TABLE OF CONTENTS

INTRODUCTION

PlanStar is a resource scheduling/planning system. It will put you in complete control of the people, places, and things for which you are responsible.

Lets clear up some fuzzy terminology quickly. There are two things that PlanStar is not:

- It is not a Personal Information Manager (PIM), because the emphasis on resource management is much broader than just managing your own day-to-day tasks. You can certainly use it for personal scheduling, however - it will neatly categorize your activities. Just don't look for a todolist!

- It is also not a 'structured' (or 'active') scheduler, software designed to fit employee hours into a workweek for you, like at a fast food restaurant. Rather, it is designed to be used in an 'unstructured' environment, such as management of a staff of professional employees being given ad hoc assignments on a variety of projects. You're in charge. PlanStar just makes sure you stay straight.

Its design is extremely flexible - it can be tailored to suit any scheduling or logging requirement. By using the unique CrossKey feature, you establish categories of events which can later be used to selectively produce lists calendars.

Because PlanStar allows you to select the criteria (types or events, categories, etc.), you can integrate all of your scheduling needs into one database. For example, you can record personal items such as your favorite football teams schedule with business items - you can control which you want to view at any given time!

There is no beginning nor end to the database that you will build with PlanStar. Onetime events do not disappear once completed - they remain in the system forever, unless you delete them. Recurring events "wrap" forever, unless you delete them, or constrain them to a time period.

If tracking time and/or money is important to you, PlanStar will handle it. You can easily set up the system to record, list, and total hours and dollars.

Resource utilization can be displayed graphically, in the form of bar and line charts, for any combination of CrossKeys and for any period of time!

PlanStar has extensive printing capabilities. You can tailor and print monthly, weekly, and daily schedules, or ad hoc event listings, for any or all of your resource categories.

Version 2 is released in coincidence with the release of our new contact manager, CallStar. If you have CallStar, you can link individuals or lists of people to PlanStar events! Take a look at the **demo** on the HELP MENU. Give us a call for more information! See also **Linking to CallStar**.

* * * * *

That's PlanStar, briefly...a system that you'll wonder how you lived without!

P.S. As a member of the **Association of Shareware Professionals**, we are committed to the principle of providing quality software and giving you, the user, plenty of opportunity to make a good evaluation.   All we ask is that you consider the amount of work that we put into PlanStar, and remember your responsibility as a shareware user: if it does the job for you, do the right thing! See **SHAREWARE VERSION**

INSTALLATION

If youre able to view this HELP file, you have already installed PlanStar.   It has a standard Windows SETUP program that makes sure all the files get to their proper places.

You must be advised that this is not a **network version!**   It will work on a network in single-user write/many-user read mode*, but will not support multi-user write!   A network version is in the works.   Please **contact us** for more information.

The most important consideration is this: if you intend to **link PlanStar with CallStar**, they MUST be located in the same subdirectory.   When you ran the SETUP program, the default subdirectory was C:\PLANSTAR, with a message to this effect.   If you changed this for any reason, and someday wish to install CallStar, you need to be aware of this fact about colocation.

*To load on a network as described above, you must install individual copies to each workstation.   In the ICON PROPERTIES, set the WORKING DIRECTORY to the file server address, where the data files will be stored.

SHAREWARE VERSION

This is a FULLY-FUNCTIONAL evaluation copy.   You are entitled to an evaluation period of **90 days or entry of 100 ONETIME events**, whichever is greater.   This means that, even if you wait six months before you begin trying it, it will continue to function until 100 events have been entered.

But...!

PlanStar is unique in that some of its value doesnt present itself - such as the ability to present historical summary reports and resource utilization charts - until after a longer period of time than most software products.   For that reason, we have a procedure for getting you an extension!   If, after your trial period is up, you would like more time to evaluate, just contact us (see **TECHNICAL SUPPORT**) and we will give you a number that will give you another 90 days and 100 events!   And we will do this as many times as you like!

HOW PLANSTAR CAN BE USED

You will find that PlanStar can be tailored to suit almost any task for which you are required to associate events with time.   This could be anything from a teenager's date book to a complex management system, recording various activities by individuals on many different tasks at many different locations, for instance.

If you do manage people, wouldn't it be great to have a system that could produce a schedule of upcoming assignments for a single employee, or a group of employees, or all employees, that you could post or hand out; that would ensure that there were no overlaps, or sending someone to Walla Walla who is supposed to be in Tallahassee; that would, at the end of his annual evaluation period, display a recap of an employee's every activity for the year, in a few seconds?   And at the same time, keep a tab of hours and/or dollars being expended by any or all employees, for any or all activities, and for any or all projects?

Well, here it is...

SEE ALSO:
Using PlanStar As a Scheduler
Using PlanStar As a Logging Tool
Using PlanStar As a Money Manager

USING PLANSTAR AS A SCHEDULER

Any number of resources can be scheduled with PlanStar. Simply establish a good list of CrossKeys, and 'tag' them to events as the events are planned.

Here are a few examples:

(1) You are the manager of a staff of four employees: Bob, Carol, Ted, and Alice. They provide documentation support as required to a number of projects for your company.   They attend planning meetings and conferences, and must travel to various company locations.

Your **CrossKey** list could look something like this:

> **Bob**
> **Carol**
> **Ted**
> **Alice**
> **Davidson & Co.**
> **Magna-Graphics**
> **Anderson Project**
> **Travel Status**
> **Meetings**
> **Conferences**

When you assign Ted to attend a meeting on the Anderson Project in Atlanta on June 15-17, PlanStar will first verify that Ted is available for that assignment during that period.   If there is a **conflict**, it will tell you what the conflicting event is and give you the option of assigning someone else, changing the time, or overriding the conflict, whatever it takes to best get the job done.   The point is that you, the manager, make the decision... that's your job!

Now, after other events have been entered, you can use **SELECTION CRITERIA** to:

> - **print** a hard copy calendar of Ted's assignments.

> - produce a listing of all "Travel Status" events, when your budget manager asks you to project known travel requirements.

> - produce a schedule of events for the Anderson Project.

(2) In your spare time, you assist the local Little League baseball program.   You could use PlanStar to produce an overall schedule and individual schedules with only the games for each team, assign the games to different playing fields, and capture the results, if you want.

(3) You run an agency offering short-term rentals of resort houses and condos.   Set

up your CrossKey list to include each property.   You may use the amount fields to project income.   When prospective renters inquire with a desired time period and/or property, you can quickly "click up" the availability.   As the properties are rented, record the renters name and other pertinent information as a PlanStar event - it won't let you rent the same property twice for the same period!   If a renter says that he wants to rent the same condo as last year, but doesn't remember which one it was, use the string search function on the SELECTION CRITERIA screen to locate the event by entering the person's name.

I could go on here with ideas for how PlanStar can organize your life, but as you will see, the possibilities are enless!   You can schedule any person, place, thing, or activity with PlanStar!

USING PLANSTAR AS A LOGGING TOOL

Since PlanStar retains all data, it can serve as a logging system, instead of, or in conjunction with its scheduling capabilities.   In other words, events can be entered as they occur.   If it's important to you to record significant happenings in the course of your business, just jot it down as a PlanStar event.   Then, at any future time, you can quickly pinpoint the event and its exact date and time...or summarize, using combinations of CrossKeys to extract the information.

You can combine scheduling and logging capabilities.   Plan a meeting, then, when it occurs, edit the event description with the minutes of the meeting, action items, etc.

USING PLANSTAR AS A MONEY MANAGER

PlanStar can be used in simple money management in conjunction with its scheduling and logging capability.

