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## What's New

### October, 2002; Release of the new version: **PrimaSoft Organizer Deluxe version 2.0**

- New [Copy Record To Clipboard](#) function copies the current record to Windows Clipboard.
- New [Copy Record To Clipboard From Template](#) function copies the current record to Windows Clipboard using a template text file.
- New Warn If Duplicate Record checkbox in [Options](#) warns if a newly added record is a duplicate.
- Maximum Number of [Data Pages](#) in the layout was increased from 10 to 15.
- Improved Search and [Replace](#) function. Remove File Path option was added in the Replace function.
- New print [Bar Codes](#) function. Bar Codes can now be printed on labels.
- Improved [Filter](#) function. New All Of and Contains options.
- New [Command-Line Parameters](#): read\_only and read\_write.
- New [Record](#) pull-down menu offers easy access to the right-panel (Recode Details Page) popup menu functions.
- [Keyword Mode](#) - new popup menu option for Drop-Down List control.
- New [Export To Text using Template](#) function (Advanced/Export).
- New [Hide/Show Picture](#) function speeds up the record browsing process.

### May, 02, 2002; Release of the new version: **PrimaSoft Organizer Deluxe version 1.9**

- Improved Details page. You can rename the right panel tabs (Part 1, Part 2,...) in Designer ([Data Fields Layout](#)).
- Improved [Table View](#) function. The column order and widths are now automatically saved and loaded in Table View (Table function).
- Improved [External Graphic](#) Field. New Edit popup menu function for editing External Graphic Fields. It only works if you have a graphic editing software registered with Windows for a given file type.
- Improved [External Graphic](#) Field. When capture function is followed by Save function the image will now be correctly renamed.
- Improved [Summary](#) function. Summary function has now a new "Day of Week" option for a summary by a Date field.

### September, 20, 2001; Release of the new version: **PrimaSoft Organizer Deluxe version 1.8**

- Improved [Table Field](#) function: Table Field has a new popup menu item called Insert File Attachment. When you have a file name in a table field (File Attachment) it is underlined and double-click on it launches the associated application.
- Improved [Table Field](#) function: In a calculated column if the column is not totaled it makes the calculation even for the Totals row.
- Improved [Table Field](#) function: In Table Edit window there are 2 new functions (buttons): Export (to a text file) and Import (from a text or DBF file).
- New function: You can launch Designer from Organizer [File/Designer].
- New function: You can launch Organizer from Designer [Organizer Deluxe push button].
- Improved [Restore](#) function: New "Restore Mode" option in Restore window - it has 2 possible values: "Restore to Original Database" and "Restore to New Database".
- Improved [Print Labels](#) function: images are now scaled in the Print Labels function (previously, large images could not have been printed).

- Improved [External Graphic](#) field: link to a graphic file is not deleted from a database even though the path to the image is not valid (example: CDROM that contains media files is not inserted into a CDROM drive)
- Improved [Export To](#) / [Import From](#) Text File function: new Memo Fields Delimited By option.

**May, 21, 2001; Release of the new version: PrimaSoft Organizer Deluxe version 1.7**

- New [Fast Find](#) function (Incremental Search). The Fast Find function allows you to display records according to the letters entered into the Fast Find edit box.
- New [Total](#) function in the Report Wizard. You can include totals for numerical fields on your report.
- New [Edit Table Field](#) function. You can easily define or modify table field layout and arithmetic formulas.
- Improved [Table Field](#) layout options.
- Improved [Calculated Field](#) layout options.

**March, 25, 2001; Release of the new version: PrimaSoft Organizer Deluxe version 1.6 and PrimaSoft Web dB Server version 1.0**

- [Export To](#) / [Import From XML](#) files (Advanced/Export or Advanced/Import) functions;
- [Export](#) / [Import](#) Record integrated with Web dB Server (Browser tab);
- [Online Search](#) function in Search window;
- [View Page](#) default layout improved;
- Reported errors corrected.

For complete list of improvements and bug fixes please visit our site:  
<http://www.primasoft.com>

**January, 10, 2001; Release of the new version: PrimaSoft Organizer Deluxe version 1.5 and PrimaSoft Web dB Server version 1.0**

PrimaSoft is announcing a new exciting service that will naturally complement and extend our Organizers product line. It will be called **PrimaSoft Web dB Server** and it will allow the users to make their databases accessible on the net through a Web browser.

**Key features:**

- Web dB Server enables you to quickly create, manage and share your databases online.
- You can upload databases from your PC-based Organizer Deluxe program to PrimaSoft Web dB Server and process it right away online.
- You can download databases from PrimaSoft Web dB Server to your PC-based Organizer Deluxe program and process it right away on your desktop.
- You will be able to make selected databases accessible to other members of PrimaSoft Web dB Server or to all Internet users.
- Please read more about **PrimaSoft Web dB Server**, go to: <http://www.lightdb.com>

**Organizer Deluxe v1.5 improvements:**

- Improved functionality of the Designer: new [Web dB Server](#) functions.
- Improved functionality of the Organizer Deluxe: new [Web dB Server](#) functions.
- Internal changes in the Organizer Deluxe database engine. They increase the record display speed more than 20 times (databases with more than 1000 records) and improve performance on the network.
- Improved functionality of the [Handy Email](#) function. You can create one email message that will be automatically personalized for each receiver.
- Other improvements: enhanced Graphic Field, enhanced Designer, reported errors

corrected.

### **June, 25, 2000; Release of the new version: PrimaSoft Organizer Deluxe version 1.4**

- Improved functionality of the [External Graphic Field](#): new Thumbnail function.
- Better support for registered users with access to the Internet: new [Online Update](#) function and new [Online "Database Template" Download](#) function.
- Improved functionality of the [Designer](#): all character fields could be resized.
- Improved functionality of the [Formatted Record](#): one line character fields support formatted record function.

### **February, 12, 2000; Release of the new version: PrimaSoft Organizer Deluxe version 1.3a**

- Maintenance release. Reported errors corrected.
- Improved integration with the Internet. New [QuickFill](#) Forms function.

### **January, 24, 2000; Release of the new version: PrimaSoft Organizer Deluxe version 1.3**

#### **Some of the new features in Organizer Deluxe Series v1.3:**

- New Data Field Types. Organizer Deluxe (Designer) supports the following new data field types: new ["Radiobuttons"](#) field, new [Checkbox](#) field, new [Autoincrementing](#) field, and improved [Calculated](#) field.
- New [Export](#) / [Import](#) from/to Netscape bookmarks or Microsoft Internet Explorer favorites.
- Improved integration with the Internet. New [Organizer Favorites](#) and new [AutoFill](#) Forms function.
- Improved [Printing](#) Functions. New print "From page To page" function. New "Group Reports By" functions.
- Improved [Backup](#) Function.
- Improved [Table](#) Field. Table field supports calculated columns.
- New [Read Only Mode](#) function.

### **September, 14, 1999; Release of the new version: PrimaSoft Organizer Deluxe version 1.2**

#### **Some of the new features in Organizer Deluxe Series v1.2:**

- New [Find Duplicates](#) function. This function allows you to display and/or delete duplicate records based on a selected data field.
- New [Reminder](#) function. You can create reminder messages that are associated with a selected database record.
- Improved functionality of the [View Page](#). HTML template files accept keywords at any position. There are several ready-to-use HTML template files that show how data fields can be integrated with the Internet resources.
- Improved functionality of the [Designer](#).
- Improved functionality of the [Multi-Line Edit](#) box. You can select a horizontal scrollbar.
- Improved functionality of the Drop-Down List field ([Maintenance/Edit Lists](#)). Load list elements from a text file. Save list elements to a text file.
- Improved functionality of the [Filter](#) function. New **one of** option.
- Improved functionality of the [HTML Edit](#) field. New expand and view in a browser functions.
- Improved functionality of the [Table](#) field.
- Improved functionality of the [Summary](#) window. The summary window can generate HTML tables.

## **June, 10, 1999; Release of the new version: PrimaSoft Organizer Deluxe version 1.1**

### **Some of the new features in Organizer Deluxe Series v1.1:**

- Improved functionality of the [Replace](#) function: Insert In Front, Append To The End.
- New [Formatted Record](#) function. The Formatted Record function automatically creates the content of the selected multi-line text or multi-line html field from the existing data fields and the template text file (\*.txt, \*.htm, \*.html,.....). You can find this function in the Maintenance window (Formatted Record).
- Improved functionality of the [Filter](#) function. New "One Of" feature. Select records from the database that contain search words defined in the "One Of" edit box.
- Reported errors corrected:
  - Improved functionality of the [Designer](#) module.
  - Import database from the existing template file: layout files are created automatically.
  - Modification of the existing database: delete fields and add new fields errors corrected.

## **March, 30, 1999; Release of the new product: PrimaSoft Organizer Deluxe version 1.0**

**Organizers Deluxe bring you some new powerful features yet they keep the same user-friendly interface that made PrimaSoft Organizers so popular. You can now CREATE MANY ORGANIZERS WITH ONE ORGANIZER DELUXE.**

### **Some of the new features in Organizer Deluxe Series v1.0:**

- **[User-definable Database](#) and [Data Entry Layout](#):** This feature alone makes Organizers Deluxe one of the most flexible, end-user-oriented database products on the market. Using a helper program called Designer you can define structures for your databases (data fields definitions). This allows you to specify the data fields that you need for your application. Also, using Designer, you can specify a layout of the Data Entry Panel according to your needs. In fact, you can specify different data fields and data entry layouts for every database. Therefore, one Organizer Deluxe is like many Organizers in one program - you can use it for all your database needs. (Examples: Address Organizer, Web Catalog/Store Organizer, Hobby Organizer, Inventory Organizer, Image Organizer,.....)
- **[External Graphic Fields](#):** This new graphic field type is very useful for applications that use many large images stored in JPEG or GIF format. Instead of storing them internally in the database this field stores only the file names. This field is more reliable and more efficient than the Internal Graphic Field which is still available.
- **[Compressed Internal Graphic Fields](#):** Internal Graphic Fields can now be compressed into JPEG or GIF format before they are stored in the database. This makes the database size smaller. However, for applications that use many large images we recommend the External Graphic Fields.
- **[Improved Backup and Restore Functions](#):** Now you can Backup and Restore your database to and from backup media in one step. There is no need to use external software. You can even backup your database to multiple diskettes.
- **[Table Data Field](#):** This new field allows you to enter and display information in a table (spreadsheet-like) format.
- **[Calculated Fields with User-Definable Formula](#):** Calculated fields allow you to specify a simple arithmetic formula. For example, you can set up a calculated field that multiplies 2 numeric fields (e.g. quantity and price).
- **[Importing data from other databases](#):** Using Designer you can now Import

data from the following database formats: DBase for Windows, Paradox, Fox Pro, MS Access.

- **Integrated with the Internet and the Microsoft Internet Explorer browser:**

**1) View Page:** In addition to data entry pages there is one new page that displays Microsoft Internet Explorer browser (or opens your default Windows browser). You do not have to switch among the data pages to check all fields of the selected record! Click on the View Tab displays the whole record in the form of the WEB page (all text fields together with images). The View Page also allows you to visit WEB pages on the Internet. View Page accepts Custom HTML Templates. Design a HTML document with the tool you know very well, your favorite HTML Editor. Use this document as a template for viewing your records. You can also use this feature for creating custom reports, letters, forms, WEB catalogs...

**2) Browser Page:** You can view WEB Pages of the selected records directly in the Organizers' Browser Page - Microsoft Internet Explorer browser. Pressing on the Browser Tab sets the Organizers' browser to activate the World Wide Web page address from the selected record. Requirements: Microsoft Internet Explorer browser v4.0.

**3) Handy Email :** (Organizer Deluxe with the email data field). Now you can create and send quickly e-mail messages to anyone on the Internet directly from the Organizer. It's easy to use and fast. At once you can send email messages to one, all, or selected e-mail addresses listed in the Organizer.

**4) HTML Report Wizard:** Without any additional HTML editor, with a click on the button, you can create a set of linked web pages that can be put immediately on your web server or you can just view your data with your favorite browser. Images are automatically converted to gif or jpeg formats.

Internet Explorer is a registered trademark of Microsoft Corporation.

## Getting Started

The information in this manual applies to all our Organizers. Since you are reading this document we can assume that you have successfully installed our software on your system. As a result of the installation you should have a program group containing the Organizer icon. Double-click on this icon to start the program. After the main window is displayed you can immediately start entering new records, but first please read the following topics:

### **Organizer Deluxe**

[Application Main Window](#)

[Options \(Preferences\)](#)

[Controls used in the Details Page](#)

[Adding New Records](#)

### **Designer Deluxe**

[Organizer Designer](#)



## Application Main Window

The main application window contains two basic elements: the **Table of Contents** and the **Details page**. Both of these elements contain your data, but each of them presents it in a different way. The left side of the window (Table Of Contents) lists several records and the right side (details page) displays the detailed information about a selected record. The main window also contains a **menu** from which you can select many functions e.g. *Search/Find*. Most of the menu functions are duplicated in the **Speed Bar** which is displayed at the bottom of the main window. The function buttons in the Speed Bar are divided into two sets (or pages) accessed by the clicking on the Standard and Advanced tabs. The main window is **resizable** and you can also change the widths of both left and right pages (TOC and Details Page) by dragging the little red-and-yellow handle at the bottom of the main window.

### Table of Contents:

- Can be configured to display any number of any data fields in any order (see: [Header](#));
- Consists of [Record Buttons](#) which display record data fields as selected in the Header;
- You can browse the TOC by clicking on *First*, *Page Up*, *Page Down*, and *Last* buttons;
- You select a record by clicking on the Record Button;
- Each Record Button has a popup menu (displayed with right-mouse click) which contains some useful functions.

### Details Page: Contains data fields for the currently selected record;

- Is divided into several parts which can be accessed by clicking on the Tabs labeled Part1, Part 2, (above the Details Page); [View Page](#) (Custom HTML Templates); [Browser Page](#).
- Contains a small Speed Bar (at the bottom of the Details Page) with some functions that can be applied to the current record e.g. *Copy Record*, *Paste Record*, *Delete Record*, *Undo*, etc. (all are listed in the popup menu)
- Data fields displayed in the Details Page can be readily modified by typing in new information;
- The changes to the current record are saved automatically when you select another record, click on the *New* button, or *Exit* from the program;
- Use of a broad range of [controls](#), such as tab pages, combo boxes, calendars, calculators makes this application not only fun to use, but also increases your productivity and reduces time spent maintaining data.
- Each Detail Page has a [popup menu](#) (displayed with right-mouse click) which contains useful functions.

**Customization:** The program provides a wide range of customization functions. Before you start entering new records it is a good practice to play with some [options](#) of the program.

- It will allow you to set program options that are close to your individual preferences (colors, fonts, size, position, data field names..).
- Experience will speed up the future data entry process (record templates, copy/paste record, filter, sort, backup).

## Controls used in the Details Page and in some dialog boxes

Controls are used for both displaying and changing the data. Controls in the Details Page directly correspond to the database fields - changes in these controls are automatically reflected in the underlying database.

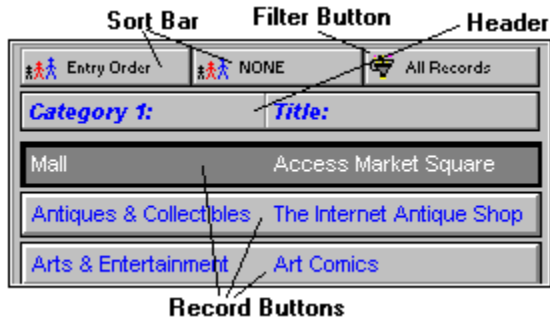
**Hint:** all controls have **Popup Menus** (accessed with the right-mouse click) containing many useful functions.

### Controls/Data Field Types:

- 1) Character / One-Line Text
  - [Simple Text](#)
  - [Drop-Down List](#)
  - [Email Address](#)
  - [Web Page Address](#)
  - [Web Page Title](#)
  - [Phone Number](#)
  - [Attachment Field](#)
  - [External Graphic Field](#)
- 2) Memo / Multi-Line
  - [Multi-Line Text](#)
  - [Multi-Line HTML Text](#)
  - [Table](#)
- 3) Graphic
  - [Internal Graphic Field](#)
- 4) Numeric
  - [Simple Numeric](#)
  - [Calculated Numeric Field](#)
  - [Radiobuttons Field](#)
  - [Checkbox Field](#)
  - [Autoincrementing Field](#)
- 5) Date
  - [Date](#)

Related topics: [Details Page Functions](#), [Browser Page](#), [View Page](#)

## Record Buttons



Record Buttons are displayed in the [Table Of Contents](#). In essence, record buttons give you a quick view of a certain number of records at once. The number of record buttons depends on the main window size (12 is the default number). This number can be changed by adjusting the size and type of fonts (right mouse click).

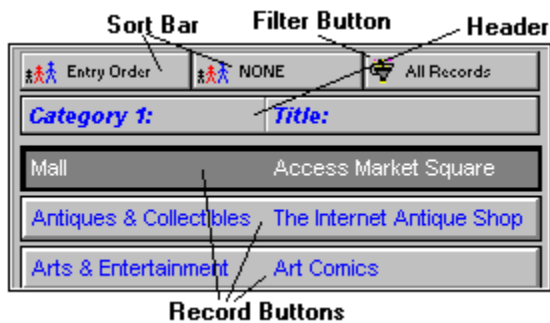
Record Buttons are controlled by the [Header](#) which determines which data fields are displayed, in which order, and how wide each field is. Multi-line edit fields and graphic fields cannot be displayed on record buttons.

Clicking on a Record Button results in the selection of the record. [Details Page](#) for the selected record is displayed.

Record buttons have the following **Popup Menu** functions:

- *Go To Web Page* : load the Web site from the record into the Web browser (only listed when database with WEB address field is opened);
- *Capture Web Page* : capture the Web site from the Web browser into the record (only listed when database with WEB address field is opened);
- *Quick View* : gives you a fast view of the selected record directly from the Record Button without having to actually make the record active;
- *View Copy Buffer* : Copy Buffer is temporary storage to which a record is being copied when using the Copy Record function; later you can Paste the record from the copy buffer;
- *Paste Record* : paste a record from the Copy Buffer;
- *Copy Record* : copy a record to the Copy Buffer;
- *Delete Record* : delete this record (cannot be undone);
- *Print Record* : print only this record;
- *Font* : allows you to select the font for the text displayed on the buttons;
- *Color* : allows you to select the text and background color for all record buttons;
- *Help* : displays information about record buttons;

## Header



Header displays the Names of the data fields that are displayed underneath on [Record Buttons](#). Header controls which fields are displayed and in what order as well as the width of each field. The user can change the order by dragging and dropping the field names on the Header (left mouse click). The widths can be changed by dragging the dividing lines on the Header (left mouse click).

The Header **Popup Menu** (right mouse click) contains the following functions:

- *Insert Field* : inserts a data field into the Header (and Record Buttons);
- *Remove Field* : removes a data field from the Header (and Record Buttons);
- *Load From Template* : allows the user to quickly load a Header layout previously Saved;
- *Save As Template* : allows the user to save the current Header layout in a template for future use;
- *Delete Template* : removes the selected template from the list of header templates.

## Letter bar



### What is it?

The Letter bar is a shortcut to filtering records alphabetically. The records are filtered into separate letters according to the first letters of [Primary Sort Field](#) data. Letter Bar is displayed in the middle of the application window (you can also have it displayed at the right window edge - see: [Options](#)). The Letter Bar contains letter buttons (A-Z). The letters that are displayed in Red (default) color signal the presence of records. Black (default) color on the other hand marks 'empty letters'. The Yellow (default) color letter (also pushed down) marks the currently selected letter for which records are displayed. You can change the Letter Bar colors in Options/Colors. You can also disable Letter Bar in Options. **Note:** When the Primary Sort Field is not a text field (e.g. ENTRY ORDER or Date Field) the Letter Bar becomes inactive automatically.

### How to use it?

Press on a letter in the bar to see all the records which primary sort field starts with that letter of the alphabet.

**Hint** : learn how to use [Sort](#) the database if you want to use the Letter Bar.

## Adding New Records

To create a new data record manually:

- Press the *New* button on the 'Standard' section of the Speed Bar (positioned below the Table of Contents or below the Details Page), or select *File/New Record* from the application menu. A new record will be prepared for data entry, you will be positioned in the Details Page.
- Simply enter your data in the fields on the Details Page.
- The new record is saved automatically when you select another record , click on the *New* button, or *Exit* from the program.

**Note:** Some fields in the record may be 'required'. This means that they can NOT be left blank - you must put some data there.

**Note:** When the new record is saved, it is positioned automatically in the data according to your sort order.

**Hint :** Advanced users may want to take advantage of the Record Templates when creating new records.

You can also create a new record by using Paste Record function. This may be useful when you are entering similar records which differ only in some data fields. In this case do the following :

- Enter manually the first record;
- Use *Copy Record* to save it in a Copy Buffer;
- Press the *New* button;
- Use *Paste Record* function;
- Modify the data fields that are different;

**Note:** The new record is saved automatically when you select another record , click on the *New* button, or *Exit* from the program.

[Copy Record and Paste Record](#)

[Deleting records](#)

[Using Record Templates](#)

## Copy Record and Paste Record

Using the 'Copy and Paste' utility will help you create new records by duplicating existing records. To duplicate the selected record:

- Position yourself in the Table of Contents.
- Use the right mouse button to invoke the pop-up menu.
- From the pop-up menu select *Copy Record*.
- Click on an empty record in the Table of Contents (or *New* push button).
- Use the right-click on that empty record to invoke the pop-up menu again.
- Select 'Paste Record' from the pop-up menu.
- Result: an identical copy of the original record was created, and appended to the database.

**Note:** You can also Paste a record into the existing record.

[Adding New Records](#)

[Deleting records](#)

[Using Record Templates](#)

## Deleting records

Records of data can be permanently removed from the data file using the 'Delete' function. This function can be accessed from the Speed Bar at the bottom of the Details Page, from the Details Page Popup Menu, and from the Record Button Popup Menu.

### How to delete a record:

- Select the record you would like to delete.
- Press the 'Delete' button, or select the 'Delete' item from the Popup Menu.
- Type in 'Yes' in the confirmation dialog box. Pressing 'Cancel' will abort the deletion.

**Note:** the deletion process can not be undone! Pressing 'Cancel' aborts the deletion process. If you do not want the confirmation dialog box to be displayed before the deletion you can change set the Immediate Delete Option (see Options).

**Hint :** You can delete a range of records (see: [Maintenance](#) and [Filters](#)).

[Adding New Records](#)

[Copy Record and Paste Record](#)

[Using Record Templates](#)



## Using Record Templates

Advanced users may want to take advantage of record templates which can speed up data entry. If you know that you will be entering a number of records having similar contents (e.g. some data fields are identical)

- Enter values that are the same.
- Save this record to a Record Template. You can do this by using the **Popup Menu** of either the [Details Page](#) or the Template Button (located at the top right corner of the Details Page). Select the *Save Record to Template* menu item. In the **Save Record As Template** window enter the template name, set options for date fields, and click on the OK push button.

