of the Detail View. Personal Comments are shown in the scrolling Comments field. Attached Notes, documents, and Events appear in the scrolling list on the left side of the log; on the right is a list of the Contact's assigned Keywords. See Chapter 8, "Customizing Contacts," for more information on attaching and viewing Comments, Notes, documents and Calendar Events.

You can resize the panes in the Contact Log by dragging the four-headed resizing control vertically and horizontally in the Detail View. The information contained in the windows remains attached to the Contact even though it may be out of view.

Contact Log entries include the following information:

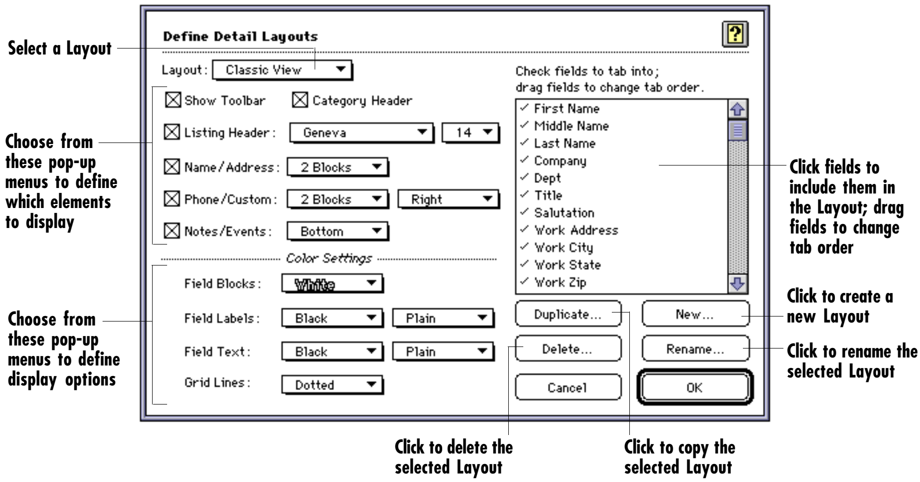
- Free-form text in the Comments field
- Type of attachment (Note, To-Do, document and so on)
- Title of the attachment
- Symbols indicating whether an attached To-Do is Done (checkmark), In Progress (two bullets) or Not Done (one bullet)

You can sort Contact Log entries by clicking any of the column header buttons; by default, entries are sorted in ascending order by type. To sort in descending order, Option-click the appropriate header.

The three icons beneath the Contact Log let you filter the entries in the log. When you select an icon, entries of that type appear in the log; when you deselect the icon, it is no longer highlighted and its entries are hidden from view. Icons for hidden entries have a red slash through them.

Defining Detail Layouts

Detail Layouts determine the appearance of the Detail View. With Now Contact, you can modify predefined Detail Layouts or create your own. Click the Detail Layouts button in the Detail View Toolbar or choose Detail Layouts from the Define menu to open the following dialog box.



Refer to "Define Detail Layouts" in Online Help for more information on determining how your Contacts look in Detail View.

When you create a new Detail Layout, it's added to the Use Detail Layout submenu of the Window menu, so you can easily switch between existing Layouts as you work.

Primary Fields

Primary Fields help to ensure that the most essential information about a given Contact is always displayed or retrieved. For each Contact, you can select a Primary Name (either Contact Name or Company Name), a Primary Phone (Work, Home, Fax, Mobile, or any telephone number in a Custom Field), and a Primary Address (Work or Home).

Primary Field functions

Primary Fields function in five main areas:

- **Listing Header in the Detail View:** The name field and telephone number you select as Primary determine the information that appears in the Contact's Listing Header.
- **Address information in the Detail View:** When you specify a display size smaller than 3 Blocks for the Name and Address information blocks, the Primary Address you select determines which address is shown first (the Secondary address is available by clicking the dog-ear in the address block).

- **Special columns in the List View:** Two List View columns are affected by your Primary Field settings. The Listing field displays the name you select as Primary, optionally followed by the unselected (or Secondary) name; the Pri. Phone (Primary Phone) field displays the Primary telephone number you select.
- **Templates and Word Processing:** When you're creating a Now Contact printing Template, or a document using Now Contact's Word Processor, you can include merge fields that automatically insert the Primary information for each Contact. The fields are «Listing», «PriAddress», «PriCity», «PriST», «PriZip» and «PriPhone».

  For example, you might set up a merge address as:

  «Listing»
  «PriAddress»
  «PriCity», «PriST» «PriZip»
  «PriPhone»

  This is often preferable to inserting, for example, «WkAddress», since you may not want to use the work address for every Contact you're including in a merge operation. Instead, the Primary Field options let you use one Contact's home address and another's work address, according to the Primary selections you've made for each Contact. For more information on using merge fields, see Chapter 12, "Printing Contacts."
- **Copy Contact Info:** You can configure the Edit menu's Copy Contact Info command to use the same Primary merge fields described above, allowing you to automatically copy a Contact's Primary information to the Clipboard. For more information on setting up and using the Copy Contact Info function, see Chapter 8, "Using Now Contact."

When your General preferences are set to display the «Listing» field as the Primary Name followed by a carriage return and the Secondary Name (the name not selected as Primary), this field will consist of two lines in Word Processor documents and in Copy Contact Info Formats.

Selecting Primary Fields

Selecting your Primary Fields is simply a matter of clicking within the Detail View.

To select Primary Fields for a Contact:

1. Open the Detail View for the Contact whose Primary Fields you want to select.

   A name and telephone number appear in the Listing Header by default. The current Primary Fields in the Name, Address and Phone blocks are underlined.

2. From the Use Detail Layout submenu of the Window menu, choose a Detail Layout that allows you to see as much Contact information as possible on your screen.

3. Place the pointer over the title of the Name field.

   The arrow pointer changes to the Primary Field Selector (≜). This selector also appears when you place the pointer over the title of the Company field. Of these two fields, the one that is currently underlined is the Primary Name—the one that appears in the Listing Header.

4. Click the title of the field you want to select as the Primary Name for the current Contact.

   The field you clicked becomes underlined, and the newly selected Primary Name now appears in the Listing Header.

5. Place the pointer over the title of the Home field.

   The pointer changes to the Primary Field Selector (≜) over this field. The Primary Field Selector also appears when you place the pointer over the title of the Work Address field. The field that's currently underlined is the Primary address.

6. Click the title of the address field you want to select as the Primary Address for the current Contact.

   The field you clicked becomes underlined.

7. Place the pointer over the title of the Work Phone (Work) field.

   The pointer changes to the Primary Field Selector over this field as well. It also appears when the pointer is over the Home Phone, Fax Phone or Mobile Phone field, as well as any Custom Fields you set up to contain telephone numbers. The telephone field that's currently underlined appears in the Listing Header.

8. Click the title of the phone field you want to select as the Primary telephone number.

   The field you clicked becomes underlined, and the newly selected Primary telephone number now appears in the Listing Header.

Dialing Contact telephone numbers

Now Contact provides the control you need to dial Contact telephone numbers accurately, no matter where you are or who you're calling. You set up the dialing function from the Dialing pane of the Preferences window, and dial from the Call dialog box. You can set up multiple dialing configurations for all of the various situations you may encounter. Now Contact remembers the dialing combinations you choose and saves them as the defaults for any subsequent calls.

Dialing methods

You can dial using your Macintosh speaker, a modem connected to your Macintosh, a Sophisticated Circuits DeskTop Dialer or another application via Apple Events.

To dial using…	Do this…
Your speaker	Hold the mouthpiece of your telephone handset as close as possible to the internal speaker of your Macintosh (or a connected external speaker) when you activate dialing (how close you need to hold it may depend on the current volume setting in the Expert Dialing Setup dialog box; see "Speaker settings" later in this chapter). As long as your outgoing line supports touch-tone dialing, your call should go through.

continued next page

To dial using...	Do this...
continued from previous page	
A modem	Select the appropriate Dialing preferences. See “Setting Dialing preferences” later in this chapter for details.
DeskTop Dialer™	Select the appropriate Dialing preferences. When you activate dialing, the Contact number is sent to the DeskTop Dialer, which in turn dials it. In addition to the dialer unit itself, you must have the Sophisticated Circuits Dialer control panel installed on your Macintosh for Now Contact to use your DeskTop Dialer.
Apple Events	Specify an application other than Now Contact to dial your Contacts. When you activate dialing, the Contact number is sent to the application and that application dials it. This is useful for certain PBX systems that use an Apple Event-aware application to handle telephone calls, or for any application capable of dialing telephone numbers.

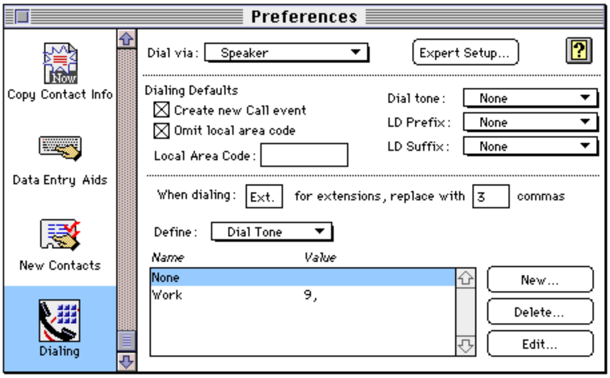
Setting Dialing preferences

Now Contact’s Dialing preferences let you configure all of the dialing combinations you might need to call from various locations and connect to any long-distance services.

To set Dialing preferences:

1. Choose Dialing from the Preferences submenu of the Define menu.

The Dialing pane of the Preferences window appears.



2. Choose a dialing method from the Dial via pop-up menu.

You can choose the Speaker, Modem, DeskTop Dialer or Apple Event Dialer options described in the previous section.

If you choose Apple Event Dialer in step 2, click the Choose button to the right of the pop-up menu. A standard directory dialog box appears—locate the application you want to use for dialing and click Open. The application you select must be Apple Event-aware; see the application’s documentation for information.

3. Set options in the Dialing Defaults section as desired.

These options apply every time you use the dialing feature. They are described in the following table.

Choose this option...	To...
Create new Call event	Create a new Call Event for the current Contact whenever you dial. This adds a record of the call to the Contact's Contact Log.
Omit Local Area Code	Remove the specified area code when dialing local telephone numbers. You must enter a local area code in the Local Area Code text field for this option to work properly. *If you don't select this checkbox, you can still omit the local area code on a per call basis by checking Smart area code handling in the Call dialog box. See "Dialing a Contact" later in this chapter for details.*
Local Area Code	Specify the area code to omit when the Omit Local Area Code checkbox is selected. Whenever you dial a number containing this area code, only the telephone number itself is dialed.
Dial Tone	Specify a number string that should be dialed to obtain a dial tone. There are two predefined dial tone strings to choose from, or you can define or modify dial tone strings; see "Defining dialing strings" later in this chapter.
LD Prefix	Specify a long-distance prefix that should be dialed before the telephone number. There are two predefined prefixes to choose from, or you can define prefixes; see "Defining dialing strings" later in this chapter.
LD Suffix	Specify a long-distance suffix that should be dialed after the telephone number. There are two predefined suffixes to choose from, or you can define or modify suffixes; see "Defining dialing strings" later in this chapter.

4. In the When dialing fields, enter text to precede telephone extensions and specify the number of commas to use in place of the text when dialing.

This allows you to dial extension numbers after the telephone numbers in your Contacts' Phone fields.

For example, if you follow a Contact's Work telephone number with Ext. 194 in the Detail View, Now Contact replaces the letters *Ext.* with the number of commas you specify—each comma causes a pause, after which the extension is dialed. This gives the main phone system time to answer before the extension is dialed.

You can enter any combination of text or numerals to precede extensions—just be sure that what you enter is short enough to fit in your Detail View Phone fields. The text you enter *must* precede any extensions in your Detail View Phone fields. You can enter only numerals in the commas field.

5. Close the Preferences window.

You're returned to the current Contact File and your Dialing preferences are set. To define or modify dial tones and dialing prefixes and suffixes, see "Defining dialing strings" later in this chapter.

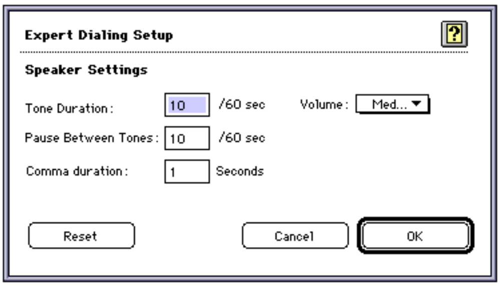
Setting expert options

When you use the Speaker or Modem dialing method, you can configure additional settings. Simply click the Expert Setup button at the top of the Dialing preferences pane and set the options in the Expert Dialing Setup dialog box that appears.

If you make changes in the Expert Dialing Setup dialog box and later decide to use the original settings, click the Reset button.

Speaker settings

The Expert Dialing Setup dialog box for speaker dialing is shown below.

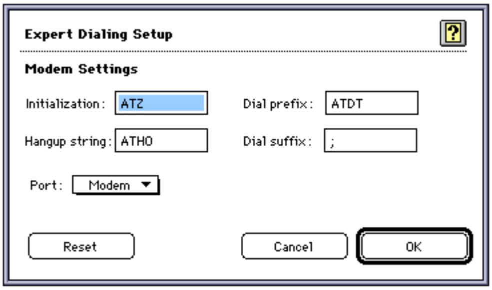


This option...	Controls...
Tone Duration	The length of the dialing tones played through your Macintosh speaker, in 60ths of a second. If you have problems connecting when dialing through your speaker, try increasing this setting.
Pause Between Tones	The length of silence between each dialing tone, in 60ths of a second. If you have problems connecting when dialing through your speaker, try increasing this setting.
Comma duration	When using commas in dialing strings, the length of silence each comma represents. See "Defining dialing strings" later in this chapter for details.
Volume	The speaker volume for your dialing tones; you can choose Low, Medium (the default) or High.

Modem settings

The Expert Dialing Setup dialog box for modem dialing is shown below. Now Contact assumes that your modem is Hayes-compatible and can respond to the industry-standard modem commands Now Contact uses.

You should be familiar with your modem and modem commands before changing the modem settings in the Expert Dialing Setup dialog box .



This option...	Controls...
Initialization	How Now Contact prepares your modem for dialing.
Hangup string	How your modem releases the line when you click Cancel in the dialing status dialog box (see “Dialing a Contact” later in this chapter for more information).
Port	The Macintosh port your modem is connected to—Modem (the default) or Printer.
Dial prefix	How Now Contact prepares the telephone line for dialing; a T at the end of the prefix indicates touch-tone dialing, while a P indicates pulse dialing.
Dial suffix	How your modem behaves during a call; a semicolon (the default setting) keeps the modem in command mode so that it can release the line if your call doesn’t go through.

Defining dialing strings

Dialing strings let you add special numbers to your Contact telephone numbers without having to modify the Phone fields for each Contact. There are three types of dialing strings, and Now Contact includes predefined strings for all types.

This string…	Dials…
Dial Tone	The numbers and pauses necessary to get a dial tone in a particular location. A predefined dial tone for outgoing office calls is included.
Prefixes	Any numbers that need to occur after getting a dial tone and before dialing a Contact's telephone number. A predefined prefix for toll-free 800 number access is included.
Suffixes	Any numbers that need to occur after dialing a Contact's telephone number. A predefined suffix for long-distance telephone card calling is included.

In addition to the predefined strings, you can define new strings or modify the predefined ones to suit your needs.

When you're defining or modifying dialing strings, inserting a comma anywhere in a string denotes a pause. You can use commas to tell Now Contact to pause the dialing process in order to wait for a confirmation tone. (See "Setting expert options" earlier in this chapter for information on setting comma pause duration.)

To define dialing strings:

1. Choose Dialing from the Preferences submenu of the Define menu.

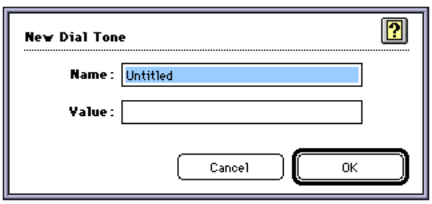
   The Dialing pane of the Preferences window appears.

2. Choose a dialing string option from the Define: pop-up menu at the bottom of the window.

   The scrolling list below the pop-up menu changes to show the strings for the option you chose.

3. Click New.

   Depending on your choice in step 1, the New Dial Tone (pictured below), New Prefix or New Suffix dialog box appears. Each dialog box contains the same components.



4. Enter a descriptive name for your new string in the Name field.

   To modify existing strings, select them in the scrolling list, click Edit and follow the remaining steps.

5. Enter the numbers to dial in the Value field.

   If you're defining a new dial tone or prefix, remember that the numbers you enter are dialed before the Contact's telephone number, while suffixes are dialed after it.

6. Click OK.

   The new string appears in the scrolling list.

7. Repeat steps 3 through 7 for any additional strings you want to define.

8. Close the Preferences window.

   You're returned to the current Contact File; the new strings you defined are now available when you use the dialing feature.

Dialing a Contact

Once you've set your Dialing preferences, you can dial any Contact in your Contact File from either the List View or the Detail View. The options you've set up in your preferences are available when you dial.

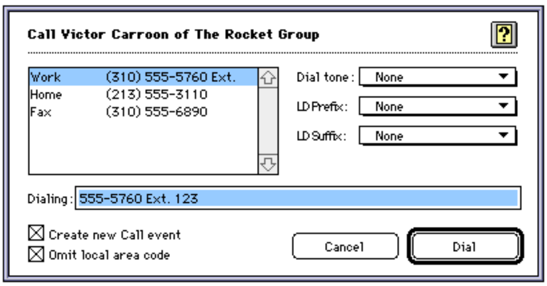
To dial a Contact number quickly from the Detail View, click the telephone icon ( ) next to the number you want to dial and follow steps 9 and 10 in the procedure below.

To dial a Contact:

1. Select the Contact whose telephone number you want to dial.

2. Choose Dial from the Contact menu, or click the Dial button in the List View Toolbar.

   The Contact's Detail View opens (if it wasn't already open), then the Call dialog box appears. Notice that the top of the dialog box displays a summary line showing the name and company of the Contact you're calling.



3. In the scrolling list of phone numbers, choose the number you want to call.

   Select a number by clicking it; the number appears in the Dialing field at the bottom of the dialog box. By default, the phone number you've specified as the Primary Phone for the Contact is selected.

4. From the Dial tone pop-up menu, choose the dial tone string necessary to obtain a dial tone at your current location.

The predefined dial tone strings, and any you've set up in the Dialing preferences window, are listed in the pop-up menu. Choose None if you don't need a string to get a dial tone.

Any dialing string you choose is inserted in the Dialing field at the bottom of the dialog box.

5. From the LD Prefix pop-up menu, choose the appropriate dialing prefix for your call.

Choose any prefix that needs to be dialed before the selected telephone number (outside line access, and so on); the predefined prefixes, and any you've set up in the Dialing preferences window, are listed in the pop-up menu. Choose None if the number requires no prefix.

6. From the LD Suffix pop-up menu, choose the appropriate dialing suffix for your call.

Choose any suffix that needs to be dialed after the selected phone number (long-distance access, and so on); any suffixes you've set up in the Dialing preferences window are listed in the pop-up menu. Choose None if the number requires no suffix.

7. Select Create new Call event if desired.

Selecting this checkbox causes Now Contact to create a new Call Calendar Event in which you can document the phone call you're making. If you select this option, the Event Info dialog box opens automatically after the telephone number has been dialed.

In the Dialing pane of the Preferences window, you can specify that Now Contact always creates a new Call Calendar Event whenever you dial a Contact.

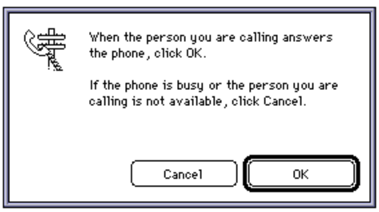
8. Select Omit local area code if desired.

Selecting this checkbox causes Now Contact not to dial the local area code.

You must specify a local area code in your Dialing preferences for this feature to work. See "Setting Dialing preferences" earlier in this chapter for details.

9. Click Dial.

Now Contact dials the number. If you selected the Create new Call checkbox in step 7, another dialog box appears allowing you to cancel or continue your call once the number has been dialed.



If you're using the Apple Event Dialer and you haven't chosen a dialing application, a standard directory dialog box appears at this point. Locate the application capable of dialing using Apple Events and click Open.

10. Click OK when the party you're calling answers the phone, or click Cancel if the line is busy or there's no answer.

If you selected the Create new Call Event checkbox, the dialog box disappears and the Event Info window appears when you click OK. If you're dialing through a modem, pick up your telephone handset when the party answers and then click OK—the modem releases the line to transfer control of the call to you.

If you click Cancel, no Call Event is created and you're returned to your Contact File.

Now Contact remembers the options you choose in the Call dialog box and uses them as the default values the next time you use the dialing feature.

