

# **Winfo: Your Personal Information Manager**

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# File Menu

The File menu works with data base files. File menu commands create new data bases, open, remove, and save existing ones, export and import data base information to/from ASCII text files, backup and restore data base files, and print your data base information.

**New Data Base** Displays the new data base selection dialog where you select a data base style and enter its name and description. See [New Data Base](#) for more information.

**Open Data Base** Displays a list of existing data bases in a list box. Select a data base and click OK to display it. You can also open a data base by pressing the F5 key, or by clicking the Open Data Base icon on the [icon bar](#). See also [Opening Existing Data Bases](#).

**Remove Data Base** Displays a list of existing data bases in a list box and allows you to select the one to be deleted. Deleted data bases cannot be restored; use this command with caution. See also [Removing a Data Base](#).

**Close Data Base** Closes the active data base.

**Save Data Base** Saves the active data base. You can also save a data base by pressing F6 or by clicking the Save Data Base icon in the [icon bar](#). See also [Saving a Data Base](#).

**Export ASCII File** Exports the contents of a data base to a comma delimited ASCII text file. A dialog is displayed that allows you to select the fields to export to the text file. Refer to [Importing and Exporting Data Bases](#) for detailed information on this command.

**Import ASCII File** Imports an ASCII text file from disk. The imported data is appended to the current data base. Refer to [Importing and Exporting Data Bases](#) for more information on this command.

**Backup Data Base** Copies one or more data base files from the Winfo directory to the destination you select. Refer to [Data Base Backup](#) for more information on this command.

**Restore Data Base** Copies one or more data base files from your backup directory to the Winfo directory. Refer to [Data Base Restoration](#) for more information on this command.

**Printer Setup** Allows you to select a printer to use within Winfo. The Setup button in this dialog displays the standard Windows printer setup dialog in which you can select print options. See also [Printing](#).

**Quick Print View** Provides a quick printout of the current view as it appears on the screen. Information is truncated if the view is too wide to fit on the paper. See also [Quick Print View](#).

**Print Report Forms** Lists a variety of printing formats used for printing data base cards information on standard printer paper, labels, and envelopes. See also [Printing](#).

**Exit Winfo** Closes the data base and exits Winfo. You can also exit Winfo by pressing F12 or by clicking the Exit icon in the icon bar. Winfo saves your work automatically when you use this command.

# Edit Menu

Edit menu commands work with data base cards to add, edit, and delete them.

**Add New Card** Adds a new card using the form specified on the Winfo status bar. You may select a different form before you add a new card by choosing the Forms command from the menu bar. (Note that selecting a different form does not change the default form for the view; the only way to change the default form is to edit the view.) See also [Creating New Cards](#).

**Edit Current Card** Edits the current card using the form specified on the Winfo status bar. You may change the current form before editing the card by choosing Forms from the menu bar. You can also select a card to edit by pointing at it and double-clicking the left mouse button. See also [Editing Cards](#).

**Delete Card** Deletes the highlighted card. Winfo displays a dialog when you choose this command to confirm your request. Use this option with caution; cards cannot be restored once deleted. See also [Removing Cards](#).

# View Menu

Views are Winfo's most powerful feature. Views allow you to specify how information should appear on the main Winfo screen, and restrict or change the order of the data. Winfo provides pre-defined views for the various data base types. View menu commands allow you select, create, edit, and delete views. Refer to [Working With Views](#) for more information.

**Select View** Displays a list box of the views available for the current data base type. You may choose any of the listed views at any time and change the view as many times as needed. From this dialog you may also create new views and edit or delete exiting ones. See also [Selecting Views](#).

**Create View** Displays the new view dialog where you name the view and define the fields that appear in it. Creating a new view gives you complete control of the order in which the information from your data base is displayed in the view area. See also [Creating New Views](#).

**Quick View** Similar to Create View in that it lets you define a view, but Quick View is used to select a specific subset of information to display. The Quick View dialog lists the operators you can use with a list of field names. For example, a Quick View lets you specify State=GA if you want the view to contain only those cards that have the State field set to GA. You can also access this command via the QV icon in the [icon bar](#).

Quick View does not change fields or their order; Quick View changes only selection criteria. A Quick View stays in effect until another view is selected or another Quick View is specified. See also [Quick View](#).

**Edit Current View** Edits the current view. Use this option to add, remove, or rearrange fields in the view and to select a default form and enter selection criteria. See also [Editing Existing Views](#).

**Delete Current View** Deletes the current view. Be sure you want to delete the current view before you use this command as deleted views cannot be recovered. If you delete a view accidentally, you'll need to recreate it with the View.Create View command.

# Forms Menu

The Forms menu displays a dialog that allows you to choose from one of the many pre-defined forms included with Winfo. Refer to [Working With Forms](#) for more information.

# Options Menu

**Screen Font** Allows you to select the font style, size, and color used for the data base information displayed in the main Winfo window. Windows 3.0 users need to restrict font size to the approximate size of the system font.

**Printer Font** If supported by the printer driver you have installed, this option allows you to select a printer font to be used when printing from Winfo.

**Background Colors** Allows you to select a background color for the main Winfo window.

**Save After Change** Determines whether or not Winfo saves to disk the changes you make to card information. If this option is not checked (the default), you can periodically save information with the File.Save command. (Your data is always saved except in the case of a power outage or a computer problem.)

Winfo automatically saves data base information when you exit Winfo or attempt to load another data base without first saving the one you're using. Enabling the Options.Save After Change option helps protect you from potential loss of data in case of power loss or other problems. Note, however, that setting this option makes saving data slightly slower for large data bases.