You can use the saved Record Templates in the following way:

**1.** Select templates from the Details Page popup menu:

- Press the *New* button on the 'Standard' section of the Speed Bar (positioned below the Table of Contents or below the Details Page), or select *File/New Record* from the application menu.
- Click with right mouse button on the record details page.
- Highlight the *Replace Record with Template* item.
- Select record template.
- As a result, the record data fields will be initialized from the record template. This form is convenient for entering series of different records.

**2.** Set the *New* button as the template record:

- Click with the left mouse button on the Template Button.
- Select the record template from the displayed menu.
- The name of the selected Record Template will appear on the Template Button.
- As a result, every time you add a new record (by clicking on the *New* button or selecting shortcut) the record data fields will be initialized from the record template. When you exit the program and start again the *New* record function will be set to blank (all fields will be empty). This form is convenient for entering series of similar records.

[Adding New Records](#)

[Copy Record and Paste Record](#)

[Deleting records](#)

## Searching the database

### What is Search?

#### Local Search

The 'Local Search' function helps you to locate the record(s) that contain the piece of data you are looking for. With this application, you are able to locate a piece of text in any field in the opened data file, with the capability of moving to the next record(s) filling your search criteria.

#### Online Search

The 'Online Search' function helps you to locate the record(s) or web pages that contain the piece of data you are looking for. With this application, you are able to locate a piece of text on the Internet or Intranet in:

- Databases that are on our Web dB Server;
- Online Search Engines;

### Search / Local Search

#### How to use the Search function?

When in the 'Search' dialog:

- Select the field to be searched (notice the 'All fields' option!);
- Select the 'Start from' (beginning or end);
- Input the text to search for (note the previous entries);
- Press the 'Find' button to activate search.

#### What is the Result of a Search?

The 'Search' function positions you in the first record that matches your search criteria. Use the 'Find next' button to go to next records that contain the text searched for.

#### What is the result of a search when the "Non-Stop Search Mode" option is marked ?

The program goes through entire database looking for records that match search criteria. When the search is finished ONLY those records are displayed that contain the text. In order to return to All-Records-Display set the Filter Scope option to All Records (in the Filter dialog box), or select All Records in The Filter Button Popup Menu.

### Search / Online Search

#### How to use the Online Search function?

When in the 'Online Search' dialog:

- To use Online Search function you have to be connected to the Internet (Intranet).
- Select the Search Engine.
- Input the text to search for.
- Press the 'Find' button to activate search.

#### What is the Result of a Search?

The 'Online Search' function displays the result web page(s) in your browser. Note: If you set Internal Web Browser option on in Options Window the result will be displayed in the Organizer's browser window.

## **Define a new Online Search**

### **Online Search, search a database on a Web dB Server**

- Open Online Search window.
- Click on the Add/Edit button.
- Enter Search Name.
- Select Web dB Search in the Search Type section.
- Enter public user ID (case sensitive) for the database.
- Enter Database Name (case sensitive).
- Additionally you have to define the Web dB Server address. Open the Web dB Server Login Settings window and enter Server Address (Web dB Server/Setup item on the main menu).

We provide all above parameters for public databases that are searchable on our server. (Example: Web Recipe Archive)

### **Online Search, search an Internet or Intranet search engine**

- Open Online Search window.
- Click on the Add/Edit button.
- Enter Search Name.
- Select Other Search Engines in the Search Type section.
- Enter URL Link of the search engine in the following form: URL link followed by a question mark (?), then the name of the input edit box (this is the name of the edit box that accepts search strings in the search form), and the equal sign.

Example: Yahoo search URL Link: <http://search.yahoo.com/bin/search?p=>

[Find Duplicates](#)

[Fast Find / Incremental Search](#)

[Filters](#)

## Sorting the database

### What is sort?

To sort records means to change the order in which the records are displayed and printed. The underlying data structure of the file remains the same: only the way data is being displayed changes.

### Two kinds of sort

This application uses one-level and two-level sort, depending on the number of fields specified in the 'Sort by' option.

### One-level sort

One-level sort is sorting records by one field only. For example: Sort by 'Date' arranges records in ascending or descending order by the 'Date' field.

### Two-level sort

Two-level sort is sorting data records by two fields at the same time. One field becomes the Primary Sort Field, with another becoming the Secondary Sort Field. The result is records ordered by the primary sort field, and within that order by the secondary field.

For example: 'Last name' primary sort field, 'First name' secondary sort field:  
All the records will be arranged alphabetically by the 'Last name'. Within that, all the records with the same 'Last names' will be further arranged by the 'First name'.

### Where is the Sort function?

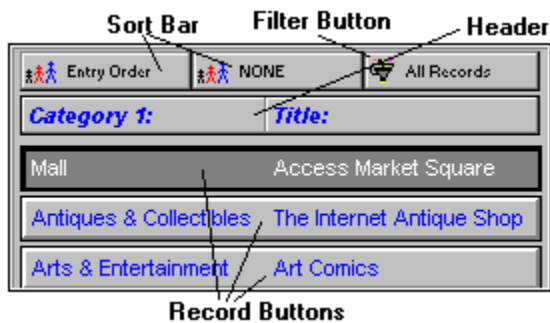
The 'Sort' function can be accessed from the 'Advanced/Sort' option on the main menu, and from the Speed Bar (advanced section), at the bottom of the screen. However, the fastest access to sort options is from the [Sort Bar](#) displayed at the top of the [Table Of Contents](#) (above Record Buttons).

**Note:** Primary and secondary sort fields are also being displayed as buttons above the Table of Contents. Pressing on these buttons also activates the 'Sort' function.

**Hint:** The [Letter Tabs](#)(Letter Bar) remain disabled until you select a text field as the Primary Sort Field.

[Quick Access to Sort and Filter Functions - Sort Bar](#)

## Quick Access to Sort and Filter Functions - Sort Bar



The Sort Bar consists of the following 3 buttons:

**1. Primary Sort Field** (first button): displays the name of the data field used as a Primary Sort Field; if a Text Field is selected as a Primary Sort Field the Letter Bar is enabled and the records are automatically separated according to the first letter of the Primary Sort Field;

**2. Secondary Sort Field** (second button): displays the name of the data field used as a Secondary Sort Field; if the Primary Sort Field is ENTRY ORDER the Secondary Sort Field is disabled; if both Primary and Secondary Sort Fields are text fields they both must have the same Sort Direction (Ascending or Descending).

**3. Filter Button** (third button): displays the current Filter Status (see Filters for more information) :

- *All Records*: filter is not active and all records are displayed;
- *Normal Filter*: filter is active and records that satisfy the filter are displayed;
- *Reversed Filter*: filter is active and records that do not satisfy the filter are displayed;

Clicking on Primary or Secondary Sort Field with the left-mouse button displays the Sort Dialog Box where the user can change the sort options.

A faster way to change the sort options is to use Popup Menus of Sort Buttons.

- Click with right-mouse button on the Sort Button (Primary or Secondary sort button);
- Select Primary Sort Field;
- Select sort field;

Clicking on Filter Button displays the Filter dialog box where the user can create or modify a filter.

The Filter Button Popup Menu contains the following functions:

- *All Records*: deactivates the current filter (all records are displayed);
- *Normal Filter*: activates the Normal Filter option (see Filters);
- *Reversed Filter*: activates the Reversed Filter option (see Filters);
- *Load From Template*: allows the user to quickly load a previously Saved filter;
- *Save As Template*: allows the user to save the current filter in a template for future use;
- *Delete Template*: removes the selected template from the list of filter templates.

## Selecting a subset of all records - Filters

### What is filtering?

Filtering is a method of limiting the number of records displayed to a certain range. A filter specifies the criteria for the process. A filtering example: list me all the records with the value of the 'Date' field greater than '01/01/1992'.

### Kinds of filters.

A filter can specify a criterion for one or more fields in the record. The more criteria for the filter you specify, the better chance of obtaining the range of records that interest you.

### How to access the 'Filter' function?

The Filter function can be located in the *Filter* option on the *Advanced/Filter* option on the Main Menu, and in the Speed Bar (advanced section), at the bottom of the screen. However, the fastest access to filter options is from the [Sort Bar](#) displayed at the top of the Table Of Contents above Record Buttons.

### How to filter?

When in the **Set Filter window**:

1. Select fields to be used in the filter (the box on the right) from the fields list on the left.
2. A filter criteria for each field used in the filter can be specified using the *Edit* button below (see: [Setting a filter criterion for a data field](#)).
3. Use the 'Scope' selection to specify the filter kind:
  - All records: display all records (clear the filter results).
  - Normal filter: use the filter as is.
  - Reversed filter: reverse the action of the filter.
4. Press the *Apply* button to see the effects of your filter settings.

**The result:** Filtering results in a range of records that meet your criteria specified in the filter dialog box.

**Load filter:** Retrieve a previously saved filter from a filter template file.

**Save filter:** Save current filter in a filter template file.

**Note:** you can't set filters for multi-line edit boxes in the filter dialog box. You can use the [non stop search](#) function for this purpose.

**Hint:** you can also use Filters for selecting subsets of records for Printing.

## Setting a filter criterion for a data field

### What does it mean?

This function will allow you to edit filter settings that will apply to a data field.

### How to get there?

When in the [Set Filter](#) dialog box:

- Double click on a field listed in the *Fields Used in Filter* box.
- Highlight a field listed in the *Fields Used in Filter* box and click on the *Edit* push button.

### How to use it?

When in the 'Filter for:' dialog box:

- Select your criteria from the 'Is' list (<, <=, =, >=, >, Between, One Of, All Of, Contains).
- Type in a value or values corresponding to your criterion selection.

## Summary and Graphs

A summary of records in the database can give you some insight into distribution of your data. For example, a summary by a Category will tell you how many records there are in each Category. Displaying a Graph can make it easier to grasp the overall picture and uncover trends in your data.

### How to display a Summary:

- Click on Summary button on the Advanced Speed Bar (or select it from Advanced Menu).
- Now select the data field (from a drop down box) that you want the summary by.
- It may take some time before the summary is displayed.
- You can Sort your summary by Name or Value.
- You can display a summary by another field at any time.
- After a summary is displayed you can click on the Graph button to display a Graph Window.
- You may want to Define and Apply a [Filter](#) (see *Selecting a subset of all records - Filters*) before using the Summary function in order to select a subset of records.

**Graph Window:** You can display 3 types of Graphs (by clicking on *Chart* radio buttons):

- Bar Chart
- Pie Chart
- Line Chart

You can control some aspects of the graphs by selecting 3D, X Axis Labels, and Items Per Page options. When you are satisfied with the graph you can print it by clicking on the *Print* button.



## Using Multiple Databases

The **Load Database** dialog box provides functions that are useful for:

- **Creating** new databases (from existing databases).
- **Deleting** databases that are no more in use.
- **Modifying** names and descriptions of existing databases.
- **Loading** different databases to the program.

A database is a collection of data files permanently stored on a hard disk.

Your data can be spread across separate databases. For example:

- Records with similar topics can be stored in one database, using a topic name as a database name.
- You can create temporary database for records that are entered during one month/week period. When the time cycle ends and all new records are revised move them to the permanent database file. This is a very secure way of maintaining your data.
- Each member of your family/company can have separate data file.
- Is your computer slow? Do you need a fast access to a group of records? Keep those records in separate databases.
- On a multi-user systems you can created private and public databases.

### Database Functions:

- **Load** Database: This function loads a new database to be used by this application. Select a database name in the *Available Databases* list box. Click on the *Load* push button.
- **Edit** Database: This function will edit information about the currently selected database. You can modify database name and description.
- **New** Database: This function will create a new, empty database, with data fields and layout imported from the existing database. Enter a name for the new database, and a short description. Click on the OK push button. Select the database format from the database list. **Note:** the *disk file name* will be generated by the program and it refers to the data files stored on the disk in the C:/ORGANIZER/DATA directory (*filename.dbf*, *filename.dbt*, *filename.mdx*). If you would like to create a new database with the new format please use [Create New Database](#) (Organizer Designer).
- **Delete** Database: This function will delete selected database. Select the database in the *Available Databases* list box. Click on the *Delete* push button.

**Read Only Mode:** You can load a database in a read only mode. Check the Read Only Mode. Select the database in the Available Databases box. Click on the Load push button.

**Note:** You can't delete a database that is in use.

[How to use Backup and Restore functions?  
Maintenance  
Organizer Designer](#)

## Printing Functions

### How to get there?

You can Print the current record by clicking on the small *Print* button on the Details Page Tool Bar (underneath the Details Page). You can Print a range of records (all records or records selected by either a [Filter](#) or a [Non-Stop Search](#) operation) by clicking on the *Print* button on the Speed Bar or by selecting *File/Print* from the main menu.

### Printing Reports:

You can Print Reports by selecting one of the above Print functions and then selecting *Standard Report* in the subsequently displayed Window.

### Printing Labels:

You can Print Labels by selecting one of the above Print functions and then selecting Labels in the subsequently displayed Window.

**Hint:** You can print a subset of all records by setting a Filter first.

[Printing Reports](#)

[Printing Labels](#)

## Printing Reports

The Print Report window allows you to create reports, set various report options, preview reports on the screen, and finally print reports on the selected printer.

### How to create a Report?

In order to create a report do the following (in the Print Report window):

- Decide which Report Layout you want to use (see below: *Report Layout*). The default layout is Fields In Columns. If you want to use Fields In Rows layout go to Report Options page.
- On the Data **Fields page** select the data fields that you want to include in your report (highlight a field on the left-side list and click on the 'green arrow' button. If you want to include next field in the same line or column then press on the 'plus' button.). If you selected Fields In Columns as Report Layout you can specify the widths of individual fields (highlight a field on the right-side list and enter the width value into the *Width* edit box).
- On the Report **Options page** select the report options. Make sure you select the *Report Layout* you want (Fields In Columns or Fields In Rows).
- Select Page Settings (*Margins, Page Size and Orientation*) on the next page.
- Select the *font type/size/color* for the report on the **Fonts page** (click on Change Font button).
- Define the report title and additional options on the **Report Title page**.
- After the report has been created you may want to test it by clicking on the *Preview* button. If you are not satisfied with the report adjust the report options and Preview it again.
- When you are satisfied with the report you can Print it on the Windows current printer by clicking on the *Print* button.
- If you think you may want to use this report in the future Save the report as a **Report Template** by clicking on the *Save* button. Later you can reuse the saved report by clicking on the *Load* button.

### "Group By" Report

Instead of printing all records together on a report you can have separate reports for each group of records. In order to use this function the primary sort field has to be the same as the group by field.

### Total Numerical Fields

Your reports can automatically display totals for all or selected numerical fields: [Total Numerical Field](#).

**Hint:** To change Pages in the Print Report window use *Previous* and *Next* buttons or click on the *Tabs: Fields, Options, Page, Fonts, Title*.

[Printing Functions](#)  
[Printing Labels](#)

## Printing Labels

The Print Labels window allows you to create label reports, set various report options, preview reports on the screen, and finally print labels on the selected printer.

### How to create a Report?

In order to create a report do the following (in the Print Report window):

- On the Data **Fields page** select the data fields that you want to include in your report (highlight a field on the left-side list and click on the '*green arrow*' button). If you want to include next field in the same line then press on the '*plus*' button. '*Red single arrow*' button: remove selected field; '*Red double arrow*' button: remove all selected fields.
- Select **Page Settings** (*Margins, Units Of Measure, Page Size and Orientation*).
- On the **Label page** select either one of the predefined Avery labels or create a custom label type. Enter the *Number of Copies* : how many times each record has to be printed on the label sheet. Enter the *Print from Label* number: the starting position on the label sheet. Enter the *Records Per Label* number: how many record has to be printed in a single label.
- Select the *font* and *starting position* for the label body text on the Label **Body page** (click on Change Font button to select a font).
- If you want some text to be identical on all labels define a header/footer on the Label **Header/Footer page**.
- If you want to include a graphic image on your labels select a BMP file and specify the image position on **Logo Setting page**.
- Finally, select the bar code parameters on the **Bar Code Settings page** for the "bar code" field.
- After the label report has been created you may want to test it by clicking on the *Preview* button. If you are not satisfied with the report adjust the report options and Preview it again.
- When you are satisfied with the report you can Print it on the Windows current printer by clicking on the *Print* button.
- If you think you may want to use this report in the future Save the report as a Report Template by clicking on the *Save* button. Later you can reuse the saved report by clicking on the *Load* button.

**Hint :** To change Pages in the Print Labels window use *Previous* and *Next* buttons or click on the *Tabs: Fields, Page, Labels, Body, Header/Footer, Logo*.

**Hint :** You can use Printing Labels function for creating more complex reports.

[Printing Functions](#)  
[Printing Reports](#)

## Options (Preferences)

### What does it do?

This application can be customized to suite your needs and preferences. For example:

- you can select fonts and colors for various elements of the user interface.
- you can show, hide some elements , or change their position.....

### How to find preferences?

User preferences can be accessed through the 'Options' function on the main menu at the top of the screen. Many options can be set faster from **Popup Menus** of various [controls](#). For example, when you click (with the right mouse button) on any Date edit box you can select a date format directly from that menu.

### How to set preferences?

Use pages in the 'Options' dialog box to customize the application, and set important system functions. All Options are grouped into the following pages (accessed through tabs):

- 1. User Interface page** - general settings controlling some aspects of the user interface.
- 2. Graphics page** - on this page you can select options for [External](#) and [Internal Graphic](#) fields.
- 3. Modem page** - modem settings used by [Phone Edit](#) Boxes to dial phone numbers (may not be used by some Organizers).
- 4. Data page** - initial (startup) data file selection (usually you want it as *Load Last Used File*). Here you can also modify the data field labels (or names). This lets you use some data fields for other purposes than designed.
- 5. Date page** - on this page you can select Date Format for data edit boxes.
- 6. Colors page** - here you can modify colors for most elements of the main window.
- 7. Fonts page** - you can select Fonts for groups of controls, e.g. single-line edit boxes, multi-line edit boxes, etc.
- 8. Security page** - if you want to restrict access to your database set the Password option to Password Required. In general, you should not modify the Data Root Directory setting. You may want to do this in some situations but make sure you know what you are doing (read Advanced Topics first). Access Rights settings can only be modified if you select a Multi-User System option on the Users page.
- 9. Users page** - if you select Multi-User System you can create, modify, and delete user accounts. See Multi-User System section for more information.

### 1. User interface page

- general settings controlling some aspects of the user interface.

- Menus and Speed Bars (Read also: [Menus, Speed Bars](#)).
  - Show Both Menus and Speed Bars.
  - Show Only Menus.
  - Show Only Speed Bars.
- Letter Tabs (A..Z) (Read also: [Letter Tabs](#)).
  - Use Letter Tabs.
  - Don't Use Letter Tabs.
- Hint Messages (Hints are one line messages displayed close to the mouse pointer).
  - Show Hint Messages.
  - Hide Hint Messages.
- Record Delete Mode.
  - Ask User to Confirm.

- Immediate Delete.
- Letter Tabs Location (Read also: [Letter Tabs](#)).
  - Center.
  - Right.
- Speed Bar Location (Read also: [Speed Bars](#)).
  - Top.
  - Bottom.
- Miscellaneous Options.
  - Display Tips On Startup.
  - Auto-Fill (set the auto-fill option for combo boxes) (Read also: [Combo Boxes](#)).
  - Don't display reminders (data backup reminders, data maintenance functions) (Read also: [Data Maintenance](#)).
  - Display Tray Icon (if set the program icon is displayed on the Tray Icon)
  - Internal Web Browser (if set the program activates the Windows default browser)
  - View Tab On Top (if set the View Page is the top page after the program start-up)
  - Warn If Duplicate Record (warns if a newly added record is a duplicate). This option works only when a Primary (or Primary and Secondary) Sort Field is selected. It doesn't work if Entry Order is selected. A record is considered a duplicate if another record with the same values of Sort Fields exists in the database.

**2. Graphic Fields Options** - on this page you can select options for [External](#) and [Internal Graphic](#) fields.

- **Internal Graphic Fields.**
  - *Number Of Colors* (select the number of colors for the image that will be stored in the database; the size of the image depends on the number of colors used)
  - *Compression* (select the compression mode; **Off**: the image will not be compressed and will be stored in the original form; **GIF**: the image will be converted into GIF format (maximum 256 colors) before is stored in the database; **JPG**: the image will be converted into JPEG format before is stored in the database.

The above options will allow you to keep your database smaller. However, for applications that use many large images we recommend the External Graphic Fields.

- **External Graphic Fields**
  - *Default Format* (select the file graphic file format; images will be stored on the disk in this format)
  - *Graphic Files Directory* (select the directory where the graphic files will be stored; if you store External Graphics files in the Organizer's ..\DATA\GRAPHIC\ directory you will be able to backup them)

**3. Modem page** - modem settings used by [Phone Edit](#) Boxes to dial phone numbers (may not be used by some Organizers).

- Com Port (select your modem comport)
- Dial Type
- Modem (select modem type from the list, or select *Custom Type* if modem settings have to be entered manually).
- Modem Configuration List String (if the modem not listed then enter value from the modem manual).
- Modem Initialization String (if the modem not listed then enter value from the modem manual).
- Modem Hangup String (if the modem not listed then enter value from the modem manual).

**4. Data page** - initial (startup) data file selection (usually you want it as *Load Last Used File*). Here you can also modify the data field labels (or names). This lets you use some data fields for other purposes than designed.

- Initial Data File.

- *Load Default File* (when you install the program and start the first time the **data.dbf** file is created: this is the default file).
- *Load Last Used File* (you can have any number of data files; when this option is set the data file from the last session will be loaded at program startup).
- **Modify Labels** (Labels that are listed above all data entry fields are only our suggestion, you can change them here).
  - Select the label that you want to modify in the *Labels* box.
  - Enter new value in the *New Label* edit box.
  - Click on the *Change* push button.
  - *Save* push button: saves current label settings to a template.
  - *Load* push button: loads labels from previously created templates.

**Note:** You can also change labels directly in the record details window. Left-mouse click on any label will display the label popup menu.

**5. Date Formats page** - on this page you can select Date Format for data edit boxes.

- *Date Fields* (select date field).
- *Date Format* (set the date format).

**Note:** Date Format can be automatically set in the Record Details Window. Left mouse-click on any date field will display the popup menu.

**6. Colors page** - here you can modify colors for most elements of the main window.

- *Applications Elements* box (select application element here).
- *Colors* box (click on the new color here).
- *Save* push button: saves current color settings to a template.
- *Load* push button: loads color settings from previously created templates.

**Note:** Color can be automatically set in the program Main Window. Left-mouse click on: [record button](#), [single-line edit](#) box, or [multi-line edit](#) box will display a popup menu with access to the Set Color function.

**7. Fonts page** - you can select Fonts for groups of controls, e.g. single-line edit boxes, multi-line edit boxes, etc.

- *Component* (select the control element here).
- *Change Font* push button (displays the Windows standard Font dialog box, select the font type and size here).

**Note:** Font type/size can be automatically set in the program [Main Window](#). Left mouse-click on: [record button](#), [single-line edit](#) box, or [multi-line edit](#) box will display a popup menu with access to the Set Font function.