Chapter 10
Organizing Contacts

Now Contact helps you manage your Contacts by allowing you to group related ones together using Categories. You can also classify Contacts by assigning your own Keywords to them, and use the Mark function to “tag” your Contacts for printing, temporary grouping or other purposes.

Using Categories

Categories help you classify your Contacts into related groups. You can assign a different color and text style to each Category, making it easy to spot related Contacts in the List View.

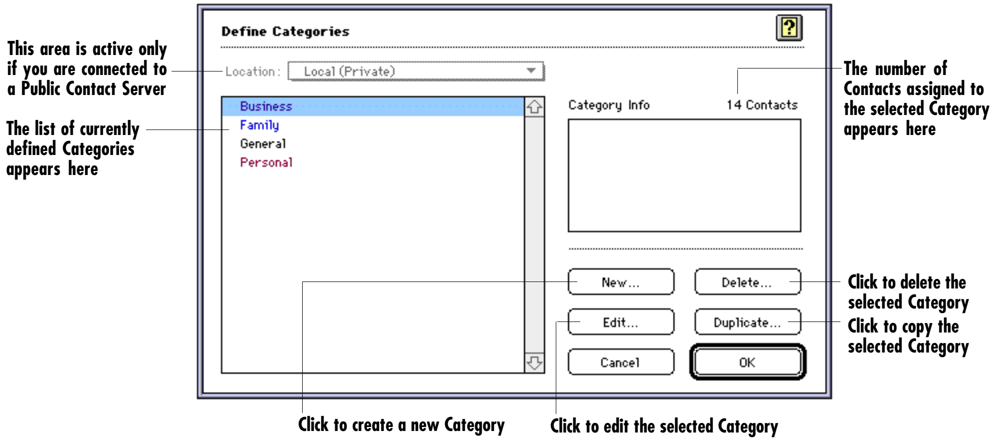
Creating new Categories

You can create new Categories from either the List View or the Detail View.

To create a Category:

1. Choose Categories from the Define menu, or choose Define Categories from the Detail View’s Category pop-up menu.

The Define Categories dialog box appears.



2. Click New.

   A dialog box appears, prompting you to enter a name for the new Category.

3. Type a name for the new Category in the Name field.

4. Type a brief description of the new Category in the Description field.

5. Click OK.

   You're returned to the Define Categories dialog box; the new Category appears in the Category list.

6. Click OK.

   You're returned to your Contact File.

Assigning Contacts to Categories

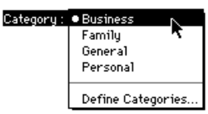
Once you've created your Categories, the next step is assigning your Contacts to the appropriate Categories. You can do this in either the Detail View or the List View.

To assign a Contact to a Category in the Detail View:

1. Open the Detail View for the Contact that you want to assign to a Category.

2. Click the Category pop-up menu.

   The available Categories are listed in the menu.



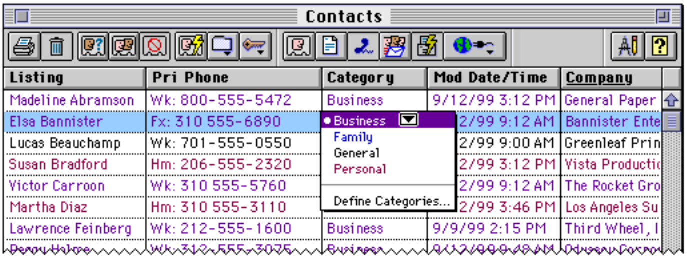
3. Choose the desired Category from the pop-up menu.

   The name of the Category you chose now appears next to Category in the Detail View.

To assign a Contact to a Category in the List View:

1. In the List View, select the Contact that you want to assign to a Category.
2. Click in the Category field for the selected Contact.

   A pop-up menu appears, listing the available Categories.



3. Choose the desired Category from the pop-up menu.

   The name of the Category you chose appears in the selected Contact's Category field.

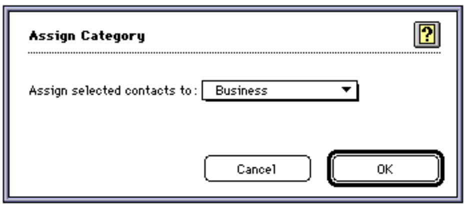
You can also select a group of Contacts and assign them all to the same Category, even if they initially belong to different Categories.

To reassign selected Contacts to a Category:

1. Select the Contacts whose Category you want to reassign.

   Shift-click to select adjacent contacts; command-click to select non-adjacent contacts.
2. Choose Assign Category from the Contact menu.

   The Assign Category dialog box opens. It contains a pop-up menu listing the available Categories in your Contact File.



3. Choose the desired Category from the pop-up menu.
4. Click OK.

Editing Categories

You can make changes to your existing Categories by renaming a Category or changing its description.

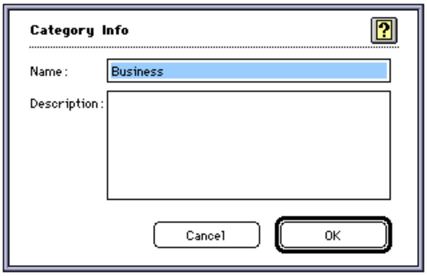
To edit a Category:

1. Choose Categories from the Define menu, or choose Define Categories from the Category pop-up menu.

   The Define Categories dialog box appears.

2. Select the Category you want to edit and click Edit.

   The Category Info dialog box appears, displaying the name and description (if any) currently defined for the selected Category.



3. Make the desired changes in the Name and/or Description fields.
4. Click OK.

   You're returned to the Define Categories dialog box.

5. Click OK.

   You're returned to your Contact File.

Deleting Categories

If you no longer have a use for a Category, simply delete it.

Deleting a Category deletes any Contacts assigned to it. Reassign any Contacts you want to keep before *deleting the Category.*

To delete a Category:

1. Choose Categories from the Define menu, or choose Define Categories from the Categories pop-up menu.

   The Define Categories dialog box appears.

2. Select the Category you want to delete and click Delete.

   A confirmation dialog box appears, asking if you're sure you want to delete the selected Category and its assigned Contacts, if any.

3. Click OK.

The selected Category is deleted, and you're returned to the Define Categories dialog box. The deleted Category no longer appears in the Category list.

4. Click OK.

You're returned to your Contact File. The Contacts assigned to the Category you deleted no longer appear in the file.

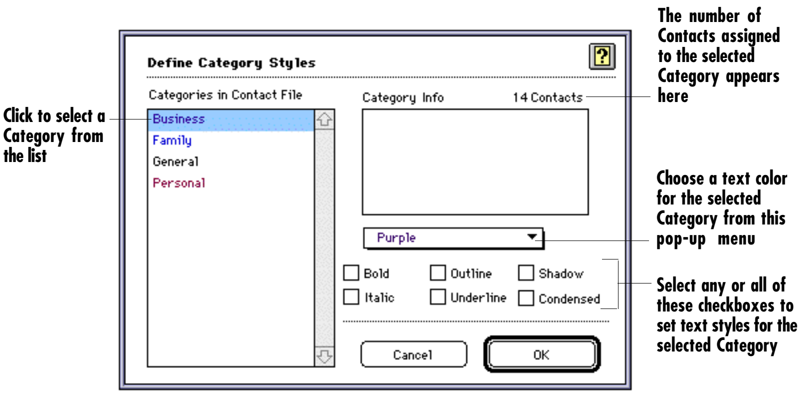
Setting colors and text styles for Categories

Now Contact lets you assign different colors and/or text styles to your Categories. This makes it easy to tell which Contacts belong to which Category.

To set colors and text styles for Categories:

1. Choose Category Styles from the Define menu.

The Define Category Styles dialog box appears.



2. Select the Category you want to assign a color and/or text style to from the Categories list.
3. Set the desired color and/or text style for the Category.
4. Repeat steps 2 and 3 to set colors and/or text styles for other Categories.
5. When you've finished setting colors and text styles, click OK.

You're returned to your Contact File.

Now Contact

Using Keywords

In addition to using Categories, you can use Keywords to help organize and classify your Contacts. Keywords let you assign multiple "tags" to your Contacts so you can identify them as belonging to one or more groups. A Contact can belong to only one Category at a time, but it can be assigned multiple Keywords. Using Keywords works well for groups that might "cross over" between Categories.

The Keywords you assign to your Contacts are not available to other networked users when you post the Contacts to a Public Contact Server. See Chapter 11, "Using Public Categories," for more information.

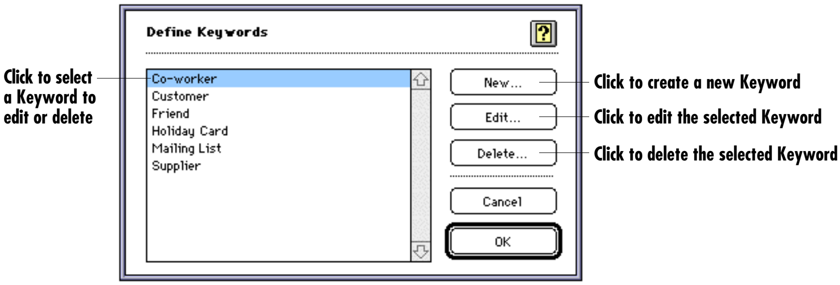
Defining Keywords

A new Contact File has Keywords already defined. You can change these default Keywords or create new ones.

To define a new Keyword:

1. Choose Keywords from the Define menu.

   The Define Keywords dialog box opens; existing Keywords are displayed in the list.



   You can also open the Define Keywords dialog box from the Detail View Contact Log. Click the Keywords column heading and choose Define Keyword from the pop-up menu that appears.

2. Click New.

   The New Keyword Title dialog box opens.

3. Type your new Keyword in the text field.
4. Click OK.

   You're returned to the Define Keywords dialog box, where the new Keyword now appears.

5. Click OK.

   The dialog box closes; your new Keyword is now available for your Contacts.

Assigning Keywords to a Contact

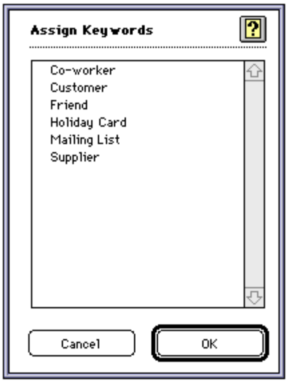
You can assign Keywords to Contacts in either the Detail View or the List View.

To assign a Keyword to a Contact:

1. Select a Contact in the List View, or open a Contact's Detail View.

2. Choose Assign Keywords from the Contact menu, or click the Keywords button in the Detail View Toolbar.

The Assign Keywords dialog box appears.



3. Click the Keyword you want to assign.

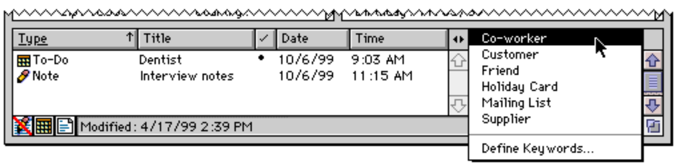
A checkmark next to a keyword means that it's already assigned to the Contact. To deselect a Keyword, click it a second time and the checkmark disappears.

4. Repeat step 3 for any additional Keywords you want to assign to the Contact.

5. When you're finished assigning Keywords, click OK.

The Keywords you selected are now assigned to the current Contact and are listed in the Keywords column of the Detail View Contact Log.

You can also assign Keywords to a Contact directly from the Contact Log, as illustrated below. Click the Keywords column heading (on the right-hand side of the log) and choose a Keyword from the pop-up menu that appears.



Now Contact

Using the Mark function

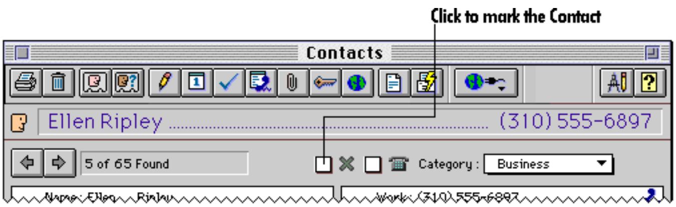
Categories and Keywords provide fairly permanent approaches to organizing your Contacts. There may be times, however, when you want to organize some of your Contacts in a more temporary group. The best way to do this is to *mark* Contacts. When you finish with the temporary group, you can unmark all of the marked Contacts at once so that you can use the Mark function again.

Marking Contacts

You can mark individual Contacts in the Detail View, or you can mark either single or multiple Contacts in the List View.

To mark a Contact in the Detail View:

1. Open the Detail View for the Contact you want to mark.
2. Select the checkbox next to the Mark icon ( ) in the Category Header.



The Contact is now marked. You can unmark it simply by deselecting the checkbox.

You can also mark a Contact in the Detail View by choosing Mark Contact from the Contact menu, and unmark it by choosing the same command a second time.

To mark Contacts in the List View:

1. Select the Contacts you want to mark in the List View.
2. Choose Mark Contact from the Contact menu.

The selected Contacts are marked. You'll be able to verify that they've been marked only if the Marked field is included in the current List Layout.

The Mark Contact command toggles the marked/unmarked state of any selected Contact, so you can unmark a marked Contact by selecting it and choosing the command again.

Choosing Mark Contacts marks all selected Contacts, whether they were marked previously or not. Choosing Unmark Contacts unmarks all selected Contacts.

Chapter 11

Importing, Exporting and Synchronizing Contacts

Now Contact

Now Contact provides a number of ways for you to move Contact information into and out of your Contact Files, and to synchronize the contents of duplicate files.

Importing from a text file

You can import addresses and telephone numbers from text files from other types of applications, such as spreadsheets, database files and word processor files.

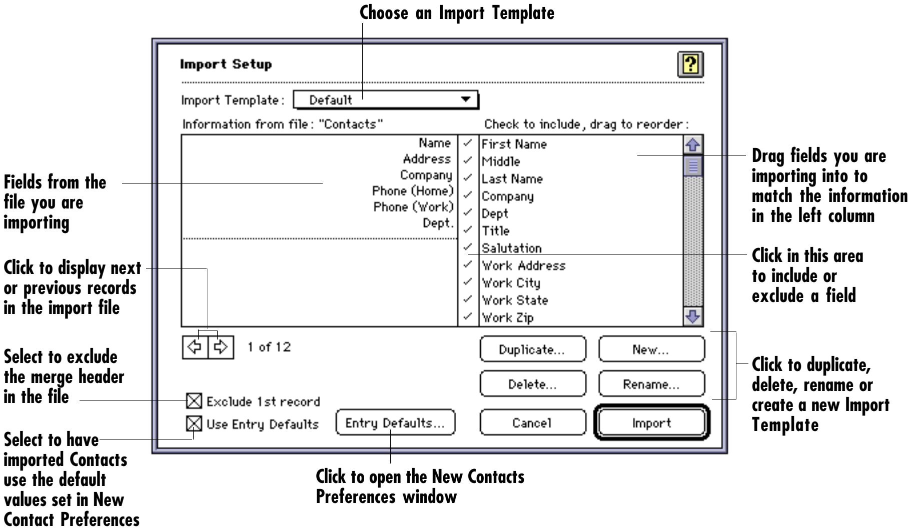
We recommend that you first import your information into a new, untitled Contact File until you are sure that the data is being imported properly (into the desired fields, etc.). This way, your regular Contact File is unaffected until you are confident that the new data will be added correctly.

To import Contact data from a text file:

1. Export the data from the other application into a tab- or comma-delimited text file.
2. Choose From Text File from the Import submenu on the File menu.

   A standard directory dialog box appears.
3. Locate and select the file you want to import and click Open.

Now Contact briefly displays a progress bar as it scans the Contacts in the file. The Import Setup dialog box appears.



4. Choose an Import Template from the Import Template pop-up menu, or create a new one for this operation.

   If a predefined Template exists for the application that created your export file, choose it from the menu. If no matching Template exists, create a new Template by clicking New or Duplicate. Click OK after naming the new Template.

5. Examine the incoming Contact data.

6. Reorder, include and exclude fields as necessary.

   Compare each line of incoming data to the field it’s across from. Drag destination fields on the right to match the incoming fields on the left.

   Click in the middle column to include or exclude fields for the Import operation.

7. Select other import options as desired.

8. Click Import.

   When the import is complete, the imported data appears in your Contact File.

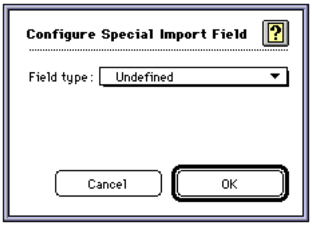
Using special import fields

Now Contact includes definable fields that you can configure to match incoming data. Several fields can be added immediately to handle Contact data for which there isn’t an appropriate field, or you can create other fields yourself.

To define import fields:

1. Double-click a Define field in the Import Setup dialog box.

The Configure Special Import Field dialog box appears.



2. Choose the appropriate field type option from the Field Type pop-up menu.

The options in the pop-up menu are described below.

If an import field is already included in the current Template, the corresponding pop-up menu option is dimmed and unavailable.

Choose this field...	To...
Wk/Home Address (2nd line)	Direct the second line of a two-line imported address to the appropriate "2nd line" import field.
Notes	Create a Note field as a temporary storage area for miscellaneous import data.
Keywords	Direct Tags or imported Keywords to the Keywords field; New Keywords are created as needed.
Listing	Import viewing options from contact managers that let you view your Contacts by "Business" or "Name."
Category	Assign imported category information. New Categories are created as needed.
Append to next/previous field	Combine the data labels with the corresponding data and put them in the correct fields for each Contact.

3. Click OK.

The field is renamed to the type you chose.

Handling duplicate Contacts

Now Contact doesn't automatically delete duplicate Contacts. To find and merge duplicate Contacts, use the Find Duplicates command in the Find menu. See "Finding duplicate Contacts" in Chapter 8, "Using Now Contact," for details.

Importing Contacts from another Contact File

Now Contact lets you combine two Contact Files by importing one directly into the other. See "Exporting Contacts to a Contact File" later in this Chapter for details on exporting the data. Use the following procedure to "merge" Contacts with other Contact Files.

To import Contacts from a Contact File:

1. Choose From Contact File from the Import submenu on the File menu.

   A standard directory dialog box appears, where you locate and select the Contact File that you want to import.

2. Select the Contact File you want to import and click OK.

   The newly imported Contacts appear in the List View of the current Contact File.

Exporting Contact data to a text file

Now Contact allows you to export Contact information by creating a text-only version of your Contact File.

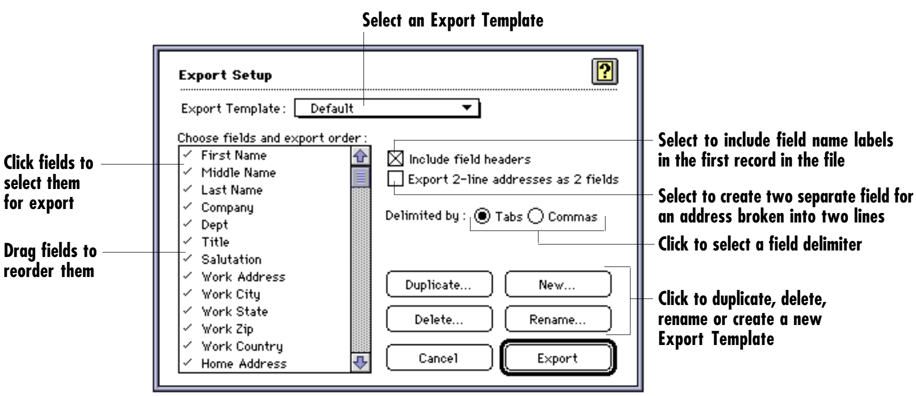
To export Contact data to a text file:

1. Verify that all the Contacts you want to export are in the current List View.

   The Export function exports only the contents of the current List View.

2. Choose To Text File from the Export submenu on the File menu.

   The Export Setup dialog box appears. Specify which fields to include in the export file and their order.



3. Choose an Export Template from the Export Template pop-up menu, or create a new one for this operation.

4. Reorder, include and exclude the available Export fields as necessary.

   Reorder fields by dragging them to the desired locations. Include or exclude fields by clicking to the left of a field name to make the checkmark appear (include) or disappear (exclude).

5. Select the other Export options as desired.
6. Click Export.

   A standard directory dialog box appears.

7. Choose a location and name for the Contact File, then click Save.

   The exported text file is saved in the location you specified.

Dragging Contact data from the Detail View onto the desktop creates a text file containing the Contact's essential information.

Exporting Contacts to a Contact File

Now Contact's Export feature allows you to export selected Contacts to a separate Contact File.

Linked Calendar Events contained in the Contacts you export are unlinked in the exported Contact File.

To export Contacts to a Contact File:

1. Verify that all of the Contacts you want to export are in the current List View.
2. Choose To Contact File from the Export command on the File menu.

   A standard directory dialog box appears.