# Dialer Menu

The dialog displayed by the Dialer menu lets you use your modem to dial telephone numbers you enter as well as those in your data base cards. You can type or click on the numbers to be dialed and then click the Dial button to initiate dialing.

You can dial a number from a card in the view by highlighting the card and then clicking the dialer icon. Winfo scans the fields in the view from left to right, and places the phone number in the dial field. All the phone number fields in the card are available on the push buttons on the right side of the Auto Dialer. If you want one of these numbers, just press the button.

The dialer requires that you have both a modem and a telephone on the same telephone line. Winfo commands the modem to dial the telephone number and then displays the Post Dialer Screen.

## Post Dialer Screen

The post dialer screen shows your 3 credit card numbers, the extension fields, and up to 3 of your Special Phone Fields. Special phone fields are any Phone Numbers that you key the description and you begin it with an '\*'.  
\* Mail Box Number            10292  
\* Password                    59271

For Example:

\* Mail Box Number            10292  
\* Password                    59271

These may be entered into the Alt phone number fields in the Phone Data Base.

The Post Dialer screen also includes the numbers and symbols from a telephone key pad. When you press one of these, the number is dialed immediately and the post dialer waits for a response from the modem. These are not very useful for dialing long sequences of numbers but are useful for choosing menu options offered by automated answering systems.

Winfo uses very simple dialing commands for this feature and assumes you're using a Hayes compatible modem. The Setup button allows you to view or edit the commands used to control the modem.



# Dialer Setup Options

**Communications Port** Set this to match the communications port your modem is using. Valid settings are COM1 through COM4 and NONE (if you don't have a modem).

**Baud Rate** Set this to match the speed of the modem. Since you won't actually be using the modem for data communications in this case, the selected speed can be any speed supported by the modem. Selections range from 110 to 19,200 bps.

**Local Area Code** Set this to your local area code. This helps Winfo determine whether or not you're making a long distance call and if it should use the Prefix for Long Distance documented below. This setting is also used to format telephone numbers after they are entered in a form.

**Modem Initialization String** This field can be used to send a command to the modem to initialize it for dialing. This is S0=0 by default, but can contain any modem or dialing command supported by your modem. If you want your modem to be in auto answer mode, you must remove this command sequence.

**Dial Initialization String** This is the modem command to initiate dialing. The default setting is ATDT. The AT gets the modem's attention, the D is the command to dial, and the T is for tone dialing. Change the T to a P if you need to pulse dial.

**Modem Termination String** This is the string used to command the modem to release the telephone line. The AT is the attention command and the H is for hang up.

**Prefix for Local Calls** If you're dialing from within an office that has a PBX system (i.e., you have to dial a number to get an outside line), enter that number here to have Winfo dial it for you. A typical setting for this would be the number 9 followed by a comma (e.g., 9, without the quotes), where the comma tells the modem to pause 2 seconds before dialing the telephone number.

**Prefix for Long Distance** This is the prefix to dial before making a long distance call. The setting may be as simple as 9,1- if you're dialing through a PBX system.

**Credit Card Numbers** The last 6 fields are for Credit Card Numbers and their descriptions. The fields on the left are the description fields and the fields on the right are where you enter the Credit Card Number. These fields will display on the Post Dialer screen.

Refer to your modem's documentation for a complete list and explanation of its commands.

# Window Menu

**Cascade** As the Window.Cascade command in the Program Manager and other applications displays open windows in a cascading format, this command in Winfo cascades open forms. Once cascaded, it's easy to pick out the form you want by clicking on it with the mouse.

**Close All Windows** Closes all open form windows. This is especially useful if you've been looking at various form windows and want to close them all with a single command. Winfo returns you to the main Winfo screen (the view area) when you use this command.

## Other Window Menu Commands

The Window menu also shows the names of open forms. This allows you to switch between forms very quickly by clicking on the name of the desired form. This feature is particularly convenient when you have more than two or three forms open simultaneously.

# Help Menu

The Help menu provides access to the on-line help system provided with Winfo. The **Help on Help** command provides standard Microsoft Windows information on the use of the Help system. The **About** command displays company and version information on Winfo.

# Winfo Term Definitions

The following terms are used in Winfo, this help file, and the Winfo user's guide.

**cards** The individual entries (lines) in the data base. Cards are also called records.

**data base** A data base is a list of cards, or records, that contains the information you enter. Winfo allows you to create a wide variety of data base lists such as phone books and to do lists. Data bases are saved to disk in \*.HAM files.

**field** The components of a card. For example, fields have names such as Last for last names, and First for first names in the phone book style data base.

**form** The entry screen you use to enter information in Winfo. Forms vary according to the data base type. Some data bases, such as the phone book data base, have multiple forms to choose from. A form is always selected; the active form's name appears on the Winfo status line.

**report form** A print definition used to print data base information on labels and envelopes. Winfo provide a variety of pre-defined formats and also allows custom definitions.

**view** A view is the data base information Winfo displays on the screen. Views allow you to restrict or define the cards that appear on the screen and/or display the information in a different order. For example, using the phone book data base, you can use a view to list only those cards which have a Last name equal to Smith. A view is always selected; the active view's name appears on the Winfo status line.

**view area** Usually the largest part of the Winfo screen, the view area displays selected information stored in a data base using one line per card.

# The Icon Bar

The icon bar provides a quick way to get to the most used commands. Icons represent pull-down menu commands.



Adds a new card to the data base using the current form. Same as Edit.Add New card or pressing the F3 key.