**8. Security page** - if you want to restrict access to your database set the Password option to [Password](#) Required. In general, you should not modify the Data Root Directory setting. You may want to do this in some situations but make sure you know what you are doing (read Advanced Topics first). Access Rights settings can only be modified if you select a Multi-User System option on the Users page.

- [Password](#).
- [Public Files Access Rights \(All Users\)](#).
- [Data Root Directory](#).

**9. Users page** - if you select Multi-User System you can create, modify, and delete user accounts. See [Multi-User System](#) section for more information.

# Password

## Why set password?

Setting a password on this application is a measure of security. When you protect your application with a password, only those who know the password will be able to access your data.

## Where to find password functions?

The 'Password' function can be found in the 'Advanced|Password' option on the main menu, as well as in the advanced section of the speed bar at the bottom of the screen.

## How to set/modify password?

When in the 'Password Dialog':

- Enter your old password into the field provided, press *OK* to continue. This serves to verify that you are authorized to change the password.
- Enter the new password in the second dialog box, press *OK* to continue.
- Verify the new password by typing it in again, press *OK* to complete the 'Set/modify password' process pressing *Cancel* at any time aborts the process.

**The result:** The new password is effective immediately after you have set or changed it. Use your new password next time you start this application.

**Important:** In order to activate the Password system select Password Required in [Options/Security](#). In a [multi-user system](#) only the Supervisor can access Options/Security settings.



## Export

You can export records (all or only those selected by a Filter) to:

[Text File](#)

[DBF File](#)

[Netscape Bookmark File](#)

[Microsoft Internet Explorer Favorites](#)

[Export To XML File](#)

[Text File Using Template](#)

**Note:** The only Export function that preserves all information is Export To DBF File (when you export to other file types graphic and/or multi-line text fields are not exported).

**Hint :** You can export a subset of all records by setting a [Filter](#) first.

## Export To A Text File

### What is exporting data to a text file?

This operation will move all or selected records to a text file. The text file will list all exported records in the following way:

- Each record without memo fields will be listed in one line.
- Data fields will be separated from each other by: tabs, commas or another user defined character.
- Data fields will be optionally delimited by: commas, quotes or another user defined character.
- Memo fields will be delimited by user defined character.

### How to find Export?

The 'Export' function can be accessed in two ways:

- from the *Advanced* section on the speed bar: the *Export* button;
- from the *Advanced* section on the main menu: the *Export* option.

Then select *Export To Text File* radio button (it is a default option) and click on *OK*.

### How to use Export?

When in the 'Export Options' screen:

- select the '*Fields separated by*' option and '*Fields delimited by*' option
- define the '*Memo Fields Delimited By*' option.
- the left list box contains *all the fields* that build the application data file;
- the list box on the right side contains fields that make a structure of the text file that is the export destination (to which the data will be exported from the application);
- select field(s) from the *All fields* list box, and use the button with one green arrow to add selected field(s) to fields included in export ;
- use the button with green arrows to include all the fields to export;
- select field(s) from the *Fields included*, and use the button with one red arrow to exclude selected field(s) from the export;
- use the button with red arrows to exclude all the fields from the export;
- when the structure of the destination data file is complete, press *OK* to continue the data export (*Cancel* will abort the export process);
- select the export destination file in the *Enter/Select Export File Name* dialog box and press *OK* to continue (*Cancel* will abort the export process).

**The result:** A text file containing exported records (one record per line).

## Export To DBF File

You can export all or a subset of records from a current database to a DBF file. This is useful when you want to transfer records to another database file. The data is always exported to a file in the EXPIMP directory under the current user data directory. For example, if your data directory is C:\ORGANIZER\DATA then your export directory is C:\ORGANIZER\DATA\EXPIMP. This directory is automatically created if it does not exist. This makes it easier to locate your import/export files, especially on a multi-user system. It also restricts access of one user to DBF files owned by other users. After you export data to a DBF file you can then import it (most likely after Loading another database) back using [the Import From DBF](#) File function.

### How to find Export?

The Export function can be accessed in two ways:

- from the *Advanced* section on the speed bar: the *Export* button;
- from the *Advanced* section on the main menu: the *Export* option.

Then select *Export To DBF File* radio button and click on *OK*. You will then be asked for the export target file name.

**Note:** All fields are exported for each record.

**Note:** Each database consists of three files: dataname.dbf, dataname.dbt, dataname.mdx. Those three files you can find in the EXPIMP subdirectory.

## Import

You can import records from:

[Text File](#)

[DBF File](#)

[Netscape Bookmark File](#)

[Microsoft Internet Explorer Favorites](#)

[Import From XML File](#)

**Hint :** You can import record to the currently opened database. New records will be appended (merge).

## Import From Text File

### What is importing data?

Importing data is another option of adding records to this application. You can import data from text files that have the following characteristics:

- fields have to be separated from each other by: tabs, commas or another user defined character;
- fields can be delimited by: quotes or another user defined character;

### How to find Import?

The Import function can be accessed in two ways:

- from the *Advanced* section on the speed bar: the *Import* button;
- from the *Advanced* section on the main menu: the *Import* option.

Then select *Import From Text File* radio button (it is a default option) and click on *OK*.

### How to use Import?

When in the **Import Options** screen:

- select the *Fields Separated By* option and *Fields Delimited By* options;
- define the *Memo Field Delimited By* option;
- the left list box contains all the fields that build the application data file;
- the list box on the right side contains fields that make a structure of the text file that is the import source (from which the data will be imported into the application);
- select field(s) from the right list box, and use the button with one green arrow to add selected field(s) to the import source;
- use the button with green arrows to add all the fields to the import source;
- select field(s) from the import source, and use the button with one red arrow to remove selected field(s) from the import source;
- use the button with red arrows to remove all the fields from the import source;
- when the structure of the source data file is complete, press *OK* to continue the data import (*Cancel* will abort the import process); make sure the data fields selected for the Import are in the same order as in the import source file;
- select the import source file in the *Enter/Select Import File Name* dialog box and press *OK* to continue (*Cancel* will abort the import process).

**The result:** The imported records are merged into the current database.

## Import From DBF File

You can import records from a DBF file previously created by an [Export To DBF File](#) function. You can only select a file for import from a EXPIMP directory under the current user data directory. For example, if your data directory is C:\ORGANIZER\DATA then your import directory is C:\ORGANIZER\DATA\EXPIMP. This directory is automatically created by Export To DBF File function. This makes it easier to locate your import/export files, especially on a multi-user system. It also restricts access of one user to DBF files owned by other users.

### How to find Import?

The Import function can be accessed in two ways:

- from the *Advanced* section on the speed bar: the *Import* button;
- from the *Advanced* section on the main menu: the *Import* option.

Then select *Import From DBF File* radio button and click on *OK*. You will then be asked for the import source file name. You should not try to import from DBF files that were not created by this program unless you are absolutely sure that the import source file has identical structure as that used by Organizer.

## Maintenance

Maintenance encompasses various data file utilities. Their purpose is to **repair** damaged files, **backup** and **restore** data, **erase** all data and **edit lists** of choices in user-defined fields. The following functions are included in the Maintenance window:

- **Reindex database:** this option repairs indexes on your database. It is mainly used when troubleshooting your application, in case your data files become corrupt. It is recommended that you use this function *once a month*.
- **Delete database indexes:** this function is useful when the MDX files become very large overtime.
- **Pack database :** When deleting records from your data files, they are not physically erased. Use the *Pack database* function periodically to reclaim disk space after deleting records.
- **Delete all records :** this function removes all records from your database. Use it with extreme caution - *it cannot be undone*.
- **Delete selected records:** this function can be used to permanently remove a group of records from the database. You select the records to be deleted by setting a [Filter](#) first.
- **Repair data file :** This function will repair a damaged data file. Sometimes your memo or graphic fields (those containing images or binary data) get corrupted, which results in error messages. Use this function to correct this problem. Typically one record (sometimes several records) may be lost. This problem is usually caused by a system crash when Organizer is open or by not closing Organizer before shutting down the system. If you are not able to start Organizer Deluxe because your database is corrupted start Designer and select Repair Database function.
- **Backup data :** **it is very important that you back up your database.** If the database becomes corrupted as a result of a system crash Restoring database from a previous backup may be your only chance to recover your data (*Repair data file* function not always works).
- **Restore data :** you need to use this function only if something went wrong (e.g. your database became corrupted) and you have backed up your database.
- **Edit lists :** this function can be used to edit lists accessible through [Combo Boxes](#) in the [Details Page](#). It is easier to access this function from combo box **Popup Menus**.
- **Display Log:** this function opens the [Maintenance Log Window](#). All data maintenance processes done on all your data files are logged here.
- **Graphic Fields:** this function converts graphic fields.
  - Converting an **Internal Graphic Field (IGF) to an External Graphic Field (EGF)**
  - **Converting an External Graphic Field (EGF) to an Internal Graphic Field (IGF)**
- **Formatted Record:** The Formatted Record function automatically creates the content of the selected multi-line text or multi-line html field from the existing data fields and the template text file (\*.txt, \*.htm, \*.html,.....).
- **Duplicates:** This function allows you to display and/or delete duplicate records based on a selected data field.

## How to use Backup function?

### It is important to back up your data!

It is recommended that you back up your data on a regular basis e.g. once a week or once a month. You should especially do a backup after entering new records. When you use Backup function all essential files for the currently selected database are compressed and stored in a selected location. If you have more than one database you have to Load each database and then back it up.

In order to Back Up your database do the following:

1. click on **Advanced/Maintenance** button and then, click on **Backup** button;
2. select a backup **Destination Drive** and **Directory** (you can click on Browse button instead of typing it in); for example, if you want to back up your database to floppy disks type in A:\.
3. type in the name of your backup file (if you want to change the suggested name);
4. click on **Next** button;
5. select backup **Options**:
  - if you want to password-protect your backup file (so nobody else can use it) check **Password Protect** option and type in your password into Encryption Password edit box;
  - if you have External Graphic Files in your database and if you want to include them in your backup check **Backup External Graphic Files** option; Note: only files stored in **Graphic Files Directory** (as specified in Options) will be backed up; also, all graphic files from that directory will be backed up even, if they belong to several databases;
  - select **None**, **Quick**, or **Maximum Compression** option depending on your needs;
6. click on **Next** button;
7. click on **Start Backup** button;



## Shortcut keys

### What does it do?

Shortcut key sequences provide fast function access through combinations of keystrokes.

Shortcut key list:

- Ctrl+Alt+'A'..'Z' - Letter Tab
- Ctrl+Home - First
- Ctrl+PgUp - Page Up
- Ctrl+End - Last
- Ctrl+PgDn - Page Down
- Alt+'1'..'4' - Part 1..4
- Alt+'W' - Capture Web Page
- Alt+'G' - Go To Web Page
- Alt+'Y' - Synchronize
- Alt+'C' - Copy Record
- Alt+'T' - Paste Record
- Alt+'P' - Print Record
- Alt+'U' - Undo Changes To Record
- Alt+'Delete' - Delete record
- Alt+'PgUp' - Previous Page
- Alt+'PgDn' - Next Page
- Ctrl+'P' - Print Report/Labels
- Ctrl+'O' - Display Options
- Ctrl+'N' - New Record
- Ctrl+'F' - Find
- F2 - Options Menu
- F3 - Table Of Contents Record Button Menu
- F4 - Detail Page Menu
- F5 - Header Menu
- F6 - Primary Sort Menu
- F7 - Secondary Sort Menu
- F8 - Filter Menu

## Frequently asked questions and useful hints.

Please visit our Frequently Asked Questions page on the Internet: <http://www.primasoft.com>  
Updated monthly.

### 1. Where can I find the PrimaSoft's programs?

#### 1) Internet

To find our products on the Internet:

- Connect with our Home Page : <http://www.primasoft.com>

#### 2) [Contact us](#).

### 2. How can I learn about new versions of your software?

You should visit one of our home pages on a regular basis. Our home page is the first place where new releases of our software are announced.

### 3. How to use backup and restore functions?

See [How to use Backup and Restore functions](#) section for a detailed description (or [Maintenance](#)).

### 4. Why are my DBF, DBT and MDX files so big?

MDX files store your database indexes and can grow substantially overtime if you have used many different orderings and filters. You can trim the MDX file by using Delete Indexes function in [Maintenance](#).

DBF files contain the main portion of your data. After a long-time usage many deleted records can accumulate. The deleted records are not displayed but they occupy your disk space. You can remove those deleted records by using *Pack Database* function in [Maintenance](#).

DBT files store both Multi-line text and graphics and they can take a lot of space (especially graphics). DBT files should be much smaller if you use 16 color graphic images as opposed to 256 or more. Still when you think your DBT file is too large you can try *Repair Data File* function in [Maintenance](#) (or Backup followed by Restore). DBT files can become corrupted in some rare situations, and you should use Repair Data File function in such circumstances.

### 5. I switched to multi-user system and I can not return to single-user system. What should I do?

Enter "**Supervisor**" as User Id in the *Login screen* and leave the *Password* field blank (if you did not set a password for the Supervisor). Then, change the [Options](#) to Single-User system.

### 6. Use the right mouse button!

You can conveniently access many options and functions by clicking with the **right mouse button** on different elements of the main window. For example, right-click on a graphic control and you will see a Popup Menu with functions such as: Clear, Load, Save, Copy, Paste, Screen Capture, and Help.

### 7. Learn how to use filters!

[Filters](#) can be very useful in selecting a subset of all records both for viewing and printing.

For example, if you are only interested in records with NAME data field beginning with letters C-F just set the filter for the NAME field with filter expression 'BETWEEN C and F'.

### **8. What is Non-Stop search?**

In the [Find](#) window (after you click on the Search button) there is a useful Non-Stop Search option. You can use it to Find all records meeting your search criteria in one pass. It works very much like a filter - you can use the result of a Non-Stop Search for both viewing and printing.

### **9. Why Letter Tabs are not working?**

The [Letter Tabs](#) are not active in one of two situations: they are disabled in [Options](#) or no Primary Sort Field has been selected. The Letter Tabs only make sense when your database is sorted alphabetically. For more information see [sort](#).

### **10. How many records are there in my database?**

To answer this question you have to disable the [Letter Tabs](#) in the [Options](#) windows. Then Click on Last button in the left panel (Table Of Contents) and select the last record by clicking on the last non-empty Record Button. The number in the right-bottom part of the main window (underneath the Details Panel) will give you the number of records in your database.

### **11. How can I get pictures into a graphic field?**

Using the right mouse button click on the graphic field and select *Scann*, *Load*, or *Screen Capture*. *Load* can load pictures from GIF, JPEG, PCX, PNG, and BMP files. Using *Screen Capture* you can import pictures from any format.

## **Contact information**

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CompuServe: [primasoft@compuserve.com](mailto:primasoft@compuserve.com)**

## Advanced Topics

[Multi-user applications](#)

[Network Installation](#)

[Command Line Parameters](#)

## Multi-user applications

Usually, you will use Single-User Mode ([Options](#), Users page) on a stand-alone computer and Multi-User Mode on a network. However, if you are not concerned with security on your network (e.g. a small number of reliable users) you may use this software in Single-User Mode (it will still work correctly when multiple users access the same record) - this simplifies the setup. Everybody will access the same set of databases. No user ids and passwords will be required. On the other hand, you may want to use Multi-User Mode on a stand-alone computer if there will be more than one user and each user needs to keep his or her database private.

If you want to use this software in a multi-user environment set Multi-User Mode in [Options](#) (Users page).

Only user who has the '**Supervisor**' user id can modify user accounts ([Options](#), Users page). Every user has his or her own private directory where his or her private databases are stored. Nobody else can access the user's private data. The Supervisor's private directory serves at the same time as a Public Directory. All users can access the Public Directory (unless the Supervisor revokes their access privilege).

Make sure that you have read/write access to the record you wish to make changes to. Only one user is allowed to make changes to a given record at the same time. Our software uses record locking (even in Single-User Mode) and only the user who selected a given record first has full read/write access to it. All other users who select the same record later will have read-only access right to this record.

## Network Installation

Our Organizers use Borland Database Engine (specifically its DBase subset) and you have to perform certain steps in order to set it up on a network. Useful information you can find on the Internet, go to Frequently Asked Questions are: <http://www.primasoft.com>

Network installation of a 32-bit version of PrimaSoft Organizer software:

### 1.Application Installation (installation of the Organizer)

On your network server run Setup.exe from disk #1, CD ROM, or your hard disk (if you downloaded and unzipped the software) and follow the installation instructions. As a result all components will be installed on the server and icons will be created.

Note: If your network server is not running Windows NT or Windows 95, 98 you should install Organizer software on a workstation (running Windows 95, 98 or NT) first. Then copy, from the workstation to the server, the following:

- entire Organizer directory (including subdirectories) e.g. c:\32io11;
- entire Borland Database Engine directory (by default C:\Program Files\Borland\Common Files\Bde - you can put it in C:\Bde on the server); you will have to reflect the BDE location in 2) below;

### 2.Setup of Borland Database Engine using our Bde Setup utility

- Download Bde Setup program from our home page by clicking on the following link: <http://www.primasoft.com/demo/bdenet.zip> and unzip it into some temporary directory e.g. C:\TEMP on your server (make sure it can be accessed from every client machine).
- Start Bde Setup (Bdenet.exe) on every client and follow the instructions. When you get to the 3rd (last) page click on Update Registry button and then on Test BDE button. If no error messages are displayed your BDE has been set up properly.
- If you set up BDE successfully skip to step 4.

### 3.Manual Setup of Borland Database Engine

On the machine on which you ran Setup.exe run Regedit.exe from Windows directory and expand the following key: [HKEY\_LOCAL\_MACHINE\SOFTWARE\Borland]. Export this key to a file e.g. Borland.reg. Open the exported file in Notepad and change all drive letters to the network drive letter on which all workstations will access BDE. Also, if BDE is not installed into the default directory, you may want to modify the directories to reflect the new BDE location.

For example, you may have to change:

```
[HKEY_LOCAL_MACHINE\SOFTWARE\Borland\Database Engine]
"DLLPATH"="C:\\Program Files\\Borland\\Common Files\\BDE"
"RESOURCE"="0009"
"CONFIGFILE01"="C:\\Program Files\\Borland\\Common Files\\BDE\\IDAPI32.CFG"
"UseCount"="1"
```

"SaveConfig"="WIN32"

```
[HKEY_LOCAL_MACHINE\SOFTWARE\Borland\BLW32]
"BLAPIPATH"="C:\\Program Files\\Borland\\Common Files\\BDE"
"LOCALE_LIB1"="C:\\Program Files\\Borland\\Common Files\\BDE\\USA.BLL"
"LOCALE_LIB2"="C:\\Program Files\\Borland\\Common Files\\BDE\\EUROPE.BLL"
"LOCALE_LIB3"="C:\\Program Files\\Borland\\Common Files\\BDE\\OTHER.BLL"
"LOCALE_LIB4"="C:\\Program Files\\Borland\\Common Files\\BDE\\CHARSET.BLL"
"LOCALE_LIB5"="C:\\Program Files\\Borland\\Common Files\\BDE\\CEEUROPE.BLL"
```

to:

```
[HKEY_LOCAL_MACHINE\SOFTWARE\Borland\Database Engine]
"DLLPATH"="F:\\Program Files\\Borland\\Common Files\\BDE"
"RESOURCE"="0009"
"CONFIGFILE01"="F:\\Program Files\\Borland\\Common Files\\BDE\\IDAPI32.CFG"
"UseCount"="1"
"SaveConfig"="WIN32"
```

```
[HKEY_LOCAL_MACHINE\SOFTWARE\Borland\BLW32]
"BLAPIPATH"="F:\\Program Files\\Borland\\Common Files\\BDE"
"LOCALE_LIB1"="F:\\Program Files\\Borland\\Common Files\\BDE\\USA.BLL"
"LOCALE_LIB2"="F:\\Program Files\\Borland\\Common Files\\BDE\\EUROPE.BLL"
"LOCALE_LIB3"="F:\\Program Files\\Borland\\Common Files\\BDE\\OTHER.BLL"
"LOCALE_LIB4"="F:\\Program Files\\Borland\\Common Files\\BDE\\CHARSET.BLL"
"LOCALE_LIB5"="F:\\Program Files\\Borland\\Common Files\\BDE\\CEEUROPE.BLL"
```

Notice the double back slash used in the above example. After making the above changes save the file and exit from Notepad. Copy the created Borland.reg file to a diskette or to the network server where it can be accessed from all workstations.

On every workstation start Regedit.exe (in Windows directory) and Import created earlier Borland.reg file.

#### **4.Create Organizer Icons on workstations**

On every workstation, create a program group and icons to access Organizer software. In most cases you will only need one icon that links to the main EXE file (residing on the network server).



## Details Page Popup Menu and Record Menu Functions

The Details Page(s) is the right side of the application window that displays the detailed information about a selected record.

Each record has the **following functions** (all are accessible from the **Details Page** Popup Menu or the **Record** Menu, some are listed in the Details Page **Speed Bar** section):

- *Go To Web Page* : load the Web site from the record into the Web browser (**Note**: only listed when database with WEB address field is opened);
- *Capture Web Page* : capture the Web site from the Web browser into the record (**Note**: only listed when database with WEB address field is opened);
- *Replace Record With Template*: Displays all previously saved [record templates](#). Select a template, the record data fields will be initialized from the record template. This form is convenient for entering series of different records. **Warning**: If the current record is not empty it will overwrite the contents.
- *Save Record To Template* : save the currently displayed record in the Details Page to a Record Template;
- *View Copy Buffer* : Copy Buffer is temporary storage to which a record is being copied when using the Copy Record function; later you can Paste the record from the copy buffer;
- *Paste Record* : paste a record from the Copy Buffer;
- *Copy Record* : copy a record to the Copy Buffer;
- [Copy Record To Clipboard](#) : copy a record to Windows Clipboard;
- [Copy Record To Clipboard From Template](#): copy a record to Windows Clipboard using a template text file;
- *Undo Changes* : this feature lets you undo the most recent changes to a record.
- *Delete Record* : delete the currently displayed record (cannot be undone);
- *Print Record* : print only this record;
- *Synchronize* : synchronize the Table of Contents with the current record in the Details Page.
- *Hide/Show Pictures* : use Hide Picture function if you want to speed up the record browsing process. Large pictures could slow down the record load/display procedure.

Related topics: [Browser Page](#), [View Page](#).

## Record Template Button

**Record Template** button provides quick access to record template functions. You can invoke functions by **right-mouse** or **left-mouse** click on the Template Button.

**Right-mouse click** on the **Template Button** displays a popup menu with a list of all available record templates (initially there is only one: 'Blank' - empty record). By selecting the item you set the *New* button as the template record. The name of the selected Record Template will appear on the Template Button. As a result, every time you add a new record (by clicking on the *New* button or selecting shortcut) the record data fields will be initialized from the record template. When you exit the program and start again the *New* record function will be set to blank (all fields will be empty). This form is convenient for entering series of similar records.