Your job calls for you to plan tasks for which there is a cost estimate when scheduled, and an actual cost when the task is completed.   Use PlanStar **PREFERENCES** to change the first of its three amount field names to **ESTIMATED COST** and the second to **ACTUAL COST**.   Use the **SELECTION CRITERIA** screen to add the two fields to your **EventLog** display.

When entering scheduled tasks, record the estimated cost.   When the task is complete, edit the event to add the actual cost to the event record.   Zero the estimated field if you want.

You may now use SELECTION CRITERIA to capture and total this information for any period of time.

SOME FRIENDLY PLANSTAR FEATURES

PlanStar is designed to be "user-friendly" as well as flexible.   Any action can be selected from a row of **ACTION BUTTONS** which appear, as appropriate, across the top of the EventLog and calendar screens.   The buttons are consistent; they mean exactly the same on all screens, wherever they appear.

While PlanStar has a **tutorial** and a complete 'help' facility to assist the new user, it also has a **QUICK HELP PANEL** in the lower right corner of most screens, which provides mouse-sensitive help.
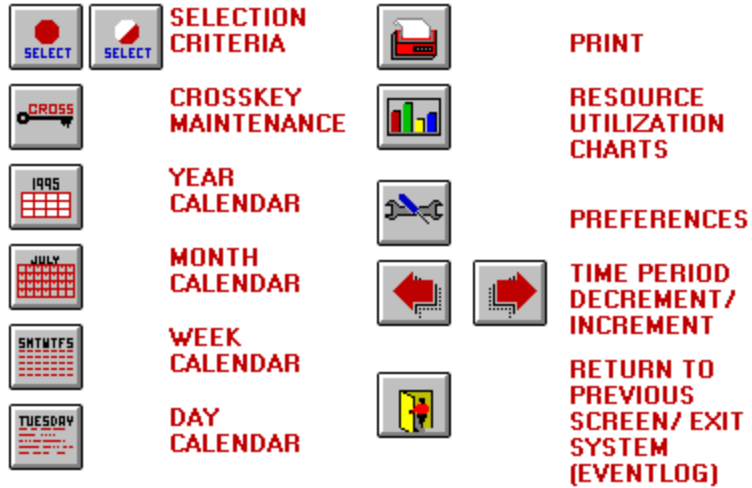
You may select any action to be taken from the **EVENTLOG MENUS**, or by using the ACTION BUTTONS as described above.   There are also **HOT KEYS** available for quickly jumping to the more often-used functions and screens of the system.

Entry of date and time fields is made easier and quicker by the use of **SPIN BUTTONS**.   These are small arrows placed just to the right of the field that let you change the contents of the field by clicking with the mouse.

ACTION BUTTONS

Here are the PlanStar action buttons and their functions:

Button	Function
SELECT / SELECT	SELECTION CRITERIA
CROSS	CROSSKEY MAINTENANCE
1995	YEAR CALENDAR
JULY	MONTH CALENDAR
SMTWTFS	WEEK CALENDAR
TUESDAY	DAY CALENDAR
(printer)	PRINT
(bar chart)	RESOURCE UTILIZATION CHARTS
(wrench)	PREFERENCES
(left arrow / right arrow)	TIME PERIOD DECREMENT/ INCREMENT
(door)	RETURN TO PREVIOUS SCREEN/ EXIT SYSTEM (EVENTLOG)

Use them to quickly jump to the PlanStar function desired.

QUICK HELP PANEL

On the bottom of most PlanStar screens is a panel that provides quick, mouse-sensitive help to the user.   As you move the mouse cursor over an item on the screen (without clicking), or use the TAB key to move about the screen, the panel displays a short description of the item's function.

Set EventLog selection criteria.
FULL CIRCLE = All events are currently selected.

Of course, if you need more help, PlanStar features full context-sensitive help.   Tab to an item on the screen and press F1

HOT KEYS

All hot keys are used in conjunction with the control (CTRL) key.   Following is a list
of the hot keys, and the functions or screens they will call:

```
                                    CONTROL
FUNCTION or SCREEN                  KEY AND
------------------                  --------
Selection Criteria                     S
CrossKey Maintenance                   C
Preferences                            P
Add Event (Blank EVENT WORKSHEET)      A
Event QUICKVIEW Window                 Q
EVENT WORKSHEET (for selected event)   E
Year Calendar                          Y
Month Calendar                         M
Week Calendar                          W
Today's Schedule                       D
Resource Utilization Charts            R
Exit PlanStar                          X
```

SPIN BUTTONS

Spin buttons are provided with various date and time fields in PlanStar.   Here is an example of spin buttons for a date field:

In the example, by clicking the green UP arrows with the mouse, you increment the associated month (**M**), day (**D**), or year (**Y**); the DOWN arrows decrement.

EVENTLOG MENUS

The EventLog screen has a dropdown menu bar across the top, with the following main menu selections:

File Menu
Event Menu
View Menu
Print MenuOptions Menu
Help Menu

YOUR PLANSTAR DATABASE

PlanStar is forever.   It has no beginning nor end.   Every event that you enter remains forever, unless you manually delete it.   The disk space requirements are very small compared to capacities being offered on computer systems today.

CrossKeys are NEVER deleted, because they may relate to past events - which, as stated above, should also never be deleted.

NOTE: There is no "load-time overhead" for one-time events, because a sequential read of the database is not required - you set the time period for the **EventLog** and that's all it has to read. The number of recurring events, however, does affect the load time, because PlanStar has to see if each event recurs in the time period you have selected.

SEE ALSO:
Maintaining your CrossKey List
Working with PlanStar Events
Importing EventLog Data
Exporting EventLog Data
Backup and Restore
PlanStar Data Files

MAINTAINING YOUR CROSSKEY LIST

Click on the CrossKey **action button** to access the CROSSKEY MAINTENANCE screen.   There are several options available to you in maintaining your list.   You may:

- **Add a new CrossKey**
- **Modify an existing CrossKey**
- **Toggle the status of a CrossKey (active/inactive)**
- **Move a CrossKey to another place in the list order**

WHAT ARE CROSSKEYS, ANYWAY?

CrossKeys are the heart-and-soul of PlanStar - they give you the ability to categorize the events you enter, so that later you can easily select them for display and print. This is the feature that makes PlanStar a resource manager, as opposed to a personal scheduler.

The term CrossKey stands for **CROSS**-reference **KEY**word.   It's given a generic description because you, the user, create them to suit the scheduling task at hand. And they can be used for just about any purpose.

CrossKeys are used to define the who, what, and where of your task.   The job is made easier to understand because all are placed into a single list.   When you enter a new event, you may 'tag' the event with as many CrossKeys as are necessary from the list - people, places, things alike!

The simplest use would be for the management of a staff of employees.   Simply enter each employee's name as a CrossKey, then activities of your business that relate - such as projects on which the employees are working.   This will allow you to come back at some time in the future and quickly identify or summarize who worked on what, and when!

The bottom line is this: how you set up your CrossKey list will determine the value you will get from PlanStar.   So just give some thought to how you do business, build a good list, and go to work!

ADDING CROSSKEYS

When the **ADD** button is selected on the CROSSKEY MAINTENANCE screen, an input box appears, letting you enter the new CrossKey.   It will be added to the bottom of the list.

PlanStar will not accept a CrossKey that already exists in your list.

MODIFYING CROSSKEYS

While CrossKeys cannot be deleted, you are free to change them as you see fit. Simply highlight the CrossKey in the list and select the **MODIFY** button.   The CrossKey will appear in an input box for you to edit.

If the new CrossKey already exists in your list, PlanStar will not accept it.

ACTIVATING AND DEACTIVATING CROSSKEYS

The **ACTIVE/INACTIVE** button toggles the status of the highlighted CrossKey.