Edits the highlighted card using the current form. Same as Edit.Edit Current Card or pressing the F2 key.



Deletes the highlighted card. Same as Edit.Delete Card or pressing the Del key. Deleted cards cannot be recovered; use this option with care.



Selects a form style. Same as clicking the Forms menu or pressing F8 key. Opens the form and displays the currently highlighted card.



Allows you to select, create, edit, or delete views. Same as View.Select View or pressing F9 key.



Quick View displays a dialog through which you define display criteria for the current data base. Quick View temporarily changes the selection criteria until another view or Quick View is selected. Same as View.Quick View or pressing the F4 key.



Moves the highlight bar up a full screen of information in a view. Same as pressing the Page Up key on the keypad.



Moves the highlight bar down one screenful of information in a view. Same as pressing the Page Down key on the keypad.



Moves the highlight bar to the beginning (top) of the view. Same as pressing the Home key on the keypad.



Moves the highlight bar to the end (bottom) of the view. Same as pressing the End key on the keypad.



Print view prints the information in your current view in a line by line style so that it looks like the view on the screen. Screen field widths are used in printing. Same as File.Quick Print View.



Prints your data base view using the form style you select. Same as File.Print Report Forms. From this dialog you can also print labels and envelopes.



Displays the auto-dialer dialog which is used to dial telephone numbers or to set up the dialer option. Same as choosing Dialer from the menu bar.



Loads an existing data base from disk. Same as choosing File.Open Data Base.



Saves the data base to disk. Winfo keeps all data in memory until you save it to disk. If you're entering data or making changes, be sure to save to disk often using this command. Same as choosing File.Save Data Base.



Exits Winfo. Same as choosing File.Exit. If you've made changes to the data base but haven't saved them, Winfo automatically saves everything.

# Working With Data Bases

Data bases store the information you enter into Winfo via forms. Refer to the following subjects for specific information.

[Creating a New Data Base](#)

[Loading an Existing Data Base](#)

[Saving a Data Base](#)

[Removing a Data Base](#)

[Importing and Exporting Data Bases](#)

[Data Base Backup](#)

[Data Base Restoration](#)

# Creating a New Data Base

The first step in creating a new data base is to decide which data base format to use. Select the File.New command to display the available data base types and to name and describe the data base.

Once you've entered a name and description for the data base, Winfo is ready for you to begin entering information. You can begin adding cards by using the Edit.Add New Card command or by clicking on the new card icon.

Winfo uses a default form when you enter data into a new data base. As explained in detail in [Data Base Types and Forms](#) you can select a different form with the Form command on the menu bar.

Once the data base is created, you can begin creating, editing, and deleting data base cards.



# Loading an Existing Data Base

A data base file has to be loaded in order to use Winfo. Existing data bases are loaded with the File.Open Data Base command, by pressing F5, or by clicking on the Open Data Base icon.

Once loaded, you can add new cards to the data base, edit existing ones, and delete cards. You can also define views to control or re-organize the way the information you enter is displayed on the screen.

# Saving a Data Base

When you load a data base, Winfo places the contents of the data base in memory (RAM, or random access memory) and, by default, does not move information back to your disk until you tell it to do so.

If you're working with a data base and adding, editing, or removing cards, you should periodically save your work with the File.Save Data Base command, pressing the F6 key, or by clicking on the Save Data Base icon.

If set, the Options.Save After Change command saves your changes to disk each time you make a change to the data base. Note, however, that when this option is selected, Winfo saves the entire data base to disk after *each* change. If you have a large data base, it may take a few seconds for the operation to complete. You may prefer to leave this option off while working with large files and save the data base manually via the File.Save Data Base command or by clicking on the Save Data Base icon.

# Removing a Data Base

Data bases you no longer need can be removed with the File.Remove Data Base command. Use this command with caution as deleted data bases cannot be restored.

# Importing and Exporting Data Bases

Winfo's data base import and export facility allows you to share information with other Winfo users, to move Winfo data to another application, and import data from another application into Winfo. Import and export also allow you to move information from one Winfo data base to another.

The commands used for these functions are on the File menu: Import ASCII File and Export ASCII File.

# Exporting ASCII Files

The Export ASCII File command displays a dialog in which you specify the name under which to save the exported file, under which you want to store the information in the Export to File text box and the names of the fields to be exported.

The name of the file must be a standard DOS file name (up to 8 characters with an optional 3 character file name extension). The Fields to Export list box is used to list the names of the fields that will be written to the ASCII text file specified in the Export to File text box. The Fields in Data Base text box contains the name of all the fields in the data base.

If you want to export all fields in the data base, click on the Fill button. This moves all fields from the Fields In Data Base list box to the Fields to Export list box. Note that only information in the current view is exported, so if the current view shows only records that have the State set to HI, only cards that are for entries in Hawaii are written to disk.

You can move fields names from one box to another by double-clicking on the name of the field you want to move. If the field appears on the left, it moves to the right, and vice versa.

An exported file has the same format as the import file described in [Importing ASCII Files](#). Briefly, the file consists of a header line which consists of field names, followed by one line for each card exported from the data base.

# Importing ASCII Files

An ASCII text file to be imported must follow a specific convention in order to be processed by Winfo. Most applications that export ASCII files (e.g. data base programs) use this format and you'll need to do little or no modification to the file to import it into Winfo. (Of course, if the file you want to import was one you previously exported from Winfo, you won't have to do anything to the file before importing it.)