**Left-mouse** click on the **Template Button** displays a popup menu with the following commands:

- *Replace Record With Template*: Displays all previously saved record templates. Select a template, the record data fields will be initialized from the record template. This form is convenient for entering series of different records. **Warning**: If the current record is not empty it will overwrite the contents.
- *Save Record To Template* : save the currently displayed record in the Details Page to a Record Template;

[Using Record Templates](#)

## Templates

You can save different settings that you want to **reuse** in a template. Just define the settings click on the *Save* push button or select *Save* item from the corresponding popup menu and enter the template name. Later, when you use the program instead of changing the settings one by one you can change the settings by loading them from the template. Select the template in the *Template List*. Clicking on the *OK* push button activates the new settings.

The following settings can be saved in a template:

- New Record Template
- Reports
- Labels
- Layout on Record Buttons
- Filters
- Labels (field names)
- Colors

## Data Root Directory

**You should avoid changing the Data Root Directory unless you really have to do it!**

Typically, you might need to change the Data Root Directory on a network. It is the user's responsibility to move all data directories to the new location. As a default, the Data Root Directory is set to the Organizer home directory (where Deluxe.exe installed). If you change the Data Root Directory all directories (with their contents) underneath the Data Root Directory must be moved to the new location. Typically, the directories that need to be moved will have names:

DATA, DATA0001, DATA0002, etc.

[Multi-user system](#)

## Go to PrimaSoft Web page



Click with LEFT mouse button on the PrimaSoft LOGO -

Sets your Web browser to activate the PrimaSoft World Wide Web Home Page -

**<http://www.primasoft.com>**

Stay tuned for future releases of our products (free minor upgrades). Any new versions will be announced on our Web Home Page. On this site you can also find links to other places that are relevant to this program (image resources, data resources, .....

## Edit User Account

This information applies only to [Multi-user Systems](#).

Only the Supervisor can add, delete and modify user accounts. Every user has:

- Name - used only for reference;
- User ID - used during the Login process; cannot be changed by the user;
- Password - used during the Login process; can be changed by the user.

The Supervisor can control every user's Access Rights to the Public Databases. The user can also be temporarily locked out of the system by the Supervisor (Current Status = Not Active).

## User Accounts

This information applies only to [Multi-user Systems](#).  
Only the Supervisor can add, delete and modify [user accounts](#).

## Edit lists

### What does it mean?

Lists are stored choices you can pick from [combo-box](#) (drop-down list) data entry elements in the application.

By using this function, you can modify contents of these lists:

- select a list
- add/edit/delete/load items in the list

By clicking on Update Lists button you can update all lists from the current database. This can be a time-consuming process and it is only necessary after you Import data from an external source (Import function).



## Attachment/Start Application

### **What is 'attachment' ?**

The attachment is the file on your hard disk that you want to link with your record. You may attach any type of file with you record (sound files, movie files, text files, word processor files, graphical files...).

### **What is 'start application' ?**

The attached file cannot be opened directly within our program. The attached files can be opened by other applications that are on your computer. Clicking on the start push button launches the program listed in the Application edit box. The program takes as a parameter the content of the Attachment File edit box. The program knows how to handle the associated file.

### **How to attach a file ?**

Click on the Select push button in the Attachment dialog box. The Standard File dialog box is opened. Using this dialog box you can find and select the file. The selected file will be listed in the Attached File edit box.

### **How to select the application for the attached file ?**

Click on the Add push button in the Attachment dialog box. The Standard File dialog box is opened. Using this dialog box you can find and select the application name. The selected application will be listed in the Application edit box. Example: for text files select notepad.exe (Notepad); for graphical files select pbrush.exe (Paint Brush); for movie clips files select mplayer.exe (Multimedia Player). Those files are usually listed in the Windows or Win95 directory.

## Preview this report

This functions lets you preview the currently selected report on the screen before printing. The Preview Window allows viewing different report pages, zooming the displayed report, and printing it on your printer.

[Print Functions](#)

[Print Reports](#)

[Print Labels](#)

## Repair data file

This function will repair a damaged data file. Sometimes your memo fields (those containing images or binary data) get corrupt, which results in impropotional file size increase. Use this function to correct this problem.

[Maintenance](#)

[Backup/Restore](#)

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**PrimaSoft PC, Inc.**

**P.O. Box 456**

**Surrey, BC V3T 5B7**

**CANADA**

- Credit Card Orders. We accept Visa or MasterCard orders. Please send us a registration form with the card number, the cardholder name and the expiration date. You may send all this information to the address mentioned above or by:  
Phone: **604-951-1085**  
Phone (Free): **800-371-7520** (Canada, U.S.A.)  
Fax: **604-951-7797**  
Internet: **support@primasoft.com**
- If you would like to speed up the registration process you can also send your order form as an e-mail with the **attached encrypted file** (order.enc). Do it in the following way:
  1. Credit Card payments only (MasterCard and Visa),
  2. Open the Order Form dialog box and fill the form.
  3. In order to encrypt the form click on the Save push button (the order.txt, order.enc files will be created)
  4. You may check the order.txt file with a Notepad or a Text editor (the same encrypted info is in order.enc file)
  5. Create and send an e-mail with the attached file (order.enc)

**Note:** Files Attached to e-mail messages are not preserved when the source and the destination are not on the same on-line system. Send it to:  
support@primasoft.com.

## Replacing the database

### What is Replace?

The 'Replace' function helps you to replace the entire or the part of the field's content with a new value. Use this function with caution. It will check all currently displayed records. Make sure you selected the desired set of records using a filter. The replace process cannot be undone.

This function is useful for users who want to make global changes on the selected field in the entire database. How much time does it take to change one field in a small database of 1000 records? The replace function needs only several seconds to accomplish this task. If the replace process is done manually it can take thousands of times longer, and also there is a chance of introducing some typing errors.

### Where is the Replace function?

The Replace function can be accessed from the Search/Find option on the main menu, and in the speed bar (Standard Section - *Replace* button).

### How to use the Replace function?

Use [filter](#) function to select only desired records.

When in the 'Replace' dialog box:

- Select the *Field To Be Replaced*.
- Select the *Replace/Insert Mode*:
  - *Replace Entire Field Contents*: select this mode if you would like to replace the entire content of the selected field with the *Replace With* string.
  - *Replace Substring Only*: select this mode if you would like to replace the part of the selected field. It will search for the text specified in the *Substring To Replace* edit box. Each found text will be replaced with a new value
  - *Auto-Increment*: select this mode if you would like to number your records. Enter the initial value in the *Start From* edit box. The number that will replace the content of the selected field is incremented by one and starts from the value entered in the *Start From* edit box.
  - *Auto-Decrement*: select this mode if you would like to number your records. Enter the initial value in the *Start From* edit box. The number that will replace the content of the selected field is decremented by one and starts from the value entered in the *Start From* edit box.
  - *Insert In Front*: select this mode if you would like to insert the text in front of the selected field content. *Insert If Found* option: only records with *Insert If Found* text will be modified. If *Insert If Found* edit box is empty all currently displayed records will be modified.
  - *Append To The End*: select this mode if you would like to append the text to the end of the selected field content. *Append If Found* option: only records with *Append If Found* text will be modified. If *Append If Found* edit box is empty all currently displayed records will be modified.
  - *Remove File Path*: it can be useful for External Graphic Fields (for example, when the graphic files are moved to a different directory) (read below).
- like to number your records. Enter the initial value in the *Start From* edit box. The number that will replace the content of the selected field is decremented by one and starts from the value entered in the *Start From* edit box.
- Enter *Substring To Replace*: this edit box is displayed when the *Replace Substring Only*

- mode is selected. Specify the text to search for that will be replaced with a new value.
- Select *Start Replacing From*: select scope for the search/replace function:
  - *Current Record*: search/replace process will start from the record displayed in the detail window.
  - *First Record*: search/replace process will start from the first record.
- Enter *Replace With* text: Specify the text that will replace the whole content or the substring according to the selected options.
- Enter *Insert In Front* or *Append To The End* text: Specify the text that will be added *in front* or *at the end* of the field content according to the selected options.
- Press the *Replace* button to activate search/replace function.

**Note: The program does not prompt you before replacing. When the function is activated it automatically goes through all currently displayed records and replaces the specified content of the field.**

### **Remove File Path Mode**

This option is useful for External Graphic Fields. The External Graphic field stores the whole path to the image. If you move your graphics to a different directory the External Graphic field content will be invalid. It will not point to the image file. In order to keep the content of the External Graphic fields valid do the following:

- Open Options and click on the Graphics Tab.
- In the Graphic Files Directory select the new directory where your images are stored (all your images have to be moved to this directory).
- Close Options window.
- Select Replace from the Search menu.
- In the Field To Be Replace select your external graphic field.
- Select Remove File Path mode.
- In the Start Replace From select First Record.
- Click Replace.

The path is removed from the image file name. When the program displays the image it looks for the image in the **Graphic Files Directory** (Options/ Graphic Page / Graphic Files Directory).

# HTML Report Wizard

## What is it?

HTML Report Wizard is a tool that generates HTML reports (web pages) from the data file. Without any additional HTML editor you can create a set of linked web pages that can be put immediately on your web server or viewed with your favorite browser. Report (web pages) creation is easy and fast. You can only select a database and fields to be included in the report and press GO push button. HTML Converter, then, begins generating HTML file(s) for the selected database. Advanced computer users will find many additional functions that give them flexibility in the report creation process. HTML Wizard accepts [Custom HTML Templates](#). Just design a HTML document with the tool you know very well, your favorite HTML Editor. Use the template for generating HTML reports, stores, catalogs.

## Features:

- In a simple and fast way converts database into html files. Computer users with basic HTML and database knowledge can create pages within several minutes.
- Creates reports in plain or tabular form. Creates one page reports or grouped reports split into separate pages.
- Allows to define general attributes for all report elements (color, size, style, alignment, column colors, font type....).
- Allows to define menus, header, footer, graphic, and background colors for all html pages.
- Converts graphic from your database into image files in the format accepted by all browsers.
- HTML report parameters can be saved as templates.
- Creates report(s) that can be viewed on any computer with a browser.
- Accepts [Custom HTML Templates](#).

## HTML Report Wizard Window

[Custom HTML Templates](#)

## HTML Report Wizard Window (Help)

[Examples/Tutorial](#)

[General Settings Page](#)

[Data Page](#)

[Report Elements Page](#)

[Report Attributes](#)

[Report Header](#)

[Report Body](#)

[Report Body \(Groups\)](#)

[Report Footer](#)

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## HTML Report Wizard - General Settings

HTML Report Wizard: [Help Index](#)

General Page Settings allow you to select a report directory and an image files format.

### **Generate HTML Report in this directory**

Select a directory where all html and image files will be saved. Additional files like a background images, a header images, a footer images will also be saved in this directory.

### **Images Format**

If your database contains images they can be used in the HTML report. The HTML Report Wizard will have to save them as graphical files. Select the file format that you would like to use. All graphical files will be stored in the report directory. File names are created in the following way: letter (optional) + field number + underscore + record number, for example: a11\_23.gif => a(letter selected by you) + 11(graphical field position in the record) + "\_" + 23(record number).



## HTML Report Wizard - Data Fields

HTML Report Wizard: [Help Index](#)

This page allows you to select fields from a database that will be included in the HTML report and define some general options for your Internet document.

### All Data Fields List Box

All data fields from the selected database are listed here. To select a field you have to highlight the field, and then click on the 'green arrow' push button. If you want to include next field in the same line or column then press on the 'plus' button. The selected field will be displayed in the Selected Fields list box. The push button with double green arrow selects all fields. + **Field Separator**: enter a separator for fields listed in the same line.

### To Remove a Field

Highlight the field. Click on the push button with a red arrow. The selected field will be removed from the Selected Fields list box. Click on the push button with double red arrow to remove all fields.

### To Change the Order of Fields

There are push buttons with up and down red arrows below the Selected Fields list box. When you click on one of them the selected field will move one position up or down.

### To Group Records

Select a "group by field" from the Group By dropdown box. NOTE: When you want to Group records by a data field your database MUST BE SORTED by this field.

Read: [How to sort records](#).

### To Group Records in Separate Files

Select a "group by field", go to the Report Elements Page and select Report Type: 2-Level, or 3-Level.

In this case the report main page (index.htm) contains the list of group names with hyperlinks to the corresponding group files.

### Field Attributes

The Field Attributes controls allow you to set different attributes of the selected field. To activate the field click on the field name in the Selected Fields list box . The following attributes of the text can be defined.

- *Name (field header/label)*: Contains the name of the field. Initially the name is taken from the data field label. You can enter new name here.
- *Width in Pixels*: for tabular report format you can define each column width here (note: some browsers ignore this value).
- *Use Individual Field Attributes*: Do you want to set different attributes for each field (different text color, background, font type, ....)? Set this option.
- *Label Attributes, Data Attributes*: Select Label when you define label/header attributes. Select Data when you define data attributes.
- *Text Color*: This control sets the color in which text will appear in on the screen.

Click here to display the Color dialog box. To select the color click on the color box. Click on the OK push button. The selected color will be displayed in the text color control.

- *Text Style, Text Font Size, Text Font Name:* These controls set the font size, style, type. Refer to HTML specification to find out more information about H1-H6, FONT tags.
- *Text Attributes:* This group of options allows you to set additional text attributes: bold, italic, underlined, centered.
- *Table Background Color:* This control sets the background color of the whole table. You can set the color for each column if Use Individual Fields Attributes option is selected.
- *Numeric Fields Attributes:* options are displayed when the numeric field is selected. Specify how many digits should be displayed after decimal point. If you want to calculate totals select the Calculate Total options.

### **User-Defined Fields**

HTML Wizard allows you to define 5 additional fields (text and/or URL addresses). Instead of creating additional data fields in your database with constant text or URL address you can use User-Defined Fields.

### **URL Link for User Field**

The user-defined field can be used as a hypertext link. The URL address, entered here, will be used as the hypertext reference.

## HTML Report Wizard - Report Elements

HTML Report Wizard: [Help Index](#)

This page allows you to select the report type. You can create one page report(s) or grouped report(s) split into separate pages.

### Report Type

*1-Level:* generates one html page with report body

*2-Level:* report is split into separate html pages, main page contains index with hyperlinks to grouped pages

*3-Level:* report is split into separate html pages, main page and the second level pages contain indexes (groups), the third level pages contain report body.

### Note

The 2-Level and 3-Level report can be selected only if you define Group By 1 and Group By 2 data fields ([Data Page](#)). Group By 1 data field corresponds to the primary sort field in your data file. Group By 2 data field corresponds to the secondary sort field in your data file.

### Four sections

Each report page is split into four sections. Depending on your requirements select sections that will be included in your report.

*Page Attributes* (define background, meta tags, menus, margins, .... )

*Page Header* (define header title, header text, header graphic,...)

*Page Body* (define report layout, ....)

*Page Footer* (define footer title, footer text, footer graphic,....)

### Insert into this HTML Page

You can insert each section of the report into any html document. Just include section tags in your html file. HTML Converter will replace each tag with the corresponding part of the report.

**<!-- PRIMASOFT:A -->** - Page Attributes tag

**<!-- PRIMASOFT:H -->** - Page Header tag

**<!-- PRIMASOFT:B -->** - Page Body tag

**<!-- PRIMASOFT:F -->** - Page Footer tag

Brackets are part of the section tag. Each tag should be listed in a separate line.

## HTML Report Wizard - Report/Page Attributes

HTML Report Wizard: [Help Index](#)

### **Include HTML Prolog/Epilog tags**

Check this option if you would like to create reports in the form of the HTML documents that could be loaded by any browser. The html report will contain all tags that are required by the HTML compliant documents. Uncheck this option if you want to create reports that will be copied to other HTML documents. In this case only the BODY of the document will be created.

### **HTML Page Title**

Enter the title of the page here. The TITLE html tag will use this text. The title is displayed in the browser's window title bar. It is also used in bookmark files.

### **Background Graphic/Background Color**

You have two ways to define the background of the html report. Use Picture control if you would like to use a tiled image as the background. Use Background Color control to set the background color of the report. The selected color in the Background Color is ignored when the Background Graphic control is not empty.

### **Meta Tags**

Meta tags provide additional information about your HTML document. Some search engines support meta tags and display the contents of these tags as the description of pages in search results. Keyword Meta Tag: Provides keywords for search engines.

### **Description**

Enter a description of your document here. Some search engines use this meta tag.

### **URL Link Colors**

These color boxes allow you to control the color of links text (hyperlinks). Initially the program uses default colors (blue-link text, purple-visited link, and red-active link). You can change them especially when the background of your html report is dark.

### **Embed Page In Table (check if you want to create Menu)**

Use this option if you want to create margins or menus.

*Page Left Margin:* enter number here. It will represent left margin in pixels.

*Page Top Margin:* enter number here. It will represent top margin in pixels.

*Left Margin Color:* select this option if you want to define unique color of a margin.

*Top Margin Color:* select this option if you want to define unique color of a margin.

*Page Menu:* select which menus should be created.

*Create Menu:* click on this push button to define menus.

Read more: [Page Menu](#)

## HTML Report Wizard - Report/Page Header

HTML Report Wizard: [Help Index](#)

This page allows you to enter text and select graphics that will be displayed at the top of the main page. You can define some html attributes for both elements.

### Source

Select the source of the page header here.

*Defined Attributes:* DB-HTML Converter will create header elements defined on this page.

*HTML File:* DB-HTML Converter will use the content of this file as a report header.

### Header Title

Enter the title of the page here. The header title will be displayed at the top of the page. You can control several attributes of this text. Read: [Text Attributes](#)

### Picture

This control allows you to define an image that will be display at the top of the main page. The Picture control has several useful functions. All are listed in the form of small push buttons on the toolbar (bottom part of the picture control) or are included in the popup menu (right mouse click). Read: [Picture functions](#)

### Picture Alignment

This function allows you to set the position of the image.

*Left:* image will be displayed on the left side of the window.

*Right:* image will be displayed on the right side of the window.

*Above Title:* image will be displayed above the title.

*Below Title:* image will be displayed above the title.

### Header Text

Here you can enter descriptive information about your html report. You can include HTML tags in the header text. The most useful HTML tags for formatting text are included in the popup menu (right mouse click). You can enter the tags in two ways. Insert a tag from the popup menu at the cursor position or highlight text and then select a tag from the popup menu. Additionally you can set some attributes for the whole text included in the Header Text edit box: color, text style, and text font size. Read: [Text Attributes](#)

## HTML Report Wizard - Report/Page Body

HTML Report Wizard: [Help Index](#)

This page allows you to define the appearance of the actual report. You can define the type of the report (tabular, plain), table options (width, transparent..), text and header attributes (color, size,..).

### Report (Body) Format

Click on **Plain** if you would like to have each field on a separate line. Click on **Tabular** if you want to display selected fields in the form of a table. Click on **Current Record Template** if you want to use the [HTML Custom Template](#).

### Table Options

This part allows you to define some table attributes. You can define the table's border width. In the box, enter a number. It will represent the table's border width in pixels. Click Transparent Table to make the table transparent (the color of the page will be used for the table's background color). Click Table Center to make the table appear horizontally centered.

### Table Width

This part allows you to specify the width of the table in three ways: as needed (browser decides), in pixels, and as a percentage of the browser display window.

## HTML Report Wizard - Report/Page Footer

HTML Report Wizard: [Help Index](#)

This page allows you to specify text and graphics that will be displayed at the bottom of the main page. You can define some HTML attributes for both elements.

### Source

Select the source of the page footer here.

*Defined Attributes:* DB-HTML Converter will create footer elements defined on this page.

*HTML File:* DB-HTML Converter will use the content of this file as a report footer.

### Footer Title

Enter the footer of the page here. The footer title will be displayed at the bottom of the page. You can control several attributes of this text. Read: [Text Attributes](#)

### Picture

This control allows you to define the image that will be display at the bottom of the main page. The Picture control has several useful functions. All are listed in the form of small push buttons on the toolbar (bottom part of the picture control) or are included in the popup menu (right mouse click). Read: [Picture functions](#)

### Picture Alignment

This function allows you to set the position of the image.

*Left:* image will be displayed on the left side of the window

*Right:* image will be displayed on the right side of the window

*Above Footer:* image will be displayed above the footer title.

*Below Footer:* image will be displayed above the footer title.

### Footer Text

Here you can enter text that will be displayed at the bottom of the main HTML page (e.g. the footer can be useful for including a copyright information, page modification date, etc.). You can include HTML tags in the footer text. The most useful tags for formatting text are included in the popup menu (right mouse click). You can enter the tags in two ways. Insert a tag from the popup menu at the cursor position or highlight text and select a tag from popup menu. Additionally you can set some attributes for the whole text included in the Footer Text edit box: color, text style, and text font size. Read: [Text Attributes](#)

## HTML Report Wizard - Hyperlinks

HTML Report Wizard: [Help Index](#)

### To Create Hyperlinks

Select a field from *Use As a URL Link* dropdown box that will be used as a hypertext link. Select the field from *Target for URL Link* dropdown box that will be use as the hypertext reference. Click on the Add push button. The defined association between fields will be displayed below in the list boxes. As Target for URL Link you can use fields that contains a valid network address like: **http://www.primasoft.com**, or **page.htm**, or **support@primasoft.com**.

### To Remove Defined Hyperlinks

Select the unwanted association. Click on the Delete push button.



## HTML Report Wizard - Functions

HTML Report Wizard: [Help Index](#)

### **Go**

Click here to generate an HTML report (web pages). Note: If your HTML Report Directory contains old html files they can be overwritten. Move your old html report files to a new directory or select different HTML Report Directory for every html report. You can also define different names for your html report files but storing your html reports in separate directories is safer.

### **Close**

It will close the HTML Report Wizard Window.

### **Load**

Displays the template window with all available templates. Click on the template name in the Existing Templates list box. Click on the OK push button. Note: A template created for one database can be used with other databases. Read: [Load Template](#)

### **Save**

You can save all settings from the HTML Report Wizard Window that you want to reuse in a template. Just define the settings on all tab pages click on the Save push button and enter the template name. Later, when you use the HTML Report Wizard instead of changing the settings one by one you can change the settings by loading them from the template. Select the template in the Template List. Clicking on the OK push button activates the new settings. Read: [Save Template](#)

### **Delete**

Click here to delete the contents of your HTML report directory (use with caution).

### **Clear**

Click here to set default parameters for all options included in the Report Wizard window.

### **View in Browser**

Click on this option if you want to display the report in the browser immediately after the Go push button is pressed.

## Text Attributes Control Elements

HTML Report Wizard: [Help Index](#)

Text Control Elements allow you to set different attributes of the selected text. The following attributes of the text can be defined: size, color, alignment, and type.

### **Text Color**

This control sets the color in which text will appear in on the screen. Click here to display the Color dialog box. To select the color click on the color box. Click on the OK push button. The selected color will be displayed in the text color control.

### **Text Style, Text Font Size**

These controls set the font size. Refer to HTML specification to find out more information about H1-H6, FONT tags.

### **Font Type**

This control selects the font type.

### **Text Attributes**

This group of options allows you to set additional text attributes: bold, italic, underlined, centered.

# Templates

HTML Report Wizard: [Help Index](#)

You can save in a template all options that are set in the HTML Report Wizard tab windows. HTML attributes of all elements, html report layout, fields selection, hyperlinks associations, grouping, .... all will be saved in the template.

