Sort your life out

It's just a few days into the new year and we bet you've broken at least one resolution already. Sally Whittle hasn't, though. She's determined to keep her promises to take control of her finances, remain in regular contact with friends and stay on top of her fitness regime – all with the aid of her PC

In the middle of writing this article my PC exploded. With a loud bang and shower of sparks, £1,500 worth of cutting-edge hardware was reduced to a pile of smouldering plastic and circuitry. My only consolation was that I had performed a full backup earlier in the week. Most of us are full of good intentions at this time of year – whether it's joining the gym or getting our finances under control.

My new year's resolution is to take better care of my (new) PC – and let it take care of all my other resolutions. You can do the same. In the next few pages we're going to look at some of the tricks you can use to keep your PC working perfectly, together with software that will help you manage your time and money more efficiently.

Getting started

Unwanted demo applications, temporary folders and a bulging cookie folder can all slow down system performance and eat up memory. A great way to get rid of them is by using Norton SystemWorks 2003 Professional, which includes the familiar Utilities applications together with the backup app Ghost, Norton AntiVirus and several performance-boosting

ILLUSTRATION: AILEEN O'DONNELL

PaperPort: creating your own digital library
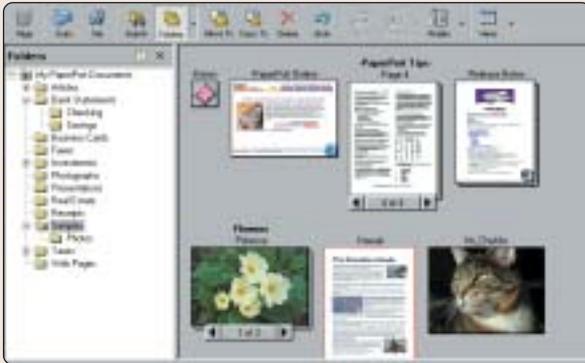
1 After installation the Samples screen should open automatically. Documents are shown as thumbnails or document icons. To add new documents to the archive, select Scan from the toolbar and identify the make of your scanner
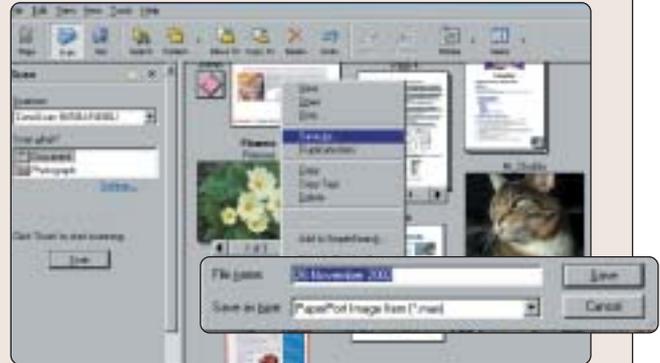
2 Opt to save the document as a Jpeg or MAX document. MAX is PaperPort's proprietary format and will let you add notes and highlights to documents later. To find files in the archive, right-click on the MAX file and choose Properties. Then you can search for documents by name

utilities such as CleanSweep 2002, GoBack 3.0 and PerformanceTest.

CleanSweep improves system performance by removing unwanted program files, cookies and internet cache data. Another bundled utility, Process Viewer, offers a more sophisticated version of the Ctrl, Alt, Del dialog box, letting you disable background processes that hog valuable resources.

Another great cleanup tool is Webroot's Windows Washer. It can be programmed to delete and overwrite a range of Windows files on an hourly, daily or weekly basis. Files that can be removed include the Document History and Find History folders, downloaded file directories and internet data such as cookies and cache files.

Windows Washer also prevents anyone from seeing what web content you've accessed. Adding 'bleach' to your daily hard drive, it can overwrite content so effectively that even a data recovery tool will be hard pressed to retrieve it.

Scaling the paper mountain

If your main problem is managing files and paperwork it may be worth investing in a database application. This will let you collate and index mountains of information into a single archive that you can search quickly and effectively.

FileMaker Pro 6.0 is a relatively low-cost database program that's simple enough not to frighten novices but can bring order to vast quantities of information.

Predesigned templates let you quickly build a range of databases from customer records to family medical histories.

Creating databases from scratch is also straightforward – simply name the fields in a blank template. For more sophisticated users, FileMaker Pro 6.0 has added support for XML which lets you import and export far more document types, including Excel 2002 spreadsheets.

Alternatively, use a document management system to organise your paper records electronically. PaperPort Deluxe 8.0, designed for home and small office users, makes use of optical character recognition technology to transfer paper documents to digital ones.