3. Choose a location and type a name for the Now Contact File, then click Save.

   The exported Contact File is saved in the location you specified.

Synchronizing Contact Files

The Synchronize feature lets you quickly and easily update different copies of the same Contact File so that they contain identical information. All changes made to the last-modified copy of the file are automatically applied to the other copy, including any newly attached or modified Notes, documents or Calendar Events, and any alterations made to a Contact—address information, company name, and so on. In addition, new Contacts added to the file and existing Contacts deleted from it are updated in the older copy.

File synchronization works only with copies of the same Contact File—for instance, an original file and a copy you made using the Save a copy command in the File menu.

Basic synchronizing

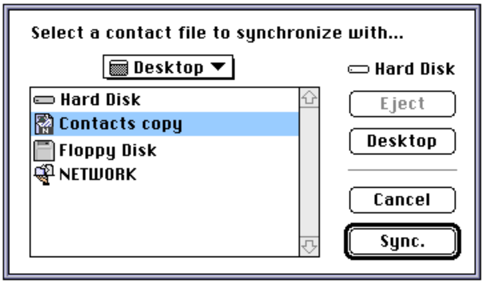
No Contact information is lost when you synchronize files. The older, outdated information is stored in a new Note attached to the Contact.

You may want to make a backup copy of the older version of a file before synchronizing Contact information.

To synchronize copies of a Contact File:

1. Open the version of the Contact File you want to synchronize.
2. Choose Synchronize from the File menu.

   A standard directory dialog box appears.



3. Locate and select the copy of the same Contact File and click Sync.

   The two copies of the file don't have to have the same name. The two must, however, be copies of the same file.

   Now Contact saves the open Contact File and closes it. When Synchronization is complete, the copy of the Contact File you had open reappears.

   If Contacts were changed as a result of the synchronization, only the changed Contacts appear in the List View; if no changes were made during synchronization, all Contacts appear in the List View.

   Synchronization changes made to Contacts in Public Categories are sent to the Public Contact Server when the next scheduled update occurs. See Chapter 10, "Organizing Contacts," for more information.

Viewing Synchronization changes

Changes made to Contacts as a result of the synchronization appear in new Notes attached to the changed Contacts. This gives you access to the older information in case you want to revert to view it for any reason.

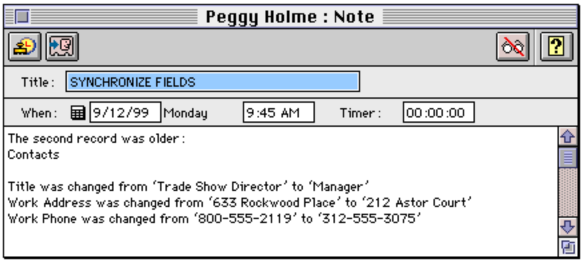
To view Synchronization changes:

1. Open the Detail View for a Contact that was updated.

   A SYNCHRONIZE FIELDS Note appears in the Contact Log.

2. Double-click the SYNCHRONIZE FIELDS entry in the Log.

   The Note window opens. The text field indicates whether the Contact in the original file (the first record) or the copy you chose in the directory dialog box in step 3 (the second record) was updated, and describes all modifications to the Contact information.



3. Close the Note window.

   You're returned to the Detail View.

Now Contact

Chapter 12

Printing Contacts

Now Contact provides a variety of ways to print the information in your Contact File, including lists of Contacts, individual Contact details, address book pages, envelopes, and labels. Use Templates—predefined sets of formatting specifications—to create and format printed output quickly, or design your own Templates.

Printing your Contact information

You can select to print any or all Contacts in the List View or the entire contents of your Contact File.

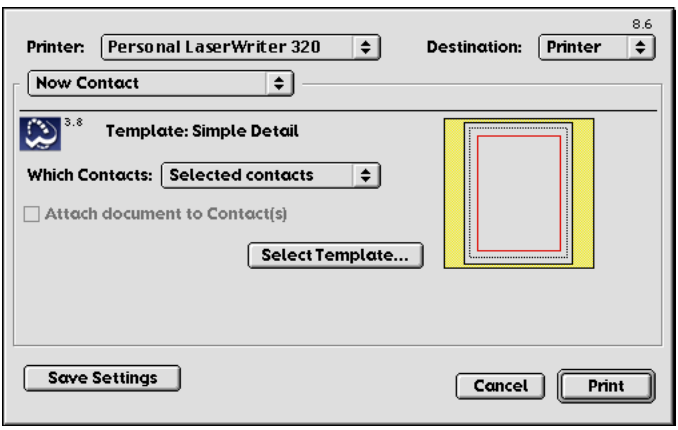
To print Contact information:

1. Select the Contact(s) whose information you want to include in the print job.

Select the Contact(s) in the List View, or narrow the contents of the List View to the desired Contacts by using the Find function or QuickFind.

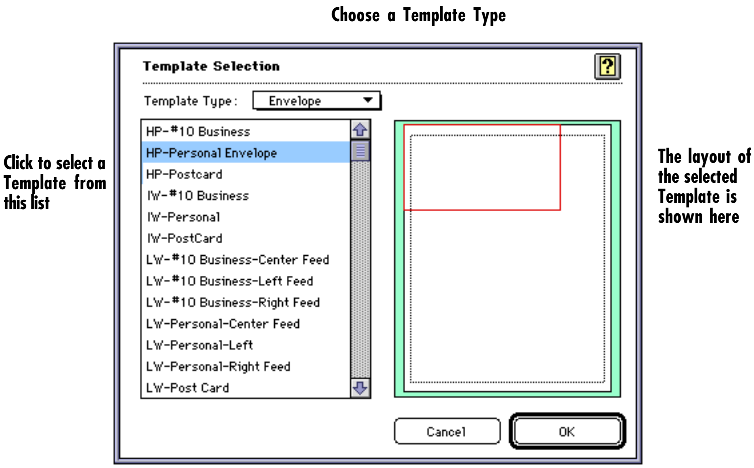
2. Choose Print from the File menu.

The Print dialog box appears with special Now Contact options at the bottom.



3. Click Select Template.

The Template Selection dialog box appears.



4. Select the Template that you want to use for printing.

If none of the predefined Templates meet your printing needs, you may need to create or modify a Template. See "Using Templates" later in this chapter for details.

5. Click OK.

You're returned to the Print dialog box.

6. Set the Now Contact printing options as desired.

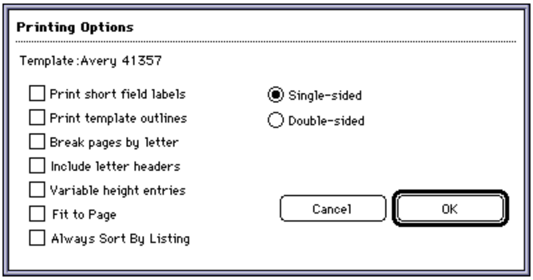
Use the Which Contacts pop-up menu to choose the Contacts whose information you want to print.

Choose...	To print...
Template Preview	The Template only with no Contacts, and the merge fields themselves.
Selected contacts	The Contacts that are currently selected in the List View.
Marked contacts	The Contacts that you've previously marked.
Current list	The Contacts currently displayed in the List View.
Entire Contact File	All of the Contacts in the Contact File.

7. Click Printing Options to specify print options.

(The Printing Options button may not be available depending on the Template you selected in step 4.)

The Printing Options dialog box appears.



Not all of the printing options (listed below) are available for every type of print job.

Select…	To specify that Now Contact will…
Print Short Field Labels	Print the short labels for the Primary Address fields, all Phone fields that contain data, and Custom Fields for which you defined short field labels.
Print Template Outline	Print the outline of the Template's margins.
Break Pages By Letter	Always start a new Address Book page each time a new letter of the alphabet is reached.
Include Letter Headers	Place a letter header before each alphabetical group of Contacts.
Variable Height Entries	Allow the height of entries on your printed pages to vary according to the amount of information they contain.
Fit to Page	Fit all fields in a Contact List across one printed page.
Always Sort By Listing	Sort the printout based on your Listing format, regardless of the current sort order.
Single-Sided	Print simple, single-sided output.
Double-Sided	Print true double-sided output; requires turning over each printed sheet and re-feeding it into the printer.
	When printing double-sided output, turn off Background Printing in the Chooser and select "Manual Feed" in the Print dialog box. Now Contact prints the first side of all pages, then prompts you to turn over these pages and feed them back into the printer.

8. Click Print.

If you're printing labels, a dialog box appears. If you want to start printing on a label other than the first one in the upper-left corner of the sheet, click the label that you want to start printing with—the labels preceding it become shaded, indicating that Now Contact will skip them. Specify the number of labels to print and click OK.

The Contact information is printed.

Templates

Templates determine the page size, margins and pre-entered text in your printed output. Several preset Templates are included with Now Contact, and you can design or modify Templates using the Template Editor.

Templates are stored in the Templates folder that the Installer places in the Now Contact folder on your hard disk. Inside the Templates folder are individual folders for each of the Template types.

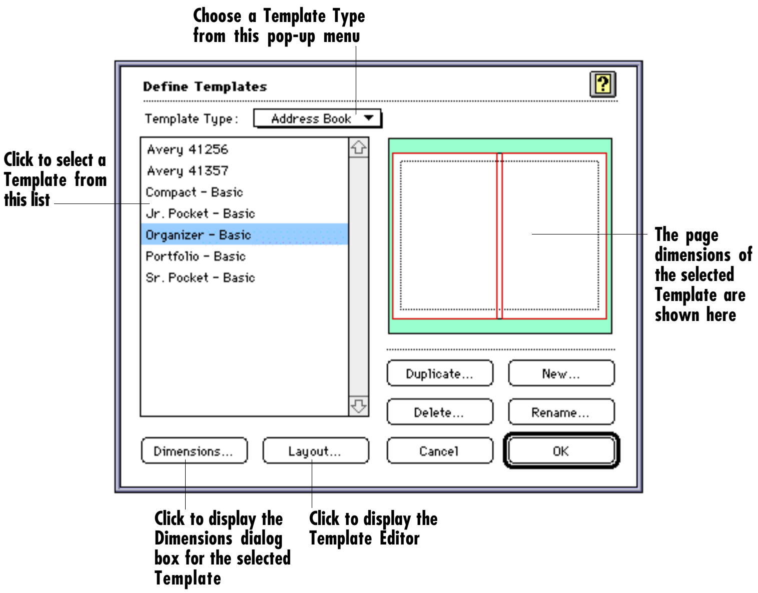
Creating and modifying Templates

The following procedure describes the basic options available when you're creating or modifying a Template.

To create or modify a Template:

1. Choose the type of Template you want to create or modify from the Templates submenu of the Define menu.

The Define Templates dialog box opens.



2. Select the Template that you want to duplicate or modify.

3. Depending on the desired result, click New or Duplicate.

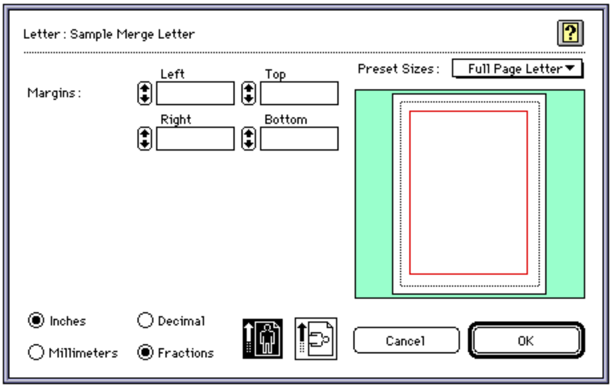
A dialog box appears, prompting you to give the new Template a name.

4. Type a name for the new Template and click "OK."

You're returned to the Define Templates dialog box where the new Template now appears in the Templates list.

5. Highlight the Template name and click Dimensions.

Depending upon the kind of Template you're creating or modifying, the options available here can differ. If you're working with a Letter, Fax, Contact Details or Contact List Template, the dialog box appears as shown below.



If you're working with an Address Book, Envelope or Label Template, additional options appear in the dialog box. See the descriptions in the "Template Setup Options" section for details.

6. Configure the Dimensions options as desired for the Template.

If you're working with a Letter, Fax, Contact Details or Contact List Template, set the margins for your printed output.

7. Click OK.

You're returned to the Define Templates dialog box.

8. Click Layout.

The Template Editor window opens. This is where you enter predefined text or graphics that will appear in a Template by default when you use it to print.

9. Place the desired text or graphics in the Template.

Use the tools and options available in the Template Editor just as you would use similar tools in any word processor. See "Using the Template Editor" later in this chapter.

10. When you're finished placing the desired elements in the Template, click OK.

The Template Editor closes, and you're returned to the Define Templates dialog box.

11. Click OK.

You're returned to your current Contact File.

Using Templates

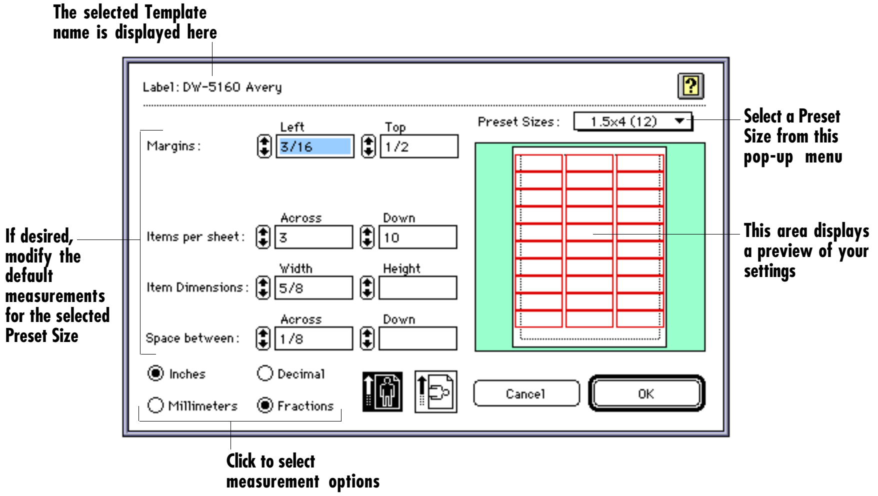
Templates determine the page size and margins of your printed Contact information and documents. Templates also determine what text, if any, is pre-entered in the address books, envelopes and labels you print. There are seven types of Templates, each of which has a corresponding command on the Templates submenu of the Define menu:

- Address Books
- Contact Details
- Contact Lists
- Envelopes
- Faxes
- Labels
- Letters

This section describes the common settings in the Dimensions dialog box, with notes for some of the specific Template Types.

Template setup options

When you click the Dimensions button for Address Book, Envelope or Label Templates in the Define Templates dialog box, the Dimensions dialog box appears.



This setting…	Specifies…
Preset Sizes	The basic page size used as a starting point for the Template. When you choose a size from this menu, the appropriate values are automatically entered in the Item Dimensions fields.
Margins	The orientation of pages on the original sheets. “Left” sets how far from the left edge the first page on a sheet is printed, and “Top” sets how far from the top edge the page is printed.

continued on next page

This setting…	Specifies…
continued from previous page	
Items per sheet	The number of pages, envelopes, or labels per sheet. In the Across text field, specify the number to print across the width of the sheet; in the Down text field, specify the number to print down the height of the sheet.
Item Dimensions	The size of the printable area of each item on a sheet.
Space between	The amount of empty space left between pages, envelopes or labels.

Address Book Template Setup options

Now Contact can automatically produce Address Book output in five basic page sizes that fit most popular address book formats. Use one of these five sizes as defined, or use one as a starting point for a custom Template.

Page size	Dimensions
Compact	4.25" x 6.75". Two pages take up only a portion of a sheet; the pages need to be cut to fit into an address book.
Jr. Pocket	2.75" x 5". Two pages take up only a portion of a sheet; the pages need to be cut to fit into an address book.
Organizer	Two pages fit exactly on one sheet of the selected paper size; the two pages can be folded or cut to fit into an address book.
Portfolio	Takes up an entire sheet of the selected paper size; requires no cutting after being printed.
Sr. Pocket	3.75" x 6.75". Two pages take up only a portion of a sheet; the pages need to be cut to fit into an address book.

An Address Book Template consists of a single text object that contains the merge fields you want to include for each Contact printed. When you actually print the Template, this text object is repeated down the height of each Address Book page as often as it will fit. Note that the Template Editor displays only one text object, even in Preview mode.

Contact Details Template Setup Options

Contact Details Templates provide a way to print a detailed summary of a Contact.

The Template Setup options for Contact Details printing are simple: you specify the left, right, top and bottom margins for the printed output. You set up Templates for Contact Details printing in essentially the same way that you set up Templates for letters and faxes—a single text object is placed on the page, and you insert, arrange and format merge fields as desired.

Contact List Template Setup Options

Contact Lists let you print specified Contacts, formatted according to any of the List Layouts you've created. Contact Lists print your Contact List exactly as you see it on your screen.

Because Contact Lists are based on your List Layouts rather than on actual Templates, you can't create or modify Contact List Templates from the Define Templates dialog box—you can only modify their page margins. Choose Define List Layouts from the List menu to modify the Layouts on which Contact List printing is based.

The Template Setup options for Contact Lists are the same ones available for Contact Details: you specify the left, right, top and bottom margins for the printed output.

The Fit to Page option in the Printing Options dialog box lets you fit all fields in a Contact List across one printed page, even if the List Layout it's based on contains more fields than will normally fit on the page.

Envelope Template Setup options

Now Contact lets you place multiple text objects in an Envelope Template. The most typical use for multiple text objects is to place one in the upper-left corner and insert your return address into it, and place one in the middle of the envelope and insert the desired merge fields for Contact information into it.

Use the various graphics tools to add graphic elements such as lines, boxes, and pictures or logos as desired.

To place a bar code in the Template, select the Bar Code tool in the Template Editor Toolbar and then click anywhere in the Template; the bar code appears where you clicked. The recommended placement is just below the address. When you print a document using this Template, Now Contact inserts the correct bar code for the Contact being printed, instead of the placeholder shown on your screen.

Label Template Setup options

You can create or modify Templates for labels of virtually any size. Since labels are frequently used to place shipping information on packages, Now Contact provides you with the same options for Label Templates as for Envelope Templates.

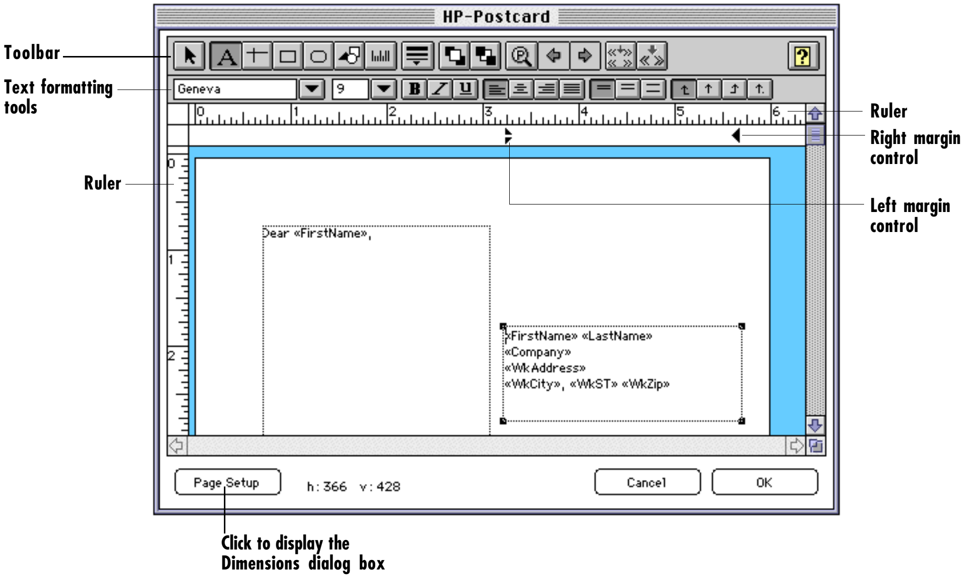
A Label Template consists of one or more text objects, usually depending on the size of the basic label you're printing. A large shipping label might contain one text object for a return address and another for a destination address. Label Template text objects can contain static text or merge fields you specify for each Contact printed.

Word Processor documents

You can create document Templates to use as the basis for letters and faxes you create in the Now Contact Word Processor. You can include merge fields in your document Templates, making it possible to send important information to several people at once without having to write a separate letter for each recipient. See "Creating and Printing Documents," later in this chapter for more information.