## To Create a Template

Set required options in the HTML Report Wizard tab windows. Click on the Save push button. Enter name in the Template Name edit box. Click on the OK push button.

## Notes

- Templates are reusable entirely by the same database. For future reference include the database name in a template.
- Templates created with one database are reusable with another database. Selected data fields, hyperlink associations between data fields, and grouping will be loaded.

## Related Topics

[Save Template](#)

[Load Template](#)

## Save Template

HTML Report Wizard: [Help Index](#)

You can save in a template all options that are set in the HTML Report Wizard tab windows. HTML attributes of all elements, html report layout, fields selection, hyperlinks associations, grouping, .... all will be saved in the template.

### **Template Name**

Enter the template name here and click on OK push button. The new template will be saved for future reuse.

### **Existing Templates**

All previously saved templates are listed here. You can save current settings in already listed template (replace). Click on the template name. The selected template will be displayed in the Template Name edit box. Click on the OK push button.

## Load Template

HTML Report Wizard: [Help Index](#)

Displays the template window with all available templates. Click on the template name in the Existing Templates list box. Click on the OK push button. All controls in the HTML Report Wizard will take values from the selected template.

### **Template Name**

It displays the name of the selected template.

### **Existing Templates**

All previously defined templates are listed here. Click on the template name. The selected template will be displayed in the Template Name edit box. Click on the OK push button. All controls in the HTML Report Wizard will take values from the selected template.

## Menu Page

HTML Report Wizard: [Help Index](#)

### Controls:

- **Menu:** Select menu type here.
- **Menu Items:** All menu elements are listed here. To check current settings for a menu item just click on it.
- **Add Push Button:** Adds blank menu item.
- **Delete Push Button:** Deletes selected menu item.
- **Do not display Item Text:** Select this option for graphical menu items.
- **Item Text:** Enter menu text here. This text will be displayed on the html document.
- **Item Hint:** Hint is one line message displayed close to the mouse pointer. The hint message corresponds to the menu image. When the image cannot be displayed, the browser should display the hint text instead.
- **Item URL Link:** Enter hyperlink address here.
- **Item Picture:** Define graphical menu items here (load from a file, capture from other program, or load from the scanner...)
- **Menu Text Attributes:** Define different attributes of the menu text. The following attributes of the text can be defined: size, color, alignment, and type.

### How to create menu item.

- 1) select menu type (horizontal or vertical)
- 2) click on the Add push button
- 3) enter menu text in the Item Text edit box
- 4) enter menu hint in the Item Hint edit box
- 5) enter URL link in the Item URL Link edit box
- 6) (optional) load graphic using Item Picture Control (If you want to have only menu with graphics, select: Do not display Item Text)
- 7) define text attributes for menu items with text
- DONE, click on Add push button to define the second menu element.

## Examples, Tutorial

HTML Report Wizard: [Help Index](#)

### Examples

PrimaSoft's Collectibles Directory (on the Internet:  
<http://www.primasoft.com/collectibles/index.htm>)

All pages created entirely with HTML Wizard. Database organized with our product:  
PrimaSoft Organizer Deluxe. To see this example you have to be connected with the Internet.  
Load the following page into your browser:

<http://www.primasoft.com/collectibles/index.htm>

- about 300 pages;
- all pages and graphics generated in less than 10 seconds with HTML Report Wizard;
- graphics and layout prepared in less than 30 minutes;

### Tutorial

**How to Create HTML document from a database in 3 easy steps.**

#### 1) Start HTML Report Wizard

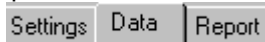
I am assuming that your data file contains some records. Click on the **HTML** push button



#### 2) Select Fields and Select Format

The HTML Report Wizard Window is displayed. Don't worry about all options. Click on the

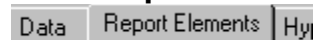
**Data Tab**



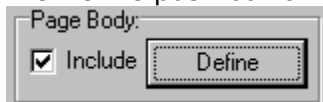
. It will display **Data Page**. Click on **Include All Fields** push button



. It will select all fields from the database. All will be included in the HTML report. Click on the **Report Elements Tab**



. It will display Report Elements Page. In the Page Body part click on the Define push button



, it will display Page(Report) Format window . In the Body Format part click on the **Plain**

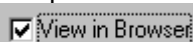


, click on the OK push button.

#### 3) Generate HTML Report

You have been selected fields, and report format. You are ready to create html document.

Set the option **View in Browser**



. Click on the Go push button



. HTML Report Wizard creates report and sets your Web browser to activate the html report page. View report in your browser.

## Maintenance Log Window

Organizer maintains a detailed Data Maintenance Activity Log. You can easily find out information about all major processes done on your data files (backups, restores,...).

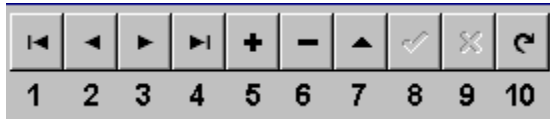
Delete push button deletes the selected log entry. To select a log entry just click on the date field. Clear push button deletes all log entries from the Maintenance Log Window.



## Table Viewer

Table Viewer allows you to display and edit your data in columns and rows. Each row contains information about one item (record). Each column represents one field.

### Toolbar Commands



Move Commands:

- 1-Selects the first record of the table
- 2-Selects the previous record of the table
- 3-Selects the next record of the table
- 4-Selects the last record of the table

New/Edit/Delete Commands:

- 5-Insert Record
- 6-Delete Record
- 7-Edit Record
- 8-Post Edit
- 9-Cancel Edit
- 10-Refresh Data

You can move to different fields and records using the keyboard as follows:

Left arrow: Selects the field to the left of the selected field.

Right arrow: Selects the field to the right of the selected field.

Down arrow: Selects the same field in the record below the current one. If the last record is selected the table

Up arrow: Selects the same field in the record above the current one.

Home: Selects the first field in the current record.

End: Selects the last field in the current record.

Ctrl+Home: Selects the active field of the first record in the table.

Ctrl+End: Selects the active field of the last record in the table.

PgDn: Displays the next set of records.

PgUp: Displays the previous set of records.

### How to edit data in fields

- 1) Select the field that you would like to edit. Double click on this field. It opens the Data Entry Window. Enter data.
- 2) You can also enter data directly into the selected field (no multiline and image fields). Select the field, enter data from the keyboard.

### How to create a new record

Click on the Insert push button in the Toolbar. It creates empty new record.

Double click on each empty field. Enter your data in the Data Entry Windows.

### Note

In the Table Viewer **Radiobuttons** and **Checkbox** fields are represented as numbers. Checkbox field has value: 0 (No) or 1 (Yes). Radiobuttons field has values: 0 for the first selection, 1 for the second selection, N-1 for the last selection. N is the number of possible selections for radiobuttons field.

## Picture Control (Graphic Fields)

Picture Controls allows you to quickly enter and easily maintain image data. There are 2 types of picture controls: [Internal Graphic Fields](#) (stored in the database) and [External Graphic Fields](#) (Organizer stores only file names). Both fields have a **Speed Bar** and a **Popup Menu** with the following functions:

- *File Name* : this command is listed for the [External Graphic Field](#) type. It displays the name of the graphic file stored on the disk;
- *Thumbnail* : this command is listed for the [External Graphic Field](#) type. When set the program creates reduced version of the image file.
- *Clear* : clears the image;
- *Load* : displays an Open File dialog box. Go to the directory where the image file is stored. Select the image file and click on the OK push button. The selected image will be displayed in the picture control. The the following image file formats are supported: BMP, JPEG, PNG, GIF, PCX.
- *Save* : saves the contents of the picture control to a file. You can save the image as a new file or just overwrite the existing one. The the following image file formats are supported: BMP, JPEG, PNG, GIF, PCX.
- *Copy* : copies the image to the Windows Clipboard;
- *Paste* : pastes the image from the Windows Clipboard into the field.
- *Screen Capture* : allows you to capture any screen element. Click on the upper left corner of the image you would like to capture, hold the mouse button, and release in the lower right corner of the image. The selected part of the screen will be loaded automatically into the picture control.
- *Print*: prints the contents of the picture control.
- **Scan: loads the image from a selected TWAIN compliant devices: scanners, digital cameras, and other image input devices.**
- *Select Source*: displays Windows standard dialog box with available Twain compliant devices. Select the image source here.
- *Full Screen*: allows viewing the image on the whole screen.
- *Auto Stretch*: stretches the image in the picture control (just for better viewing). It will not resize the image.
- *Hide Tool Bar*: hides tool bar.

Note: Set reasonable optical resolution (dpi) and the number of colors when entering images to the organizer. The standard resolution for computer images is 70-75 dpi. Very often 256 colors is enough to receive a good quality digital image. It will keep your data smaller and thus faster to display and browse.

## HTML Report Wizard - Group Page (BODY)

HTML Report Wizard: [Help Index](#)

This page will be included in your report in the following situation: you selected group by field, and you selected 2 level or 3 level report type. The Group Page allows you to define attributes of the group names. If the group index is very long you might want to display it in several columns. Enter the column number in the Number of Columns control.

## HTML Report Wizard - Maintenance

Maintenance options are for advanced users. They can be used for two purposes:

- to allow more flexible naming of the generated HTML and graphic files.
- to allow more efficient HTML files maintenance - users can select which files will be generated.

When **HTML Files** radio button is selected you can set maintenance options for HTML Files. For 2-Level Reports ([Report Elements](#)) "HTML Files - 2nd Report Level" options can be set. For 3-Level Reports ([Report Elements](#)) both "HTML Files - 2nd Report Level" and "HTML Files - 3rd Report Level" options can be set.

Those options are the following:

**Start File Names With:** this option allows you to specify the prefix for all HTML files that will be created automatically by the program;

**Start Numbering From:** this option also controls how the file names are created by the program; for example, if Start File Names With is "test" and Start Numbering From is "100" the program will create the following files: "test100.htm", "test101.htm", etc.

**HTML File Name Field:** this options allows the user to designate one text field in the database that will be used for HTML file names. You can now keep the file names unchanged even when new records are added to the database. File Naming Mode options are active only when the above HTML File Name Field is selected.

**File Naming Mode options:**

- Create All Files/Create All Names: this option causes the program to generate file names for all records (according to Start File Names With and Start Numbering From settings) and to store those file names in the selected database field (HTML File Name Field); this option is useful for a new HTML Report;
- Create Only Files With Empty Names: this option means that the program will go through all records and when it finds no file name in the HTML File Name Field it will create the file name automatically, store it in the field, and create an HTML file; this option is useful when you add some new records and want to update the HTML Report (only files for new records will be created); it makes updates very easy;
- Create Files According to Update Rule: this option allows you to specify which HTML files should be created; this option allows you to update only HTML files for which the Update Rule is satisfied; the Update Rule is defined by selecting a database field (Update when Value of the Field), the operator and the operand (a text, date, or numeric value); for example, the Update Rule could be: Last\_Name <= B (create only pages for which Last\_Name is A or B);
- Create All Files / Don't Update Names: this option allows you to recreate all HTML files without changing the file names stored in the HTML File Name Field;

When **Graphic Files** radio button is selected you can set maintenance options for Graphic Files. Those options are the following:

**Start File Names With:** option allows you to specify the prefix for all graphic files that will be created automatically by the program;

**Start Numbering From:** option also controls how the file names are created by the program; for example, if Start File Names With is "test" and Start Numbering From is "100" the program could create the following files: "test100\_1.gif", "test100\_2.gif", "test101\_1.gif", "test101\_2.gif", etc.

**Graphic File Name Field:** this options allows you to designate one text field in the database that will be used for graphic file names; using this field you can now keep the graphic file names unchanged even when new records are added to the database; File Naming Mode options are active only when the above Graphic File Name Field is selected;

**File Naming Mode options:**

- **Create All Names:** this option allows you to generate names for all graphic files and store them in the database;
- **Create Only Missing Names:** this option allows you to keep the graphic file names unchanged; only names missing in the database (e.g. for new records) will be created by the program.

## Browser Page

**Browser Page** displays the Microsoft Internet Explorer browser.

Click on the **Browser Tab** displays Organizer's browser. You can use standard browser commands that are listed in the popup menu (right mouse click on the browser window). There are additional commands provided by the Organizer that allow you to integrate data fields with the browser or Web Pages. The Organizer's browser supports the following functionality:

- Click on the Browser Tab automatically loads the Web page for the selected record. Assuming the database contains records with [Web Address](#) field.
- Organizer allows you to create a collection of **Favorite** Pages.
- Organizer allows you to create a collection of **AutoFill Form** Pages with data fields assigned to the form fields. There are two kind of AutoFill Pages. The AutoFill Form function is described below.

**Tool Bar** is displayed at the top of the browser window. You can increase the browser display window by hiding the tool bar. Click on the **Hide Tool Bar** check box (in front of the **Internet Address** edit box).

### Tool Bar

- **Go Back button:** click here to return to the last page you viewed.
- **Go Forward button:** click here to view the page you have seen previously.
- **Home Page button:** click here to display the home page (this page is set in the Internet Explorer/View/Options/General Tab/Home Page area).
- **Stop button:** click here to cancel the page loading process.
- **Refresh button:** click here to refresh the currently displayed page.
- **Change Font Size Button:** click here to change the font size.
- **PrimaSoft Home Page Button:** click here to display our Home Page (<http://www.primasoft.com>). Stay tuned for future releases of our products. Any new versions will be announced on our Web Home Page.
- **Favorites Button:** click to add a new page to the favorites list or click here to select a Web page from favorites list.
- **Web dB Server Button:** click here to access your Web dB Server account. [More](#).
- **Fill Form Button:** click here to select the web page with a form (see explanation below). Left click opens a popup menu with forms listed in categories. Right click opens a popup menu with the **QuickFill** function.
- **Template Button:** click here to create a form template file (see explanation below).

### Favorites Function

How to add a new page to Organizer's Favorites. Click with right mouse button on the Favorites button. Select **Ad To Favorites** command. In the **Save Favorites** windows enter the page title and enter/select category.

### Fill Form Function

Organizer allows you to create a collection of **AutoFill Form** Pages with data fields assigned to the form fields. You can use this function in two different ways.

- **AutoFill Forms that are the same for each data record:** You can integrate data fields with the Internet form pages (like search engines), so you do not have to enter text manually. Example: integrate data fields from the Movie Organizer with the Internet Movie Database search engine. In this case you want to create AutoFill Form that will be the same for each data record.

- **AutoFill Forms that are unique for each data record:** You can integrate data fields with the Internet form pages (like Web service pages) that require login and password entries. Example: you are a member of different Web services that require login name and password. In this case you want to create a database that will allow you to store information about all Web accounts. You could create the database with the following data fields: Web\_Title, URL\_Address, Login\_Name, Password, Notes. In this case you want to create AutoFill Form that will be unique for each record.

#### **How to add a new page with a form to Organizer's Fill Forms.**

- Open a page with a form in the Organizer's browser (first time you have to enter manually the Web's URL address).
- Click on the **Template** button. It will display **Internet Form Template Maker** window. The left panel lists all fields from the form. The right panel lists all fields from a database. You can link data fields with form fields. Select(highlight) the form field and then double click on the data field. Organizer also supports multiple data fields selection. In this case select "?" (question mark) for the form field. When you select the Web page that has a template with the question mark the Organizer's browser will ask you which data field to use to fill the form.
- When you define your form template page click on the **Save** button. Enter the title and the category in the **Save Form** window.
  - **Create AutoFill Forms that are the same for each data record:** enter the title and the category. The category and the title name will allow you to select this form from the **Fill Form** popup menu.
  - **Create AutoFill Forms that are unique for each data record:** in this case the program should assigned the template form to the selected record. You can do that by using the contents of the record's field as the form title.

#### **Open Web page using Fill Form function**

- **Open a Form that is the same for each record:** To display the page with a form click with **left** mouse button on the **Fill Form** button. It opens a popup menu with all categories. Select the category and select the form. The Form Web page will be opened in the Organizer's browser window. All form's fields will be filled with data from the currently selected record. Form's fields will be filled according to the form template file. Note: Sometimes the form page loads very slowly and the form fields are not automatically filled with data. In this case select the Web page again.
- **Open a Form that is unique for each record:** To display the unique form click with **right** mouse button on the **Fill Form** button. It opens a popup menu. Click on the **Quick Fill** command. Note: the **Quick Fill** popup menu lists the all field names. Select the field name that is used as the form's title. The Form Web page will be opened in the Organizer's browser window. All form's fields will be filled with data from the currently selected record. Form's fields will be filled according to the form template file. Note: Sometimes the form page loads very slowly and the form fields are not automatically filled with data. In this case select the Web page again.

## View Page

**View Page** displays the data and images in a Web page format. Displaying a record in Web page format allows you to benefit from the full potential of the browser and the Internet new technologies.

There is no limit on the number of ways you could display your data in the View Page. The integration of data and the browser gives advanced users unlimited flexibility with adding new custom functionality that already is provided by the Internet. You can easily:

- Create custom HTML layouts for viewing your data (select the font size, background color, fields layout, display data in rows or tables, display data in any order, include all or selected fields, display one field in several places).
- Create several HTML template files that will allow you to display and view data depending on the current requirements.
- Create HTML template files that you can use as letter templates, report templates, or any document forms.
- Integrate data with the Internet resources, search engines, mapping systems, multimedia, ActiveX Controls,...

View Page displays records in a simple row form (no HTML template file loaded) or in a complex, fully customizable form through HTML template files. View Page accepts HTML files with keywords that represent data fields. Before the HTML file is displayed in the View Page all keywords are replaced with data contents.

The View Page also allows you to visit WEB pages on the Internet. Click with right mouse button on the display window opens the popup menu with the browser commands. Please check the explanation of the commands in the Microsoft Internet Explorer browser help.

**View Page/Tool Bar** is displayed at the top of the view window.

- **Go Back button:** click here to return to the last page you viewed
- **Go Forward button:** click here to view the page you have seen previously
- **Change Font Size Button:** click here to change the font size
- **PrimaSoft Home Page Button:** click here to display our Home Page (<http://www.primasoft.com>). Stay tuned for future releases of our products. Any new versions will be announced on our Web Home Page.
- **HTML Template File Edit Box:** displays the name of the template file. Click here to load a custom HTML template file.

### Default HTML Template

View Page allows you to select HTML files(templates) for viewing your records. If you do not select the custom HTML file then the viewer displays all data fields in rows.

### Custom HTML Templates

View Page allows you to load any HTML file with keywords that represent data fields. Design HTML documents with the tool you know very well, your favorite HTML Editor. Use this document as a template for viewing your records. You can also use this feature for creating custom reports, letters, forms,...

**Examples** (custom reports, letters, forms,...)

- Web Builder Deluxe -> HTML template in the form of the final Web page ([HTML Wizard](#) allows you to use this template for generating Web pages).
- Inventory Organizer -> HTML template in the form of the Standard Purchase Order
- Address Organizer -> HTML templates in the form of the Custom Letters
- Hardware Organizer -> HTML template in the form of the Standard Discrepancy Report



- Collectibles Organizer -> HTML template in the form of the WEB Catalog Page

Right mouse click on the viewer displays the standard Internet Explorer popup menu; Select **Print** command to print the HTML document. Select **View Source** command to view HTML code in the Notepad Editor. Use Notepad Save command to save the HTML document as the HTML file.

## How to use Custom HTML Templates

1) HTML Editor -> Create HTML document (template).

- Create HTML file with your favorite HTML editor.
- Define the layout of your HTML document (menu, tables, background, graphics, footer, header,.....). Decide where you would like to have information from your database fields. Just try to create the whole document with the sample data from one data record.
- When you are satisfied with your HTML page delete the sample data and insert at the same position **Keywords** that represent data fields:  
 <!--PrimaSoft:1--> ,.... <!--PrimaSoft:4--> ...  
 or (with data field labels)  
 <!--PrimaSoft:L1--> ,.... <!--PrimaSoft:L4-->...
- Some HTML editing tools does not allow to enter the above keys correctly. Starting with version 1.2 the Organizer also accepts keywords in the following form: **!--PrimaSoft:N** or **!--PrimaSoft:LN**

2) Keywords **!--PrimaSoft:N-->** or **!--PrimaSoft:N**

- Rule 1: Keywords have the following syntax (without spaces):  
 <!--PrimaSoft:N-->  
 or  
 !!--PrimaSoft:N
- Rule 2: The Number in the keyword represents the position of the data field in the data record.
- Rule 3: You can put L indicator in front of the Number. In this case the field name will be listed at the beginning of the field contents. **!--PrimaSoft:LN-->** with the field name.
- **Rule 4** (starting with version 1.2): New and old keywords could be entered at any position in the HTML template file.

3) Example (HTML Custom Template with keywords)

```
<HTML>
<HEAD>
<TITLE> !--PRIMASOFT:1-- </TITLE>
</HEAD>
<BODY>
<BR>
<BR>
<TABLE WIDTH="400" HEIGHT="300" BORDER="1" ALIGN="CENTER" CELSPACING="1"
CELLPADDING="1" BGCOLOR="#FFFFCC" BORDERCOLORLIGHT="#FF99FF"
BORDERCOLORDARK="#FFFFFF">
<TR>
    <TD WIDTH="0"></TD>
    <TD ALIGN="LEFT" WIDTH="30%"> !--PRIMASOFT:2 </TD>
    <TD ALIGN="LEFT" ROWSPAN=5 WIDTH=70%"> !--PRIMASOFT:3 </TD>
</TR>
<TR>
    <TD></TD>
```

```
<TD ROWSPAN="4" ALIGN="LEFT" VALIGN="TOP"> !--PRIMASOFT:4</TD>
</TR>
<TR>
    <TD></TD>
</TR>
<TR>
    <TD></TD>
</TR>
<TR>
    <TD></TD>
</TR>
</TABLE>
</BODY>
</HTML>
```

## Handy Email

(Only in organizers with the E-mail Address data field)

**Handy Email** is a useful utility that allows you to create and send quickly e-mail messages to anyone on the Internet. It's easy to use and fast. At once you can send email messages to one, all, or selected email addresses listed in the Organizer.

### Send To

Displays the e-mail address that is listed in the e-mail data field.

### Subject

Type the subject of the message.

### Attached Files

Click on the Add push button, and then double-click the file you want to send.

### Message Body

Type your message.

- Load: You can load a message from a text file.
- Save: You can save a message in a text file.
- Clear: Click to clear the message window.
- Paste: Click to move text from the clipboard to message window.

### Message Body / Template Message

You can create one email message that will be modified with the content of the record when the message is sent to the receiver. You can insert keywords into the message body. When you press **Send** or **Send All** button the **Handy Email** replaces the keywords with the contents of the corresponding data fields.

Keywords have the following form: `<!--PRIMASOFT:N-->`

Replace **N** with the field number (1..n).

**Example:** The first field in the database contains the person name. The following message will be personalized for each receiver.

*Dear <!--PRIMASOFT:1-->*

*This is the test message.*

*Regards,  
PrimaSoft PC, Inc.*

The keyword `<!--PRIMASOFT:1-->` will be replaced with the receiver name.