While CrossKeys cannot be deleted, they may be deactivated as you see fit.   The word "INACTIVE" is attached to the CrossKey, and will not appear in other CrossKey lists throughout the system.   They will, however, continue to be appear attached to events in the EventLog and calendars, followed by the letter "**I**" in parentheses **(I)** to signify that the CrossKey is inactive.

There is a reason for not deleting CrossKeys.   Because PlanStar retains all data entered, the relationship between an event previously entered and its associated category cannot be eliminated.   For instance, your database contains many events which you have associated with an employee CrossKey, **ROBERT**.   Even if Robert leaves your employ, those events still exist in your database.

So, instead of deleting, simply deactivate the CrossKey **ROBERT** in your CrossKey list so that it doesn't appear.   At some future time, if you ever need to summarize old events for Robert, you can activate it long enough to do that, then re-deactivate it!

MOVING CROSSKEYS IN YOUR LIST

You may reorganize your CrossKey list at any time.   You may wish to move little-used CrossKeys to the bottom, for instance.   To do this, simply highlight the CrossKey you wish to move, then select the button **MOVE**.   You will be instructed to select the point in the list where you wish the CrossKey to be placed.

WORKING WITH PLANSTAR EVENTS

SEE TOPICS:

Event types
The Event Worksheet
Using the Actual Hours Field
Using the Money Fields
Conflict-checking

EVENT TYPES

PlanStar accepts two general categories of events: **onetime** events and **recurring** events.   Onetime events are just as they sound - they occur only once.   Recurring events are events which repeat on a regular basis, like a birthday or anniversary. They are entered into the system once, and PlanStar takes care of the rest - they repeat forever, or as long as you want them to.

CHARACTERISTICS OF ONE-TIME EVENTS

- They may be for an exact point in time.   For instance, you may have a requirement that something be finished by noon on Friday.

- They may contain a clock time, or they may not.   A two-hour meeting would certainly require a beginning and ending time, but an event specifying that Tuesday is a holiday would not.

NOTE: if you are accumulating time associated with CrossKeys (see **USING THE ACTUAL HOURS FIELD**), you must specify the beginning and ending time of day.

- They may be for a single day, or for a range of days.   If you are scheduled to be on a business trip for a week, you would enter the first and last days of the trip.

NOTE: if you specify a beginning and ending time, it applies to EACH DAY.

NOTE: if the event extends over a Saturday and/or Sunday, you will have the option of having those days appear in your EventLog and calendars, by selecting or de-selecting the INCLUDE WEEKENDS check box.

- They may be associated with one or more CrossKeys, or none at all.

CHARACTERISTICS OF RECURRING EVENTS

- They are entered into the CrossKey database only once.   When PlanStar loads the EventLog or a calendar, it tests each recurring event to see if it falls within the selected timeframe.

- They may be for a floating or fixed period of time.   A floating event will display at every possible recurrence during the **SELECTION CRITERIA** timeframe; a fixed event is limited to recur only during a period set specifically for the event.   For instance, if you have an event scheduled to recur every Tuesday from March 1 through May 31, if your EventLog SELECTION CRITERIA was set for the range February 1 to March 31, the event would appear only during March.

- Recurring events cannot be selectively changed.   If you enter an event to recur every Tuesday morning at 9 a.m., there is no procedure for changing the day-of-the-week or the time on a onetime-only basis.   (A future version of PlanStar may

indeed have this capability - it's being looked at!)

THE RECURRING EVENT TYPES

Following are the nine recurring event types:

DAILY: Recurs every day (you may select or omit certain weekdays) at a specified time.

WEEKLY: Recurs on the same day every week.

BIWEEKLY: Recurs on the same day of the week, every other week.

NOTE: biweekly events must be fixed, because that is the only way PlanStar can determine when it should begin recurring.

MONTHLY: Recurs on the same day every month.

NOTE: if a month does not have the specified day, it is ignored, i.e. an event that recurs on the 31st would appear only for January, March, May, July, August, October, and December.

MONTHLY VARYING: Recurs on a specific occurrence of the same weekday every month, i.e. the third Thursday of the month.

QUARTERLY: Recurs on the same day every three months.

SEMI-ANNUAL: Recurs on the same day every six months.

ANNUAL: Recurs on the same day every year.

ANNUAL VARYING: Recurs on a specific occurrence of the same weekday in the same month, every year, i.e. the fourth Sunday in August.

THE EVENT WORKSHEET

The EVENT WORKSHEET screen is where you can **add events**, **change event data**, or **remove events from your database**.   You may call this screen from the EventLog or any of the calendars, except the Year Calendar.

When the button named ADD EVENT is selected, a blank worksheet is presented, so that a new event may be entered.   When an existing event is selected from the EventLog or a calendar, the worksheet appears with the data for that event.

After adding a new record, you have the option of returning directly to the EventLog or calendar screen from which the worksheet was called, or displaying the QUICKVIEW screen.   This latter option is introduced so that you can immediately create a CallStar link after adding a new PlanStar event.

ADDING EVENTS

Selecting the **ADD EVENT** button on the **EventLog**, **Month Calendar**, **Week Calendar**, or **Day Calendar** screens will produce a blank **EVENT WORKSHEET**.   This is where you will record all pertinent data about a new event. You must, at a minimum, enter an event type, a date, and a description of the event.   You may optionally enter a beginning and ending time, associated **CrossKeys**, and up to three **amount fields**.

A frame with the caption **WHEN** appears at the center top of the EVENT WORKSHEET screen, wherein you must establish the date(s) that the event will occur (or recur).

SETTING THE DATE FOR A ONETIME EVENT

You may edit the date fields using standard date notation, or quickly set by using the green **spin buttons** to the right of the dates, a set of up and down arrows for adjusting the month, day, or year.   When using the spin buttons, the TO date "tracks" the FROM date - any change you make to the FROM date will automatically change the TO date.

You may also set the dates by selecting the **CALENDAR** button in the lower right corner of
the WHEN frame.

USE OF THE SPIN BUTTONS OR POP- UP CALENDAR IS RECOMMENDED SINCE IT ENSURES VALID DATES ARE ALWAYS ENTERED!

Selecting the **TODAY** button (above the FROM date) will change the FROM date to the current date.

The box to the right of the label "Days:" will show the number of consecutive days you are entering for the event.   This is for information purposes only.

When you enter a date range that extends over one or more of the weekend days (Saturday or Sunday), a check box will appear asking you if you want to include weekends.   If you indicate **YES**, the event will appear in the EventLog and Calendars on those weekend days; if **NO**, the event will not be displayed.   For example, if you schedule an employee for a two-week training course in which he is actually only in class from Monday thru Friday, selecting **NO** will ensure that the event is only displayed for weekdays.

SETTING THE DATE FOR A DAILY EVENT

   - Select the days of the week that you want the event to recur.

SETTING THE DATE FOR A WEEKLY EVENT

- Select the one weekday on which you want the event to recur.

SETTING THE DATE FOR A BIWEEKLY EVENT

- Enter a fixed date range for a biweekly event.   PlanStar uses the beginning date to establish the pattern of repetition for the event.

SETTING THE DATE FOR A MONTHLY EVENT

- Enter the day of the month on which you want the event to recur.   You may use the spin buttons to quickly set the day.

SETTING THE DATE FOR A MONTHLY VARYING EVENT

- Select the monthly variance number (the number of times the weekday occurs in the month) from the dropdown box on the left.   This may be the First through Fifth, or Last occurrence in the month.

- Select the weekday from the dropdown box on the right.