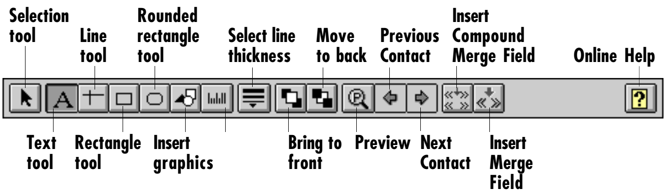
Using the Template Editor

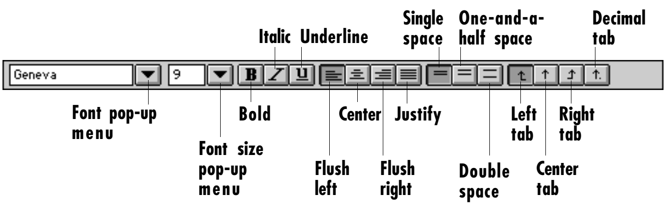
The Template Editor combines familiar word processor features with graphics capabilities for creating the basic foundations of print documents.



Template Editor Toolbar

The Template Editor features a Toolbar at the top of the window. The graphics tools and buttons that are available depends on the type of Template you are creating or modifying.





Now Contact

Working with graphics

You can place graphics saved in MacPaint, PICT or EPS format to your Template. Graphics are placed as separate elements in Address Book, Label, Envelope and Contact List Templates; they're placed in-line with text in document and Contact Details Templates.

To Now Contact 1.x users: *When you use version 1.x Letter, Fax and Contact Details Templates in Now Contact version 3.8, graphics contained in the Templates are converted from separate elements to inline graphics.*

To place a graphic in a Template:

1. Click the Picture tool.

   A directory dialog box opens where you locate and select a graphic to place.

2. Locate and select the graphic you want to place in the Template.

3. Click Open.

   The pointer changes to a special picture cursor for placing your graphic ().

   If you're creating or modifying an Address Book, Label, Envelope or Contact List Template, you can place the graphic anywhere on the page. If you're creating or modifying a Letter, Fax or Contact Details Template, the graphic is placed at the text insertion point.

4. Click to place the graphic.

To resize a graphic in a Template:

1. Click the graphic once to select it.

2. Drag one of the four corner handles.

   All resizing is proportional.

To move a graphic in a Template:

1. Click the graphic once to select it.

2. Drag it from its center.

Using merge fields in Templates

Merge fields let you automatically place specific pieces of Contact information in predefined areas of your Templates.

Compound merge fields

Clicking the Compound Merge Field button in the Template Editor Toolbar opens a long pop-up menu of compound merge fields and options; fields are surrounded by angle brackets (« »), while options are not. The sections of fields and options are divided by separators.

The following table shows which merge fields are inserted for the options in the first two sections.

Choose this...	To insert...
«Today's date»	Today's date
Primary Postal Address	«Listing» «PriAddress» «PriCity», «PriST» «PriZip» «PriCntry»
Home Postal Address	«FullName» «HmAddress» «HmCity», «HmST» «HmZip» «HmCntry»
Work Postal Address	«FullName» «Company» «WkAddress» «WkCity», «WkST» «WkZip» «WkCntry»

The third section of the compound merge fields list lets you insert the Home Return Address and Work Return Address you've defined in the Personal Data pane of the Preferences window.

The fourth section of the compound merge fields list consists of field names based on the data you've selected as Primary for each Contact. Choosing «FullName» and «Listing» inserts the Full Name and Listing according to formats set in the General pane of the Preferences window.

The fifth section of the compound merge fields list contains fields that insert information about the Contact, as well as information on attachments to the Contact.

! *This section is not available for Address Book, Envelope and Label Templates.*

Choose this...	To insert...
«Keywords»	A list of all Keywords specified for the Contact.
«Category»	The Category to which you're assigned.
«Notes»	The text for all notes attached to the Contact.
«Events»	A summary of all Calendar Events attached to the document.
«Documents»	Information about all documents attached to the Contact—the documents' names, descriptions, and so on.

The last section in the compound merge fields list displays all of the Copy Contact Info Formats that are set for the current Contact File. These are the same Format names that appear on the "Copy Contact Info" submenu in the Edit menu. You set Copy Contact Info Formats in the Copy Contact Info pane of the Preferences window.

Inserting a Copy Contact Info Format name into a document allows you to enter several blocks of Contact information in one step, rather than inserting the information one merge field at a time.

Individual merge fields

The pop-up menu that appears when you click the Merge Field button lets you insert individual merge fields, one at a time.

Inserting merge fields

To insert a merge field into a Template, position the cursor where you want the merge field to be inserted, then choose the desired merge field from the Compound Merge Field or the Merge Field menu. Choose the appropriate field or fields from the menu; the merge field appears in the Template at the location you specified.

Format merge fields so that they'll look correct when replaced with actual Contact data. For example, when creating the last line of an address, be sure to place a comma and space between «WkCity» and «WkST», and a space between «WkST» and «WkZip». You can select any merge field in the Template Editor and apply any text style to it.

When applying a text style to a merge field, be sure that you select the entire merge field, including the brackets surrounding it.

Preview the appearance of your Template by clicking the Preview button and then moving forward and backward through Contacts in the current Contact File using the Next Contact and Previous Contact buttons.

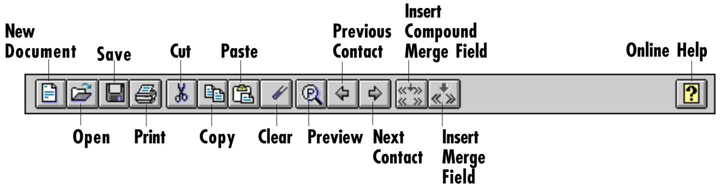
Creating and Printing Documents

You can use Now Contact's built-in Word Processor to create documents such as letters and faxes that can be either individual documents for a single Contact, or merge documents for multiple Contacts.

When you create a document, you can choose a Template to determine the document specifications. Now Contact includes several preset document Templates, or you can design custom Templates using the Template Editor.

Word Processor Toolbar

The Now Contact Word Processor Toolbar buttons are described below.



The Word Processor text formatting buttons are identical to buttons in the Template Editor. For descriptions of these buttons, see "Template Editor Toolbar," earlier in this chapter.

Creating a letter or fax

The Word Processor provides all of the tools you need to create letters and faxes.

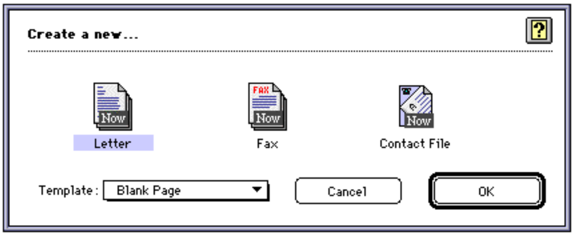
To create a letter or fax:

1. Select the Contact you'll be sending the document to.

You can either select the Contact in the List View, or open the Detail View for the Contact.

2. Choose New from the File menu.

A dialog box opens where you can select the type of new file you want to create.



3. Depending on the type of document you want to create, click the Letter or the Fax icon.

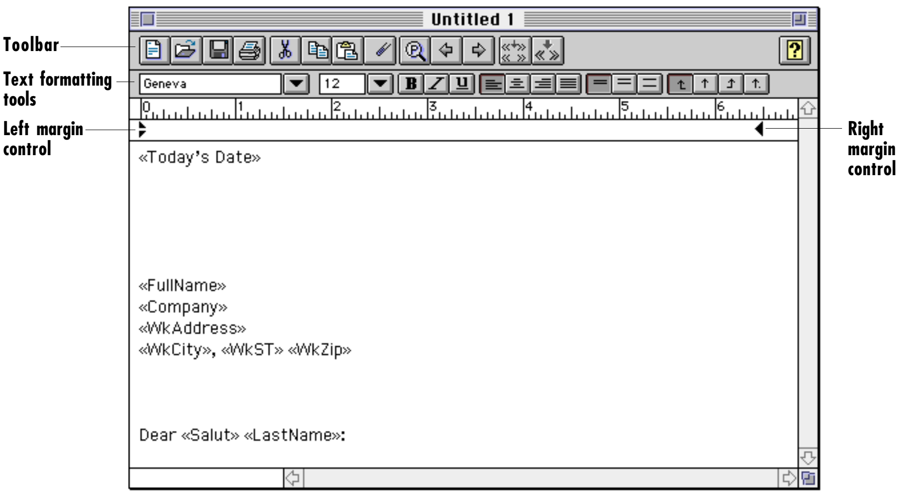
The icon becomes highlighted.

4. From the Template pop-up menu, choose the Template to use as the basis of the letter or fax.

This pop-up menu displays all of the available Templates for the currently selected document type. To create a document without any preset formatting specifications, choose Blank Page and modify the document as needed.

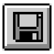
5. Click OK.

The Now Contact Word Processor opens. If you selected a Template that contains merge fields, they're replaced by the actual data from the selected Contact.



6. Type any additional text to be included in the document.

   Add text as necessary, as you would in any word processor.



7. When you've finished working on your document or you want to save your work, choose Save from the File menu or click the Save button in the Toolbar.

   A standard directory dialog box appears, allowing you to name your document and choose a location for storing it on your hard disk. The dialog box also includes a pop-up menu for choosing a file type.

8. Choose a file type from the File Type pop-up menu.

   Save the document as a Now Contact file to make it accessible from within Now Contact's Word Processor, or save it as a text file to open it with another word processor.

9. Enter a name and choose a location for the document, then click Save.

   The document is saved in the location you specified.

10. Close the Word Processor by clicking its Close box, or by choosing Close from the File menu.

Creating a merge letter or fax

Creating a merge document is very much like creating an individual document, except that you specify multiple Contacts as recipients instead of just one.

To create a merge letter or fax:

1. Select the Contacts you'll be sending the merge letter or fax to.

   You can either select the Contacts in the List View, or reduce the contents of the List View to the desired recipients of the document by using the Find function or QuickFind.

   At print time, you can also choose to send a merge document to all marked Contacts, or to all of the Contacts in your Contact File.

2. Choose New from the File menu, or click the New Document button.

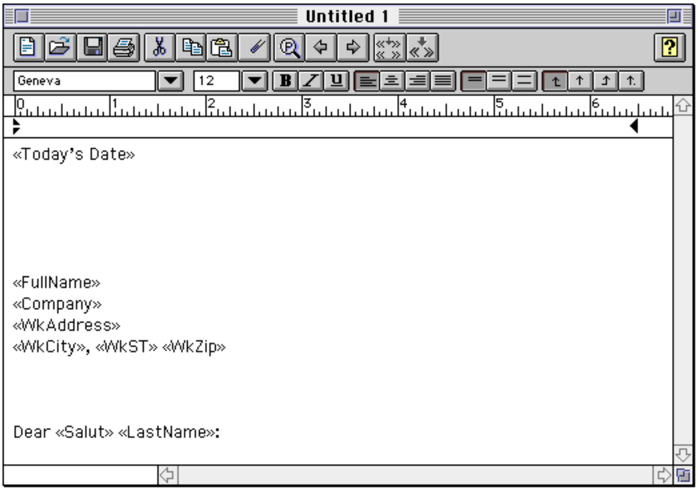
   A dialog box opens where you can select the type of new file you want to create.

3. Depending on the type of document you want to create, click the Letter or the Fax icon.

   The icon becomes highlighted.

4. From the Template pop-up menu, choose the Template to use as the basis of the letter or fax.

The Now Contact Word Processor opens. If you selected a Template that already contains merge fields, they appear in your document.



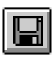
6. Insert additional text or merge fields into the document as desired.

To insert a merge field, position the cursor where you want the merge field to go, then choose the desired merge field using the Compound Merge Field or Merge Field pop-up menus.

7. Preview your merge document with actual Contact data, if desired.

Click the Preview button to see how the document looks with the merge fields replaced by actual data. Click the Previous Contact or Next Contact buttons to move through the Contacts.

You can't edit your merge document in Preview mode; to resume editing the document, click the Preview button again.



8. When you've finished working on your document or you simply want to save your work so far, choose Save from the File menu.

A standard directory dialog box appears, allowing you to name your document and choose a location for storing it on your hard disk. The dialog box also includes a pop-up menu for choosing a file type.

9. Depending on the desired result, choose Now Contact 3.5 or Text from the File type pop-up menu.

10. Enter a name and choose a location for the document, then click Save.

The document is saved in the location you specified. For instructions on printing your document, see the next section, "Printing documents."

11. Close the Word Processor by clicking its Close box, or by choosing Close from the File menu.

Printing documents

Two printing procedures are presented in this section. The first assumes that you want to view and possibly modify the document before you print it. The second procedure shows you how to take advantage of Now Contact's Template-based printing to print your document without previewing it.

To view and then print a document:

1. Select the Contact(s) to whom you'll be sending the document.

   You can either select the Contacts in the List View, or reduce the contents of the List View to the desired recipients of the document by using the Find function or QuickFind.

   If you're printing a merge document, you can also choose to send it to all marked Contacts or to all of the Contacts in your Contact File.

2. Open the document that you want to print.
3. Make any desired changes to the document, or preview it if desired.
4. Choose Print from the File menu.

   The Print dialog box opens with special Now Contact options at the bottom.

5. Set the Now Contact printing options as desired.

   Select the Attach document to Contact(s) checkbox if you want to add the document to the Contact Log(s) of the Contact(s) you've selected to receive it.

   If you're printing a merge document, choose from the Which contacts pop-up menu.

Choose…	To print…
Template Preview	The document with no Contacts, showing the merge fields themselves.
Selected contacts	The Contacts currently selected in the List View.
Marked contacts	The Contacts that you've previously marked.
Current list	The Contacts currently displayed in the List View.
Entire Contact File	All of the Contacts in the Contact File..

   The Which contacts pop-up menu is dimmed when you're printing an individual (non-merge) document.

6. Click Print.

   The document is printed.

   In merge documents, the order in which the Contacts are printed is determined by the current list's sort order.

To print a document without previewing or modifying it:

1. Select the Contact(s) to whom you'll be sending the document.

2. Choose Print from the File menu.

The Print dialog box opens with special Now Contact options at the bottom.

3. Click Select Template.

The Template Selection dialog box appears.

Choose Fax or Letter from the Template Type pop-up menu.

4. Select the Template that you want to use for printing.

5. Click OK.

You're returned to the Print dialog box.

6. Set the Now Contact printing options as desired.

See step 5 in the previous procedure for an explanation of these options.

7. Click Print.

The document is printed.

Chapter 13
QuickAccess Features

Now Up-to-Date and Now Contact offer several quick access features that give you the ability to view, enter and edit Calendar and Contact information without having to launch the main applications. The QuickAccess components are described in the following table, and the rest of this chapter describes each one in detail.

This component...	Lets you...
QuickContact	View, edit and dial existing Contact, find existing Contacts, and create new Contacts.
QuickDay	View and edit Events for the current day, receive and respond to Reminders, and create new Events.
QuickPad	Enter new Event and Contact information in an intuitive and free-form way.

Using QuickContact

The QuickContact component adds a pull-down menu of Contacts, telephone numbers and options to your menu bar. You can find, view, dial, and copy Contact information from QuickContact. You can also use QuickContact to launch Now Contact where you can modify Contact information and create new Contacts.

Adding Contacts to QuickContact

You specify which Contacts in your primary Contact File appear in the QuickContact menu by selecting the QuickContact checkbox in the Contacts' Detail Views. You must save the Contact File before the newly added Contact will appear in the QuickContact menu.

Configuring QuickContact

Before you can use QuickContact to find Contacts and display frequently called Contacts in the pull-down menu, you need to set up the QuickContact control panel.

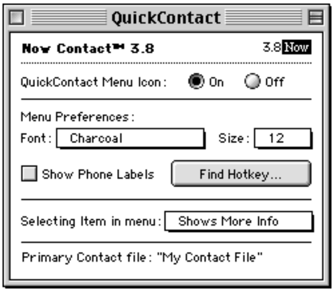
This section assumes that you installed QuickContact when you installed Now Contact, and that you've restarted your Macintosh since installation. If this isn't the case, please do so before proceeding.

To configure the QuickContact control panel:

1. Open the QuickContact control panel.

   Open the control panel by choosing Control Panels from the Apple menu and locating and opening QuickContact.

   The name of your primary Contact File appears at the bottom of the control panel.

2. Select the On radio button next to QuickContact Menu Icon.
3. Choose a font and size from the Menu Preferences pop-up menus.
4. Select the "Show Phone Labels" checkbox if desired.

   Selecting this checkbox precedes the telephone numbers in the QuickContact menu and the QuickContact Find dialog box with a label indicating whether they are Work, Home, Fax or Mobile numbers (or a telephone number in a Custom Field).

5. Click the Find Hotkey button.

   A dialog box appears where you specify a hotkey to open the QuickContact Find dialog box.

6. Press the desired key combination in the "Enter Hotkey:" text field.

   The hotkey can be any combination of letters and numbers plus one or more modifier key (Shift, Command, Option, Control or a function key). The key combination you press appears in the text field.

7. Click OK.

   Your hotkey is saved; press this key combination in any application to open the QuickContact Find dialog box.

8. Select an option from the Selecting item in menu pop-up menu.

The four options in this pop-up menu determine what happens when you choose a Contact from the QuickContact pull-down menu.

Choose…	To…
Shows More Info	Display the Contact's essential information in the QuickContact Find dialog box.
Opens Contact Record	Open Now Contact and then open the Detail View for the selected Contact.
Dials Primary Phone	Dial the Primary telephone number for the Contact you chose.
Copies to Clipboard	Copy the Contact's essential information to the Clipboard.

9. Close the QuickContact control panel.

Your QuickContact settings are saved. QuickContact settings are stored in the QuickContact Preferences file located in the "Now Contact Prefs" folder inside your Preferences folder.

10. Click the QuickContact icon in the menu bar.

The Contacts in your primary file that you've specified to include in QuickContact now appear in the QuickContact menu.

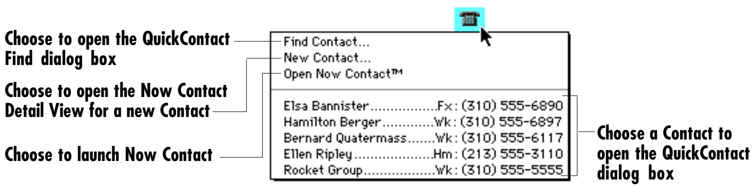
Working with QuickContact

This section describes how to use QuickContact to view Contacts, create new Contacts, find a Contact, and more.

To view a Contact using QuickContact:

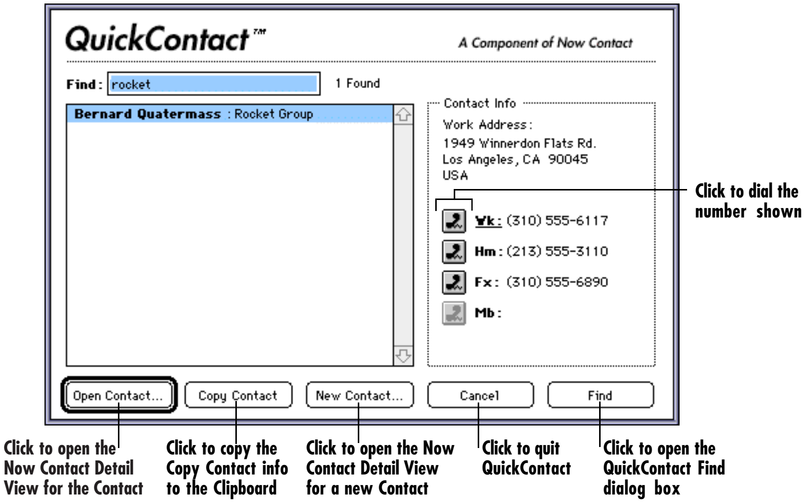
1. Click and hold the QuickContact icon in the menu bar.

The QuickContact menu displays several options and the list of Contacts you've selected from your primary Contact File.



2. Choose one of the Contacts in the menu.

The QuickContact dialog box displays the Contact information for the selected Contact.



3. Click the Cancel button to dismiss the dialog box.

Alternately, you can hold down the Option key while choosing a Contact from the QuickContact pull-down menu to open your primary Contact File in the full Now Contact application and open the Detail View for the selected Contact.

To find a Contact using QuickContact:

1. Choose a Find Contact from the QuickContact menu.

   The QuickContact Find dialog box appears.

2. Type the text you want to search for in the Find text field.

   QuickContact searches your entire Contact File based on First Name, Last Name, Company and Full Name, so choose the text to search for according to these criteria. The Full Name option allows you to search for Contacts simply by typing the first letters of their first and last names, with a space in between.

3. Click the Find button (or press the Return or Enter key).

   The names of any Contacts matching the text you entered appear in the box below the Find field, followed by their Company names. The first Contact in the found list is selected, and information for that Contact appears to the right.

To dial a Contact using QuickContact:

1. Choose a Contact from the QuickContact menu, or find a Contact as described above.

   The QuickContact dialog box displays the Contact information for the selected Contact.

2. Click the phone icon button next to the number you want to dial.

   See “Dialing Contacts” in Chapter 9, “Viewing and Dialing Contacts,” for details.

To modify a Contact using QuickContact:

1. Choose a Contact from the QuickContact menu.

   The QuickContact dialog box displays the information for the selected Contact.