### Close

Click to close the Handy Email window.

### Send

Click to send the message. Before you send a message you have to specify Send To address and Subject. You can type in a Message Body, Load it from a text file, or Paste from the clipboard.

### Send All

Click to send the message to all e-mail addresses listed in the organizer. Use filter function if you would like to send e-mail messages to the selected group of recipients.

**Cancel**

Click to stop the e-mail sending process.

**Setup**

Before you start using Handy Email you have to type in some parameters. Click on the Setup push button to display the [Handy Email Setup Window](#).

## Handy Email / Setup Window

Before you start using Handy Email you have to type in some parameters.

- **SMTP Host** : this is your email host for sending out email messages; see your main email client software for the correct SMTP Host;
- **My Name** : your first and last name;
- **My Address** : your full email address e.g. jsmith@aol.com
- **Reply To** : your return email address (you can leave it blank);
- **Use Auto-Dialer option** : check this option if you want Handy Email to connect to the Internet when needed;
- **Dialup Connection** : select your Internet dialup connection from the list if you checked "Use Auto-Dialer".

## Creating a New Database Definition

In order to create a new database definition do the following:

- 1) Think over what data fields your application will need and write it down.
- 2) Start Designer and click on **Create New Database** button.
- 3) Click on **New Field** button and create a new data field. The **Field Name** cannot be longer than 10 characters. For each new field you have to select one of the following **Field Types: Character** (1-254 characters, see below all possible types), **Memo** (multi-line edit field, multi-line HTML field, or table field), **Graphic** (internal graphic field), **Numeric** (simple numeric, calculated, radiobuttons, checkbox, autoincrementing), and **Date**.
- 4) Repeat step 3 as many times as you need.
- 5) When all data fields have been defined click on **Save** button.
- 6) Type in the name of the new database.
- 7) If you made a mistake you can modify your database definition by clicking on Modify Database button (you can add more data fields or delete existing fields).
- 8) Create a [Data Entry Layout](#) by clicking on **Create/Modify Data Fields Layout** button.

### Data Field Types

- 1) Character / One-Line Text
  - [Simple Text Field](#)
  - [Drop-Down List Field](#)
  - [Email Address Field](#)
  - [Web Page Address Field](#)
  - [Web Page Title Field](#)
  - [Phone Number Field](#)
  - [Attachment Field](#)
  - [External Graphic Field](#)
- 2) Memo / Multi-Line
  - [Multi-Line Text Field](#)
  - [Multi-Line HTML Text Field](#)
  - [Table Field](#)
- 3) Graphic
  - [Internal Graphic Field](#)
- 4) Numeric
  - [Simple Numeric Field](#)
  - [Calculated Numeric Field](#)
  - [Radiobuttons Field](#)
  - [Checkbox Field](#)
  - [Autoincrementing Field](#)
- 5) Date
  - [Date Field](#)

## Creating or Modifying Data Entry Layout

After [Creating a Database Definition](#) you have to create a Data Entry Layout. You can also modify an existing Data Entry Layout.

### Data Entry Layout Window

- Allows you to define the layout of the **Data Entry Controls** on one or more data pages.
- Allows you to define the **Data Entry Control** type for the selected **Data Field**.

### Data Entry Controls

Data Entry Controls are used for displaying, changing the data and selecting functions that are data specific.

Example:

- If the data field is of type **Character** (One Line Text) and you want to use this field for storing **categories** you can select the **Drop-Down List** data entry control. This control will allow you to select the category from the list or can speed up data entry by automatically picking up list elements based on the first typed-in characters.
- If the data field is of type **Character** and you want to use this fields for storing **email addresses** you can select the **E-Mail Address** data entry control. You will be able to send quickly email messages directly from the Organizer.

The above data fields can be also stored in the Simple Text data entry control but then you will not have the specialized functionality. Read about all data fields: [Data Fields / Data Entry Controls](#).

### How to create/modify Data Entry Layout

- Click on **Create/Modify Data Fields Layout** button.
- From the **Select Database Window** select the database.
- Select data fields by clicking on the data field check boxes on the left side of the window.
- Depending on the data field type you will be given a set of data entry controls to select from. For example, if the data field is of type Memo you have to select one of the following data entry controls: Simple Multi-Line (a regular multi-line edit box), Multi-Line HTML (a multi-line edit controls with a popup menu useful for editing HTML code), Table (a spreadsheet-like control).
- When your page is full you can create a new page for your data entry controls by clicking on Add Page button. You can create maximum 15 data pages.
- For each page you can select if data entry controls should be displayed in one or two columns (Page Layout radio buttons).
- To rename the panel tabs (**Part 1, Part 2,..** ) enter new label into the **Page Name** edit box .
- After creating a data entry layout click on Save button.

## Table Data Field

This field allows you to enter and display information in a table (spreadsheet-like) format. You can add/delete rows and columns by clicking on the Table field with the right mouse button and selecting a command from popup menu. In the same way you can also specify headers for the Table field. You can also add rows by using the arrow keys. The Table Field controls have the following Popup Menu functions:

- Edit Table Field: displays [Edit Table Field](#) window. You can define or modify layout or arithmetic formulas.
- Add Row: adds new row.
- Delete Row: deletes selected row.
- Insert File Attachment: allows you to insert the link to any file. When you have a file name in a table field (File Attachment) it is underlined and double-click on it launches the associated application.
- Import: imports data from Text of dBase file. [Import From Text of DBF File](#).
- Font..: allows you to select the font type and size.
- Color..: allows you to select the text and background color.

### How to create a Table Field

You create and define table field in two steps.

- 1)** You have to create table field type in the Designer module.
  - Create a Memo field in the [Create a New Database Definition](#) window (when creating data fields for your new database in the [Designer](#)).
  - Select a Table field type in [Data Entry Control](#) window (when defining a layout/display of data fields in Field Layout Designer window).
- 2)** You define number of columns, headers, arithmetic formulas for your table in the Edit Table Field window.
  - [Edit Table Field Window](#)



## Calculated Field

Calculated fields store numeric values. The value is calculated automatically according to the arithmetic formula. For example, you can set up a calculated field that multiplies 2 numeric fields (e.g. quantity and price). You can refer to other numeric fields in your formula by using "@" character followed by a numeric field number e.g. @3\*@4. The Calculated Numeric Fields have the following Popup Menu functions:

- Recalculate All Records : recalculates value of this field for all records;
- Font : allows you to select font type;
- Color : allows you to set colors;

In the calculated field you can refer to the value of the same field from the previous record. In the arithmetic formula you can refer to the value from the previous record by using "#" character. For example, you can set up a calculated field that calculates total for all records.

You set up the formula when in the Designer. If you want to use a **Calculated Field** in your database:

- create a **Numeric Field** in the [Create a New Database Definition](#) window ([Designer](#)).
- select a **Calculated Type** in the [Create or Modify Data Entry Layout](#) window ([Designer](#)).
- define an arithmetic formula in the Calculated Field window.

Note: 9 is the maximum number of fields in a formula.

### How to define arithmetic formula

- The organizer calculates numbers using operators from left to right. You can not use brackets.
- Available operators are: + (addition), - (subtraction), \* (multiplication), / (division).
- You can use constants: 2, 3.2, 0.5.
- Other numeric fields are represented in the following way: @2 or @5. The number represents the position of the numeric field in the record.
- You can refer to the value of the same field from the previous record by using "#" character.

### Example

**@2\*@3+0.3\*@4**

This formula will be calculated in the following way: The value of the second field will be multiplied by the value of the third field, then the 0.3 will be added and then the result will be multiplied by the value of the fourth field.

### Example

**@2+#**

There is a "Total" field with the formula: @2+# . It will be calculated in the following way: The value of the second field will be added to the value of the "Total" field from the previous record. Note: The value of the new field that uses "#" operator depends on the order of your records. You can recalculate all values for your calculated fields by selecting Recalculate All Records command from a field popup menu.

### Examples

1)

Regular formula (multiplication done first , then addition)

C + A \* B

Organizer representation

@A \* @B + @C

2)

You receive the payment in US \$. You are in the Germany.  
There is processing fee for every order. You would like to have  
a calculated field that shows your net income in your currency.  
Your database in the organizer needs the following fields:

- payment (A) ( 50US \$)
- exchange rate (B) (1.56)
- processing fee 25% (C) (0.25)
- net income (D, to calculate) (in DM)

Regular Formula (Net Income):

$A * B * ( 1 - C )$

Organizer Representation:

1 - @C \* @ A \* @ B

## External Graphic Field

This new graphic field type is very useful for applications that use many large images stored in JPEG or GIF format. Instead of storing them internally in the database this field stores only the file names. This field is more reliable and more efficient than the [Internal Graphic Field](#) which is still available.

If you want to use an **External Graphic Field** in your database:

- create a **Character** field in the [Create a New Database Definition](#) window ([Designer](#)).
- select an **External Graphic** type in the [Create or Modify Data Entry Layout](#) window ([Designer](#)).

You should choose the sufficient field length to hold full file names (128 should be enough in most cases). Images for the External Graphic Field can be stored anywhere on your hard disk but we recommend that you store all images in one directory, preferably in the directory specified in [Options](#) (Graphic Files Directory option). If you do so, you will be able to backup and restore your image files. Graphic Data Entry Control has a Popup Menu with the following functions:

- File Name : displays the name and the path of the image file;
- Thumbnail : displays large pictures in a reduced form. If this option is selected and you browse through your records the program tries to display a thumbnail image. If the thumbnail image does not exist the program creates automatically the reduced version of the image file. The thumbnail image file is created with a new name. If original file name is **mypicture.jpg** the thumbnail file name is **~mypicture.jpg**.
- Edit : It only works if you have a graphic editing software registered with Windows for a given file type. It will start the editing program with the selected image automatically loaded.
- Clear : clears the image;
- Load : displays an Open File dialog box. Go to the directory where the image file is stored. Select the image file and click on the OK push button. The selected image will be displayed in the picture control. The the following image file formats are supported: BMP, JPEG, PNG, GIF, PCX.
- Save : saves the contents of the picture control to a file. You can save the image as a new file or just overwrite the existing one. The the following image file formats are supported: BMP, JPEG, PNG, GIF, PCX.
- Copy : copies the image to the Windows Clipboard;
- Paste : pastes the image from the Windows Clipboard into the field.
- Screen Capture : allows you to capture any screen element. Click on the upper left corner of the image you would like to capture, hold the mouse button, and release in the lower right corner of the image. The selected part of the screen will be loaded automatically into the picture control.
- Print: prints the contents of the picture control.
- Scan: loads the image from a selected TWAIN compliant devices: scanners, digital cameras, and other image input devices.
- Select Source: displays Windows standard dialog box with available Twain compliant devices. Select the image source here.
- Full Screen: allows viewing the image on the whole screen.
- Auto Stretch: stretches the image in the picture control (just for better viewing). It will not resize the image.
- Hide Tool Bar: hides tool bar.

### [Internal Graphic Field](#)

## HTML Field (Multi-line HTML Text)

HTML Field is like a regular multi-line text field except that it has a popup menu with most useful HTML commands. It is a very useful field for creating and editing HTML code. And you can see the result of your HTML code in the Viewer window or the field's browser (Expand function). The most useful HTML tags for formatting text are included in the popup menu (right mouse click). You can enter the tags in two ways:

- Insert a tag from the popup menu at the cursor position.
- Highlight text and then select a tag from the popup menu.

The Table Field controls have the following Popup Menu functions:

- Load From File: loads HTML code from the selected file.
- Save To File: saves the contents of the field in a new file.
- Expand: opens Organizer's HTML Editor.
- Clear: deletes contents of the field.
- Font..: allows you to select the font type and size.
- Color..: allows you to select the text and background color.
- HTML Tags: this section lists the most useful HTML tags for formatting text.

If you want to use an **HTML Field** in your database:

- create a **Memo** field in the [Create a New Database Definition](#) window ([Designer](#)).
- select a **Multi-Line HTML** type in the [Create or Modify Data Entry Layout](#) window ([Designer](#)).

## Multi-line Text Field

These fields allow entering multiple lines of text up to about 64KB in size. Characters typed in can be alphanumeric (letters of alphabet and numbers); they also accept 'special characters' like: quotes, exclamation marks, percent signs, asterisks, etc. The fields' Popup Menu has the following functions:

- Undo : undoes the last changes;
- Cut : deletes the selected text and copies it to the Clipboard;
- Copy : copies the selected text to the Clipboard;
- Paste : pastes text from the Clipboard;
- Delete : deletes the selected text;
- Select All : selects entire text;
- Load : loads the contents of the selected file into the field;
- Save : saves the contents of the field to a text file;
- Font : allows you to select the font for all Multi-Line Edit Fields;
- Color : allows you to select the text and background color for all Multi-Line Edit Fields;
- Horizontal Scrollbar : displays or hides the horizontal scrollbar;

If you want to use a **Simple Multi-Line Field** in your database:

- create a **Memo** field in the [Create a New Database Definition](#) window ([Designer](#)).
- select a **Simple Multi-Line** type in the [Create or Modify Data Entry Layout](#) window ([Designer](#)).

## Drop-Down List

### Drop-Down List (Keyword Mode)

#### Drop-Down List Field

**Drop-Down List** is a data entry control that combines an edit box with a list, much like that of a list box. You can either type text in the edit box or select an item from the list. The lists in the Drop-Down List can be edited in Maintenance/Edit Lists function or from the Popup Menu. The Drop-Down List data entry control has the following Popup Menu functions:

- Cut : deletes the selected text and copies it to the Clipboard;
- Copy : copies the selected text to the Clipboard;
- Paste : pastes text from the Clipboard;
- Delete : deletes the selected text;
- Select All : selects entire text;
- Font : allows you to select the font for all single-line edit controls;
- Color : allows you to select the text and background color for all single-line edit controls except numeric fields;
- Edit List : allows changing, deleting, and adding new list elements;
- Auto-Fill : if checked, can speed up data entry by automatically picking up list elements based on the first typed-in characters;
- **Keyword Mode** : if checked selected keywords are added to the content of the field. Pressing on the "drop-down" button of the edit box opens the Keyword List dialog box.

If you want to use a **Drop-Down List Field** in your database:

- create a **Character** field in the [Create a New Database Definition](#) window ([Designer](#)).
- select a **Drop-Down List** type in the [Create or Modify Data Entry Layout](#) window ([Designer](#)).

#### Drop-Down List Field (Keyword Mode)

**Drop-Down List** data entry control has the **Keyword Mode** option. You can either type text in the edit box or select an item from the Keyword List box. Selected keywords are added to the content of the field. Pressing on the "drop-down" button of the edit box opens the Keyword List dialog box.

**Keyword List** dialog box:

- Add keyword: in the **Keyword** list box select a keyword and click **Add**. To add a keyword you can also double click on the keyword.
- Delete keyword: to delete the keyword click on the keyword (place the cursor on this keyword) and click **Delete**.
- The Keyword List dialog box does not allow you to add new keywords to the Keyword Selection list. You can do this by typing a new keyword in the edit box. New keyword is added automatically to the keyword selection list. You can also select Edit List command from the pop-up menu (right mouse click on the field) and modify keywords in the Edit Lists dialog box.

If you want to use a **Drop-Down List Field** in the **Keyword Mode** in your database:

- create a **Character** field in the [Create a New Database Definition](#) window ([Designer](#)).
- select a **Drop-Down List** type in the [Create or Modify Data Entry Layout](#) window ([Designer](#)). You do not define the Keyword Mode in Designer.
- start Organizer Deluxe. Select the **Keyword Mode** from the popup menu (right mouse click on the drop-down field)

## Internal Graphic Fields

Internal Graphic Fields store graphical images. The Graphic Field allows storing any size images. It also has a Speed Bar with the function buttons at the bottom. Graphic Data Entry Control has a Popup Menu with the following functions:

- Clear : clears the image;
- Load : displays an Open File dialog box. Go to the directory where the image file is stored. Select the image file and click on the OK push button. The selected image will be displayed in the picture control. The the following image file formats are supported: BMP, JPEG, PNG, GIF, PCX.
- Save : saves the contents of the picture control to a file. You can save the image as a new file or just overwrite the existing one. The the following image file formats are supported: BMP, JPEG, PNG, GIF, PCX.
- Copy : copies the image to the Windows Clipboard;
- Paste : pastes the image from the Windows Clipboard into the field.
- Screen Capture : allows you to capture any screen element. Click on the upper left corner of the image you would like to capture, hold the mouse button, and release in the lower right corner of the image. The selected part of the screen will be loaded automatically into the picture control.
- Print: prints the contents of the picture control.
- Scan: loads the image from a selected TWAIN compliant devices: scanners, digital cameras, and other image input devices.
- Select Source: displays Windows standard dialog box with available Twain compliant devices. Select the image source here.
- Full Screen: allows viewing the image on the whole screen.
- Auto Stretch: stretches the image in the picture control (just for better viewing). It will not resize the image.
- Hide Tool Bar: hides tool bar.

Note: Set reasonable optical resolution (dpi) and the number of colors when entering images to the organizer. The standard resolution for computer images is 70-75 dpi. Very often 256 colors is enough to receive a good quality digital image. It will keep your data smaller and thus faster to display and browse. If you would like to store a large number of images we suggest to use [External Graphic Field](#) type.

If you want to use an **Internal Graphic Field** in your database:

- create a **Graphic** field in the [Create a New Database Definition](#) window ([Designer](#)).
- the **Internal Graphic** type will be selected automatically in the [Create or Modify Data Entry Layout](#) window ([Designer](#)).

## Date Fields

Date Fields store dates. Date Field is a variation of an edit box that displays and accepts date values in different formats. Enter a date using numeric keys on the keyboard. Clicking on the '...' button of the Date Field, displays a small calendar, from which you can select a date. The date will be automatically entered as a text in the date field. Date formats can be set from the 'Options' function on the main menu or from the Popup Menu. The Date Fields have the following Popup Menu functions:

- Undo : undoes the last change;
- Today : enter the current system date;
- Clear : clears the field contents;
- Font : allows you to select the font for all single-line edit controls;
- Color : allows you to select the text and background color for all single-line edit controls except numeric fields;
- Date Format : allows you to choose one of the four date formats (MM/DD/YYYY, DD/MM/YYYY, YYYY/MM/DD, and YYYY).

If you want to use a **Date Field** in your database:

- create a **Date** field in the [Create a New Database Definition](#) window ([Designer](#)).
- the **Date** type will be selected automatically in the [Create or Modify Data Entry Layout](#) window ([Designer](#)).



## Numeric Fields

Numeric Fields store numbers. Numeric Fields are variations of edit boxes, and accept numerical data only. Use numerical keys on the keyboard to manually enter data into the numeric field. Pressing on the '...' button of the numeric field displays a small keypad. Use keypad buttons to enter value in the field. Press the 'Checkmark' button to accept the entry, the 'Cancel' button aborts the data entry and closes the keypad. The Numeric Fields have the following Popup Menu functions:

- Undo : undoes the last changes;
- Cut : deletes the selected text and copies it to the Clipboard;
- Copy : copies the selected text to the Clipboard;
- Paste : pastes text from the Clipboard;
- Delete : deletes the selected text;
- Select All : selects entire text;
- Font : allows you to select the font for all Numeric Fields;
- Color : allows you to select the text and background color for all Numeric Fields;

If you want to use a **Numeric Field** in your database:

- create a **Numeric** field in the [Create a New Database Definition](#) window ([Designer](#)).
- select a **Regular Numeric** type in the [Create or Modify Data Entry Layout](#) window ([Designer](#)).

Related topic: [Calculated Numeric](#) field.

## Attachment Fields

These edit boxes allow you to attach external files to the records (Audio file, Video file, Word Processor file, Graphical file, Text file, ... ). Later you can start an associated application (Word Processor, Notepad, Movie Viewer, Sound Player,...) with a corresponding file. The Attachment edit box is disabled - you can not enter the name of the file manually. The attached file and the corresponding application has to be selected in the [Attachment](#) dialog box. Pressing on the '...' button of the edit box displays the dialog box. The Attachment Fields have the following Popup Menu functions:

- Clear : clears the contents of the field;
- Set/Run : allows you to edit the file link, change the associated application, or run the associated application;
- Font : allows you to select the font for all single-line edit controls;
- Color : allows you to select the text and background color for all single-line edit controls except numeric fields.

If you want to use an **Attachment Field** in your database:

- create a **Character** field in the [Create a New Database Definition](#) window ([Designer](#)).
- select an **Attachment Field** type in the [Create or Modify Data Entry Layout](#) window ([Designer](#)).

## E-Mail Address / Email Edit Box

These data fields/edit boxes are a special type of the Attachment Fields. They allow you to enter e-mail address and later start an e-mail application (Eudora, Pegasus Mail, Microsoft Explorer,...) or our [Handy Email](#) utility with the contents of this field sent as a parameter. Right mouse click on the E-Mail edit box displays the popup menu. Second command in the popup menu allows you to select the email client program:

- to use our [Handy Email](#) select Use Native E-mail Engine
- to use e-mail program defined in the Internet Properties/Mail and News Window (unselect Use Native E-mail Engine)

Pressing on the '...' button of the e-mail edit box displays the selected e-mail client.

If you want to use an **Email Address Field** in your database:

- create a **Character** field in [the Create a New Database Definition](#) window ([Designer](#)).
- select an **Email Address** type in the [Create or Modify Data Entry Layout](#) window ([Designer](#)).

## Phone Number Fields

These are a special type of an edit control. When you click on the '...' button the Dial dialog box will be displayed. If your computer is equipped with a modem you can dial the number that is contained in the Phone Edit Box (or any other number). In order for the Dial function to work your modem COM Port and modem parameters must be selected in

- Options/Modem window. Phone Edit Boxes have the same Popup Menu as regular edit boxes.

If you want to use a **Phone Number Field** in your database:

- create a **Character** field in the [Create a New Database Definition](#) window ([Designer](#)).
- select a **Phone Number** type in the [Create or Modify Data Entry Layout](#) window ([Designer](#)).

## Web/Internet Address Field

These edit boxes allow you to enter World Wide Web Page Addresses. Pressing on the '...' button of the edit box sets your Web browser to activate the World Wide Web page address from the selected record. This function may be also invoked from the popup menu of the edit box. The WWW address can be captured automatically from your browser by selecting the Get Address command from popup menu of the edit box. Note: both Send Address and Get Address functions automatically start your browser.

If you want to use a **Web/Internet Address Field** in your database:

- create a **Character** field in the [Create a New Database Definition](#) window ([Designer](#)).
- select a **Web Address** type in the [Create or Modify Data Entry Layout](#) window ([Designer](#)).

## Web/Internet Page Title Field

These fields/edit boxes allow you to enter World Wide Web Page Title. Pressing on the '...' button of the edit box gets automatically the title site into the edit box from your browser. The WWW address and the site title can be captured automatically from your browser by selecting the Capture Web Page command from popup menu of the Record Button or Details Page. Note: both Go To Web Page and Capture Web Page functions require that your Web browser is running.

If you want to use a **Web/Internet Page Title Field** in your database:

- create a **Character** field in [the Create a New Database Definition](#) window ([Designer](#)).
- select a **Web Page Title** type in the [Create or Modify Data Entry Layout](#) window ([Designer](#)).