SETTING THE DATE FOR A BIMONTHLY, QUARTERLY, SEMI-ANNUAL, OR ANNUAL EVENT

- Select the month(s) of the year that you want the event to recur from the choices in the dropdown box.   Then enter the day of the month, using the spin buttons if desired.

SETTING THE DATE FOR AN ANNUAL VARYING EVENT

- Select the monthly variance number (the number of times the weekday occurs in the month) from the dropdown box at the top left.   This may be the First through Fifth, or Last occurrence in the month.

- Select the weekday from the dropdown box at the top right.

- Select the month of the year that you want the event to recur from the choices in the third dropdown box.

NOTE: For all of the recurring events above, see **EVENT TYPES** for an explanation of FLOATING and FIXED events.

SETTING THE TIME

An event time is not required for an event - the **TIME** box in the upper right corner of the Event Worksheet gives you the option of recording time or not.

NOTE: If you do not enter a time, the actual hours are not recorded.

You may change the default time setting for a new event in **PREFERENCES**, to one of the following:

- No time.

- Time set to the current time of day.

- Time set to 8:00 AM.

The **ACTUAL HOURS** field is automatically set to be the difference between the beginning and ending time.   You may manually adjust this value if necessary.

TAGGING CROSSKEYS TO THE EVENT

Your current **CrossKey list** appears on the right side of the worksheet.   Select all the CrossKeys that apply to the event. The **TOGGLE ALL** button will mark or unmark all CrossKeys, depending upon the status of the first CrossKey.

ENTERING THE MONEY FIELDS

If you are using PlanStar to **track dollar values**, enter all that apply to the event in the three boxes below the CrossKey list on the right of the worksheet.

POPUP CALENDAR

The popup calendar on the **EVENT WORKSHEET** screen is there to provide you with a quick look at the month and ensure that dates are entered properly.

It is available for **onetime events** only.   To activate, select the button labeled **CALENDAR** in the lower right corner of the **WHEN** frame.   This little calendar will appear:
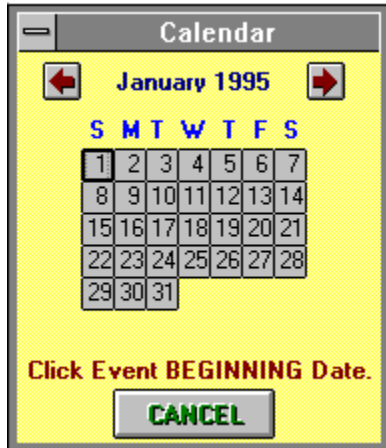
You will be instructed to click the beginning date, then a second click for the ending date.   NOTE: You must click twice, even if the event begins and ends on the same day.

You may move forward or backward one month by clicking the **LEFT** or **RIGHT** arrows at the top of the calendar window.

MODIFYING EVENTS

To change an existing event, simply double-click on the event in the **EventLog**, **Month Calendar**, or **Week Calendar**, or single-click on the event in the **Day Calendar**.   This will cause the **EVENT WORKSHEET** to appear for this event.

You may then modify any data about the event, except the EVENT TYPE.

See **ADDING EVENTS** for detailed information about the EVENT WORKSHEET.

DELETING EVENTS

It is recommended that events never be deleted except in the case of scheduled events that were cancelled.   PlanStar is designed to give you complete access to your past, as well as your future.

To delete an event, simply double-click on the event in the **EventLog**, **Month Calendar**, or **Week Calendar**, or single-click on the event in the **Day Calendar**.   This will cause the **EVENT WORKSHEET** to appear for this event.

A **DELETE** button will appear at the lower right of the screen.   Selecting this button will remove the event from your database.

USING THE ACTUAL HOURS FIELD

If (and only if) a beginning and ending time is entered when recording an event, an actual hours field is associated with that event for each day an event occurs.   (In other words, if a onetime event is scheduled to occur from Monday through Wednesday in a given week, from 9 a.m. to 11 a.m., then the actual hours field of 2 hours represents 2 hours on EACH of the three days.)

For recurring events, the actual hours represents the elapsed time for ONE OCCURRENCE of the event.

The actual hours field is automatically set to be the time span between the beginning and ending times, but it can be adjusted if necessary.   For instance, if an event is entered which will begin at 8 a.m. and end at 5 p.m., you may wish to change the actual hours field from 9 hours to 8 if you don't want to include an hour for lunch.

The **EventLog** detail line can be **tailored** to include the actual hours field.   When included, a total of the actual hours for the selected EventLog will appear beneath the column.

USING THE MONEY FIELDS

PlanStar has three amount fields associated with every event, which may be used for any purpose.   The **PREFERENCES** screen will let you rename the fields to your choosing.

When recording an event, enter the dollar amounts as necessary in the appropriate field on the **EVENT WORKSHEET**.

The **EventLog** detail line can be **tailored** to include any or all of the money fields. When included, the columns will be totaled beneath the EventLog.

The amounts will also be used to produce **Resource Utilization charts**, i.e. dollars per month per CrossKey.

CONFLICT-CHECKING

When a new event is entered, PlanStar quickly scans your database to see if there are any events in the SAME DATE/TIME RANGE, that are associated with one or more of the SAME CROSSKEYS.   If it finds any, a warning screen will appear, and you will have the option of saving the event anyway, or returning to the **EVENT WORKSHEET** screen to make changes.

Conflict-checking will also occur when a change is made to an event affecting its dates, times, or CrossKeys.

IMPORTING EVENTLOG DATA

Due to popular demand, it is now possible to import bulk data to your PlanStar database.   The concern here, and the reason it was not implemented in an earlier version, is that your import file must be perfect or you risk doing considerable damage to your data files!   We have taken every effort in the code to avoid this, but you cant code for every possible situation.

In that regard, the watchword is BACKUP.   Before you attempt to import data, do a DOS copy of all of your .PS1 files to a backup location.   Then, if something goes awry, you can always copy them back and retry!

Your import data file must be in the following format:

*{beginning date},{ending date},{beginning time},{ending time},{event description},{amount one},{amount two},{amount three}

And conform to the following rules:

Each set of data describing an event must have as its first item the beginning date PRECEDED BY AN ASTERISK (*) WITH NO SPACE IN BETWEEN.

The date and time fields are in your Windows default date format, such as DD/MM/YY and HH:MM AM.

If the beginning date and ending date are the same, you may leave the ending date blank, with its place marked by a comma.   The same is true for the beginning and ending times.

Because this is a Comma-separated variable (CSV) file, THERE MUST BE NO COMMAS IN THE EVENT DESCRIPTION!!!!   There can be seven, and seven only, commas in each event set.

EXPORTING EVENTLOG DATA

PlanStar will let you create a comma-separated variable (CSV), ASCII file representation of a selected **EventLog**.

Simply use **SELECTION CRITERIA** to produce the EventLog you wish to export, then select EXPORT from the dropdown **FILE MENU**.

You will then be asked to select the fields you wish to include in the file.   SELECT THE FIELDS IN THE ORDER YOU WANT THEM TO APPEAR IN THE FILE.   As you select the fields, the order will appear in the box at the bottom of the window.   If you wish to remove an item, simply re-click it.

When you select the button labeled **CONTINUE**, a file named EXPORT.DAT will be created in your PlanStar subdirectory, which may then be used as input to any other software program that will import a CSV file.

If you select the item "CrossKeys (indices)" to be included in your CSV file, this will produce an indexed list of your CrossKeys, using a 3-character mask separated by an "AT" (@) sign.   In other words, selecting three CrossKeys whose sequence numbers are 3,7 and 12 will produce the string:

>   @   3   @   7@ 12

Another file with the name CROSSKEY.NDX will be simultaneously generated with a cross-reference of the CrossKey sequence numbers and names.