The standard format used by Winfo for imported files must consist of a header line (the first line in the file) consisting of comma-delimited fields which contain names for the fields to be used in Winfo. For example, the following would be the header line for a simple phone data base:

```
First,Last,Phone,Comment
```

Subsequent lines of text in the file would contain the actual data which makes up the data base. For example:

```
First,Last,Phone,Comment,ZIP  
John,Doe,555-1234,Raquetball nut,33076
```

The Export feature is very useful for interacting with word processors to produce Mail Merge Documents. Simply export the fields that you want to merge and the word processor will handle the rest.

# Data Base Backup

Winfo can backup with the File.Backup Data Base command. Winfo doesn't change the format of the data base file when you use these commands. When you back up a data base, Winfo copies the data base file into another directory you define.

When you use the File.Backup Data Base command, the following dialog is displayed. Use the Backup to Directory to specify the destination directory for the data base file (do not specify a file name). For example, if you specify A:\ in the text box, the data base(s) you want to save will be saved in the root directory of your system's A drive.

The Active Data Bases list box contains the names of all Winfo data bases. The list box on the right, Backup Data Bases, contains the names of data base files which are to be copied to the destination you specify in the Backup to Directory text box.

Move data base names from one box to another by double-clicking on the data base name you want to move.

It's a good idea to create another directory you'll use just for storing backed up data bases. Alternatively, you can specify the name of another drive into which the files are to be copied.

# Data Base Restoration

Once you've specified the source directory (the location of backed-up data base files), Winfo displays the following dialog in which you select data bases to restore.

The list boxes in this dialog work as in the [data base backup dialog](#); the list box on the left contains names of backed up data base files in the source directory and the list box on the right contains the names of data bases to be restored. Move data base names from one list box to the other by double-clicking on the data base name. Click on the OK button to begin the process.



# Restore From What Directory

Use this dialog to specify the name of the directory that contains data base files to be restored. For example, if you specify A:\ in the text box, Winfo will look on the system's A drive for data base files.

# Working With Cards

Winfo uses a "card" for each data base record you enter into a form. Each line in a view is a card. Go to one of the following sections for details on working with cards.

[Creating New Cards](#)

[Editing Cards](#)

[Removing Cards](#)

# Editing Cards

To edit any card in a view you must select it first. A card can be selected by pointing to it and pressing the left mouse button. Once selected, you can use the Edit.Edit Card command to load the card into a form. Alternatively, you can double-click the left mouse button to load the card to be edited into the current form.

While editing a card within a form, the form's name is displayed in the status bar at the bottom of the form window. If the current form is not appropriate for the card you want to edit, use F8 (Forms) to select the form you desire.

Depending on the form selected and the information contained in the card, you may not see all the information you expect to find in the form. This can happen, for example, if you select a personal entry while looking at your phone book data base with the business form selected.

Refer to [Data Base Types and Forms](#) for more information on data base types and the forms associated with them.

# Creating New Cards

You can use either the Edit.Add New Card command or its icon equivalent to add new cards to your data base. When you use this command, Winfo displays a form you fill out with information you want to store in your data base. The actual form and type of information it can contain varies according to the data base type you're working with. Refer to Data Base Types and Forms for detailed information on each type of data base and form.

# Removing Cards

Cards you no longer want in your data base can be deleted by highlighting the card and then using the Edit.Delete Card command, the Delete Card icon, or by pressing the Del key.

**Note:** Deleted cards cannot be recovered. Use this command with caution.

# Working With Views

Winfo's Views define the way information appears in the view area of the Winfo window. Multiple views can be defined for any data base, and can be used to change the order in which information is listed and to define selection criteria for the cards. Refer to the sections below for more specific information.

[Creating New Views](#)

[Selecting Views](#)

[Editing Existing Views](#)

[View Quick View](#)

[Defining Selection Criteria](#)

# Creating New Views

The View>Create New View command is used to create a new view definition for the current data base type. When you create a new view, you must name the view by typing its name into the View Name text box. The name you enter here is the name Winfo displays in the View.Select View dialog. You can use spaces and other characters in the view name, but it cannot exceed a total of 24 characters in length.

The two list boxes, View Fields to Display and Fields in Data Base, are used to define the view. When you create a new view, the View Fields list box is empty and the Fields to Display box contains all the field names associated with the current data base type.

The View Fields list box lists the fields defined for the view. You move fields into this list box by double-clicking on them in the right list box. If you select a field you don't want in the view, simply double-click on it in the Fields to Display list box to move it back to the right. Fields that move to the right go to the bottom of the list box.

Fields you select to display are moved into the Fields to Display list box in the order in which you select them from the Fields in Data Base list box. The resulting view displays from left to right the fields as listed from top to bottom in this list box.

You can reorganize the selected fields as many times as needed until you get just the right order. It's OK to move fields from right to left and back a number of times until you get it just the way you want it.

Default widths are used for the fields in a view. If you need to change field sizes in the view area you can do that by dragging the separators in Field Name Bar as described in chapter 3 of the Winfo User's Guide.

The Default Screen list box determines the type of form displayed when you choose to edit a card (see [Editing Cards](#)) in the view. The list of forms varies according to the data base type in use. Refer to [Data Base Types and Forms](#) for more detailed information on forms and their use.

The Selection Criteria text box allows you to narrow the view by specifying selection criteria for selected fields. For example, if you're using a phone book data base and want to see only those listings that are in the state of Texas, you could specify the following in the text box:

```
state = TX
```

A complete list of the operators used in the Selection Criteria list box and additional examples can be found in [Quick View Command](#).