## Simple Text

Simple Text fields accept text in one line. Characters typed in can be alphanumeric (letters of alphabet and numbers); they also accept *special characters* like: quotes, exclamation marks, percent signs, asterisks, etc. The Simple Text edit controls have the following Popup Menu functions:

- Undo : undoes the last changes;
- Cut : deletes the selected text and copies it to the Clipboard;
- Copy : copies the selected text to the Clipboard;
- Paste : pastes text from the Clipboard;
- Delete : deletes the selected text;
- Select All : selects entire text;
- Font : allows you to select the font for all single-line edit controls;
- Color : allows you to select the text and background color for all single-line edit controls except numeric fields;

If you want to use a **Simple Text Field** in your database:

- create a **Character** field in the [Create a New Database Definition](#) window ([Designer](#)).
- select a **Simple** type in the [Create or Modify Data Entry Layout](#) window ([Designer](#)).

## Organizer Designer

This feature alone makes Organizers Deluxe one of the most flexible, end-user-oriented database products on the market. Using a helper program called Designer you can define structures for your databases (data fields definitions). This allows you to specify the data fields that you need for your application. Also, using Designer, you can specify a layout of the Data Entry Panel according to your needs. In fact, you can define different data fields and data entry layouts for every database. Therefore, one Organizer Deluxe is like many Organizers in one program - you can use it for all your database needs.

### Important

Before using any **Designer** functions close your **Organizer Deluxe**.

### Functions

[Working Directory](#) - use this function to set the Designer Working Directory.

[Create New Database](#) - use this function for creating new databases.

[Modify Database](#) - use this function for adding/deleting fields to/from the existing database.

[Create/Modify Data Fields Layout](#) - use this function for creating new or modifying old layouts for all databases.

[Import Database](#) - use this function for importing database from other database tables.

[Delete Database](#) - use this function to delete a database.

[Repair Database](#) - use this function to repair a database.

[Download Template](#) - use this function to download a template database from the Internet.

[Web dB Server](#) - use this function if you have an account on the PrimaSoft Web dB Server or you purchased the PrimaSoft Web dB Server application.

**Organizer Deluxe** - use this function to close Designer and start Organizer Deluxe.



## Modify Database

This function allows you to modify your existing databases. You can **add** more data fields or **delete** existing fields. You can also **change the size** of the existing simple-text fields.

### **Note!**

You are not allowed to change the type of the old field.

### **Warning!**

1. Changing the structure of your database should be done only when absolutely necessary. Use this function **ONLY** when you know what you are doing.
2. This function can result in the loss of some data (e.g. when you remove some data fields or change the size of the field).
3. Your previous backup files will no longer be compatible with your restructured database. Before you use this function make sure your database is up-to-date and not corrupted.
4. All Records Templates will be lost.

## Import Database

This function allows you to **Import** data from the following database formats: DBase for Windows, Paradox, Fox Pro, MS Access.

### How to Import a database.

- 1) Click on **Import Database** push button.
- 2) In the **Open** window select the type of the database in the **File of type** drop-down box.
- 3) Go to the database file directory.
- 4) Select the database file.
- 5) Click on the **Open** push button.
- 6) Enter the new **Name** for the imported database in the **Create New Database** window.
- 7) Create a [Data Entry Layout](#) by clicking on **Create/Modify Data Fields Layout** button.

## Maintenance/Graphic Fields

Converting an **Internal Graphic Field** (IGF) to an **External Graphic Field** (EGF):

1. in Designer program click on Modify Database and then, add a Character Data Field (we recommend the size of at least 80);
2. in Designer click on Create/Modify Data Fields Layout and add the new Character Data Field field to the layout; select [External Graphic Field](#) data entry control.
3. in Organizer click on Advanced/Maintenance and then, click on Graphic Fields;
4. in the left list box select an IGF that you want to convert into an EGF;
5. in the right list box select the EGF that you created in step 1;
6. click on Convert Internal Field To External button;
7. go back to the main screen and make sure the images were copied correctly from the IGF to the EGF;
8. in Designer program click on Modify Database and then, delete the IGF;

Converting an **External Graphic Field** (EGF) to an **Internal Graphic Field** (IGF):

1. in Designer program click on Modify Database and then, add a Graphic Field;
2. in Designer click on Create/Modify Data Fields Layout and add the new IGF field to the layout;
3. in Organizer click on Advanced/Maintenance and then, click on Graphic Fields;
4. in the left listbox select the IGF that you created in step 1;
5. in the right listbox select an EGF that you want to convert into an IGF;
6. click on Convert External Field To Internal button;
7. go back to the main screen and make sure the images were copied correctly from the EGF to the IGF;
8. in Designer program click on Modify Database and then, delete the EGF;

If you use many images or large images in your database we recommend that you use **External Graphic Fields**. If your database was imported from one of our older Organizers you may want to convert an **IGF** to an **EGF**.

## How to use Restore function?

If your database becomes corrupted or is destroyed you can restore it from your latest backup file.

In order to **Restore** your database do the following:

1. click on **Advanced/Maintenance** button and then, click on **Restore** button;
2. type in **YES** into the **Confirm Action** window;
3. select a **backup file** (you can click on Browse button instead of typing it in); for example, if you want to restore your database from floppy disks type in A:\data32499.zip (if your backup file was called data32499);
4. if you password-protected your backup file type in the **Encryption Password**;
5. if you backed up **External Graphic Files** and want to restore them check **Restore Graphic Files** option; also, select **Restore Mode For Graphic Files**;
6. click on **Next** button;
7. select **Restore Mode** and click on **Start Restore** button; **Restore to Original Database**: it will restore to Original Database (regardless of the currently opened database), if Original Database was deleted this function will recreate the database. **Restore to New Database**: it will create a new database with the structure, content, and layout of the original database.

## HTML Wizard/Custom HTML Templates

You can create automated reports with the Organizer's HTML Wizard. The HTML Wizard allows you to define all sections of the final HTML Document (header, footer, body, menu,....). The process of defining every section of the HTML document could be time consuming for new users who have to learn how the program operates, and for advanced users who would like to create complex WEB pages. The Custom HTML Templates feature is the solution for this. Just design a HTML document with the tool you know very well, your favorite HTML Editor. Use this document as a template for generating your HTML reports, catalogs, stores, .... The same templates you can use in the [Organizer's Viewer](#) for viewing your records.

### How to use Custom HTML Templates

1) HTML Editor -> Create HTML document (template).

- Create HTML file with your favorite HTML editor.
- Define the layout of your HTML document (menu, tables, background, graphics, footer, header,.....). Decide where you would like to have information from your database fields. Just try to create the whole document with the sample data from one data record.
- When you are satisfied with your HTML page delete the sample data and insert at the same position **Keywords** that represent data fields:

<!--PrimaSoft:1--> ,.... <!--PrimaSoft:4--> ...

or (with data field labels)

<!--PrimaSoft:L1--> ,.... <!--PrimaSoft:L4-->...

- Some HTML editing tools does not allow to enter the above keys correctly. Starting with version 1.2 the Organizer also accepts keywords in the following form: **!--PrimaSoft:N** or **!--PrimaSoft:LN**

2) Keywords <!--PrimaSoft:N--> or !!--PrimaSoft:N

- Rule 1: Keywords have the following syntax (without spaces):

<!--PrimaSoft:N-->

or

!--PrimaSoft:N

- Rule 2: The Number in the keyword represents the position of the data field in the data record.
- Rule 3: You can put L indicator in front of the Number. In this case the field name will be listed at the beginning of the field contents. <!--PrimaSoft:LN--> with the field name.
- **Rule 4** (starting with version 1.2): New and old keywords could be entered at any position in the HTML template file.

3) When HTML Wizard uses the Custom HTML Templates?

- **View Page:** Select the HTML Template file that you would like to use. Go to the Organizer's [View Page](#) . **View Page / HTML Template File Edit Box:** click here to load a custom HTML template file.
- **HTML Wizard / Page Body:** Select the **Body Format / Current Record Template** option in the **HTML Wizard / Page Body / Body Format** section.

Example: Small Collectibles Store is using Organizer Deluxe as an inventory system. The owner of the store wants to generate product description pages for the Online Store/Catalog.

- Create a **HTML Document** with the sample data from one data record with your

favorite HTML Editor.

- Create **HTML Custom Template**. Replace Data with Keywords. Save the document as product.htm.
- Open **Organizer Deluxe**; Go to **View Page**; Select product.htm **HTML Template** file;
- Open **HTML Wizard**; Go to **Data Page**; Select **Group By Field** (select unique field, we want to generate separate pages for all products)
- In the **HTML Wizard** go to **Report Elements Page**. Select Report Type -> **2 Level**.
- In the **Report Elements Page** click on the **Define** push button in the **2nd Level Pages** section.
- In the **Page Body** Window select **Body Format** -> **Current Record Template**. Close this window.
- Select **View in Browser** option. You are ready to generate a product catalog. Just press **GO** push button.

### Example (HTML Custom Template with keywords)

```
<HTML>
<HEAD>
<TITLE> !--PRIMASOFT:1</TITLE>
</HEAD>
<BODY>
<BR>
<BR>
<TABLE WIDTH="400" HEIGHT="300" BORDER="1" ALIGN="CENTER" CELLSPACING="1"
CELLPADDING="1" BGCOLOR="#FFFFCC" BORDERCOLORLIGHT="#FF99FF"
BORDERCOLORDARK="#FFFFFF">
<TR>
    <TD WIDTH="0"></TD>
    <TD ALIGN="LEFT" WIDTH="30%"> !--PRIMASOFT:2</TD>
    <TD ALIGN="LEFT" ROWSPAN=5 WIDTH=70%> !--PRIMASOFT:3</TD>
</TR>
<TR>
    <TD></TD>
    <TD ROWSPAN="4" ALIGN="LEFT" VALIGN="TOP"> !--PRIMASOFT:L4</TD>
</TR>
<TR>
    <TD></TD>
</TR>
<TR>
    <TD></TD>
</TR>
<TR>
    <TD></TD>
</TR>
</TABLE>
</BODY>
</HTML>
```

## Graphics Directory

**You should avoid changing the Graphics Directory unless you really have to do it!**

Images for the External Graphic Field can be stored anywhere on your hard disk but we recommend that you store all images in one directory, preferably in the directory specified in Options (Graphic Files Directory option). If you do so, you will be able to backup and restore your image files.

As a default, the Graphic Directory is set to **C:\DELUXE\DATA\GRAPHIC** directory.

## Designer / Working Directory

Designer Working Directory is the same as the Organizer Deluxe Home directory. As a default, the Working Directory is set to the Organizer Home Directory (where deluxe.exe installed **C:\DELUXE\**). You do not have the change it.

Typically, you might need to change the Designer Working Directory:

- on a network.
- if you have several Organizers installed on your computer and only one Designer.

Set the Designer **Working Directory** to the **Organizer Home Directory**.



## Formatted Record

### What is the Formatted Record?

The Formatted Record function automatically creates the content of the selected field from the existing data fields and the template text file (\*.txt, \*.htm, \*.html,.....). This function is useful for:

- create quickly formatted chunks of html code
- create new fields with information from other data fields
- create custom reports

### Where is the Formatted Record function?

The Formatted Record function can be accessed from the Advanced/Maintenance option on the main menu, and in the speed bar (Advanced Section - Maintenance button). The Maintenance dialog box contains Formatted Record push button.

### How to use the function?

- Your database needs at least one empty simple-text, multi-line text, or multi-line html field.
- Create template file with keywords that represent data fields.
- Keyword should be in the following format **<--Prima:N-->**. The "N" in the keyword represents the position of the data field in the data record. Please copy the above keyword and replace N with your field number when you create template files. You will avoid typing errors. **Note:** The "N" represents the position of the field in the database (Designer), not the display position (Organizer). The display position in the Organizer could be different than the field creation order in the Designer.
- Open **Formatted Record** dialog box: Advanced/Maintenance/Formatted Record.
- Select multi-line field from the **Select a Multi-Line or Simple Text Field** list box. Just click on the name of the field. It activates the **Store Formatted Record into Multi-Line or Text Field** push button.
- Click on the **Store Formatted Record into Multi-Line or Text Field** push button. It opens **Select the Formatted Record Template File** dialog box. Select the template file. Click on the Open push button.
- Close windows and check the contents of the selected field (formatted field).

### Examples

#### 1) Java Search Script

Our company created small directory for collectors. The database is maintained with our Organizer Deluxe. The whole site is created with Organizer's HTML functions. The database contains the following fields: site name, url address, page name, description, keywords, category, .... I found a free Search Java Script. Why not to add additional functionality to the Collectibles Directory. I did not want to enter all modification manually. The script required the following line of text for each record:

**'pagename.htm~ Page Title|keyword1, keyword2, keyword3, keyword4, keyword5,\*' +**

Our solution:

- created new multi-line html field in the database with the name WORKTEMP
- created simple template file (javasearch.txt) with one line'**<--Prima:6-->~ <--Prima:2-->|<--Prima:8--> \*' +**  
**<--Prima:6-->** page url address field  
**<--Prima:2-->** page title field

<--Prima:8--> site keywords field

- run Formatted Record function (selected WORKTEMP field, selected javasearch.txt file)
- run Export To Text file function with only one field selected (WORKTEMP)
- copied the contents of the export file to the Java Search Script
- done

## 2) Address Organizer example.

Initially you decided to store address information in the following fields:

- AddressLine1 (street name), field number 2
- AddressLine2 (apartment Number), field number 3
- City (City Name), field number 4
- State (State Name), field number 5
- PostalCode (Postal Code Number), field number 6
- Country (Country Name), field number 7

After a while you would like to have a different format. For example the above information you would like to store in

one multi-line field. You have 500 records and you do not want to move them manually. How to do that?

- create a new multi-line field in the database with the name ADDRESS
- create simple template file (newfield.txt) with the following content:

<--Prima:2-->

<--Prima:3-->

<--Prima:4-->, <--Prima:5--> <--Prima:6-->

<--Prima:7-->

- run Formatted Record function (select ADDRESS field, select newfield.txt file)
- done

## Getting Started - Online Tutor

**Getting Started - Online Tutor** introduces you to **PrimaSoft Organizer Deluxe Series** and helps you learn how to use our products right away.

- getting started
- new features
- real examples
- graphical illustrations
- advanced

The Online Tutor is located at the following Web address:

<http://www.primasoft.com/tutor/tutor.htm>

## Find Duplicates

This function allows you to display and/or delete duplicate records based on a selected data field. For example, if you have a database of Web pages you can easily find and eliminate records with the same Web page address.

After you click on **Duplicates** button a **Duplicate Records** window is displayed. In this window you have to select a **Duplication Field** from the list of data fields. Then, you have 2 options:

- If you want to only view the duplicate records click on **Display Duplicate Records** button. If you want to display all records afterwards right click on the small **Filter Button** at the top of the left panel (which says **Normal Filter**) and select **All Records**.
- If you want to eliminate the duplicate records click on **Delete Duplicate Records - Keep First Record** button. This function will **delete all duplicates** (the first record will be kept). **WARNING:** This operation cannot be undone.

### Note

There is **Warn If Duplicate Record** option. You can set this option in the [Options](#) window (Options / User Interface Page / Miscellaneous Options). It warns if a newly added record is a duplicate. This option works only when a Primary (or Primary and Secondary) Sort Field is selected. It doesn't work if Entry Order is selected. A record is considered a duplicate if another record with the same values of Sort Fields exists in the database.

## Reminders

Reminders window allows you to View, Edit, Add, and Delete reminders. All Reminders listbox displays all your reminders sorted by date. When you start Organizer Deluxe it will check all reminders - if there are any active reminders which are in the warning period (Warning Date is  $\leq$  Current Date  $\leq$  Reminder Date) [Active Reminders](#) window will be displayed automatically. Each reminder is associated with a database record which was selected at the time the reminder was created.

- To add a reminder click on **Add Reminder** button ([Add/Edit Reminder](#)).
- To edit a reminder select a reminder from the list and click on **Edit Reminder** button.
- To delete a reminder select a reminder from the list and click on **Delete Reminder** button.

## Active Reminders

Active Reminders window is automatically displayed after you start Organizer Deluxe if there are any Active Reminders. A reminder is considered active if all the following conditions are met:

- Warning Date is  $\leq$  Current Date  $\leq$  Reminder Date;
- Is Active option is checked;

Each reminder is associated with a database record which was selected at the time the reminder was created. By clicking on Locate Record button you can display that record.

## Add/Edit Reminders

Add/Edit Reminder window allows you to add a new reminder or modify the selected reminder. A reminder has the following fields:

- Reminder Date
- Warning Date
- Reminder Title
- Reminder Note
- IsActive

## Checkbox Fields

Checkbox fields store information that has only two possible values: **Yes** (checked) or **No** (unchecked). The Checkbox fields have the following popup menu functions:

- Font : allows you to select the font for all Numeric Fields;
- Color : allows you to select the text and background color for all Numeric Fields;
- Help : displays help message;

If you want to use a **Checkbox Field** in your database:

- create a **Numeric** field in the [Create a New Database Definition](#) window ([Designer](#)).
- select a **Checkbox** type in the [Create or Modify Data Entry Layout](#) window ([Designer](#)).

Note:

The Checkbox field has "yes" value when checked and "no" value when unchecked. In a database (internally), "yes" and "no" values are represented by 1 and 0 (two numbers). That's why you have to select Numeric Field when creating Checkbox field type.

Related topic: [Calculated Numeric](#) field.



## "Radiobuttons" Fields

Radiobuttons fields store information that has only one value from the fixed set of possible values. The Radiobuttons fields have the following popup menu functions:

- Font : allows you to select the font for all Numeric Fields;
- Color : allows you to select the text and background color for all Numeric Fields;
- Help : displays help message;

If you want to use a Radiobuttons **Field** in your database:

- create a **Numeric** field in [the Create a New Database Definition](#) window ([Designer](#)).
- select a Radiobuttons type in the [Create or Modify Data Entry Layout](#) window ([Designer](#)).
- click on the Radiobuttons field to display Radiobuttons Create Label window.
- enter radiobutton labels, they will represent possible values (selections) for this field.

Note:

The Radiobuttons field allows you to select one value from the fixed number of possible selections. Internally the information is saved as a number (from 0 to N-1, N represents a number of possible selections). That's why you have to select Numeric Field when creating Checkbox field type.

Related topic: [Calculated Numeric](#) field.

## Autoincrementing Fields

Autoincrementing fields automatically generate a unique number for you by using the previous value from the last record and adding number one.

New Value = Old Value +1. The Autoincrementing Fields have the following popup menu functions:

- Color : allows you to select the text and background color for all Numeric Fields;
- Help : displays help message;

If you want to use an Autoincrementing **Field** in your database:

- create a **Numeric** field in the [Create a New Database Definition](#) window ([Designer](#)).
- select an Autoincrementing type in the [Create or Modify Data Entry Layout](#) window ([Designer](#)).
- enter the "the start from" value. When you create the first record the value of this field will be equal to "the start from" + 1.

Note:

1) If the start from value is equal 0 then the autoincrementing field represents the total number of all created records (number of records that are in the Organizer + number of records that have beend deleted)

2) You are not allowed to modify the value of the autoincrementing field manually. You can only change all values by using [Replace](#) function.

- open Replace window
- select autoincrementing field in the Field To Be Replaced dropdown box
- select Auto-Increment as Replace Mode
- enter Start From value
- select First Record in the Start Replacing From section
- click on the Replace button

Related topic: [Calculated Numeric](#) field.

## Export To Netscape Bookmark File

Organizer Deluxe is "Internet Ready". It means that you can create databases with specialized fields (Web Title, Web Address, EMail fields) that are integrated with Web browser. All our organizers already contain a separate database with the best Internet resources. You can use this database as a Web Organizer.

You can export all or a subset of records from a database to a Netscape Bookmark file. The data can be exported to a file in any directory. Fields exported are: Title, Address and optionally Description.

### How to find Export?

The Export function can be accessed in two ways:

- from the *Advanced* section on the speed bar: the *Export* button.
- from the *Advanced* section on the main menu: the *Export* option.

Then select *Export To Netscape Bookmark File* radio button and click on OK. You will be asked if you want to include the contents of the Description field in a bookmark file. Then the Select Data Fields window will be displayed. In the Select Data Fields window select data fields for Web Page Title, Web Page Address, Category, and Description. Click OK push button. In the Save As Netscape Bookmark File window select name (and directory) for your bookmark file.

**Note:** You may want to set a Filter before using the Export function (if you want to export only some records).

## Export To Microsoft Internet Explorer Favorites

Organizer Deluxe is "Internet Ready". It means that you can create databases with specialized fields (Web Title, Web Address, EMail fields) that are integrated with Web browser. All our organizers already contain a separate database with the best Internet resources. You can use this database as a Web Organizer.

You can export all or a subset of records from a database to a Microsoft Internet Explorer Favorites. Fields exported are: Title, Address and optionally Category.

### How to find Export?

The Export function can be accessed in two ways:

- from the *Advanced* section on the speed bar: the *Export* button.
- from the *Advanced* section on the main menu: the *Export* option.

Then select *Export To Microsoft Internet Explorer Favorites* radio button and click on OK. You will be asked if you want to include categories as folders. Then the Select Data Fields window will be displayed. In the Select Data Fields window select data fields for Web Page Title, Web Page Address, Category/Folder. When you click OK push button the program will **add** all items from the database to your Microsoft Internet Explorer Favorites.

**Note:** You may want to set a Filter before using the Export function (if you want to export only some records).

## Import From Netscape Bookmark File

Organizer Deluxe is "Internet Ready". It means that you can create databases with specialized fields (Web Title, Web Address, EMail fields) that are integrated with Web browser. All our organizers already contain a separate database with the best Internet resources. You can use this database as a Web Organizer.

You can import data from a Netscape Bookmark file into a current database. This is especially useful when you have many Netscape Bookmarks that you want to transfer to the Organizer. Fields imported are: Title, Address, Description and optionally Category (from Bookmark Folders).

### **How to find Import?**

The 'Import' function can be accessed in two ways:

- from the Advanced section on the Speed Bar: the Import button,
- from the Advanced section on the main menu: the Import option.

Then select Import From Netscape Bookmark File radio button and click on OK. You will be asked to specify some options for the import function. Then you will have to select a name (and directory) of the source bookmark file.

## Import From Microsoft Explorer Favorites

Organizer Deluxe is "Internet Ready". It means that you can create databases with specialized data fields (Web Title, Web Address, EMail fields) that are integrated with Web browser. All our organizers already contain a separate database with the best Internet resources. You can use this database as a Web Organizer.

You can import data from a Microsoft Explorer Favorites into a current database. This is especially useful when you have many bookmarks that you want to transfer to the Organizer. Fields imported are: Title, Address, and optionally Category.

### **How to find Import?**

The 'Import' function can be accessed in two ways:

- from the Advanced section on the Speed Bar: the Import button,
- from the Advanced section on the main menu: the Import option.

Then select Import From MS Internet Explorer Favorites radio button and click on OK. You will be asked to specify some options for the import function.