NOTE: All commas in your data will be replaced by semicolons in the CSV file!

BACKUP AND RESTORE

This feature is intended for more than one purpose.   You may wish to safeguard your data offline (although simply doing a DOS copy of your **data files**would do the same).

The primary purpose is to restore damaged database linking.   PlanStar is very heavily indexed to speed up the search process as much as possible.   If power to the computer should be interrupted when it is in the process of saving data, a damaged link can occur.   Some strange computing will result.

If you get a error such as "invalid path" or "file not found", I recommend you create a BACKUP file, followed by a system RESTORE.

When you select **BACKUP** or **RESTORE**, a window will appear asking you to select the path to your backup file.

NOTE: The backup file produced is in ASCII format, therefore you can easily view it. I advise extreme caution, however, in making any modifications to the file, since the RESTORE function is expecting a specific format.   Do a DOS backup (see above) first.

PLANSTAR DATA FILES

When examining your PlanStar DOS subdirectory, you will notice that a number of files have been generated with a .PS1 extension.   These are your data files, and their names are:

MASTER.PS1
LOG.PS1
LOGINDEX.PS1
RECUR.PS1
SETUP.PS1
DESC.PS1
WHAT.PS1
WHATPTR.PS1

These files are all required for your database, and **should not be individually moved or deleted**.   If they are deleted, your PlanStar system will restart from scratch!

They can be copied AS A GROUP (*.PS1) to another computer if desired.

DIFFERENT WAYS TO VIEW YOUR DATA

PlanStar lets you choose the way you want to view your data.   For a quick look at the information about a single event, there is a pop-up **QUICKVIEW** window.   If you want to look at an event with the idea that you may want to modify it in some way, you may select the **EVENT WORKSHEET** screen.

After you have entered many events, you may choose to view them in chronological order in the **EventLog**, **Month Calendar**, **Week Calendar**, or in the **Day Calendar**.

While the **Year Calendar** does not display events, it is the best way to launch other calendars when skipping around over a wide timeframe.

When viewing either of the year, month, and week calendars, you may elect to view any of its subordinate calendar screens.   For instance, when viewing the Year Calendar, you may view any month, week, or day in that year.

The Month and Week Calendar will let you click up the QUICKVIEW window for an event;   the Month, Week, and Day Calendar will pop up the EVENT WORKSHEET.

THE QUICKVIEW WINDOW

The QUICKVIEW window is a pop-up display of all information about a single event. It is accessible from the **EventLog**, the **Month Calendar**, and the **Week Calendar**.

The QUICKVIEW window cannot be used to change event data.   The **EVENT WORKSHEET** is used for this purpose.

You may now create links to individuals or groups of people outside your organization, by integrating CallStar, the new contact manager from ComputerEase. The passageway to these links is through the QUICKVIEW window.   On the right side of the screen, the panel labeled Link to CallStar, will contain either one of two buttons: **CREATE LINK** or **EDIT LINK**.   When no link has yet been made for an event, the CREATE LINK button will be visible; when a link already exists (there can be only one link per event), the EDIT LINK alone is visible, along with a scrollable display of the person(s) on the list.   Selecting either of these button will summon the LIST MANAGER window, where you can build or modify the link list.   See **Linking to CallStar**.

THE EVENTLOG

The EventLog is the main PlanStar screen.   It is a scrollable, chronologically-ordered list of events selected from your database by setting the **SELECTION CRITERIA**., Here in the EventLog, and the calendar screens as well, PlanStar lets you, the user, specify whether you want to look at all of the events you have entered for a certain time period, or just certain types or categories.

If you have chosen to **select** certain types of events, or maybe a combination of different **CrossKeys**, the criteria you have set will appear in a static display on the EventLog screen; if you have chosen to display **all** types of events for a time period, the display will not appear, and the EventLog will expand to fill a larger portion of the screen.

From the EventLog you can call any other PlanStar process, either via **ACTION BUTTONS** or the menu.

Across the top of the EventLog screen is the PlanStar menu choices, from which you may choose the **File Menu**, the **Event Menu**, the **View Menu**, the **Print Menu**, and the **Help Menu**.

Below the menu bar are the action buttons,   with which you may call the SELECTION CRITERIA screen, the CROSSKEY MAINTENANCE screen, the **Year Calendar**, the **Month Calendar**, the **Week Calendar**, the **Day Calendar**, the **Resource Utilization Charts** , or the **Preferences** screen.
The **PRINT** button, when selected, will load the PlanStar PRINT MODULE, from which you can print the current EventLog.

The EXIT button, when selected, will cause PlanStar to close all files and terminate.

The EventLog detail line can be **tailored** to include or exclude the following fields: the beginning time of an event, the **actual hours** recorded for the event, or any combination of the three **amount fields**.   Changing the EventLog fields takes place on the SELECTION CRITERIA screen.   If the hours or amount fields are included on the EventLog line, the columns are totaled for all events in the EventLog.

When a link is created between a PlanStar event and a CallStar list, the small column at the far left of the EventLog line will contain a small C.   See **Linking to CallStar**.

Selecting the Add Event button on the EventLog will produce a blank **EVENT WORKSHEET**.

There is a mouse-sensitive **<u>Quickhelp Panel</u>** in the lower right corner of the screen.

SETTING THE SELECTION CRITERIA

The SELECTION CRITERIA screen allows you to build an **EventLog**, **Month Calendar**, **Week Calendar**, and/or **Day Calendar**, with the types of events you choose, for any combination of **CrossKeys**.   You also establish the date rangefor the EventLog on this screen, and **tailor the EventLog detail line**, if you choose.

The SELECTION CRITERIA **action button** appears on all of the above screens, so you may easily access it.

A first look at this feature may be slightly bewildering!   What this does, however, is give you complete control over your PlanStar system.   You can extract every conceivable combination of event types, dates, and CrossKeys, letting you create innumerable views of your data.

ALL OR SELECTED EVENTS

If you select the **ALL** button the EventLog and calendar screens will display all events in the database which fall in the appropriate time period.

If you select the **SELECTED** button, you may then include certain major categories of events, and/or select from your CrossKey list, as follows:

When ALL events are being displayed, the SELECTION CRITERIA action button on the

EventLog and calendars will be

When SELECTED events are being displayed, the SELECTION CRITERIA action button

on the EventLog and calendars will be

INCLUDING MAJOR CATEGORIES OF EVENTS

You may choose to include either or both (but at least one) of **ONETIME or RECURRING events**.   You may choose to include either or both (you must choose at least one) of NON-CROSSKEYED or CROSSKEYED events.

By including or excluding these four major event categories, you can group events in a wide variety of combinations.

If you have chosen to include CROSSKEYED events, your CrossKey list will be displayed, from which you may choose.

By marking or unmarking combinations of CrossKeys here, coupled with the

operators **ALL**, **OR**, **AND**, and **EXCLUSIVE**, you can further define your event groupings in an almost endless number of combinations.   Here's an explanation of the operators:

ALL (applies only when one CrossKey has been marked in your list):   This means that all events will be selected from your database that include the CrossKey.

OR (applies only when more than one CrossKey has been marked):   This means that events will be selected that include ANY of the marked CrossKeys.

AND (applies only when more than one CrossKey has been marked);   This means that events will be selected that include ALL of the marked CrossKeys.

EXCLUSIVE: This means that events will be selected that include ONLY the marked CrossKey(s).

Here is an example of the different ways you can select by CrossKey.   Suppose you have the following events in your database, with their associated CrossKey lists:

[BOB] Event# 1
[BOB, CAROL] Event# 2
[BOB, TED] Event# 3
[CAROL, TED] Event# 4
[BOB, CAROL, TED] Event # 5

On the SELECTION CRITERIA screen, if you mark **BOB** and the operator **EXCLUSIVE**, you will get event# 1 in your EventLog or calendar.