Scanned documents are translated into standard Office documents for storage in an archive on your hard disk. (See *PaperPort: creating your own digital library*, above.)

Take control of your inbox

Remembering good email discipline – do it, delegate it, delete it – is tough enough without having to cope with countless business offers from Nigerian diplomats or perky cheerleaders. But if your new year's resolution is to get your life in order you have to find a way to manage email.

One of the simplest ways to reduce your inbox messages is to utilise Microsoft Outlook's handy tools – the most commonly used email client. In Outlook 2000 and 2002 it's possible to filter mail

at the server using the Rules Wizard. This lets you identify message senders, subject headers and keywords that can be automatically deleted without ever troubling you. The wizard can filter messages in other ways, too – by automatically moving new messages from friends into a personal folder, for example.

The Organise button lets you sort messages by importance, conversation thread or colour so that messages from your boss could be automatically highlighted in red. (See *Outlook 2002: bringing order to your emails* on page 120.)

Even if you're conscientious about keeping emails under control your inbox may still get cluttered once in a while – for example, when you go on holiday. Nelson Email Organizer (www.caelo.com), which is on this month's cover disc, can whip an Outlook inbox into shape in a matter of minutes – and make sure it stays that way.

If you receive more than three spam messages each day, chances are you need something more powerful than Outlook's junk email filter. Among the best mail-filtering packages is McAfee's SpamKiller (www.mcafee.com), which spots spam before it reaches your inbox and sends an error reply message to spammers, giving the impression that your address doesn't work.

SpamKiller costs $39 (about £25) to download, compared to $30 (£19) for SpamCop (http://spamcop.net), which reduces spam by blocking certain IP addresses from mailing your PC.

Outlook 2002: bringing order to your emails
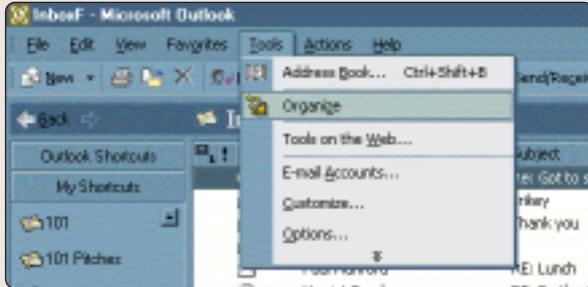
1 In Outlook 2000 and 2002, select Tools from the main toolbar then choose Organize. You will see a dialog box with four options: Using folders, Using colors, Using views and Junk mail – we're going to choose the colour option

2 Click on Colors to colour-code existing and incoming messages according to the sender. Click on any email in your inbox and select a colour from the drop-down menu. All future mails from that person will be coloured as requested

Act 6.0: keeping your eye on contacts
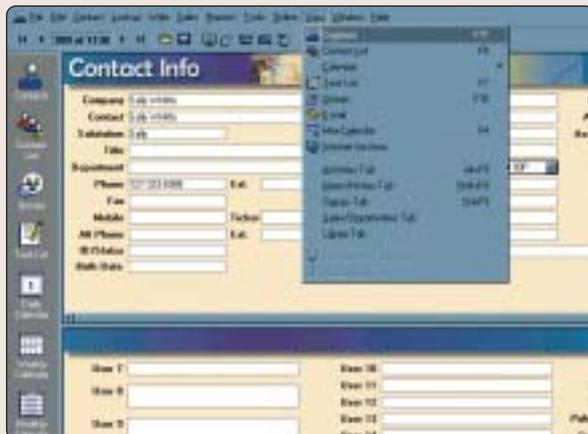
1 Get an overview of your contacts in Act by selecting View, Contacts. Select the contact you want to track by double-clicking its name using the left mouse button. The top half of the screen will now show that contact's details, while the bottom half will show any notes associated with them

2 To see any emails or notes sent to or by that contact, click on View, View activities. The bottom half of the screen will then display all the messages sent to or from that person. Simply double-click on one of the messages to open it

Getting personal

PIMs (personal information managers) can keep track of appointments and also store email addresses, phone numbers and reminder notes. Unlike a paper diary, they can remind you when you're running late or even double up as a calculator.

Microsoft has cornered the PIM market with Outlook and Outlook Express, but are you using these applications to their full potential? The software giant offers a utility for Outlook 2000 and 2002 that automatically backs up data at regular intervals. Download it for free at http://office.microsoft.com/downloads/2002/pfbackup.aspx. Outlook 2002 can also

publish free and busy times from your calendar to an intranet or web server.