2. Click the Open Contact button.

   Now Contact opens and displays the Detail View for the selected Contact.

To create a new Contact with QuickContact

1. Choose New Contact from the QuickContact menu.

   Now Contact opens and displays an empty Detail View window.

2. Enter the new Contact information.

Using QuickDay

The QuickDay component adds a pull-down menu to your menu bar. It also lists the current day's Holidays and Special Events, Appointments, To-Dos, Calls and Undated To-Dos. The QuickDay menu lets you create new Events, edit existing Events and open Now Up-to-Date. This provides you with a quick way to glance at your schedule without having to launch Now Up-to-Date, or to edit any of the listed Events simply by choosing one of them.

Working with QuickDay

The QuickDay pull-down menu makes it easy to view, create and edit Events, even when you're not running Now Up-to-Date.

Events that you create or modify using the QuickDay Event Info dialog box aren't saved to your Calendar File until you open it in Now Up-to-Date.

To check your schedule using the QuickDay menu:

1. Pull down the QuickDay menu by clicking and holding the QuickDay menu bar icon.

   Below the commands, the menu lists the current day's Holidays and Special Events, Appointments and Meetings (in chronological order), and To-Dos, Calls and Undated To-Dos.

   You can specify which Event types appear in the QuickDay menu. See "Setting Event Menu preferences" later in this chapter for more information.

To create a New Event using QuickDay:

1. Choose New Appt. from the QuickDay menu.

   The QuickDay Event Info dialog box appears, with your primary Calendar File listed at the top right. A new Appointment is created automatically with the default attributes.

2. Enter the desired text and values for the new Appointment in the dialog box.

   There are a few limitations when using this dialog box to create or edit Events, as compared to using the Event Info window in Now Up-to-Date:

- Public Events are created and edited offline, and aren't posted to the Public Event Server until the next time you open your Calendar File in Now Up-to-Date.
- Only standard Repeating Events can be created; Custom Repeats aren't available.
- You can't create or edit Sticky Notes, Banners or Graphics.

3. Click Add to save the settings for the new Event.

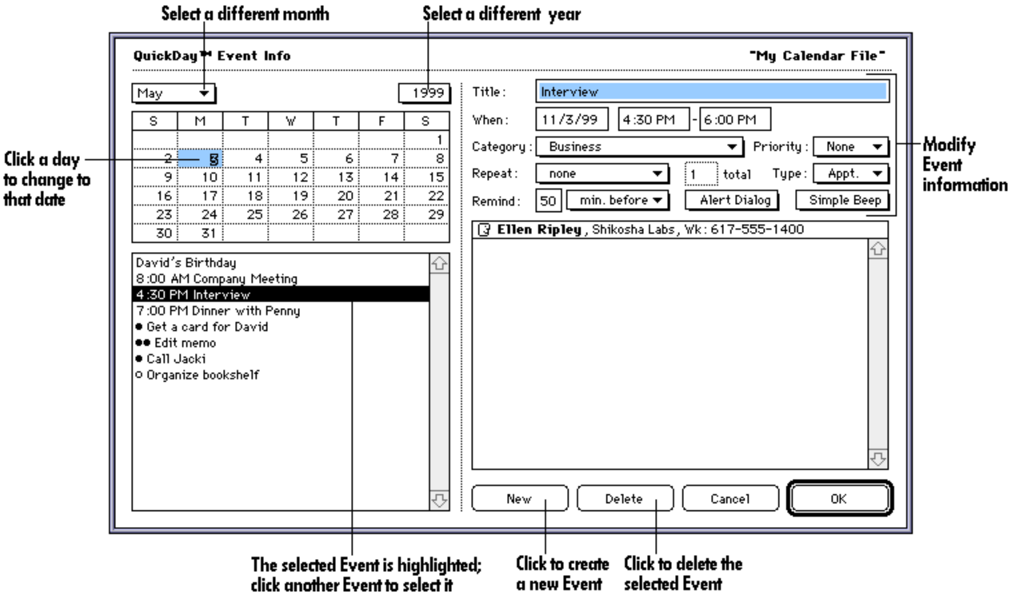
4. Click OK to close the dialog box.

To edit an existing Event using QuickDay:

1. Pull down the QuickDay menu.

2. Choose any Event from the menu.

The QuickDay Event Info dialog box appears with the Event selected.



3. Make any desired changes to the Event.

Note the following limitations in this dialog box:

- Public Events are created and edited offline, and are posted to the Public Event Server until the next time you open your Calendar File in Now Up-to-Date. If you've modified Events contained in password-protected Public Categories, you'll be prompted for the passwords when you open your Calendar File.
- Only standard Repeating Events can be created; Custom Repeats aren't available.
- Editing the description of a Repeating Event changes the description of all future Events in the repeating series, without first asking you whether the change should affect one, all or future occurrences.
- You can't edit Meeting Notices, only view them.
- You can't create or edit Sticky Notes, Banners or Graphics.

4. Click OK to save the new settings for the Event and close the dialog box.

Setting QuickDay preferences

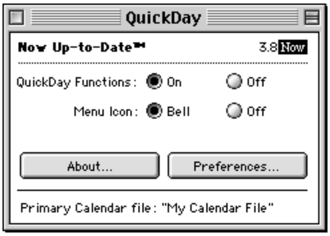
Use the Preferences settings in the QuickDay control panel to specify what items appear in the QuickDay menu, how QuickDay reminds you of your Now Up-to-Date Events, and more.

To set Event Menu preferences:

1. Open the QuickDay control panel.

Open the control panel by choosing Control Panels from the Apple menu and then locating QuickDay.

The name of your primary Calendar File appears at the bottom of the control panel.



2. Depending on whether or not you want to use the QuickDay Event menu, select “Bell” or “Off.”

Select “Bell” to have the bell icon appear in the menu bar so that you can use the Event menu; select “Off” if you don’t want to use the menu at all.

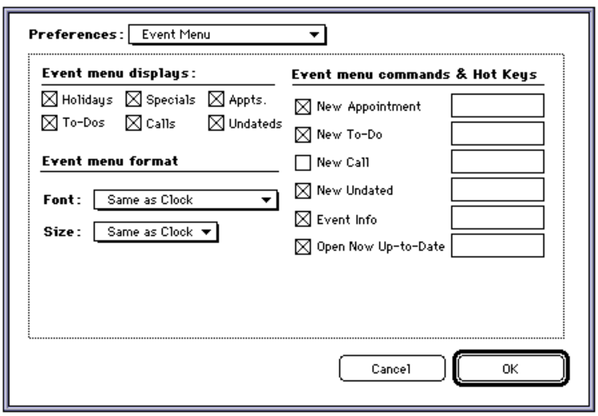
If you select “Off,” you will not receive any reminders for which you’ve chosen the “Menu Bar Alert” notification option. You can close the control panel at this point, since the Event Menu will not be displayed.

3. Click Preferences.

The Preferences dialog box appears.

4. Choose Event Menu from the Preferences pop-up menu.

The Event menu pane of the Preferences dialog box appears.



5. Select the checkboxes for the Event types you want to appear in the QuickDay Event Menu.

   The Event types you select will appear in the pull-down menu.

6. Select the checkboxes for the commands you want to appear in the QuickDay menu.

7. To set a Hot Key for an Event menu command, highlight the text field next to the command and press a key or key combination.

   Once you've configured a Hot Key, pressing the corresponding key combination will activate that command.

8. Specify a font and font size for the QuickDay menu text.

9. Click OK to save the QuickDay menu settings.

   You're returned to the QuickDay control panel.

To set Reminder preferences:

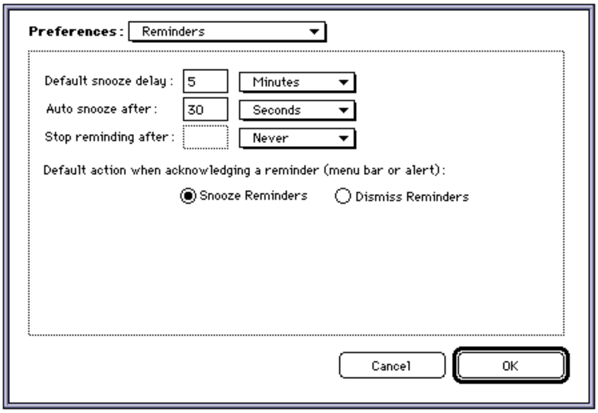
1. Open the QuickDay control panel.

2. Click Preferences.

   The Preferences dialog box appears.

3. Choose Reminders from the Preferences pop-up menu.

   The Reminders pane of the Preferences dialog box appears.



4. Set a Default snooze delay for your Reminders.

   When a Reminder appears, you can delay it for this period of time by clicking Snooze. (You can also change the Snooze delay for an individual Event when its Reminder appears.)

5. Set an Auto Snooze after delay for your alert dialog box Reminders.

   When a Reminder alert dialog box appears, it remains on screen until this period of time has passed; it then snoozes automatically for the amount of time you set for the default snooze delay in step 4.

This setting applies only to alert dialog box Reminders. It ensures that the alert dialog boxes don't interrupt background processes such as printing or modem downloads.

6. Set a Stop reminding after period for your Reminders.

When a Reminder appears for an Event and you don't dismiss it, it reappears until the period of time specified here has passed.

7. Select a default alert action for your Reminders.

Dismisses Reminder turns off the alert when you acknowledge the Reminder. Snoozes Reminder delays the alert for the default snooze time you specified in step 4 when you acknowledge the Reminder.

You acknowledge menu bar alerts by clicking on the menu bar display when the alert appears. You acknowledge dialog box alerts by pressing the Return or Enter key when the alert appears; depending on your selection here, either the Snooze for or Dismiss button in the dialog box is already highlighted.

8. Click OK to save the Reminder settings.

You're returned to the QuickDay control panel.

Using QuickPad

QuickPad, included with Now Up-to-Date & Contact, gives you the ability to enter new Calendar and Contact information quickly and at your convenience without forcing you to open the main applications. QuickPad uses SmartWords to automatically define and schedule Events; see “Using SmartWords” later in this chapter for details.

Working with QuickPad

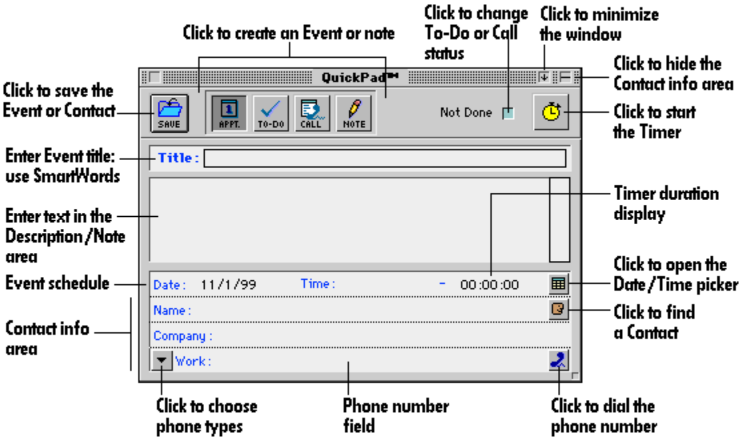
This section details how to use QuickPad’s features to create Events or Contacts, find a Contact, jot down notes, dial a call, and other useful functions.

In order to use QuickPad to find a Contact, you must already have selected a primary Contact File in Now Contact. See Chapter 8, “Using Now Contact” for more information.

To create an Event with QuickPad:

1. Open QuickPad by choosing it from the Apple menu or using the QuickPad hot key.

See “Setting QuickPad Preferences” later in this chapter for more information on setting the hot key.



The appearance of the QuickPad window differs slightly for each Event type. For illustration purposes, an Appointment window, which contains a majority of the available elements, is shown above.

2. Type a title for your Event in the Title field.

If the first word you type is a SmartWord, QuickPad selects the corresponding Event type when you tab out of the field, and schedules the Event with the preset start and end times, if appropriate. To override the selection, click another Event type button at the top of the QuickPad window.

3. Type additional text relating to this Event in the Description/Notes field.

4. Set or override the date and the start and end times.

You can also use the Date/Time Picker to choose a date and time.

5. To attach a Contact from your Contact File, type the Contact's name in the Name field and press Tab.

   QuickPad searches for matching names from your Contact File. See "To find a Contact with QuickPad" later in this chapter for details.

6. To accept a Contact name suggested by QuickPad, press Tab.

   The company name and primary telephone number for the Contact appear in the Company and Phone fields.

7. Click the Save button.

   The Event is saved to your primary Calendar File.

   You can also save an item by pressing the Enter key, or by choosing Add Item from the File menu.

   If you simply close the QuickPad window, a dialog box appears asking if you want to save the item to its respective Calendar and/or Contact File, or discard it.

   If you quit the QuickPad application, any open windows are retained without being saved to a Calendar and/or Contact File. The next time you launch QuickPad, the unsaved windows will open, along with a new window.

To create a Contact in QuickPad:

1. Open a QuickPad window by choosing QuickPad from the Apple menu or using the QuickPad hot key.
2. If desired, enter Event information as described above.
3. Type the new Contact's first and last names in the Name field, and press Tab.
4. Type the Contact's company name in the Company field, and press Tab.
5. Type the Contact's primary telephone number in the Phone field, and press Tab.
6. Select a phone type (work or home) from the Phone types pop-up menu.
7. Click the Save button.

   New Contacts are stored according to the preferences you defined for new Contacts in the Now Contact Preferences dialog box.

To find a Contact in QuickPad:

1. Open a QuickPad window by choosing QuickPad from the Apple menu or using the QuickPad hot key.
2. Type a first or last name in the Name field, or a company name in the Company field, then press Tab.

   QuickPad automatically enters the first alphabetical matching name from your Contact File. If multiple matches are found, the Find Contact button appears as a head icon. If no matches are found, the Find Contact button appears as a question mark icon.

3. Click the Find Contact button.

   If QuickPad found one or more matches, the matching Contacts are displayed. Select a Contact entry and click OK to add it to the QuickPad window.

   If QuickPad found no matching entries, the Find dialog box opens. You can then perform a more detailed search, or create a new Contact as described above.

To dial a phone number in QuickPad:

1. Open a QuickPad window by choosing QuickPad from the Apple menu or using the QuickPad hot key.
2. Find an existing Contact with its phone number, as described above, or enter a new phone number in the Phone field.
3. Click the Dial button.

   The dialing functions use the settings that you've specified in Now Contact. See "Dialing Contacts" in Chapter 9, "Viewing and Dialing Contacts," for details.

Using SmartWords

QuickPad uses SmartWords to help you create Events and attach Contacts without specifying an Event type in the Toolbar, or clicking the Find button to find a Contact. If the first word you type in the Title field is a SmartWord, QuickPad selects the corresponding Event type when you tab out of the field, and schedules the Event with preset start and end times. The following table lists the SmartWords that you can use to trigger specific actions in QuickPad.

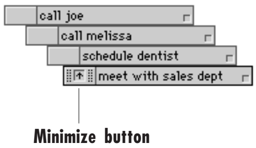
You can type SmartWords in any format you want—all capital letters, all lowercase letters, or any combination.

Type this SmartWord...	To trigger this action...
with, w/, at, @, or **see** [first or last name]	attach a Contact name to the current Event, as in "lunch with monica".
meet, meeting, appt, visit, or **see**	create an Appointment scheduled to start at the current time by default.
call, phone, ring, or **fax**	create a Call scheduled for the current time.
to-do, todo, or **do**	create a To-Do scheduled for the current time.
breakfast	create an Appointment from 7:00 am to 8:00 am.
lunch	create an Appointment from 12:00 noon to 1:00 pm.
dinner	create an Appointment from 7:00 pm to 8:00 pm.
note or **remember**	create a Note.

You can attach Contacts to Events using the SmartWord "with." Just follow one of the SmartWords listed above with the word "with," followed by a Contact's first, last, or company name. The first matching Contact found will be attached by default.

Using QuickPad throughout the day

Save space in the QuickPad display by clicking the Minimize button in the title bar. When you minimize a window, only a small bar remains displaying the item's title, and you can drag the bar to any location. Click the Minimize button again to see the entire window.



Minimizing a QuickPad window does not save the item to your Calendar or Contact file. You must specifically choose to Save or Add the item as described in the previous section.

QuickPad supports drag and drop, so you can drag selected text from the Description/Note field (or other fields) into Now Up-to-Date or Now Contact, to another application or to the Finder to create a clipping file. You can also drag text from other applications into QuickPad's text fields.

Setting QuickPad preferences

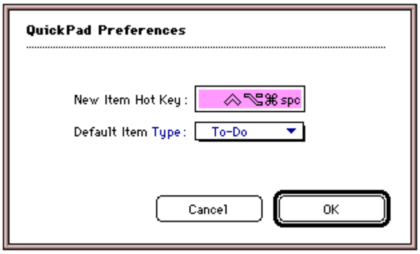
Preferences let you specify how you want to open the QuickPad application, and which Event type appears by default when you open a new window.

Open the QuickPad application either by choosing it from the Apple menu or using a hot key. The default hot key is Control-Option-Command-Spacebar.

To set QuickPad preferences:

1. Choose Preferences from QuickPad's File menu.

   The QuickPad Preferences dialog box opens. The default hot key combination appears in the New Item Hot Key field.



2. Press the key combination you want to use to open a new QuickPad window in the New Item Hot Key field.

   Your hot key can be any combination of letters and numbers plus one or more modifier keys (Shift, Command, Option, Control or a function key). The key combination you press appears in the text field.

3. Choose an item type from the Default Item Type pop-up menu.

   The item type you choose (Appointment, Call, To-Do or Note) will be selected by default when you open a new QuickPad window.

4. Click OK.

   Your hot key is saved; you can now use it in any application to open a QuickPad window with the default item type you selected.

Chapter 14
Linking Events and Contacts

Now Up-to-Date integrates seamlessly with Now Contact, letting you share information easily and efficiently between the two applications. You can create new Contacts in Now Up-to-Date and automatically add them to your Now Contact File, and you can search for specific Contacts and link them to an Event without leaving Now Up-to-Date.

When you create a linked Contact from within Now Up-to-Date, the Contact information is sent to Now Contact via Apple Events and added to your primary Contact File by default. Similarly, when you create a linked Event in Now Contact, the Event information is sent to Now Up-to-Date via Apple Events and added to your primary Calendar File. Once you create a linked Contact or Event, you can switch applications and see the linked item in the other file instantly.

If the application you're linking to isn't running at the time, the sending application uses a "store and forward" technique to make sure the new information is saved and added the next time you launch the destination application.

Now Up-to-Date links to your primary Contact File by default, just as Now Contact automatically links to your primary Calendar File.

If you make changes to the linked Contact or Event after its creation (for example, a Contact's telephone number changes, or an Event's time or date changes), the changes are recorded in both applications regardless of where they were made.

Setting linking preferences

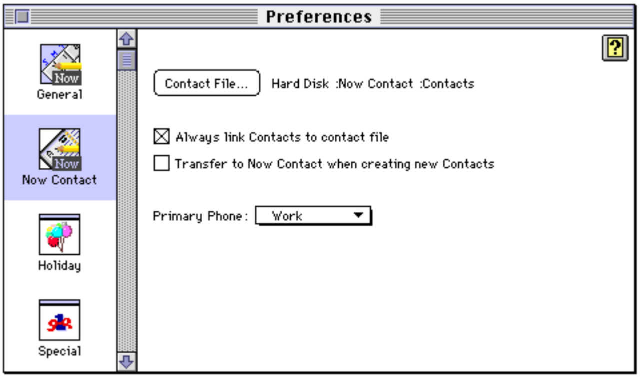
Before you begin sharing information between Now Up-to-Date and Now Contact, you need to specify in the Preferences windows of each application how you want the communication to occur.

The steps below describe how to set linking preferences from within Now Up-to-Date. Follow the same procedure from within Now Contact.

To set linking preferences:

1. Choose Now Contact from the Preferences submenu of the Define menu.

   The Now Contact pane of the Preferences window appears.



2. To link to a Now Contact file other than your primary Contact File, click the Contact File button.

   It's best to maintain the same pair of linked files at all times.

   A directory dialog box appears, where you locate and select the Contact File you want to link to.

3. Locate and select the desired Contact File, then click Link.

   The file you selected is now the destination for Contacts you create and link from within Now Up-to-Date, as well as the source for Contacts you link to Now Up-to-Date from within Now Contact.

4. Select or deselect the Always link Contacts to contact file and Transfer to Now Contact when creating new Contacts checkboxes as desired.

   Always link Contacts to contact file automatically links every new Contact to the selected Contact File. If you don't want all Contacts created in Now Up-to-Date to be linked to your Now Contact File, deselect this checkbox.

   Transfer to Now Contact when creating new Contacts automatically transfers you to Now Contact whenever you create a new Contact.

5. Choose a default telephone number type from the Primary Phone: pop-up menu.

   This telephone number type (Work, Home, Fax or Mobile) is automatically selected in the New Contact dialog box when you create a new Contact.