If you mark **BOB** and the operator **ALL**, you will get events # 1, 2, 3, and 5.

If you mark **BOB** and **CAROL**, and the operator **OR**, you will get events # 1, 2, 3, 4, and 5.

If you mark **BOB** and **CAROL**, and the operator **AND**, you will get events # 2 and 5.

If you mark **BOB** and **CAROL**, and the operator **EXCLUSIVE,** you will get event # 2.

The **TOGGLE ALL** button will mark or unmark all CrossKeys in the list, depending upon the status of the first one.

When the SELECTION CRITERIA screen is called from the EventLog, the right side of the screen will be displayed on which you can (1) establish the time period for the EventLog, and (2) **tailor the EventLog line**.

ESTABLISHING THE TIME PERIOD

Enter the beginning and ending dates for the period by either editing the date fields, or by using the green **spin buttons** justto the right of the fields.   There are three of them, one each for quickly incrementing or decrementing the month, day,

and year fields.

SEARCHING BY CHARACTER STRING

You may have a need to scan through your database to find a particular character string within the **EVENT DESCRIPTION**.   If so, establish all the other parameters that apply - date range, event types, etc. - then enter the character string into the text box labeled **SEARCH STRING**.   When you **CLOSE** the SELECTION CRITERIA screen, PlanStar will create the EventLog and/or calendars with only those events.

SAVING AND RESTORING THE DEFAULT CRITERIA

The **SAVE SETTINGS** button can be selected if you want PlanStar to automatically load the EventLog and calendars with the displayed criteria setting.

Then, if you have made temporary changes to produce ad hoc lists, you can select the **RESTORE SETTINGS** button to recall the default criteria.

TAILORING THE EVENTLOG LINE

If the **SELECTION CRITERIA**screen is called from the EventLog, you may optionally add the following to the EventLog detail line:

Event beginning time
Event **actual hours**
Any combination of the three **amount fields**.

Simply check the box(es) as appropriate.   The settings will be saved along with the other criteria by selecting the **SAVE SETTINGS** button.

FILE MENU

You may select the following actions from the File Menu:

Import
Export
Backup Data Files
Restore Data Files

```
Exit                          Terminates PlanStar
```

EVENT MENU

You may select the following actions from the Event Menu:

Add New Event
Quickview Event
Event Worksheet

VIEW MENU

You may display the following from the View Menu:

Year Calendar
Month Calendar
Week Calendar
Todays Schedule
Resource Utilization Charts

PRINT MENU

Selecting the Print Menu gives you several options:

Today's Schedule
EventLog
Year Calendar
Month Calendar
Week Calendar

Selecting any of them does the same thing - it loads the PlanStar PRINT MODULE, which is the central point for all **printing** in the system.   There, you can actually select   any of the above options for print.   The selection you made, however, is already set when you get to the print module.

OPTIONS MENU

The Options menu has the following selections:

Selection Criteria
CrossKey Maintenance
Preferences

HELP MENU

The Help menu has the following selections:

```
Contents        Help file Table of Contents
Search          Help file search function
How to Use Help  Help on help
```

CallStar Demo
How to Order
Technical Support
Need More Evaluation Time?Tutorial

```
About PlanStar   Info about PlanStar and ComputerEase
```

THE CALENDARS

PlanStar provides four levels of calendars:

- **Year Calendar**
- **Month Calendar**
- **Week Calendar**
- **Day Calendar**.

The latter three provide various levels of event details (the Year Calendar does not display events at all).

Some of the calendars can call the **EVENT WORKSHEET**; some can call the **QUICKVIEW** window as well.

YEAR CALENDAR

The year calendar is a display of all twelve months of a selected year.

Each monthly calendar on the screen is topped by a button with the name of the month.   Selecting that button will display the appropriate **Month Calendar**.

By single-clicking on a date, you can display its **Day Calendar**; by double-clicking on a date, you can display the **Week Calendar** for the week containing that date.

OTHER ACTIONS YOU MAY TAKE:

    - Select the **LEFT** or **RIGHT** arrow buttons at the top to move backward or forward one year.

    - Edit the year field at the top to "jump" to a more distant year.

    - **Print** an image of the year calendar by selecting the print button.

    - You may access and reset PlanStar **PREFERENCES**.

    - Return to the previous screen by selecting the **EXIT** button.

MONTH CALENDAR

This is a standard month calendar showing a list of events within the day blocks.   A block can display about five events; if there are more events for a day, a scroll bar attaches to the block so that you can scroll.

Because of the limited space in the block, event times and CrossKeys are not displayed; if there are CrossKeys, a bracketed asterisk (*) appears before the event.

There are small buttons down the left side of the screen with the letter **W**. Selecting one of these buttons will call the **Week Calendar** for the week to the immediate right of the button.

Clicking the mouse on the day of the month (the number) in the block will call the **Day Calendar** for that date.

Clicking on an event in the block will call the **QUICKVIEW** window for that event; double-clicking will call the **EVENT WORKSHEET**.

OTHER ACTIONS YOU MAY TAKE:

- Call **Selection Criteria**, **CrossKey Maintenance**, the **Year Calendar**, or **Preferences** screens by selecting the appropriate **action button** above the calendar.

- **Print** the calendar by selecting the Print button.

- Select the **LEFT** or **RIGHT** arrow buttons at the top to move backward or forward one month.

- Add a new event by selecting the **Add Event** button near the lower right corner of the screen.

- Return to the previous screen by selecting the **EXIT** button.

WEEK CALENDAR

The week calendar has seven columns, one for each day of the week, with seven boxes in each column for events.

The event box will contain the times for the event, or the braced words {no time}, the event CrossKey list, and as much of the event as can be displayed in the box.

If there are more than seven events for a day, a button will appear at the bottom of the column with the word **MORE**, which, when selected, will display up to seven more events.   After the last events are displayed, the next click on **MORE** will display the beginning again.

At the top of each column, beneath the day of the week, is a button with the calendar date on it.   Selecting one of these buttons will call that **Day Calendar**.

Clicking an event box will call the **QUICKVIEW** window for that event; double-clicking will call the **EVENT WORKSHEET**.

OTHER ACTIONS YOU MAY TAKE:

　　　- Call **Selection Criteria**, **CrossKey Maintenance**, the **Year Calendar**, the **Month Calendar**, or **Preferences** screens by selecting the appropriate **action button** above the calendar.

　　　- **Print** the calendar by selecting the Print button.

　　　- Select the **LEFT** or **RIGHT** arrow buttons at the top to move backward or forward one week.

　　　- Add a new event by selecting the **Add Event** button near the lower right corner of the screen.

　　　- Return to the previous screen by selecting the **EXIT** button.

DAY CALENDAR

The day calendar display all of the events scheduled for the day, according to the current SELECTION CRITERIA.   It displays up to four events at a time.   If there are more than four events for the day, the words **MORE EVENTS** will appear at the bottom of the screen, with **UP** and **DOWN** arrow buttons which will let you move forward and backward.

At the left of each event is a button with a number representing its place in the order for the day.   (Events with no time specified will be placed first.)   Selecting that button will display the **EVENT WORKSHEET** for the event.

OTHER ACTIONS YOU MAY TAKE:

- Call **Selection Criteria**, **CrossKey Maintenance**, the **Year Calendar**, **Month Calendar**, **Week Calendar**, or **Preferences** screens by selecting the appropriate **action button** above the calendar.

- **Print** the calendar by selecting the Print button.