If an existing view is close to what you need, you may modify it as explained in [Editing Existing Views](#). See also [Criteria Examples](#) for view criteria examples.

# Selecting Views

The View.Select View command is used to select a view for the current data base. When you use this command, Winfo displays a dialog with a list of the views available for the current data base. Simply highlight your choice and click OK. You can also point to your selection and double-click the left mouse button to select it.

You can change views as many times as you like in order to display your data in the best possible format for your needs. If none of the views listed in the View.Select View dialog suit your needs, you can create a new view with View.Create View or modify an existing view with View.Edit Current View. More information on these two commands appears in Editing Existing Views and Creating New Views.

The view selections displayed by Winfo vary according to the data base type that's selected. In other words, you cannot use a view created for a phone book data base to display information from a shopping list data base.



# Editing Existing Views

The View.Edit Current View command is used to edit the current view. In most cases, the view you'll want to edit is also the current view. Should you want to edit a different view, select it with the View.Select View command and click on the dialog's Edit button. The View Name field in this dialog shows the name of the view that's in effect.

Editing the view is a matter of moving field names left and/or right as necessary to create the desired order. The steps for moving the fields are the same as those in [Creating New Views](#). Briefly, you move field names by pointing to them and double-clicking. If the field is on the left, it will move to the right side list box and vice versa.

The Default Screen and Selection Criteria fields are also documented in [Creating New Views](#).

# Quick View

The View.Quick View command gives you a quick way to specify selection criteria for the current view. Quick View search criteria is not saved but remains in effect until another Quick View is defined or until another View is selected.

The operator buttons that appear on the right side of the Quick View dialog are used to specify selection criteria in combination with field names. Click on field names from the list box to add them to the criteria text box, and click on the operator buttons to select an operator. Refer to [Selection Criteria Operators](#) for a list of operators and to [View Selection Criteria Examples](#) for examples of their use.

# Defining Selection Criteria

The process of specifying selection criteria is the same regardless of whether you're doing in it a quick view or a regular view. The fields you have to work with in either case vary according to the data base type with which you're working.

Specifying selection criteria lets you change a view so that it lists only those cards which you want to see based on the value of one or two fields.

Refer to [View Selection Criteria Examples](#) and [Selection CriteriaOperators](#) for more information.

# View Selection Criteria Examples

Specifying selection criteria for views and quick views allow you to display cards from your data base the meet specific requirements. For example, if you are working with a phone book data base and want to limit the view to those cards that have Roswell as the city name, you'd go into a view dialog and specify `city=Roswell` as the selection criteria. Note that the search is not case sensitive; upper and lower case letters are the same for purposes of the search. Refer to [Selection Criteria Operators](#) for a list of valid operators.

There is a special field, "ANYFIELD", in ALL Data Bases that will allow you to scan all fields in each card. If you need to search for a word or series of words, but do not remember what field you entered it into, use the "ANYFIELD @" option to find the card.

ANYFIELD @ WinWare  
will search all cards, all fields including all text, phone numbers, and comment fields, for WinWare and add the card to the view if it is found.

Available in some data bases, the Key Word field accepts text information you use to search in Views. The Key Word field in these forms is named KeyWord in view definitions. For example, you can use the Key Word field to enter Cyclist for all the phone book entries that are for friends who enjoy cycling, then create a view that restricts the entries to those who are cyclists by entering the following selection criteria:

```
keyword=cyclist
```

The @ operator allows you to search for any string within another string. Using the keyword example again, specifying the following would show those cards which have "runner" anywhere in the keyword:

```
keyword @ runner
```

You can search for birth dates by using a couple of operators to tell Winfo to restrict the view to those entries which begin with a particular month. It's easy to specify the search criteria since dates in Winfo always have the same format (mm/dd/yy). For example, to find all the November birthdays in your phone book data base, you'd specify the following search criteria:

```
b-day > 10 and b-day < 12
```

A maximum of two comparisons is allowed in any selection criteria specification.

The period character (.) can be used in conjunction with the equal sign (=) operator to act as a wild card character. The period matches anything that appears after the text you specify before the period. For example, if you know a lot of people who work at Acme Corp. but didn't always enter the company name the same way, you could specify the search criteria as follows:

Company = Acme.

Using this example, all cards with Acme as the beginning of the company name will meet the search criteria (e.g., Winfo lists entries with Acme Corp., Acme, Corp., and Acme Cement Co.)

The exclamation point symbol (!) can be used to determine whether or not a field contains text. For example, if you want to restrict the view to only those entries which have text in the company name field, you'd specify it as follows:

Company > !

In this case, Winfo compares the Company name field and uses the card in the view if the field is not empty. If the field is empty, the card is not used in the view.

The Personal, Business, Family, and Card List radio button and check boxes which appear in forms can also be used to specify a selection criteria. If you want to list only those cards which have the Family check box selected, you'd specify the following:

Family=Family

The same applies to Business, Personal, and Card List (e.g. Bus/Personal=Business, etc.).

# View Selection Criteria Operators

The operators allowed in selection criteria are as follows:

<b>Symbol</b>	<b>Meaning</b>	<b>Example</b>
>	greater than	ZIP > 30000
<	less than	ZIP < 40000
=	equal to	State = NY
#	not equal to	State # NY
@	find within	keyword @ runner
<b>OR</b>	or	State = NY or State = PA
<b>AND</b>	and	City = Erie and State = PA

These operators can be used in any view selection dialog that has a selection criteria text box. A maximum of two comparisons is allowed in any selection criteria specification. Also refer to [Criteria Examples](#).