   There is no corresponding selection in the linking preferences from within Now Contact.

6. Close the Preferences window.

   You're returned to your Calendar File. The Now Up-to-Date preferences for linking with Now Contact are set.

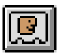
Working with linked Contacts in Now Up-to-Date

Use the Now Up-to-Date Event Info window to create, edit, and search for Contacts stored in your linked Contact File. You can tell by looking at the Event Info window whether a Contact attached to an Event is linked or not, as shown below.

To create a linked Contact:

1. Locate the Event to which you want to attach a linked Contact.
2. Double-click the Event.

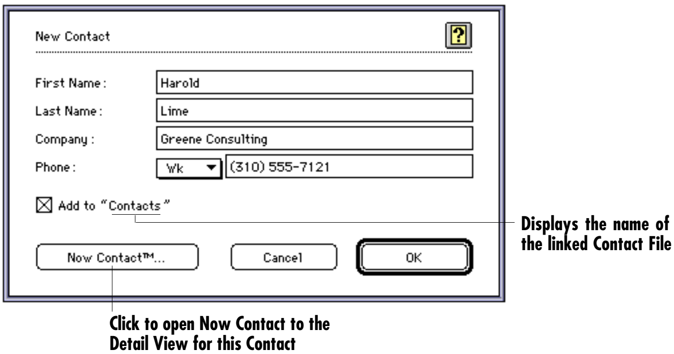
   The Event Info window opens.



3. Choose New Contact from the Contact submenu of the Event menu, or click the New Contact button in the Toolbar.

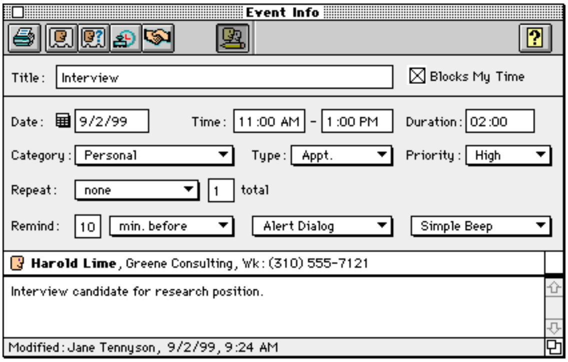
   The New Contact dialog box appears.
4. Enter the desired Contact information in the appropriate fields.
5. Select the Add to checkbox.

   If you selected "Always link Contacts to contact file" in the Now Contact pane of the Preferences window, this checkbox is selected by default.



6. Click OK.

Once a Contact is linked to a Contact File, it cannot be unlinked. The only way to break the link is to delete the Contact or the Event.

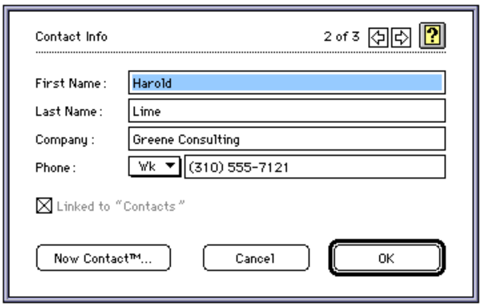


Only a first, last and company name and a single telephone number for a Contact appear in Now Up-to-Date.

To edit a linked Contact:

1. Double-click the Contact in the Event Info window's Contact field.

The Contact Info dialog box appears. If more than one Contact is attached to the Event, the total number of attached Contacts is listed in the upper-right corner; click the left and right arrows to display the other attached Contacts.



2. Make the desired changes to the Contact.

You can edit any of the text fields in the dialog box.

When you're connected to a network and sharing Event information with other users, you may view, but not modify, Contact entries linked to other users' Contact Files.

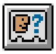
3. Click OK.

The changes appear in the Contact field of the Event Info window and in the Contact in your Contact File.

To find an existing Contact and link it to an Event:

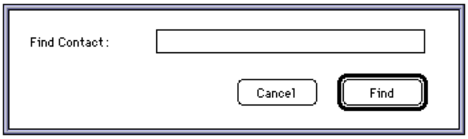
1. Locate the Event to which you want to attach a linked Contact.
2. Double-click the Event.

   The Event Info window opens.



3. Choose Find Contact from the Contacts submenu of the Event menu, or click the Find Contact button in the Toolbar.

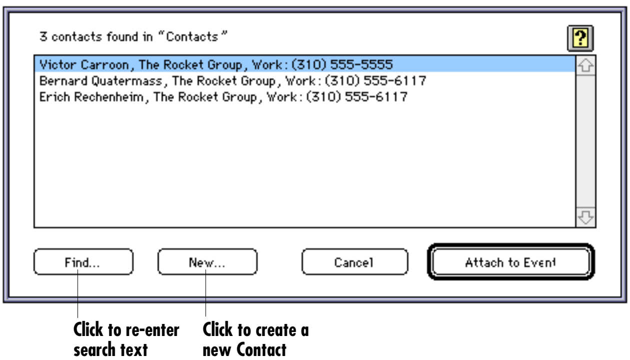
   The Find Contact dialog box appears.



4. Type the text you want to search for in the text field.

   You can search for a Contact by first name, last name, full name or company name.
5. Click Find.

   A dialog box appears, listing all of the Contacts in the linked Contact File that match your search text (if no matching Contacts are found, the dialog box indicates “0 contacts found”).
6. Select the desired Contact.



7. Click Attach to Event.

   You’re returned to the Event Info window, where the Contact appears with a Contact icon in the Contact field.

Linked repeating Events

Now Contact handles linked repeating Events differently than Now Up-to-Date, which offers flexible handling of repeating Events and lets you view them wherever they occur in your Calendar File. If you link a Contact to a repeating Event, Now Contact's Contact Log displays only the last repeating Event in the series (if the last Event is in the past) or the next occurrence in the series; no other Events in a repeating series are listed.

Deleting linked Contacts

You can delete linked Contacts from the Contact field of an Event's Event Info window. Deleting a Contact from Now Up-to-Date does *not* delete the Contact itself from your Now Contact File.

If you delete an Event to which you've attached linked Contacts, the linked Contact entries are deleted along with it. The Event entry is deleted from each of the corresponding Contacts' Contact Logs, but the Contacts themselves are *not* deleted.

You cannot delete a Contact linked to a Public Event if the Contact is linked to another networked user's Contact File. Such a Contact appears in the Event Info window preceded by a dimmed Contact icon.

To delete a linked Contact:

1. Locate the Event that contains the Contact you want to delete.
2. Double-click the Event.

   The Event Info window opens.
3. Select the Contact in the Contact field.
4. Press Delete/Backspace.

   The Contact is removed from the Contact field, and the corresponding Calendar Event in Now Contact is deleted from the Contact's Contact Log.

   You can "re-link" the Contact at any point by finding the Contact and attaching it to the Event again.

Working with linked Events in Now Contact

Now Contact lets you create Calendar Events manually in the Detail View, or automatically when you dial a Contact's telephone number. You can link these Events so that they also appear in your Now Up-to-Date Calendar File, which lets you receive automatic updates whenever the Events are modified in Now Up-to-Date.

Creating linked Calendar Events in the Detail View

Creating linked Calendar Events when using Now Contact and Now Up-to-Date together is only slightly different from creating unlinked Events.

Certain elements of Now Up-to-Date's Event Info window are missing from Now Contact's Event Info window—for instance, the Priority, Repeat and Remind settings, and some of the available Event types (Banner, Sticky Note and so on). When you link a Calendar Event to your Now Up-to-Date Calendar File, these settings take on the values you set in the Event panes of the Now Up-to-Date Preferences window.

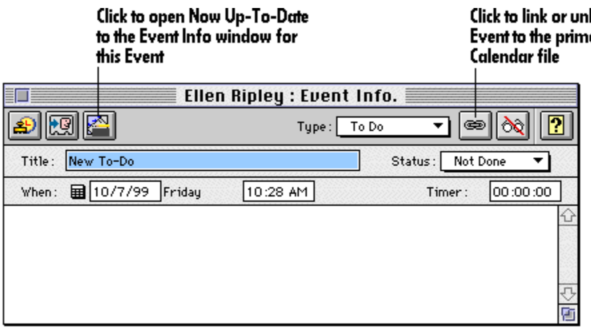
To create a linked Calendar Event:

1. Open a Contact's Detail View.

The Contact Log at the bottom of the Detail View displays any Events already attached to the Contact; the most recent Events appear at the top of the log.

2. Choose an Event type from the New Event submenu in the Contact menu, or click the appropriate Event button in the Toolbar.

The Event Info window opens, where you enter the necessary information for the new Calendar Event. See "Creating Calendar Events for a Contact" in Chapter 8, "Using Now Contact," for a full discussion of available Event types.)



If you selected the "Transfer to Now Up-to-Date when creating new events" checkbox in the Preferences window, Now Contact transfers you to your Now Up-to-Date Calendar File immediately after you choose an Event type. The Event Info window for the new Event opens in Now Up-to-Date, with the new Event already linked to the original Contact. See "Creating New Events" in Chapter 3, "Using Now Up-to-Date" for more details on creating Events.

3. Enter the appropriate information for the new Calendar Event.

4. Click the Link/Unlink Event button in the upper-right of the window.

If you selected Always link events to calendar file in the Preferences window, the Event is already linked. If you don't want this particular Event to be linked to your Now Up-to-Date Calendar File, click the button again.

5. Close the Event Info window.

   You're returned to the Detail View. If your Calendar File is currently open in Now Up-to-Date, the new Event has been added. If your Calendar File is not currently open, the new Event is added the next time you open the Calendar File.

   You can switch quickly to your Now Up-to-Date Calendar File by Option-double-clicking a linked Event in the Contact Log—you go directly to the corresponding Event Info window.

Deleting linked Events

You can delete linked Events from either the Detail View or the Event Info window. Deleting an Event from Now Contact does *not* delete the Event itself from your Now Up-to-Date Calendar File.

If you delete a Contact that contains linked Events, the linked Events are deleted along with it. The corresponding Events in your Now Up-to-Date Calendar File lose their entries for the deleted Contact, but the Events themselves are *not* deleted.

To delete a linked Event in the Detail View:

1. Open the Detail View for the Contact with the linked Event you want to delete.
2. Select the Event in the Contact Log and press the Delete key.

   The Event entry is removed from the Contact Log, and the corresponding Event in Now Up-to-Date loses the Contact that was attached to it.

To delete a linked Event from the Event Info window:

1. Open the Detail View for the Contact with the linked Event you want to delete.
2. Double-click the Event in the Contact Log.

   The Event Info window opens.
3. Click the Link/Unlink Event button in the upper-left corner of the window.

   The icon on the button changes to a broken chain, and the corresponding Event in Now Up-to-Date loses the Contact that was attached to it.
4. Close the Event Info window.

   You're returned to the Contact's Detail View, where the Event remains in the Contact Log.

   You can "re-link" the Event at any point by clicking the Link/Unlink Event button in its Event Info window.

Chapter 15

Using Now Up-to-Date & Contact on a Network

If you're using Now Up-to-Date & Contact on a network, you can share Events and Contacts with other users through Public Categories stored on a Public Event Server or a Public Contact Server.

This chapter assumes that a Macintosh running a Public Event or Contact Server containing Public Categories already exists on your network. If one doesn't exist on your network, consult your network administrator before proceeding. If you plan on using your Macintosh as a Public Server, refer to the Administrator's Guide for details.

Communicating with a Public Server

To view shared Events and Contacts, you must connect to the Public Event or Contact Server. Connecting to a Server is a simple process, and requires only that AppleTalk be active on your Macintosh. To verify that AppleTalk is active, choose Chooser from the Apple menu. AppleTalk's Active button in the Chooser window should be selected.

You can also connect to a Public Server via TCP/IP, either remotely or via a local area network. After making sure that your TCP/IP connection is active, simply follow the procedures for either Now Up-to-Date or Now Contact below.

Connecting Now Up-to-Date to a Public Event Server

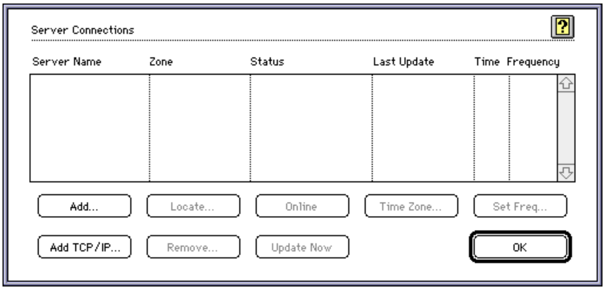
Shared Events are stored and maintained in Public Categories on a Public Event Server.

To connect to a Public Event Server:

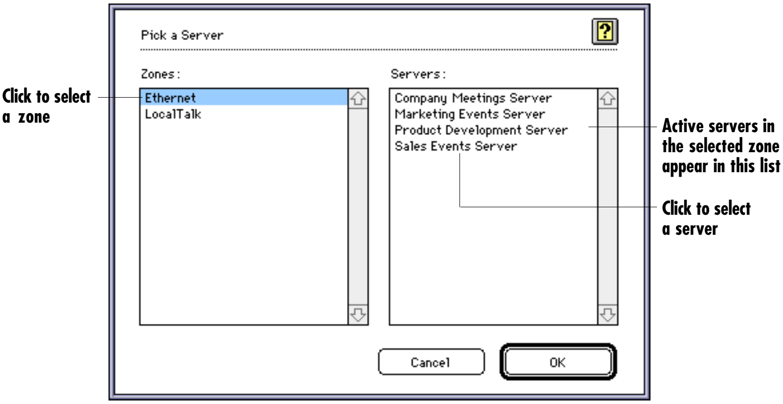
1. Choose Server Connections from the Define menu.

Sharing Data

The Server Connections dialog box appears, showing the names of any Public Event Servers that you've connected to previously. If this is the first time you're opening the dialog box, this area is blank.



2. Click Add.



If no Public Event Servers appear in this dialog box, you should verify that AppleTalk is active on your Macintosh and that at least one Public Event Server exists on your network.

If you want to connect to a Public Event Server using TCP/IP, click TCP/IP... and enter the server's name, its IP address, and its port number (this information should be supplied to you by the administrator of the Public Event Server), then click OK. The server should now appear in the Server Connections dialog box; skip ahead to step 5.

3. Add a Public Event Server by selecting it in the Servers list and clicking OK.

You're returned to the Server Connections dialog box.

4. Repeat steps 2 and 3 to connect to other Public Event Servers on your network.

5. Select the Server name, and change settings as desired.

Click…	**To…**
Set Freq	Choose the time interval at which your Calendar checks the Public Event Server. *Increase the frequency to a longer time interval if you want to reduce network traffic.*
Update Now	Update your Calendar File immediately.
Set Time Zone	Choose the time zone offset type (ahead or behind) and the number of hours to offset. *Use this feature when you are in a different time zone than the Server.*

6. Click OK.

You're returned to the calendar display. In the Month, Week or List View, the status message in the header briefly reads "public events up to date" when you have successfully connected to the Public Event Server. (You may also notice that a Meeting menu has been added to the menu bar. The Meeting menu is described in Chapter 12, "Group Scheduling.")

Changing Public Event Server status

You may want to disconnect temporarily from the Server to reduce network traffic or to turn off AppleTalk on your PowerBook to conserve battery power. When you do this, your Calendar File will indicate that you are "offline." To resume communication with the Server, go back online. You may also permanently disconnect from a Server.

At times you may lose your connection to a Server if someone renames or moves it. If this happens, the status message reads "looking for [Public Event Server name]" constantly rather than "public events up to date." When you see this message, you may need to re-establish your connection.

To change Public Event Server status:

1. Choose Server Connections from the Define menu.

The Server Connections dialog box appears, listing any Public Event Servers you've connected to previously.

2. Select a Public Event Server and make the desired change to its status.

Click…	**To…**
Offline	Temporarily disconnect (go offline).
Online	Go back online.
Remove	Permanently disconnect.

Removing the Server connection also removes Public Categories and the Public Events they contain from your Calendar File.

continued next page

Click…	To…
	continued from previous page
Locate	Re-establish connection. Select the desired Server in the dialog box.

3. Click OK.

You're returned to the calendar display.

If you removed the connection to the Server, the Meeting menu option is also removed from the menu bar. You do not have access to group scheduling functions unless you are logged in to a server.

Editing and creating Public Events while offline

When you disconnect from your network and open your Calendar File, you still have access to the Events in all Public Categories that were part of any existing Sets the last time you were connected to the Public Event Server. You can edit these Events and create new ones.

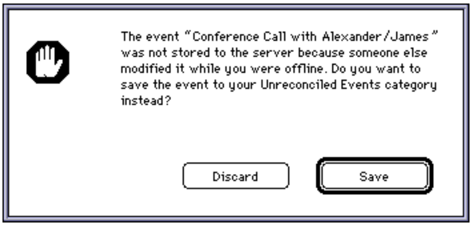
The first time that you edit or create a Public Event while offline, a dialog box will appear, indicating that the Public Event Server is not responding, and asking if you want to make changes offline and send the edits to the Server the next time you connect.

When you click OK, the new or modified Event is saved in your Calendar File. If Marks is turned on in the Event Display submenu of the View menu, a plus sign (+) appears next to the Event, marking it as an edit that will be sent to the Public Event Server the next time you're connected. Subsequent edits or new Events are automatically marked without interrupting you with a confirmation dialog box.

Reconnecting to a Public Event Server

The updating of the Public Event Server when you reconnect to the network is a mostly automatic process. If you set the Public Event Server status to "offline" in the Server Connections dialog box while you were disconnected, change the status back to "online." Otherwise, simply opening your Calendar File after restoring your network connection starts the updating process automatically.

If Now Up-to-Date discovers that an Event you modified while offline was also edited by someone else in your absence, a dialog box appears indicating that your edited version of the Event was not stored to the Public Event Server, and asking if you want to save the edited Event to a Private Category called "Unreconciled Events."



You can either click Discard to delete your edited version of the Event, or click Save to place the Event in your Unreconciled Events Category (if this is the first time an Unreconciled Event has occurred in your Calendar File, the special Category is created automatically). You can then compare it to the version that was edited while you were offline, if you want.

To compare an unreconciled Event to the original Event:

1. Select the unreconciled Event.

   An unreconciled Event is denoted by a question mark (?) in front of its title.

   You must turn on Marks in the Event Display submenu on the View menu in order to see the question mark.

2. Choose Find Original from the Event menu.

   Now Up-to-Date switches the current View and highlights the original version of the Event. Once you've located the original Event, you can decide whether to keep it or replace it with your changes.

   If the Event was moved to a different Category that is not in your current Set, Now Up-to-Date may not be able to find it; we suggest that you switch to a Set in which you subscribe to all Categories to have the best chance of finding the original Event.

3. Choose Find Original again to move back to the Unreconciled Event, if you want.

   Choose Find Original to move the View back and forth between the two Events.

If you made changes while offline to a password-protected Public Category to which you don't have access, you will be asked to enter the password when the edits are sent to the Server. If you don't know the password, you can store the edited Events to the "Unreconciled Events" Private Category.

To find an unreconciled Event, choose Find from the Event menu, type "?" (the Mark that is attached to unreconciled Events) in the text field, and click Find.

While offline, you can't modify existing Public Categories or create new ones.

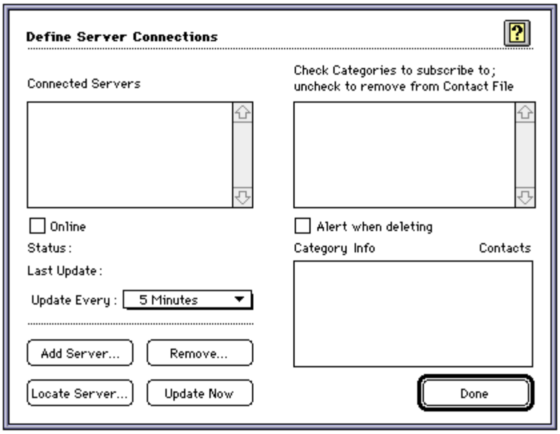
Connecting Now Contact to a Public Contact Server

Shared Contacts are stored and maintained in Public Categories on a Public Contact Server.

To connect to a Public Contact Server:

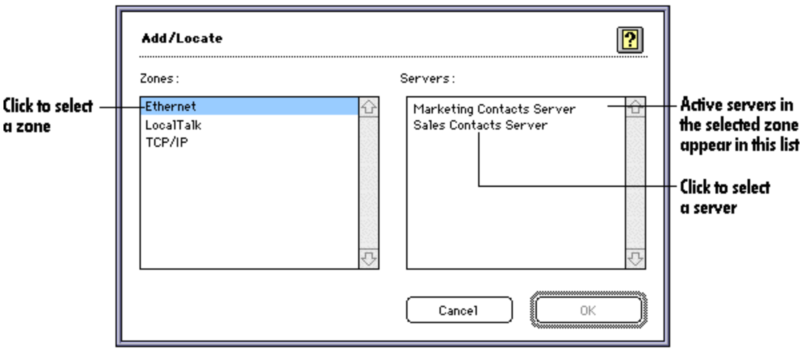
1. Choose Server Connections from the Define menu.