For a quirky new year PIM consider FranklinCovey's PlanPlus add-on for Outlook. This is currently available for Outlook 2000 or 2002 and will only run on Windows 98, Me, XP or 2000. PlanPlus is based on a combination of an existing PIM application, Franklin Organizer and the writings of Stephen Covey, who wrote the businessman's bible *The Seven Habits of Highly Successful People.*

You don't just get a calendar and contacts database – you also get applications grouped under the heading WRM (what really matters). These include

gems like the Life Goal Wizard, which will help you find direction in your life. It's straightforward enough to skip the uplifting philosophy of PlanPlus and simply use the well-designed and intuitive PIM functionality, but how many other calendars offer you the chance to schedule time for setting life goals?

Keeping in close contact

If your job relies on you maintaining a close relationship with your contacts you might want to consider a dedicated contact management package which will organise and track communications with customers, colleagues and friends.

Quicken 2003: organising your financial affairs

1 After installing Quicken, select File, Create New to start your tracking system. This means each member of the family can have their own financial records. It's now a matter of answering a few questions on your circumstances and how you'll use the software. Simply select the correct answers and click Next or Finish

2 Click on Create next to the type of account you want to track. You will then have a mini credit and debit sheet, which will let you enter one-off payments or regular outgoings. Any time you want an overview of your personal wealth, click on the Summary button

One of the simplest contact managers is Act, which takes a lot of the hard work out of tracking customer communications. If, for example, you use Word to type up a letter to a customer, Act will record the letter alongside the relevant contact entry. You can also integrate your email with Act.

In terms of features, though, Act is far superior to Outlook – for example, the Contact activity lookup feature lets you search across your contacts so you can quickly find all the people who have sent new orders in the last month or all customers with outstanding bills.

Show me the money

Your computer can help make fiscal responsibility less of a burden. Personal finance packages can pay your bills on time, monitor your bank accounts, track your investments and help with long-term financial planning.

Both of the two leading personal finance packages, Microsoft Money and Intuit Quicken, are releasing 2003 versions in the UK in Spring. Intuit Quicken 2003 is simpler to use and can also calculate your net worth by the hour.

Setting up your Quicken financial tracker is relatively straightforward – you create separate details for your current account, savings, mortgage and loans and then enter details of regular bills and income. These can be used to prepare long-term budget planners, schedule regular bill

payments or issue reminders to customers for overdue invoices. All this data can be gathered into one view or used to create customised reports. (See *Quicken 2003: organising your financial affairs,* above.)

Traditionally Quicken has been a market leader in personal finance, but with Money Deluxe 2003 Microsoft might just close the gap. The pesky requirement to sign up for a Passport has gone and the web-style interface is intuitive if a touch cluttered.

Where Microsoft Money really comes into its own, however, is its investment tools. Along with your regular accounts, you can set up an investment tracking account that is linked directly to MSN's online investment portal (Quicken provides a link to Motley Fool's financial website). Money 2003 also has top-notch online resources at MSN Money and can be integrated with your online accounts.

Both Money and Quicken should make enough of a difference to your finances to pay for themselves within a year, but they don't suit everyone. Businesses are better off with a more sophisticated tool along the lines of Sage Instant Accounts which offers sales and purchase ledgers, credit control and VAT returns as well as more familiar banking and payment features.

If Quicken or Money assumes a level of financial savvy you don't have, try Intuit's TaxCalc 2002. This is a stripped-down application that guides you through a series of questions and forms before using

your answers to fill in your tax return – it does all the tricky calculations for you, making it ideal for beginners. And if you don't mind the odd performance glitch you can always fill in your own tax return online at www.inlandrevenue.gov.uk. ■

Contact information

- FileMaker Pro 6.0 **01628 534 158; www.filemaker.co.uk; £219.**
- FranklinCovey PlanPlus PIM **0870 600 0226; www.franklincoveyeurope. com; £69.95.**
- Intuit Quicken 2002 **0845 606 2161; www.quicken.co.uk; £25.99.**
- Intuit TaxCalc 2002 **0845 606 2158; www.taxcalc.com; £29.99.**
- Microsoft Money 2003 **0870 601 0100; www.microsoft.com; £29.99.**
- Microsoft Office XP **0870 601 0100; www.microsoft.com; £429.**
- Norton SystemWorks 2003 Pro **020 7616 5600; www.symantec.co.uk; £79.99.**
- Sage Act 6.0 **0845 300 0900; www.sage.co.uk; £149.**
- Sage Instant Accounts 8.0 **0845 300 0900; www.sage.co.uk; £99.99.**
- PaperPort Deluxe 8.0 **0118 963 7464; www.scansoft.co.uk; £60.**
- Webroot Windows Washer **www.webroot.com; £19.**