# Printing

Winfo offers great flexibility in printing the data you enter. Winfo can print to a printer equipped to print on standard printer paper, labels, and envelopes. You can print from the view screen by clicking on either of the two print icons listed in IconBar. These icons are the equivalent of the File.Quick Print View and File.Print Report Forms commands.

The File menu has three printing-related commands:

Printer Setup  
Quick Print View  
Print Report Forms

Also refer to the following for more specific printing information:

Printing Labels  
Printing Envelopes  
Print Report Forms  
Printer Setup  
Quick Print View

Note: Older printer drivers do not support the landscape setting within Winfo. If you are using an older driver, you will need to change the landscape mode in the Control Panel. If you choose Printer Setup.Setup and get the Warning stating you must use the control panel for printer setup, then you have this problem.

# Printer Setup

The File.Printer Setup command displays a dialog from which you select the printer to use for printing with Winfo. Winfo gets its printer list from what you've set up in Windows via the Windows Control Panel application.

Clicking the Setup button displays the standard Windows printer configuration dialog through which it's possible to configure a variety of printer functions. You may print in landscape mode if that's supported by your printer.



# Print Report Forms

The File.Print Report Forms command and icon allow you to print data base card information onto a wide variety of label and envelope sizes. Wininfo has more than 10 pre-defined forms and allows you to create your own.

The dialog displayed by the File.Print Report Forms command contains a list box which shows the names of the pre-defined printing setups. The setups are named according to the type of paper source they are designed to work with.

If none of the label definitions in the list box suit your purposes, click on the Custom Label button to display the custom definition dialog and make changes. Click on the Envelope button to print envelopes and specify envelope printing options. The dialogs through which you define custom printing display a graphical representation of labels and envelopes and allow you to define paper size, margins, and other print style criteria.

The landscape check box may be set and it applies to any form that you pick from the list box. It will not affect the landscape setting for other programs. It also does not affect Custom Labels, Envelopes, or Quick Print Views since they have landscape settings of their own..

Starting label applies only to label reports from the list box. The labels are numbered left to right, top to bottom starting at 1. This is useful for Laser printers when part of a page has already been printed.

# Quick Print View

The File.Quick Print View command and icon are used to print the current data base view contents to the printer. This gives you a list of your data one line per card. You choose the fields and cards to print by defining an appropriate view. You may print on any paper supported by your printer.

The margin boxes allow you to specify left, right, top, and bottom margins for the text. The Fonts button displays a dialog in which you can select a printer font if your printer has variable, software controllable fonts.

The landscape check box may be set and it applies only to Quick Print View. It will not affect the landscape setting for other programs. It also does not affect Custom Labels, Envelopes, or Reports since they have landscape settings of their own..

# Printing Custom Labels

Winfo can print data base information onto labels of a wide range of sizes. If the pre-defined form sizes on the File.Print Report Forms command list box do not suit you, it's possible to define a custom label format. Values used in the custom label dialog fields are expressed in inches (1.000 = 1 inch, .5 = half an inch, etc.).

**Landscape** Page Orientation Setting. Only for Custom Labels.

**Top Margin** The distance between the top of the label sheet and the labels.

**Bottom Margin** The distance between the bottom of the label sheet and the labels.

**Label Width** The distance from the left side of one label to the left side of the label to its right (if you're working with paper that has more than one label across it). If there is a gap between the labels, this measurement must include the width of the gap.

**Labels Across Page** The number of labels on the page (horizontally).

**Left Margin** The distance between the left side of the label sheet and the leftmost label.

**Label Height** The height of the individual labels; the distance from the top of one label to the top of the next label. If there is a gap between the labels, this measurement must include the height of the gap.

**Tractor Feed Page Height** The height (in inches) of the label paper. If set to the default value (0), the paper is assumed to be 11" long.

**Inside Top Margin** The margin between the top of the label and its text.

**Inside Bottom Margin** The margin between the bottom of the label and its text.

**Inside Left Margin** The margin between the left side of the label and its text.

**Inside Right Margin** The margin between the right side of the label and its text.

**Starting Label** Starting label from left to right, top to bottom beginning with 1.

Example	1	2
	3	4
	5	6

# Printing Custom Envelopes

If your printer accepts envelopes, you can use Winfo to print address information on the envelopes directly from your phone book or mail list data bases. As explained in the table below, Winfo lets you define placement of all the text that is printed on the envelope. Note that Winfo uses default values in these dialogs which work in most cases; you may not need to change all the values in the dialog to get the printout you want.

The blank lines at the top left of the envelope area are used for the return address you want printed on the envelopes. Values used in numeric fields are expressed in inches (1.0 = 1 inch, .250 = 1/4 inch, etc.).

**Landscape** Page Orientation Setting. Only for Custom Labels.

**Distance to top of Envelope** The distance between the return address and the top of the envelope.

**Envelope Width** The width of the envelope.

**Left Margin** The margin between the left of the envelope and the return address.

**Envelope Height** The height of the envelope.

**Tractor Feed Paper Height** The height (in inches) of the tractor feed paper to which the envelope is attached. Default value (0) is for standard, 11 high paper.

**From Top of Envelope** The distance between the forwarding address and the top of the envelope.

**From Left of Envelope** The distance between the forwarding address and the left side of the envelope.

**Personal Address** If this radio button is checked, Winfo prints the address from the personal side of each data base form.

**Business Address** If this radio button is checked, Winfo prints the address from the business side of each data base form.