   The Define Server Connections dialog box appears.



   The scrolling list under Connected Servers shows Public Contact Servers to which you have connected. If you are not connected to any (or if this is the first time you are connecting to a Server), this area is blank.

2. Click Add Server.

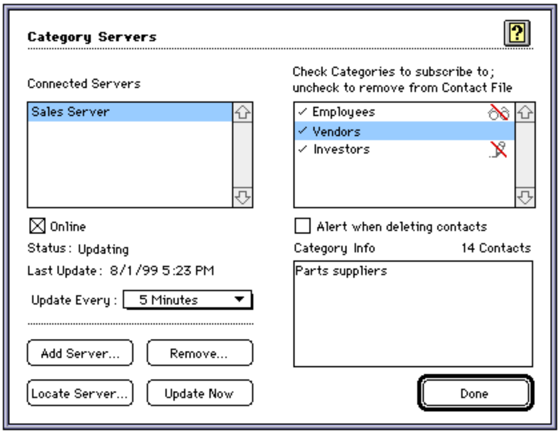


If no Public Contact Servers appear in this dialog box, verify that AppleTalk is active, and/or that a Public Contact Server exists on your network.

If you want to connect to a Public Contact Server using TCP/IP, click TCP/IP and enter the server's name, its IP address, and its port number (this information should be supplied to you by the administrator of the Public Contact Server), then click OK. The server should now appear in the list at right; go on to step 3.

3. Add a Public Contact Server by selecting it in the Servers list and clicking OK.

You are returned to the Define Server Connections dialog box. The Public Contact Server you selected now appears in the Connected Servers list and its Public Categories are displayed in the scrolling list in the upper right.



4. Select the Categories you want to subscribe to.

In the scrolling list on the right, double-click a Category. This places a checkmark in front of the Category name and includes the Category's Contacts in your Contact File.

Repeat step 5 to add other Categories from this Server. Repeat steps 3, 4, and 5 to add Categories from other Public Contact Servers on your network.

5. With the name of the connected Server selected, choose its update frequency from the Update Every pop-up menu.

The update frequency indicates how often your Now Contact application checks the Public Contact Server for new Public Contacts or modifications to existing Public Contacts.

Click Update Now to update Public Contacts on this Server immediately.

6. Select the Alert when deleting checkbox if you want to receive an alert when a Public Contact is deleted.

7. Click Done.

You're returned to your current Contact File.

Choose Find All from the Find menu to display the Contacts in the Public Categories you subscribed to.

Installing a single copy of Now Contact on both a desktop Macintosh and a PowerBook is an acceptable way to take your Contacts with you when you travel. Generally, it's best to quit Now Contact on your desktop Macintosh when you leave the network site and plan to connect remotely with your PowerBook.

Changing Public Contact Server status

You may want to temporarily suspend communication with a Public Contact Server (go offline) to reduce network traffic or to turn off AppleTalk on your PowerBook to conserve battery power. You may also permanently disconnect from a Server.

You may lose your connection to a Server if someone renames or moves it. If this happens, the Server status message reads "Looking for [Server name]," rather than "Shared Contacts up to date." When you see this message, you may need to re-establish your connection.

To change the status of a Public Contact Server:

1. Choose Server Connections from the Define menu.

   The Define Server Connections dialog box appears, listing any Public Contact Servers you are connected to.

2. Select a Public Contact Server in the Connected Servers list and make the changes you want to its status:

Click…	To…
Offline	Temporarily disconnect (go offline).
Online	Go back online.
Remove	Permanently disconnect. *Removing the Server connection also removes Public Categories and the Public Contacts they contain from your Calendar File.*
Locate	Re-establish connection. Select the desired Server in the dialog box.

3. Click Done.

   The Server status changes to reflect your selection.

Disconnecting from a Public Contact Server is not the same as going offline. When you disconnect from a Server, the Contacts in the Public Categories you subscribe to are no longer available in your Contact File.

Editing Public Contacts while offline

Contacts in Public Categories remain in your Contact File when you temporarily suspend communication with a Public Contact Server (go *offline*).

Before you go offline, update your Server connections to be sure that you have the most current version of all Public Contact information in your personal Contact File.

Public Contacts that you create or modify while offline are automatically sent to the Public Contact Server when you launch Now Contact and resume communication with the Server.

When you edit or create a Public Contact while offline, the message “Edits pending for [Server name]” appears in the status bar at the bottom of the Now Contact window (List View and Detail View). This message remains until you resume communication with the Server and the Public Contacts are updated.

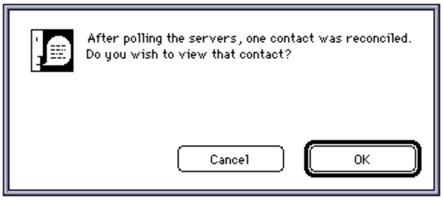
You can’t modify attributes of existing Public Categories or create new ones while you’re offline.

Reconnecting to the Public Contact Server

Public Contacts you create or edit while offline are automatically updated when you resume communication with the Server.

If Now Contact discovers that a Contact you modified while offline was also modified by a network user who was online, your edited version of the Contact is not posted to the Public Contact Server. Your changes are instead saved to a Note called “RECONCILE FIELDS” attached to the Contact. This allows you to compare your changes to the version that was edited while you were offline.

Unreconciled Contact Notes are also attached to Public Contacts the next time the Server is updated. If you subscribe to a Contact that was modified both online and offline, you’ll see the dialog box below when your Server is next updated.



Click OK to display only the unreconciled Contact(s) in the List View; you can then open the Detail View and compare the offline changes in the Note to the current, updated Contact.

If you made changes while offline to a password-protected Public Category to which you do not normally have access, you will be prompted to enter the password when the edits are sent to the Server.

Sharing Events Using Public Categories

Events that are assigned to Public Categories can be viewed and modified by all users (except for Events assigned to password-protected Public Categories). In addition, all users can create and modify Public Categories.

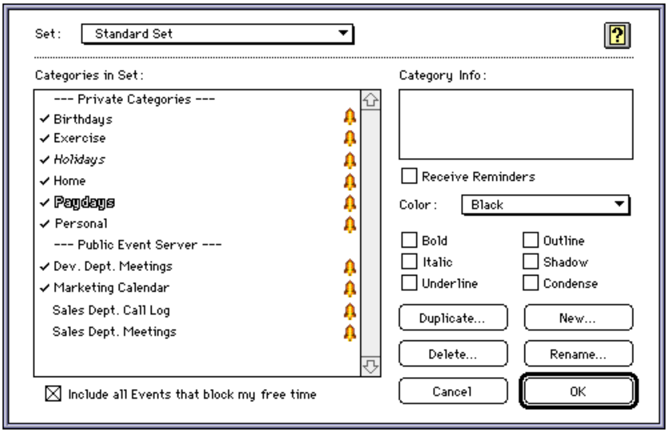
Viewing Events from Public Categories

To see Public Events in Now Up-to-Date, you first need to select the Public Categories whose Events you want to view. You do this by including Public Categories in one or more Sets.

To view Events from Public Categories:

1. Choose Sets from the Define menu.

The Define Sets dialog box appears displaying the name of each Public Event Server you are connected to, along with any Public Categories it contains.



2. Using the Set pop-up menu, choose the Set you want to add Public Categories to.

Click New to create a new Set to contain Public Categories.

3. Click to the left of a Category's name (or double-click the name) to subscribe to it in this Set.

A checkmark appears to the left of the Category's name and a Reminder icon appears after it indicating that you'll receive Reminders for Events in the Category. Deselect the Receive Reminders checkbox if you don't want to get these Reminders.

4. Repeat step 3 for any other Categories you want to subscribe to in the Set.

We recommend that you subscribe to your default Category (specified in the Preferences window for each new Event type) in any Sets you create. See "Sets and your default Category" in Chapter 5, "Organizing Calendar Events" for more information.

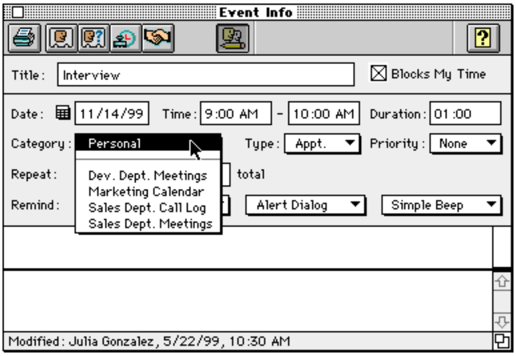
5. When you’ve finished adding Categories to the Set, click OK.

   You’re returned to the calendar display. Now Up-to-Date begins retrieving Public Events from the Public Categories you subscribed to.

Assigning Events to Public Categories

Events that you assign to Public Categories become available to other users who are running Now Up-to-Date.

You assign an Event to a Public Category the same way you assign an Event to any Category—using either the Category pop-up menu in the Event Info window, or the pop-up menu that appears in the Category column of the List View.



The Categories listed in the menu are grouped according to the Server where they reside, divided by separator lines. Choose a Public Category from the menu to assign an Event to it. Other users on the network who subscribe to the Public Category will have access to the Event.

Creating and Modifying Public Categories

It’s best to create Public Categories for clear and specific scheduling topics, so that other users on the network can more easily identify them when choosing Categories for viewing.

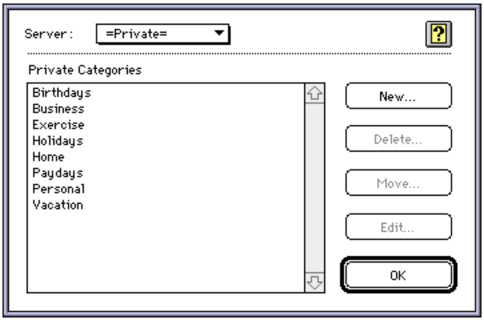
You can modify a Public Category whenever you’re connected to a Public Event Server, as long as you have the password. See “Password-protected Categories” later in this chapter for details.

To create a new Public Category:

1. Choose Categories from the Define menu.

   The Define Categories dialog box appears.

Notice that =Private= appears next to Server—this indicates that any Categories you create will be Private Categories and stored locally in your Calendar File, unless you change the selection in this menu.

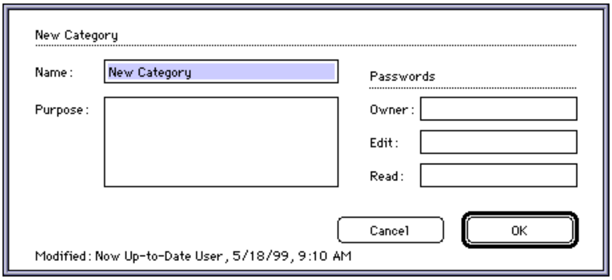


2. Choose a Public Event Server from the Server menu.

The Public Event Server's name appears next to Server, and the Categories stored on the Public Event Server appear in the Categories on Server list.

3. Click New.

The New Public Category dialog box appears.



4. Type a name for the new Category in the Name field.

5. Type a description of the Category's purpose in the Purpose field, if desired.

Including a description is very helpful to network users trying to decide which Categories to subscribe to.

6. Type in passwords as desired to add password protection.

See "Password-protected Public Events and Contacts" later in this chapter for details.

7. Click OK.

You're returned to the Define Categories dialog box; the new Category appears in the Categories on Server list.

8. Click OK.

You're returned to the calendar display. The new Public Category is automatically added to your current Set, and you can now assign Events to it.

To modify a Public Category:

1. Choose Categories from the Define menu.

   The Define Categories dialog box appears.

2. Choose a Public Event Server from the Server pop-up menu.

   The Public Event Server's name appears next to Server, and the Categories contained on the Public Event Server appear in the Categories on Server list.

3. Select the Category that you want to modify.

4. Click the button for the modification you want to make.

Click...	To...
Delete...	Delete the Category and all Events stored in it.
Move...	Move the Category to either another Public Event Server or your own Macintosh.
Edit...	Change the information shown for the Category.

   See "Password-protected Categories" later in this chapter for details on deleting password-protected Categories.

   You're returned to the Define Categories dialog box.

5. Click OK.

   You're returned to the calendar display.

Public Categories and Sets

As you start to use Public Categories, and as additional Public Categories are created on your network's Public Event Server, you may find that there is more information displayed in your Calendar File than you want to view at one time. The Sets feature allows you to view only Events from selected Categories, and to "filter out" Events from other Categories.

The Include all Events that block my time option in the Define Sets dialog box ensures that your Calendar displays Meetings and other Events which you have marked as Attending. See Chapter 16, "Group Scheduling," for more information.

Once you've created Sets, switch between them by choosing Set names from the bottom of the View menu.

You can also set a different color and/or text style for the Events in each Category, so that when you look at your calendar display, it's easier to tell which Events come from which Category. See "Using Sets" in Chapter 6, "Organizing Calendar Events," for details.

Sharing Contacts Using Public Categories

Contacts that are assigned to Public Categories can be viewed and modified by all users (except for Contacts assigned to password-protected Public Categories). In addition, all users can create and modify Public Categories.

Assigning Contacts to Public Categories

Once you connect to a Public Contact Server, you can assign Contacts to Public Categories. Contacts in Public Categories are available to other network users who have Now Contact.

Keywords you assign to your Contacts are not available to network users when you assign the Contacts to Public Categories.

To assign a Contact to a Public Category:

1. Open the Detail View for a Contact.

   The Category to which the Contact is assigned is in the Category pop-up menu.

2. Open the Category pop-up menu.

   The pop-up menu lists the available Categories, which are grouped according to the Server where they reside and divided by separator lines.

3. Choose a Public Category from the Category pop-up menu.

   If the Contact has Notes or Calendar Events attached to it, a dialog box appears giving the option of making all attachments public, private, or leaving them unchanged. Click the appropriate button to proceed. (Any Custom Fields you've defined for the Contact are public.)

   The name of the Category you chose appears next to Category.

4. Save the Category setting by pressing the Enter key or closing the Detail View.

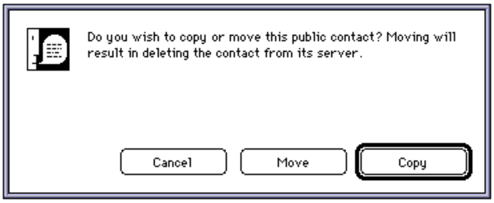
   The Contact is now stored on the Public Contact Server as well as in your Contact File, and is available to any networked users who subscribe to that Public Category.

To assign multiple private Contacts to a Public Category, select them in the List View and then choose Assign Category from the Contact menu.

Color and text style settings for individual Categories are personal only; they don't affect how your Public Contacts appear in other users' Contact Files.

Moving Public Contacts

You can assign a Public Contact to a local Category, but doing so moves the Contact from the Server to your private Contact File and makes it inaccessible to other users. A dialog box appears when you reassign a Public Contact to a private Category, giving you the option of moving the Contact or copying it to your private Contact File.



Creating and Modifying Public Categories

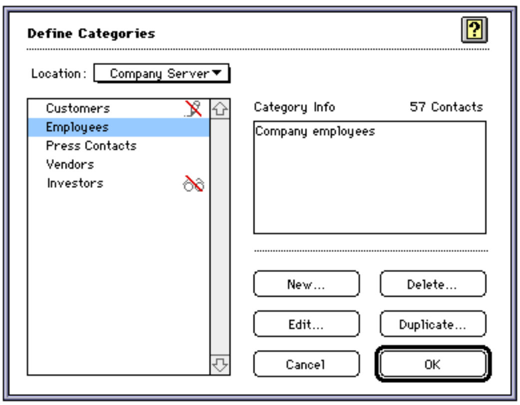
It's best to create Public Categories for clear and specific topics, so that other users on the network can more easily identify them when choosing Categories for viewing.

There may be times when you want to modify a Public Category by changing its name or the passwords you've set for it, moving it to another Server, or deleting it. You can modify a Public Category whenever you're connected to a Public Contact Server, as long as you have the password. See "Password-protected Categories" later in this chapter for more details.

To create a new Public Category:

1. Choose Categories from the Define menu.

The Define Categories dialog box appears. Local is chosen in the Location pop-up menu—this indicates that any Categories you create will be Private Categories stored locally in your Contact File, unless you change the selection in this menu.

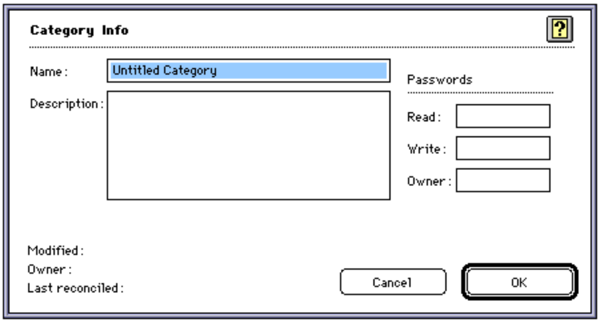


2. Choose a Public Contact Server from the Location pop-up menu.

The Public Contact Server's name now appears next to Location:, and the Categories contained on the Public Contact Server appear in the Categories list.

3. Click New.

The Category Info dialog box appears.



You'll be prompted for a password to create a Category on the selected Server if the person in charge of the Public Contact Server has assigned a password for this function.

4. Type a name for the new Category in the Name field, and, if desired, a description of the Category's purpose in the Description field.

5. Type passwords as desired to add password protection.

See "Password-protected Categories" later in this chapter for details.

6. Click OK.

You're returned to the Define Categories dialog box; notice that the new Category appears in the Categories list along with any previously created Categories.

7. Click OK.

You're returned to your current Contact File.

To modify a Public Category:

1. Choose Categories from the Define menu.

The Define Categories dialog box appears.

2. Choose a Public Contact Server from the Location pop-up menu.

3. Select the Category that you want to modify in the Categories list.

4. Click the button for the modification you want to make.

Click…	To…
Edit…	Change the Category's name, description, or passwords.
Duplicate…	Enter a new name, description or passwords for the copied category
Delete…	Delete the selected Category and its attached Contacts.

You're returned to the Define Categories dialog box.

5. Click OK.

You're returned to your current Contact File.

Password-protected Categories

A Public Category can be password-protected in order to prevent network users from changing or deleting Events or Contacts, or from deleting the Category and its contents. You cannot modify an Event or Contact that belongs to a password-protected Public Category, unless you have the password.

When creating a password-protected Category in Now Up-to-Date and Now Contact, the following password options appear in the New Category and Category Info dialog boxes:

This password…	Must be entered to…
Read	See any Contacts or Events in the Category. Read-protected Public Categories are indicated by .
Write or Edit	Change or delete existing Events or Contacts in the Category. Write- and edit-protected Public Categories are indicated by .
Owner	Create new Contacts or Events; archive, move or delete the Category; change its name or passwords.

Chapter 16
Group Scheduling

With Now Up-to-Date's Group Scheduling feature, you can schedule Meetings with colleagues and associates who have also installed Now Up-to-Date and connected to a Public Event Server. A system administrator sets up users and resources on the Server for Meetings, and then network users configure their Calendar Files for Group Scheduling.

The Group Scheduling features can automatically find the time when you, your co-workers, and your desired Meeting room are all available for a Meeting. All invitees are notified, whether they've subscribed to that particular Public Category or not; they can then accept or decline the invitiation. Detailed Meeting information is available in each person's Calendar File.

Getting started with Group Scheduling

To begin scheduling Meetings, you first need to set up your Calendar File for Group Scheduling. This is a one-time procedure (unless you need to change your settings later).

Necessities for Group Scheduling

In order for you to use the Group Scheduling features, the following conditions must exist:

- Your network administrator must install the Public Event Server software on a Macintosh and then post the names of users, Meeting places, and Meeting resources to the Server so that these items are available for scheduling Meetings.
- You, along with all those you want to invite to a Meeting, must be connected to a Public Event Server.
- You must make yourself available for Group Scheduling by logging in with your user name.
- You must include at least one Public Category in your current Set.
- You must select users, Meeting rooms and resources listed on the Public Event Server and add them to your Calendar File for your use in scheduling Meetings.

Basic setup

If you want Now Up-to-Date to guide you through the Group Scheduling setup, just click the New Meeting button in the Toolbar, and follow the directions provided at each step.

If you'd rather go through the setup process at your own pace, use the following steps.

To set up your Calendar File for Group Scheduling:

1. Connect to the Public Event Server that's been set up for Group Scheduling, if you haven't done so already.

Choose Server Connections from the Define menu and add the Server.

2. Choose Log In from the Meeting menu.

The Log In dialog box appears.