- Select the **LEFT** or **RIGHT** arrow buttons at the top to move backward or forward one day.

- Add a new event by selecting the **Add Event** button near the lower right corner of the screen.

- Return to the previous screen by selecting the **EXIT** button.

LINKING TO CALLSTAR

Version 2 of PlanStar provides a capability that has been requested by many users: the ability to create lists of people - normally external to your organization - and link the list to a scheduled event.   By normally external, I mean that you should not confuse this with the PlanStar **CrossKey** function, which will associate internal resources with events.   So, if you have chosen to create as CrossKeys your employee names, and tag them to events, an external link would be entirely different.

An external link list would be a list of names and addresses from your CallStar directory...if you have CallStar loaded in the PlanStar subdirectory.   (See **Installation**.)

Heres one example of how PlanStar and CallStar could be used together:

You work for a business education facility teaching a curriculum of business-type courses. There are several tracks such as accounting, advertising, computing, etc.   Your job is to plan future class sessions and publicize it to potential attendees - people who have attended other courses in the same track.

Let PlanStar handle the scheduling part of it, by assigning a classroom, instructor(s), necessary equipment such as computers, etc., and assuring you of no conflicts for any of them for the time period.

Once youve scheduled the class, CallStar steps in and handles the notification part.   Because you have recorded past attendees in track lists (youre maintaining a list named COMPUTER for those people interested in computer courses), a couple of mouse clicks and you have a listing and/or a stack of mailing labels.

Now you would use PlanStar to create a link between the scheduled course and the COMPUTER list (actually CallStar would create a copy of the list as the link, for you to work with).

As the people responded, you could record their intentions in contact history for the link list. You could also add new names to the COMPUTER list if necessary.

When the deadline arrived, you would then trim the link list down to actual attendees and use it for sending out course materials, maintaining a class roster, etc.

Since all the information remains in the PlanStar and CallStar dynamic databases forever - unless you purposely delete - you have a permanent record of all class attendees, by session. You can later, for instance, select an individual and request a summary of all classes that he or she has taken.   With one mouse click.

CREATING THE LINK TO CALLSTAR

There is only one way to get to CallStar from PlanStar, and thats via the **Quickview** screen. So an event must be created as is normally done. Then, when you return to the EventLog screen, the line containing the event will have a letter C (for CallStar!) in the far left column.

NOTE: The EventLog columns are determined at load time. When loading, if CallStar is present, the additional EventLog column is created. It will not appear if CallStar is not present.

Bring up the Quickview screen by clicking on the line with the C. At the right of the screen is a large box titled Link to CallStar. If a link exists, a button with the words EDIT LINK is visible, and a box below where you can view the names on the list; if a link does not exist, the button has the words CREATE LINK. Clicking the button in either case will summon the **CallStar List Manager**.

THE CALLSTAR LIST MANAGER

This screen will show the event (possibly truncated) in large letters across the top of the screen. The panel below contains all of the entries in your current CallStar directory.   If you are in EDIT LINK mode, the selected names for the list are highlighted in the directory.   You may now remove or add names as you wish.

On the left side of the Directory panel are some option buttons that let you change the SORT ORDER of the directory.   This is let you quickly locate entries, or isolate groups of entries for easier selection.

Below the sort order options is a small box with the words ALL or SELECTED.   If ALL is chosen, then all directory entries are displayed, selected or not.   If SELECTED is chosen, then only the entries on the current list are displayed.

When your list contains all of the names you need, select SAVE.

When you EXIT the List Manager, you will return to the Quickview screen.   The new list will be displayed.

Then, when you return to the EventLog, the event will sport the C in the leftmost column.

USING LISTS FOR REPORTS AND/OR LABELS

It is not possible in this version (it will be in a later one!) to print a report or set of labels for the linked list.   You must execute CallStar to do this.   One of the options on the CallStar Print Module screen allows you to display all PlanStar linked lists.

PRINTING

PlanStar will print the current **EventLog**, the **Year Calendar**, the **Month Calendar**, the **Week Calendar**, and the **Day Calendar**.   All printing is done from the...

PRINT MODULE

The PRINT MODULE may be called from the **Print Menu**, where you can select to print Today's Schedule (the Day Calendar for the current day), the current EventLog, the current Year Calendar, the current Month Calendar, or the current Week Calendar.

Printing may also be initiated from any of the PlanStar screens, by selecting the Print **action button**; this will load the PRINT MODULE with whatever time period is currently being displayed.

The frame making up the biggest part of the bottom half of the window titled Current Selection Criteria displays the settings as you have previously selected. You may change these settings for the purpose of this printout, by clicking the button labeled CHANGE in the upper right corner of the frame.

Select the printout desired by clicking on the radio buttons on the upper left side of the window.   Notice that the corresponding period description appears to the right of the calendars, with more detail offered for the EventLog.

PRINTING THE EventLog

The default heading for the printout appears as Events for {beginning date} thru {ending date}.   You may modify the heading to say anything you please.

The EventLog can be printed in two formats:

     - **DESCRIPTIVE**.   All of the event data is printed in a rectangular box.   The event description is printed complete, wrapped if necessary.   This method would primarily be used when printing the EventLog as a schedule.

     - **COLUMNAR**.   Each event is printed on a single line on the page, with the date, CrossKeys, event description, actual hours, and amount fields in columns. This method would primarily be used for preparation of a report, in the type system where accumulation of **hours** and/or **money** are being tracked.

PRINTING THE CALENDARS

The year calendar printout is an image of the PlanStar Year Calendar screen.

The other calendars are formatted block printouts.   Each element of the calendar, such as a particular day on the Month Calendar, is restricted in size so that the

entire calendar can fit on a single page.   This may result in data for an element to be truncated.   If this occurs, you must print out the next level of calendar for that period.   For instance, if there is too much data to print in a box for a day on the Month Calendar, you must print a Week Calendar in order to view the entire days events.   Or Day Calendar, if necessary.

***

Printing will be directed to the printers which you have assigned using the Windows Print Manager.   If the option box labeled EXPRESS PRINT is marked with an X, the printout goes directly to the Windows default printer; if it is not, the standard Windows dialog box appears, allowing you to redirect the printout.

NOTE: All printouts are in PORTRAIT format.   Do not select the LANDSCAPE format on the dialog box.

RESOURCE UTILIZATION CHARTS

Creating a graphic representation will give you a quick view of resource utilization, allowing you to spot trends, level responsibilities, etc.

SELECTING THE CHART CRITERIA

Before displaying the resource chart, you must establish several criteria at the top of the screen.   NOTE: THIS CRITERIA SETTING IS NOT RELATED TO THE PLANSTAR SELECTION CRITERIA.

Selecting CrossKeys:

You must select at least one **CrossKey**(two if you are producing a graph BY CROSSKEY).   The **TOGGLE ALL** button will mark or unmark all CrossKeys depending upon the status of the first CrossKey.

SUMMARY OF and BY elements:

There are two dropdown boxes, one listing the "SUMMARY OF" elements and the other, the "BY" elements.   (As an example, this is stated as "summary of Events by Year".)   The elements and their meanings are as follows:

```
SUMMARY OF
----------
Events      A count of the selected events.
Event/days  A count of days for selected events.
Hours       Totals of hours for selected events.
{Amount 1}  Totals of the first amount field.
{Amount 2}  Totals of the second amount field.
{Amount 3}  Totals of the third amount field.
```

NOTE: if the amount fields have been renamed in **PREFERENCES**, the new names will appear in this dropdown list.

```
 BY
--------
CrossKey  Totaled for each selected CrossKey.
Day       Totaled for each day in the date range.
Week      Totaled for each week in the date range.
Month     Totaled for each month in the date range.
Year      Totaled for each year in the date range.
```

NOTE: there must be at least two of whatever is chosen to be the BY element.   In other words, if you select BY CROSSKEY, you must select two CrossKeys to summarize.   See below for how PlanStar works when BY (time period) is selected.