# Working With Forms

Winfo forms are special dialogs into which you enter information you want to store in data base cards. Winfo includes a variety of pre-defined forms. Forms vary in Winfo according to the data base type you have selected. Some data bases, such as the Phone Book data base, have multiple forms. Other data bases have only one form.

For data bases that have more than one form available, you can use the form that best suits your intended use for the data base. The forms available for each data base type are described in detail in [Data Base Types and Their Forms](#).

Winfo allows you to open multiple forms while looking at a data base so that you can compare information between cards and view multiple cards simultaneously. All the forms can be the same, each displaying information about a different card in your database. They can be different forms for each card. Don't hesitate to open multiple forms while working with a data base! You can go from one form to another easily by using Window menu commands or by clicking on the form you want.

Note: Phone numbers are automatically formatted to add your area code and dashes. You may begin a phone number with a 1 or 0 to suppress formatting.

# Forms

Forms are used to enter and change information in Winfo data bases. Each form displayed contains the information for a single card in a Winfo data base. Winfo has many different forms and they vary according to the data base type with which you're working.

Refer to the following for more specific information:

[Data Base Types and Their Forms](#)

[Icon Bar in Forms](#)

[Working With Forms](#)

## Clip Label

Clip label copies either personal or business name and address information (according to the radio button selection for these options) to the clipboard. You can then paste the information into another document using the Paste function the other application.

# Print Form

Print form allows you to print one or more copies of the current form's contents. Click on the Print button to print. To change printer settings, click on the Setup button. Click on the Label or Envelope buttons to change those settings, respectively.



## Select Form

This list box displays the names of the forms available for the current data base type (some data bases have only one form). To select a form, select it with the mouse pointer and click the OK button, or, double-click on the form name.

# Tool Bar Icons for Form Windows

All forms have an icon bar which is used to manipulate entries. The specific combination of icons displayed for a given form varies slightly according to data base and form type.



Displays help information for forms.



Save and return to view. Adds the current data in the form to the data base and exits the form.



Save and continue. Adds the data in the form to the data base and displays an empty form so that you can enter another card.



Removes the current card from the view and the data base. Use this with caution as deleted cards cannot be restored.



Loads the previous card in the view into the form.



Loads the next card in the view into the form.



Prints labels, envelopes, or the current form and its contents.



Displays the Dialer, loaded with the telephone number highlighted in the form. The cursor must be in a phone number field.



The Forms icon. Clicking this icon produces a list of existing forms in the current data base. Select the appropriate form and the current cards information will display on the newly selected form.



Cuts a label to the clipboard so it can be pasted into another Windows application. If a card contains both business and personal addresses, Winfo prompts you to select the address you prefer to use.



Cancels the current operation and returns you to the view; discards changes entered into this current form.

No matter which form you use to enter information into Winfo, you can control and organize how the information is displayed through the use of views. Refer to [Working With Views](#) for complete information on views.

# Data Base Types and Their Forms

Winfo offers the data base types listed below. Detailed information is available for each data base type.

[Phone Book](#)

[Restaurants & Hotels](#)

[Shopping List](#)

[Accounts List](#)

[Inventory](#)

[Recipes](#)

[Business Contacts](#)

[Repair](#)

[To Do List](#)

[Stock Transaction](#)

[Music, Video, & Software](#)

[Mail List](#)

# Open Data Base

A data base file has to be loaded in order to use Winfo. Existing data bases are loaded with the File.Open Data Base command, by pressing F5, or by clicking on the Open Data Base icon.

Once a data base is loaded, you can add new cards to it, and edit and delete existing cards. You can also define views to control or re-organize the way the information you enter is displayed on the screen.

# Phone Book Data Base

All form styles for the phone book data base allow you to enter name, address, telephone, and other information which makes up a phone book.

When you click on the Forms menu while using the phone book data base, Winfo displays a dialog that allows you to select a form. The following forms are available for this data base:

Long and Long Alternate Form

Business Form

Personal Form

## **The Long and Long Alternate Forms**

These two forms are very similar and share many of the same fields. Use either of these forms if you need to enter both personal and business information for a person in your data base. For example, if you entered your best friend in your data base, you'd likely have both a work and a home phone and address to enter.

The long forms have fields for everything you need to associate with your phone book entries. There are many extra fields for information such as birth dates, spouse name, and alternate telephone numbers. There's even a comments section into which you can enter more detailed information. You could then click on the Personal radio button in the dialog to highlight this entry as a personal contact.

On the other hand, if you were entering a business contact, you'd click on the Business radio button. If the entry is for a family member, you should also check the Family check box in addition to marking the card Personal.

Use the Key Word field to enter a key word with which you can later define a view. Think of the key word as a specialized business or family button that you define.

All these options give you a lot of flexibility later on when you define views, so that you can specify a view of personal, family, or business cards in your data base.

## **The Business Form**

Use the Business form to enter information for any type of business you deal with. You could use this form when entering information for such businesses as department stores you frequent and movie theaters. There are no fields for personal information in this form. Use this form to enter your business items if you prefer working with a smaller form.

## **The Personal Form**

The Personal form is used to enter information about friends and family. Be sure to check the Card List check box on this list for those entries you want to be able to list with a view for a card list you can use during the holidays. If the entry is for a family member, check the Family check box. If this person is not part of the family, check the Personal radio button. Use this form to enter your personal items if you prefer working with a smaller form.



# Restaurant & Hotel Data Base

The restaurant & hotel list allows you to keep a record of the hotels and restaurants you visit so that you can tell at a glance where you've been in which cities, which places you liked, and which ones you didn't.