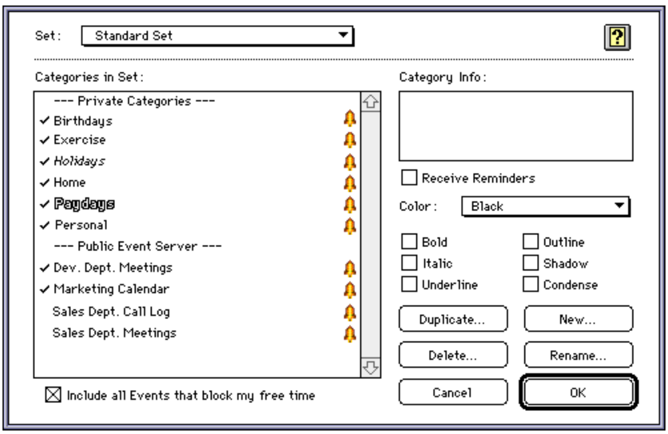
3. Highlight your name in the list and click OK.

Select your name from the list identifies you on the network as a participant in Group Scheduling. Once you click "OK," your name will appear at the bottom of the Meeting menu, confirming your identification in Group Scheduling. If your name isn't in the list, contact your network administrator.

If prompted, enter the password your network administrator has given you. You can change the password by choosing Set Password from the Meeting menu.

4. Choose Sets from the Define menu.

The Define Sets dialog box opens.



5. Subscribe to at least one Public Category in the current Set.

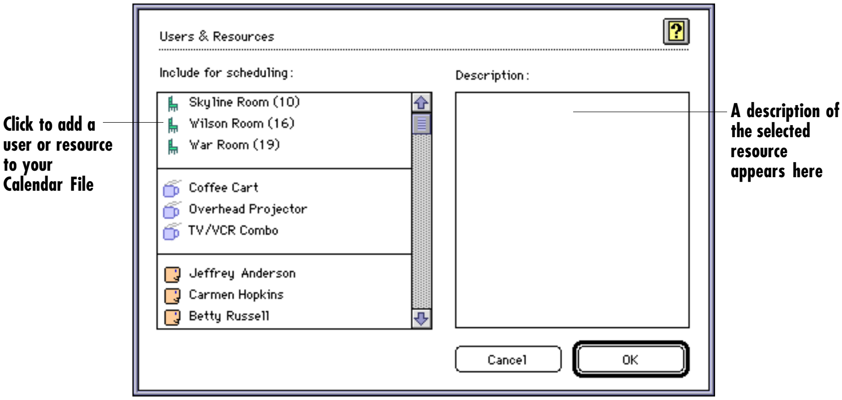
Double-click the Category's name to subscribe to it; a checkmark appears to the left of the name.

The Include all Events that block my free time option ensures Meetings and other Events you have marked as "Attending" will appear in your Calendar—even Events assigned to Categories that you aren't subscribed to in any Set, or on Public Event Servers that you haven't connected to yet. This allows you to subscribe to fewer Categories, while still keeping abreast of Meetings that affect you. This option is turned on by default when you create a Set that contains at least one Public Category.

6. Click OK.

7. Choose Users & Resources from the Meeting menu.

The Users & Resources dialog box opens.



8. Add any users, conference rooms and resources that you might want to include in a future Meeting.

The items you add here become available in your Calendar File for Group Scheduling, even when you're disconnected from the network.

Choose only the resources that you'll regularly need for scheduling Meetings.

9. Click OK.

Group Scheduling setup is complete; you're now ready to begin scheduling Meetings.

Advanced Setup

Use the following Advanced Setup procedures to define password protection, set time block availability, and set up convenient Groups of people, Meetings rooms and resources.

Defining Password protection

Password-protect access to your user name to prevent others on the network from logging in as you. If you don't have a password assigned yet and you want to create one, choose Set Password from the Meeting menu.

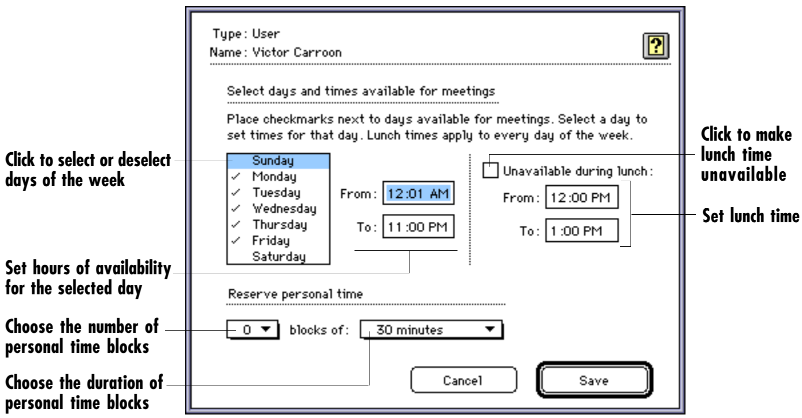
To remove the password protection, choose Set Password and then delete your password from the dialog box. You'll be prompted to enter your old password once more to confirm the change, and then password protection will be turned off.

Setting your Availability

Your Appointments appear as "busy time" during which others shouldn't schedule conflicting Meetings that include you. Banners, Holidays, and Special Events will block out entire days of "busy time" for you, when the Blocks My Time option is selected in the Event Info window for those Events.

Use the Availability settings to provide additional Meeting Availability information, such as your normal lunchtime, and time that you want to reserve during the day for non-Meeting activities.

To modify your Meeting availability, choose Availability from the Meeting menu. Modify your Availability with the options on the Availability dialog box.



The Reserve personal time option specifies blocks of time in your day when you're unavailable for Meetings even if you have no actual Appointments scheduled.

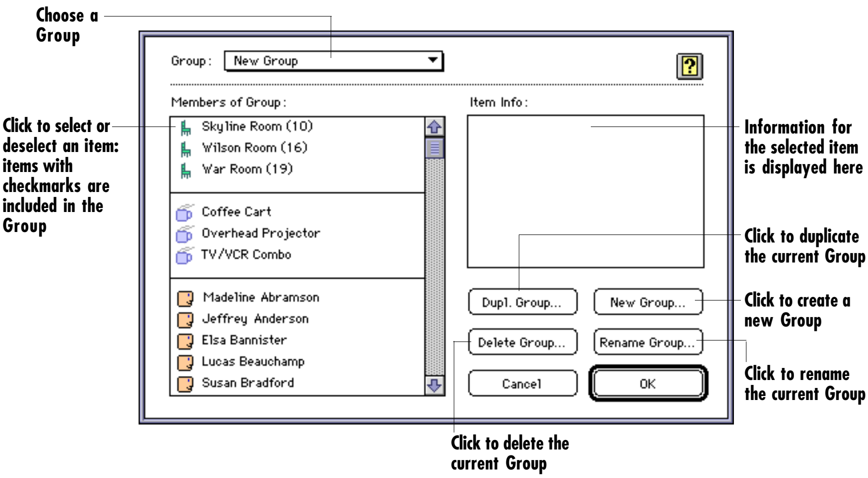
If you prefer to have blocks of reserved time scheduled at specific times instead of letting Now Up-to-Date place them wherever available, create repeating time-specific Appointments for the period(s) of time you want to set aside.

Setting up Groups

Use the Groups function to identify a group of people—or any combination of people, Meeting rooms and resources—that you can invite to a Meeting with one selection. When setting up a Meeting, selecting the Group's icon invites all the people and places you've specified.

To create or modify Groups, choose Groups from the Meeting menu. The Groups dialog box opens.

If you're choosing the Groups command for the first time, Now Up-to-Date asks you to name the first new Group. Once you've done so, the dialog box opens directly.



Scheduling a Meeting

There are two different ways to schedule Meetings. Use Auto-Pick to let Now Up-to-Date find the best time to meet on a particular day. Or, use Group View to specify the exact time you want to hold the Meeting.

Meetings you create while offline don't block out time on any users' schedules until you connect to the Server again.

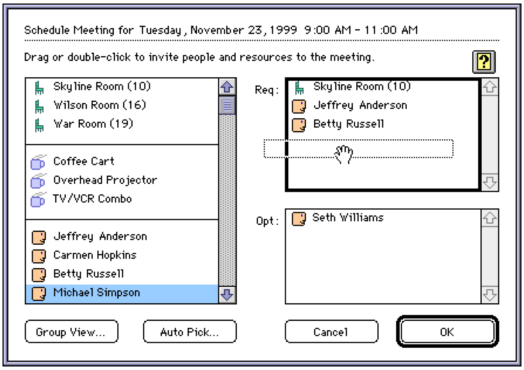
To schedule a Meeting using Auto-Pick:

1. Choose New Meeting from the Event menu.

   The Schedule Meeting dialog box opens.

2. Select the users, Groups, Conference Rooms, and/or Resources to include in the Meeting.

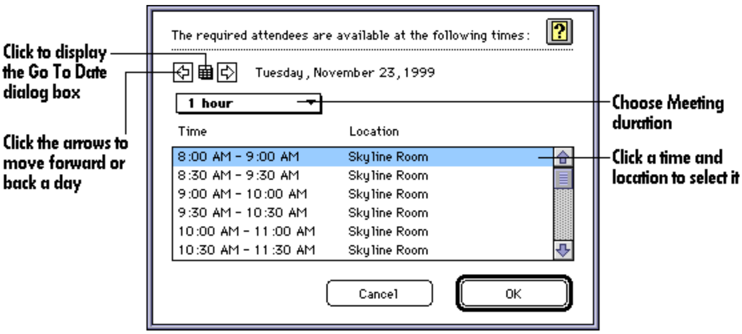
Drag the desired items from the list on the left to the "Req:" list on the right. To deselect an item, drag it back to the first list. To inform a user that the Meeting will take place but not invite that user, drag the user's name to the "Opt:" list. Drag Rooms and/or Resources directly to the "Req:" area to reserve them.



When you drag a Group to the "Req:" list, all of the items it contains appear separately. Also, when you drag a Group to the Opt list, any Conference Rooms or Resources it contains are automatically omitted from the list.

3. Click Auto-Pick.

Now Up-to-Date checks the schedules of invited users and Resources and displays the Auto-Pick dialog box with available Meeting times.



The available Meeting times are shown with durations corresponding to the default duration specified in your New Meeting Preferences.

4. Select the time when you want the Meeting to take place and click OK.

You're returned to the Schedule Meeting dialog box.

5. Click OK.

The dialog box closes, and you see the Event Info window for your new Meeting.

6. Fill in any necessary information for the Meeting and press the Enter key to confirm the new Event.

The Meeting now appears in your Calendar File, and everyone in the "Req:" and "Opt:" lists receives notification of the new Meeting.

To schedule a Meeting using Group View:

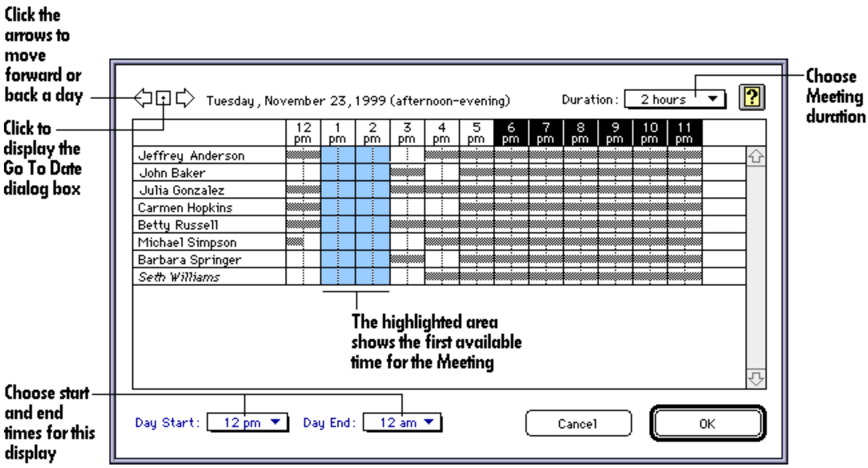
1. Choose New Meeting from the Event menu.

   The Schedule Meeting dialog box opens.

2. Select the users, Groups, Conference Rooms, and/or Resources to include in the Meeting.

3. Click Group View.

   Any users you've placed in the "Opt:" list appear in italics at the bottom of the list.



   The highlighted time is shown with a duration corresponding to the default duration specified in your New Meeting Preferences.

4. Click in a column to select the time you want the Meeting to take place and click OK.

   You're returned to the Schedule Meeting dialog box.

5. Click OK.

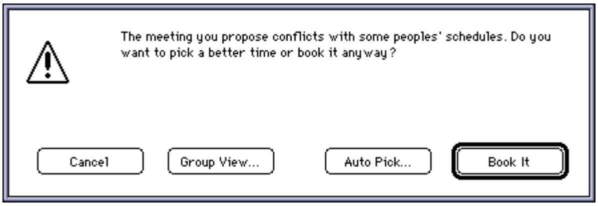
   The dialog box closes, and you see the Event Info window for your new Meeting.

6. Fill in any necessary information for the Meeting and press the Enter key to confirm the new Event.

   The Meeting now appears in your Calendar File, and everyone in the "Req:" and "Opt:" lists receives notification of the new Meeting.

Handling conflicts in Group Scheduling

Now Up-to-Date checks for conflicts in the schedules of users you've placed in the "Invite:" list only—not users whose attendance is optional. When conflicts occur, you'll see the dialog box below.



When you see this alert, you can choose to:

- Open the Group View dialog box so you can find a non-conflicting time yourself;
- Open the Auto-Pick dialog box to let Now Up-to-Date find a non-conflicting time automatically;
- Book the Meeting at the time you originally specified, even though some attendees may not be able to attend the Meeting because of schedule conflicts.

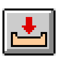
Viewing and responding to Meeting Notices

When another user on your network schedules a Meeting and lists you as an attendee, you'll be notified in Now Up-to-Date with two visual cues. The Meeting Notices button in the Toolbar changes to look like the button shown here. Also, the right side of the header area displays a text message telling you to "check Meeting notices."

You can also set different notification options. See "Meeting Preferences" later in this chapter for details.

You are notified of any new Meeting to which you're invited, regardless of whether you are subscribed to the Public Category in which the Meeting is stored.

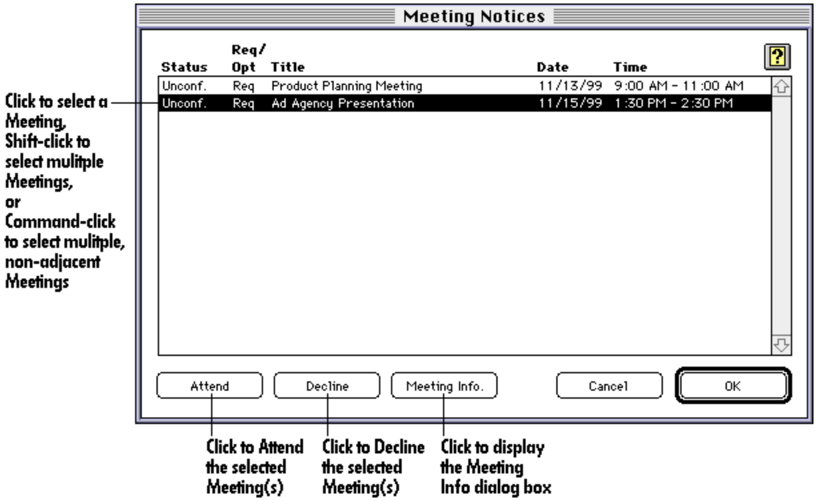
To respond to a Meeting Notice:



1. Click the Meeting Notices button in the Toolbar to open the Meeting Notices dialog box.

   You can also choose Open Meeting Notices from the Meeting menu.

The Meeting Notices dialog box opens.



2. Check the information displayed for each Meeting in this dialog box.

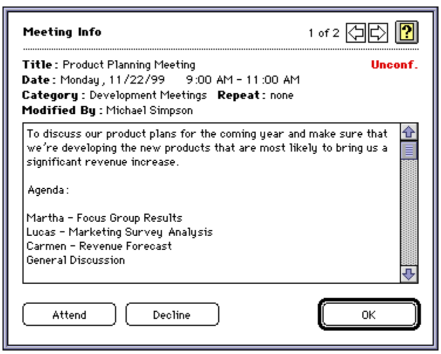
The Status column displays Unconfirmed, if you haven't indicated whether you'll attend or decline, or Rescheduled, if the Meeting's been moved to another date, time or location.

The Req/Opt column indicates whether your attendance at the Meeting is Required or Optional (for your information only).

Meetings that are repeating Events appear only once in the Meeting Notices dialog box. Accepting an invitation to a repeating Meeting marks you as Attending for all Meetings in the repeating series.

3. Act on any Meetings appearing in the dialog box as desired.

Click Meeting Info to see the information that you'd see if you opened the Event Info window for the Meeting.



4. Click OK.

You're returned to the calendar display.

Proxies

A Proxy is someone who is selected by one user to act on his/her behalf in scheduling Meetings and accepting/declining invitations to Meetings. A Proxy can:

- Create new Meetings on behalf of the proxied user and include attendees, Conference Rooms and Resources.
- View the proxied user's schedule commitments and Meeting notices.
- Accept and decline invitations to Meetings.

A Proxy *cannot:*

- Read, modify, create or delete the proxied user's Private Events (they do appear when the Proxy selects the "Include all Events that block my free time" option in the Define Sets dialog, but only as time blocks with the generic title **Private Meeting**).
- Change the user's Log-In password.
- Modify the user's Meeting Availability settings.

Selecting a Proxy for yourself

To select a Proxy, choose Proxies from the Meeting menu. In the Choose Proxies dialog box, select one or more names—a checkmark appears in front of any names you select—and then click OK.

Once you've selected a Proxy, your name appears at the bottom of the Meeting menu in the Proxy's Calendar File. Your Proxy chooses your name from the Meeting menu to schedule Meetings and accept or decline invitations to Meetings on your behalf.

Acting as a Proxy for another user

When you act as another user's Proxy, the user's name appears at the bottom of the Meeting menu below your name. Choose that name from the menu so that it's checked instead of yours. Your Calendar File automatically changes to display the proxied user's schedule.

In the calendar display, some Meeting titles appear in brackets, and no detailed information is available for them. To view or edit information for such a Meeting, open the Define Sets dialog box and add the Category, or you will not be able to see complete Meeting information. Attend or Decline Meetings in the calendar display by opening the Event Info window and choosing the desired option from the Meeting Confirmation menu.

To respond to new Meetings, choose Open Meeting Notices from the Meeting menu. You can accept or decline in this dialog box.

To schedule a new Meeting, choose Schedule Meeting from the Meeting menu. New Meetings you create while acting as a Proxy automatically include the proxied user as an attendee and show that user's name as the last person to modify the Event.

Choose Print from the File menu to print the proxied user's schedule.

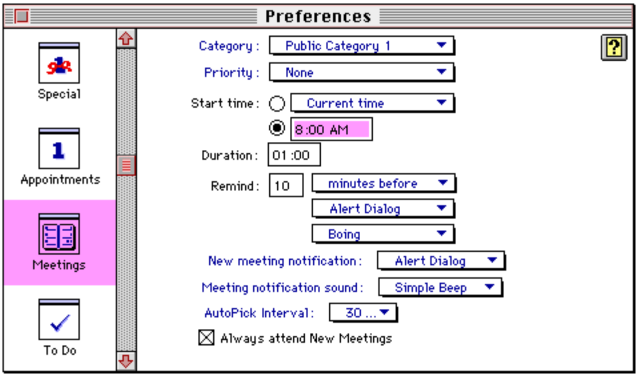
Acting as a Proxy for a Conference Room or Resource

It's useful for someone in your workgroup to function as a Proxy for the Conference Rooms and Resources that are available for Group Scheduling, so that you can view or print a calendar display that shows only the Meetings involving a specific Room or Resource. Conference Rooms and Resources always automatically attend Meetings that they're included in. As a Proxy for a Conference Room or Resource you can create new Meetings if you wish.

If you are set up as a Proxy for a Room or Resource, choose the item's name from the bottom of the Meeting menu. The name of the Room or Resource you're proxying for appears in the title bar of your Calendar File and your Calendar File displays the schedule for the Room or Resource, and nothing else.

Meeting Preferences

To set your preferences for Meetings, choose New Meetings from the Preferences submenu in the Define menu. In this pane you can set defaults for new Meetings and Meeting notification.



Use this option...	To specify...
Category	The default Public Category for Meetings you create.
Priority	The default Priority level for Meetings you create.
Start time and Duration	The default start time to schedule new Meetings, and the default duration.
Remind	How you want to receive a reminder through QuickDay.
New Meeting notification	The form of alert you want to receive when someone invites you to a Meeting.
Meeting notification sound	The sound that will accompany the alert you receive when someone invites you to a Meeting.
Auto-Pick interval	The interval of Meeting times suggested in Auto-Pick.
Always attend New Meetings	Whether or not you should be shown as attending Meetings you create.

If you want your private and public Meetings to appear as unavailable time to other users on the network and/or to your Proxy, be sure that you're entered as attending them, and that this last checkbox is selected.

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