Date range:

PlanStar will summarize only events falling in the selected date range.

Since you must select at least two of the BY elements (see note above), PlanStar will ensure that you have done this properly by adjusting the date range for you, as follows:

- If you select BY DAY, and the date range does not specify at least two days, the ending date of the date range will adjust to satisfy this requirement.

- If you select BY WEEK, the beginning date must fall on a Sunday and the ending date must fall on a Saturday, because that is considered to be the week span. The dates will adjust to this automatically. If the date range does not specify at least two weeks, the ending date will adjust to cover a two-week period.

- If you select BY MONTH, the beginning date must fall on the first day of a month and the ending date must fall on the last day of a month. The dates will adjust to this automatically. If the date range does not specify at least two months, the ending date will adjust to cover a two-month period.

- If you select BY YEAR, the beginning date must fall on January 1, and the ending date must fall on December 31. The dates will adjust to this automatically. If the date range does not specify at least two years, the ending date will adjust to cover a two-year period.

There is a difference in the way charts are produced BY CROSSKEY and BY (time period). A chart produced BY CROSSKEY will create a plot point for each CrossKey you have selected; a chart produced BY (time period) will create a plot point for each day, week, month, or year in the range, summarizing for all CrossKeys.

CHART TYPES:

You may select to display your graph as a line, vertical bar, or horizontal bar chart, with the bar charts either two-dimensional or three-dimensional.

DISPLAY THE CHART

When all of the criteria has been set to your satisfaction, select the **DRAW CHART** button to the right of the criteria settings, and the graph will be displayed. If there are any errors or inconsistencies in the criteria, a dialog box will be displayed and you will have to correct the error.

SETTING PREFERENCES

You may change some of the ways PlanStar works or displays data on the PREFERENCES screen.

CHANGING THE TIME DISPLAY FORMAT

This lets you to have times displayed and printed in either the 12-hour clock (with AM/PM), or the 24-hour representation.

CHANGING THE EVENT WORKSHEET DEFAULT TIME SETTING

You have the option of having the blank EVENT WORKSHEET display either (1) No time, (2) the current time-of-day, or (3) 8:00 AM.

CHANGING THE AMOUNT FIELD NAMES

When PlanStar is first installed, the amount fields are named **AMOUNT 1, AMOUNT 2**, and **AMOUNT 3**.   You may change these to any other description you desire. The new fields will be displayed properly on all screens and printouts.

CHOOSING TO MARK RECURRING EVENTS

You may choose to mark recurring events in the EventLog and calendars with <R> in the event description.   This allows you to quickly distinguish between recurring and onetime event types.

PLANSTAR TUTORIAL

We have designed PlanStar to be very easy to use, but include a tutorial for those people who like to get a quick look rather than delving through instructions!

This tutorial runs automatically when you first install the system; thereafter, simply select TUTORIAL from the HELP MENU.

It is not an interactive demo, just some pop-up windows that explain some of the finer points.   To advance, click on the NEXT SCREEN button.

CALLSTAR DEMO

If you dont have CallStar already, and would like to get a feel for what it is, select CALLSTAR DEMO from the HELP MENU.   This is a series of screen images with some brief explanations.   They are not interactive; you simply click the button captioned NEXT SCREEN in the lower right corner until you reach the end.

NOTE: The screen images are .BMP files which have been compressed into a single file.   Each time you run the demo, the file will be de-compressed.   You must have at least 1.7 megabytes of disk space available in order to do this.

TECHNICAL SUPPORT

Technical support is available via any of the following methods:

Mail: **ComputerEase**
               7204 John Elizabeth Place
               Prince George, VA 23875

Phone: **(804) 458-2212   (5 - 10 PM EST, answering**
machine at all other   times)

CompuServe: **Doug Patrick   (71221,2766)**

Internet: **71221.2766@compuserve.com**

I much prefer that you use email to contact me, if you have that capability, because you are more likely to reach me - I have a day job! - and it provides a permanent record of the problem, date and time without anyone having to take notes.   I check my email at least once a day.   Please be specific in your request!

Tech support is provided for all users; registered users of CallStar have priority.

HOW TO ORDER PLANSTAR

SINGLE-COPY PRICE $49 To order, select HOW TO ORDER from the HELP menu. If you want to order by mail, click on the ORDER FORM button and edit the form in your Windows NOTEPAD, then print.

A license for PlanStar entitles you to unlimited use of the system forever, technical support for as long as we are in operation (and that depends upon your support!), bug fixes on demand, and FREE upgrades. Free, that is, providing you accomplish your own downloads* of newer versions. **We will send you an upgrade on diskette for the payment of $5 shipping/handling - paid by check directly to ComputerEase only.**

*Newer versions will be found in many locations - our primary repositories are on Compuserve in IBMAPPS and WINSHARE. The version number on most BBS can be determined by the file name: it will be PSTARxxx.ZIP where xxx equals the version number (i.e. PSTAR234.ZIP would be version 2.34). On Compuserve it will be PSTARx.ZIP - they only allow for a 6-character file name. At the time of this writing, plans are being made to have current versions of PlanStar available on the Internet and accessible via anonymous FTP. Give us a call, or preferably, send us an email, to determine availability at the time needed.

NOTE: Downloading and installing a newer version will not remove or affect your licensing information.

For single copies, mail or fax your order to:
Henning Associates
Rt. 2, Box 526-A
Crozet, VA   22932

AND

Telephone: 1-800-823-6896 or (804) 823-6896
You may FAX to the same phone numbers!

For purchase of multiple copies, you must contact ComputerEase directly (see **Technical Support**). The chart below shows the reduced price per copy for quantities greater than 5.

BULK PURCHASE:

COPIES	Per copy
1- 5	$49
6-20	$40
21-50	$32
51+	$26

ASSOCIATION OF SHAREWARE PROFESSIONALS

ASP OMBUDSMAN STATEMENT

This program is produced by **ComputerEase**, a member of the **Association of Shareware Professionals (ASP)**. **ASP** wants to make sure that the shareware principle works for you. If you are unable to resolve a shareware-related problem with an **ASP** member by contacting the member directly, **ASP** may be able to help. The **ASP Ombudsman** can help you resolve a dispute or problem with an **ASP** member, but does not provide technical support for members products. Please write to:

ASP Ombudsman
545 Grover Road
Muskegon, MI 49442

or send a CompuServe message via CompuServe Mail to **ASP Ombudsman - 70007,3536**. The Internet address is **70007.3536@compuserve.com**.

WARRANTY DISCLAIMER

ComputerEase makes no warranty of any kind, expressed or implied, including, without limitation, any warranties of merchantability and/or fitness for a particular purpose, other than to guarantee that this product, at the time of its creation, was delivered in good faith. **ComputerEase** shall not be liable for any damages, whether direct, indirect, special, or consequential arising from a failure of this program to operate in the manner desired by the user. **ComputerEase** shall not be liable for any damage to data or property which may be caused directly or indirectly by use of the program. IN NO EVENT WILL **ComputerEase** BE LIABLE TO YOU FOR ANY DAMAGES, INCLUDING ANY LOST PROFITS, LOST SAVINGS, OR OTHER INCIDENTAL OR CONSEQUENTIAL DAMAGES ARISING OUT OF YOUR USE OR INABILITY TO USE THE PROGRAM, OR FOR ANY CLAIM BY ANY OTHER PARTY.