This data base offers the following forms:

[Restaurant](#)

[Hotel](#)

[Hotel and Restaurant](#)

## Restaurant Form

The restaurant form has fields for the restaurant's name, address, and telephone number. There's even a place to list a contact name for that special maitre d'hôtel that always manages to seat you at your favorite table. Use the Type, Specialty, and Dress fields to define the type of restaurant.

Check the Reservations check box if the restaurant takes or requires reservations, and check the appropriate charge card box for the credit cards they take. You can enter more detailed information of any sort in the Comments text box such as Be sure to request table 30; great view!

Speaking of views, a helpful way to define a View for restaurants and hotels is by State and City. This lets you see your favorite places in each of the cities you visit so that you can select them more easily. If you're in the mood for Italian food in Boston's North End, for example, you can define the view as city=Boston and type=Italian and Winfo will display a list of all the Italian restaurants in your data base which are located in the city of Boston.

## **Hotel Form**

The Hotel form is similar to the restaurant form but has more comment space and check boxes you can use to indicate whether or not the hotel has a pool or an exercise room. You can enter either a number or a comment in the rating box. You can use your own scale, say from 1 to 10, or rate it anywhere from bad to lavish.

The Located Near text box is good for listing the sights or transportation options (e.g. bus stops and subway stations) that are near the hotel. Use the Comment space to enter any other comments you may have about the hotel, its service, or price.

## **Hotel and Restaurant Form**

The Hotel and Restaurant form is a combination of the individual Hotel and Restaurant forms and can be used to enter information about either type of establishment as well as for hotels that have restaurants.

# Shopping List Data Base

The Shopping List data base has two forms: Gift List and Shopping List. The gift list form is used to enter shopping list information for birthday, anniversary, holiday, and other type of gift information. The shopping list form is for general shopping lists.

# **Accounts List Data Base**

The Accounts List data base has two forms: Account Format 1 and Account Format 2. Both forms are used to enter information about checking, savings, and other types of bank accounts, including credit cards, and certified deposits (CDs).

# Inventory Data Base

The Inventory data base is useful for listing all kinds of valuables, from jewelry to computer equipment you have in your home or office. Having such a list makes it easier to work with insurance companies and helps you keep track of the serial numbers for all of your equipment.

There are two forms for the inventory data base: Inventory and Inventory short. Use these forms to enter as much information as possible about your valuables. If you take an inventory of electronic equipment, be sure to get the serial number from the back (or the bottom) of the units.

# Recipes Data Base

Use the recipe data base to store information about your favorite recipes so they're easy to search. The Recipes data base has two forms: Recipes and Alternate Recipes. Both allow you to enter ingredient lists, instructions, and classify the recipe by its course (appetizer, dessert, etc.). The Recipes form allows you to enter more detail.



# **Business Contacts Data Base**

The Business Contacts data base has two forms: Business Contact and Sales Short form. This data base is intended for use by anyone who works in sales or consulting. This data base helps you keep track of your clients, their addresses and telephone numbers, and your meetings with them.

# Repair Data Base

The repair data base offers you a way to track the work you've had done to your car and home, the sort of work that was performed, and the name of the person who performed the work.

This data base offers the following forms:

Main Repair

Car Repair

Household Item Repair

## **Main Repair Form**

The Main Repair form is a combination of the Car Repair and Household Item Repair forms. Main Repair can be used to enter information about any type of repair.

## **Car Repairs Form**

Use this form to track car repairs other than those which are part of regular maintenance, such as recharging a dead battery, fixing a flat tire, etc. The comment area gives you plenty of room to describe the problem and its resolution.

## **Household Item Repair Form**

Similar to the Car Repair form, the household item repair form allows you to track repairs done to the home (interior and exterior), its appliances, furniture, and other home-related items like the lawn mower and the sprinkler system.

# To Do List Data Base

This data base helps you keep a list of errands you need to run and appointments you've made. There are two forms for this data base: To Do and Alternate To Do. The forms have a number for radio buttons you can use to prioritize items and indicate their completion status.

# Stock Transaction Data Base

This data base has a single form called Stock List. Use this data base to list your investments in stocks, bonds, and mutual funds. The form lets you enter information about the purchase date, price and other pertinent details. A large comment area lets you enter text to describe the investment.

# Music, Video, & Software Data Base

The Music, Video, and Software category is used to inventory LP record, compact disc, audio and video tape, and software collections. This data base offers the following forms:

[Music/Video/Software](#)

[Music Collection](#)

[Video Collection](#)

[Software Library](#)



## **Music/Video/Software**

This form is a combination of the three forms described below. You can use this form to enter music, video, or software information.

## **Music Collection**

Use this form to enter information about musical recordings you own, whether they're on CD, reel-to-reel tape, LPs, or DAT. The form has radio buttons you can use to classify the music and text boxes for the name of the artist, the title of the recording, and its label.

## **Video Collection**

The video collection form has fields you can use to describe your videos, including title, rating, and star name fields. The large comment area provides plenty of room for you to enter information about the video's style, length, and quality.

## **Software Library**

Use the software library form to enter information about software packages you own. The form includes a place for serial number, vendor, and date purchased.

# Mail List Data Base

The mail list data base provides an alternative location for phone book information that you also use as your mailing list. If you have a business and want to keep track of your customers so you can do mailings, this is a good place to do it.

Using Winfo's data base export/import feature, you can also consider using the phone book data base type for this information, define a view to list only those cards you want in your mail list, export the cards, and then import them into this data base.

When you have a mail list data base set up, you can print the information onto regular printer paper, labels, or envelopes. See [Printing](#) for details on printing.