## Internet Form Template Maker, AutoFill Forms

Organizer allows you to create a collection of "AutoFill Form Pages". **AutoFill Forms** will work like your Explorer's Favorites or Netscape Bookmarks. But in addition to the selected site opening the AutoFill Forms function will fill automatically form fields with data from the Organizer. This function is useful when you would like to integrate the Internet search engines, login pages, submission forms, or other "form pages" with the data fields from the Organizer.

### Fill Form Function (two AutoFill Forms types)

Organizer allows you to create a collection of **AutoFill Form** Pages with data fields assigned to the form fields. You can use this function in two different ways.

- **AutoFill Forms that are the same for each data record:** You can integrate data fields with the Internet form pages (like search engines), so you do not have to enter text manually. Example: integrate data fields from the Movie Organizer with the Internet Movie Database search engine. In this case you want to create AutoFill Form that will be the same for each data record.
- **AutoFill Forms that are unique for each data record:** You can integrate data fields with the Internet form pages (like Web service pages) that require login and password entries. Example: you are a member of different Web services that require login name and password. In this case you want to create a database that will allow you to store information about all Web accounts. You could create the database with the following data fields: Web\_Title, URL\_Address, Login\_Name, Password, Notes. In this case you want to create AutoFill Form that will be unique for each record.

### How to add a new page with a form to Organizer's Fill Forms.

- Open a page with a form in the Organizer's browser (first time you have to enter manually the Web's URL address).
- Click on the **Template** button. It will display **Internet Form Template Maker** window. The left panel lists all fields from the form. The right panel lists all fields from a database. You can link data fields with form fields. Select(highlight) the form field and then double click on the data field. Organizer also supports multiple data fields selection. In this case select "?" (question mark) for the form field. When you select the Web page that has a template with the question mark the Organizer's browser will ask you which data field to use to fill the form.
- When you define your form template page click on the **Save** button. Enter the title and the category in the **Save Form** window.
  - **Create AutoFill Forms that are the same for each data record:** enter the title and the category. The category and the title name will allow you to select this form from the **Fill Form** popup menu.
  - **Create AutoFill Forms that are unique for each data record:** in this case the program should assigned the template form to the selected record. You can do that by using the contents of the record's field as the form title.

### Open Web page using Fill Form function

- **Open a Form that is the same for each record:** To display the page with a form click with **left** mouse button on the **Fill Form** button. It opens a popup menu with all categories. Select the category and select the form. The Form Web page will be opened in the Organizer's browser window. All form's fields will be filled with data from the currently selected record. Form's fields will be filled according to the form template file. Note: Sometimes the form page loads very slowly and the form fields are not automatically filled with data. In this case select the Web page again.
- **Open a Form that is unique for each record:** To display the unique form click with **right** mouse button on the **Fill Form** button. It opens a popup menu. Click on the

**Quick Fill** command. Note: the **Quick Fill** popup menu lists the all field names. Select the field name that is used as the form's title. The Form Web page will be opened in the Organizer's browser window. All form's fields will be filled with data from the currently selected record. Form's fields will be filled according to the form template file. Note: Sometimes the form page loads very slowly and the form fields are not automatically filled with data. In this case select the Web page again.

Related topic: [Browser](#)



## Online Update and Online Database Template Download

### Online Update

Online Update function allows registered users to update the program. You have to be connected to the Internet before you start this function.

You can start the Update program by clicking on the Update icon. You can also start the Update program from the Organizer's main menu: *Update / Update Organizer Deluxe Through The Internet*. If you start the Update program from the Organizer's main menu you have to close Organizer Deluxe before you move to the next step in the update procedure.

### Update Program (You have to be connected to the Internet before you start this function)

- connects with PrimaSoft PC Internet server.
- checks the program version numbers on the server and on your computer.
- if version numbers are the same Update program displays the message that your program is up-to-date.
- if the program on your computer is older the Update procedure downloads new version of the program and automatically replaces old program files with new ones. The following files could be replaced: deluxe.exe, deluxe.hlp, designer.exe, manual.doc.

### Online Database Template Download (Designer)

There are several ready-to-use database templates. All database templates are listed on PrimaSoft's Web Site. You can check the list. You can download the selected database template file. You can import template to the organizer database system using Designer program. The above procedure has to be done manually. The Online Database Template Download function automates the whole procedure. You have to be connected to the Internet before you start this function.

Download Template:

- Connect to the Internet.
- Start **Designer**.
- Click on the **Download Template** push button.
- the Download Template function connects with the PrimaSoft Web Server, downloads the list of all available ready-to-use database templates, and displays the list in the **Select Template** window.
- select the database template from the **List Of Available Templates**, click on the **Ok** push button
- Download Template function download the template and creates automatically new database (your old databases are not overwritten).
- Close **Designer** program
- Start **Organizer Deluxe** program
- Click on the **Load** push button or click **Load Database** on the File menu
- Select the database and click on the **Load** push button in the **Load Database** window.

## Designer / Web dB Server

### Note

**PrimaSoft Web dB Server** is an application that runs on the Internet server computers. Designer's Web dB Server functions are for users who rent or purchase PrimaSoft Web dB Server application. To read more about PrimaSoft Web dB Server go to:  
<http://www.lightdb.com>

### Designer / Web dB Server

#### Setup

Setup window allows you to define your Web dB Server connection parameters. Your Web dB Server account has to be defined before you use export, import, upload image files functions.

**Host Address:** enter your PrimaSoft Web dB Server host address.

**User ID:** enter your Login User Name

**Password:** enter your Password

#### Export

Export window allows you to export any database created with PrimaSoft Organizer Deluxe to your PrimaSoft Web dB Server account. Click on the Export push button. It will display Select Database window with the list of all available databases. Highlight a database that you want to export. Click on the OK push button. Enter the name of the exported database (you can use the name suggested by the Export To window). Extension ZIP is required (MYNAME.ZIP). Click on the OK push button. The Designer connects to your Web dB Server account and uploads the selected database. Login to your Web dB Server account and use Import Database function. The uploaded database is immediately accessible on the Internet (Intranet).

#### Import

Import window allows you to import any database from your PrimaSoft Web dB Server account to your desktop PC and use it with PrimaSoft Organizer Deluxe. Before you use Designer's Import function you have to Use Export function on your Web dB Server account. It will make your online databases available for the Designer's Import function. If your online databases are ready you can start Designer, click on the Web dB Server push button, and click on the Import push button. The Designer connects to your Web dB Server account and downloads the list of database names that are ready for importing. Select the database that you want to import (download). Click on the OK push button. Designer downloads the database and displays Replace Existing Database window. You can replace an old database (select the database name) or you can create new database (select import to NEW DATABASE) with the content of the imported database.

Note: **THE REPLACE FUNCTION OVERWRITES THE CONTENT OF THE OLD DATABASE.**

#### Upload Image Files

Upload Image Files window allows you to upload image files (used by your databases) to your Web dB Server account. If you have a database with an external graphic field the database stores only the path to the image that is stored on your hard drive. If you decide to export (move) this database to your Web dB Server account you have to do it in two steps. Use Export function. It will move the database to your Web dB Server account. Use Upload Image Files. It will allow you to select all images used by your database and upload them to Graphic directory on your Web dB Server account.

Use Upload Image Files function if you want to upload images that will be used on your database custom display pages (Table of Contents page, Detail Record Page, Top Panel Page,

Bottom Panel Page). Please read on the Internet: Web dB Server help topic about custom display pages.

### **Upload Image Files Window**

- **Directory:** Displays the currently active directory. The content of this directory is displayed in the Existing Files list box. To change the active directory click on the Select push button. In the Select Directory window select the directory with your image files. Click on any file in this directory and then click on the Open push button.
- **Existing Files:** Displays the content of the selected directory. To display only a group of files you can define a wildcard. For example \*.gif will display files with the gif extension.
- **Selected Files:** Displays the list of image files that will be uploaded to your Web dB Server when you click OK push button.

Related topics: [Organizer Deluxe / Web dB Server](#)

## Delete Database

This function will delete a selected database. Select the database in the Available Databases list box. Click on the OK push button.

## Repair Database

This function will repair a damaged data file. Sometimes your memo or graphic fields (those containing images or binary data) get corrupted, which results in error messages. Use this function to correct the problem. Typically one record (sometimes several records) may be lost. This problem is usually caused by a system crash when Organizer is open or by not closing Organizer before shutting down the system.

Select the database in the Available Databases list box. Click on the OK push button.

## Organizer Deluxe / Web dB Server

### Note

**PrimaSoft Web dB Server** is an application that runs on the Internet server computers. Organizer's Web dB Server functions are for users who rent or purchase PrimaSoft Web dB Server application. To read more about PrimaSoft Web dB Server go to:


<http://www.lightdb.com>

or

<http://www.primasoft.com/webdb/webdb.htm>

### Organizer Deluxe / Web dB Server

You can access your PrimaSoft Web dB Server account through the Organizer Deluxe program. Organizer Deluxe has built in browser (MS Internet Explorer). To display/activate the browser click on the [Browser](#) Tab. The browser's Tool bar contains a Web dB Server

button . Move the mouse pointer over the button. A right mouse button click displays popup menu with two commands: **Set Login Parameters, Fill Login Form**. A left mouse button click displays login page (to use this command you have to be connected to the Internet).

### Set Login Parameters

Displays **Web dB Server Login Settings** window. Enter your account information into the edit boxes: **Server Address, Userid, and Password**.

### Click on the Web dB Server button

If you defined you Web dB Server account information (Server Login Setting window) click on this button (left mouse button click). It will automatically display the login page and fill the form with your login information.

### Fill Login Form

If your Internet connection is slow there could be problems with displaying and filling the login form. If the login page is displayed and not filled with your login information you can repeat the filling procedure by clicking with left mouse button on the Web dB Server button and selecting Fill Login Form command from the popup menu.

### Import from Web dB Server into New Record



[Import from Web dB Server](#)

### Export Record to Web dB Server



[Export to Web dB Server](#)

### Submitting Selected Records(advanced)

Accessing Web dB Server through Organizer Deluxe has additional advantage. You can have two databases with the same structure. One database is online, another one is on your desktop computer (master database). After you login to your Web dB Server account you can automatically submit selected records from your desktop to your online database using [AutoFill Form](#) function.

Related topics: [Designer / Web dB Server](#)

## How to use Import from XML File?

### **XML file format.**

XML is a new method for putting structured data in a text file. XML uses tags (like in HTML) to delimit pieces of data.

If you are new to XML, please read additional information about XML on the Internet.

### **How to use Import from XML File.**

- Open Import Source window.
- Select XML File in the Import From section.
- Select the XML file in the Enter/Select Import File Name dialog box and press OK to continue.
- The program loads the selected XML file.
- If the XML file contains errors, the program displays a message 'Parser Error', and the import procedure is aborted.
- If the XML file is accepted the program displays XML Import - Field Mapping window. In this window define the mapping and click OK button. The imported records are merged into the current database.

### **XML Import - Field Mapping Window.**

- The left list box contains all the fields that define the data structure in the XML file (source).
- The right list box contains fields of the currently loaded database (target).
- To define field mapping select the Source Field and the corresponding Target Field. Click on the Arrow (>) button.
- When you finish field mapping procedure click on the OK button.
- The imported records are merged into the current database.

[XML Field Mapping Window](#)  
[Export to XML File](#)

## How to use Export to XML File?

### **XML file format.**

XML is a new method for putting structured data in a text file. XML uses tags (like in HTML) to delimit pieces of data.

If you are new to XML, please read additional information about XML on the Internet.

### **How to use Export to XML File.**

- Open Export Target window.
- Select XML File in the Export To section.
- Select the existing XML file or create a new XML file in the Enter/Select Export File Name dialog box, and press OK to continue.
- The program exports all fields to the XML file.
- You can display and view the content of the XML file in your browser (4.0 or above) or in any text editor.


[Import from XML File](#)



## How to use Export Record to Web dB Server?

### **Export Record to Web dB Server.**

This function allows you to export selected records from Organizer Deluxe to a database that is maintained on our Web dB Server.


- Open Organizer's Browser, click on the Browser Tab.
- Enter WEB address of the XML Import Form page.
- When the form is displayed select a record that you want to move to the web database and click on  Export Record to Web dB Server button.
- In the XML Export - Field Mapping window define the corresponding field pairs. You define the mapping once, the first time you use this function. The Organizer automatically saves the mapping for you. If you would like to redefine the mapping click with right mouse button on the Export Record to Web dB Server button and select Reset function.
  - When the mapping is defined click on the OK button.
  - Selected record is inserted into the XML Import Form.
  - You can continue the above procedure for other records.
  - To export selected records click on the Import button on the XML Import Form page.

[Organizer Deluxe / Web dB Server](#)

## How to use Import from Web dB Server into New Record?

### **Import from Web dB Server into New Record.**

In the Organizer's Browser window you can display databases maintained on our Web dB Server. If the database supports the import function you can quickly move (import) selected record(s) from the web database into your Organizer's database.

- Open Organizer's Browser, click on the Browser Tab.
- Enter URL address of the database.
- Select a record that you want to import.
- Click on  Import from Web dB Server button in the Organizer's Browser.
- In the XML Import - Field Mapping window define the corresponding field pairs. You define the mapping once, the first time you use the import function. The Organizer automatically saves the mapping for you. If you would like to redefine the mapping click with the right mouse button on the Import Record from Web dB Server button and select Reset function.
  - When the mapping is defined click on the OK button.
  - Selected record is automatically added to your currently opened database.

[Organizer Deluxe / Web dB Server](#)

## Field Mapping Window

Field Mapping Window is displayed in the following situation:

- [Import from Web dB Server into New Record](#)
- [Export Record to Web dB Server](#)
- [Import Records from XML file](#)

In all above cases the application moves record(s) from one data file to another data file using XML file format as the record representation.

Field Mapping window allows you to define the corresponding field pairs. Pieces of data will be moved from source fields to destination fields according to your field mapping definition.

To define field mapping pairs do the following:

- Select (highlight) a source field in the Source Fields list box.
- Select (highlight) a destination field in the Target Fields list box.
- Click on the arrow button ( > ).

If source database (or XML file) and the target database (or XML file) have the same structure you can use double arrow key button ( >> ) to define mapping in one step.

## Fast Find (Incremental Search)

Fast Find function displays group of records that start with letters entered into the Fast Find edit box.

Entering a character into the Fast Find edit box will result in the immediate action (Incremental Search). To use this function you have to select a text field as a primary sort field (Advanced/Sort).

Define a text field as a primary sort field:

- Click on the sort push button ([Sort Bar](#)) or open Sort Options window (main menu: Advanced/Sort command).
- Select any text field as primary sort field.
- Close sort window.
- Enter character into the Fast Find edit box.

## Total / Report Wizard

**Total** option allows you to decide which numerical fields will be automatically summarized on your report.

### Define Total

- Open Print Report window (click **Print** push button, select **Standard Report**).
- From **All Fields** list box select (highlight) numerical field.
- Click on the green **Arrow** (>) button.
- Select (highlight) numerical field in the **Included Fields** list box.
- **Total** check box under **Included Fields** list box is activated.
- Select the **Total** check box to sum the selected field on the report.

### [Report Wizard](#)

## Edit Table Field

Edit Table Field window helps you to define the table field layout and arithmetic formulas.

### Edit Table Field Commands


- **Delete Column:** Deletes the selected column from the table. To select the column click on any cell in the column. The flashing cursor indicates the selected cell (column).
- **Delete Row:** Deletes the selected row from the table. To select the row click on any cell in the row. The flashing cursor indicates the selected cell (row).
- **Add Column:** Adds a new column after the last column.
- **Add Row:** Adds a new row after the last row.
- **Clear:** Clears the content of the table. The content of each cell is deleted.
- **Edit Headers:** Opens the Table Headers window. In the Table Headers window define new headers (column names). Program automatically creates a header for a new column. Initially the header is a number (first column has number 1, second column has number 2, ..). Instead of numbers you want to have words as headers. You can do it in here.
- **Export:** Exports the content of the table field to a text file.
- **Import:** Imports the content of a Text or DBF file to a table field. [Import FromText or DBF File](#).

### Total Columns


You can sum a column of numbers. Total columns section lists all column headers. To sum selected column check the corresponding check box. The program automatically adds the new row with "sum formula" after the last row. **Note:** You can't total the first column.

### Formula for Calculated Column

You can specify simple arithmetic formula for a column. In the arithmetic formula you can refer to other numeric columns, numeric fields from the record, and constants. The table calculates numbers using operators from left to right. You can not use brackets.

- Total Columns section lists all headers (column names).
- Click on the Header name (do not click on the check box that is in front of the header). The header is selected (highlighted).
- Enter arithmetic formula into the Formula for Calculated Column edit box.
- You refer to other columns by @N (for example @1 is column 1).
- You can use numeric constants (2 or 10.5, or other number).
- You can use the following operators: + - \* / ~ (+ add, - subtract, \* multiply, / divide, ~ negate).
- To include other numeric fields in the calculated column formula use the name of the field (as displayed in Organizer) surrounded by quotation character ". Example:  
"Servings" \* @3
- When your formula is entered click on Save Formula button .
- Read examples at the end of this help topic.

### Delete/Modify Formula

- Select the column in the Total Columns section.
- Delete/Modify the content displayed in the Formula for Calculated Column edit box.
- Click on the Save Formula button .

### Link Column Total to Data Field

You can link total value from one column to the outside field (numerical or text field).

- Define the column that should be summarized in the Total Columns section (check the corresponding check box).
- Highlight (select) the column in the Total Columns section.
- Highlight (select) the outside numerical field in the Link Column Total to Data Field.
- Click on the arrow button -->.
- The link is displayed in the edit box.
- To delete the link click on the delete arrow button (<--).

Note: you can define only one link to the outside field.

### How to create a Table Field

You create and define table field in two steps.

- 1) You have to create table field type in the Designer module.
  - Create a Memo field in the [Create a New Database Definition](#) window (when creating data fields for your new database in the [Designer](#)).
  - Select a Table field type in [Data Entry Control](#) window (when defining a layout/display of data fields in Field Layout Designer window).
- 2) You define number of columns, headers, arithmetic formulas for your table in the Edit Table Window.
  - Think over how many columns your table will need and write it down (regular columns and calculated columns).
  - Think about the order of columns. This is very important if you have calculated columns. If you change order of columns in a table with a calculated column you can receive unwanted results.
  - When you know the number of columns for your table, just click Add Column push button and enter column header (name).
  - Select Edit Headers command (Edit Headers push button). In the Table Headers window define new headers. Initially program automatically creates a header for a new column. The header is a number (first column has number 1, second column has number 2, ..). Instead of numbers you want to have words as headers. You can do it in here.
  - In the Total Columns section define which columns should be totaled. Click on the corresponding check box.
  - In the Formula for Calculated Column edit box define arithmetic formulas for calculated columns.
  - In the Link Column Total to Data Field section define link.

### Calculated Column Samples

#### MYTOTAL|@1\*@2

- MYTOTAL is a header (column name).
- | separates header from formula.
- @1\*@2 is a formula, numerical value from column 1 multiply by numerical value from column 2.
- The **MYTOTAL** field was selected in the **Total Columns** section. The @1\*@2 formula was entered into **Formula for Calculated Column** edit box.

#### MyColumn|1+@3 / "QUANTITY"

- NEXTEXAMPLE is a header (column name).
- | separates header from formula.
- 1+@3/"QUANTITY" is a formula, one add to a numerical value from the column 3 then the result divide by numerical value from the field with label QUANTITY (field QUANTITY is an outside field).
- The **NEXTEXAMPLE** field was selected in the **Total Columns** section. The **1+@3/"QUANTITY"** formula was entered into **Formula for Calculated Column** edit

box (note: outside field has to be surrounded by quotation character: " ).

### Example1

In Stock Organizer you can have a table field with the following columns: Date (transaction date), Transaction (transaction type), Shares (number of shares), Price (purchase price per share), Commission (commission rate), NewPrice (current share price on the market) and two calculated columns: Cost (total cost), Value (current total value).

Table Field in Stock Transaction Organizer

Date	Transaction	Shares	Price	Commissi	NewPrice	Cost	Value
02/15/1999	buy	2000	2.5	10	3	5010	6000
04/01/1999	buy	3000	2.75	10	3	8260	9000
~Total:		5000				13270	15000

**Totaled Columns:** Shares, Cost, Value

**Calculated Columns:** Cost, Value

Cost = Shares \* Price + Commission => arithmetic formula entered: @3\*@4+@5

Value = Shares \* NewPrice => arithmetic formula entered: @3\*@6

### Example2

In Purchase Order Organizer you can have a table field with the following columns: Product Number, Description, Quantity, Price (unit price), Amount.

Data entry/display page:



PRODUCTS				
Number	Description	Qty.	Price	Amour
SK01	Address Organizer Deluxe	2	65.00	130
SK02	Book Organizer	1	34.23	34.23
SK23	Joke eBook	2	12.24	24.48
~Total:				188.71
SUBTOTAL				
				188.71
DISCOUNT				
				0.10
DAMOUNT				
				18.87
TAX				
				0.14
TAXAMOUNT				
				26.42
SHIPPING				
				2.00
TOTAL				
				198.26

**Totaled Columns:** Amount

**Calculated Columns:** Amount

Amount = Quantity \* Price => arithmetic formula entered: @3\*@4

**Linked Column Total to outside Data Field:** Amount

Total for **Amount** column linked to **SUBTOTAL** data field.

Note:

DAMOUNT, TAXAMOUNT, TOTAL are calculated fields.

DAMOUNT = DISCOUNT \* SUBTOTAL

TAXAMOUNT = TAX \* SUBTOTAL

TOTAL = SUBTOTAL - DISCOUNT + TAXAMOUNT + SHIPPING

## Import from Text or DBF File

Import from Text or DBF File allows you to import all or selected records from dBase or text file to a table field.

### How to Import from DBF File

- Click with the right mouse button on the **Table Field**. Select **Import** command from the Table Field popup menu. It opens the **Import from Text or DBF File** window.
- In the **Import from Text or DBF File** window select a database file (dBase file: \*.dbf) and click on the **Open** button. The selected file name will be remembered by the program for the next use.
- In the Confirm window click on: 1) **Yes** - it will replace the content of the table field. 2) **No** - it will add new rows of data to the content of the table field.
- In the **Import from DBF File** window select your options and click on the **OK** button.
- When you click on the **OK** button all the above options will be saved.

### Import from DBF File Window

- **Import From:** this table displays the content of the selected dBase file.
- **Table Columns:** lists all available fields from the selected dBase file. Here you define fields that will be imported. To select the field click on the check box. The name of the selected field is displayed in the **Columns Selected for Import** list box.
- **Import Scope:** select **All Records** to import all records from the dBase file. All records from the selected dBase file will be added to the content of the table field. Select **Selected Records** to import selected records. You can select more than one record by holding down **Ctrl** key while selecting.

### How to select a database file created with Organizer Deluxe

- The **Import from Text or DBF File** window lists file names with extensions. Only text (\*.txt) and dbase (\*.dbf) files are listed.
- To select the database created with Organizer Deluxe you have to know the **disk file name**.
- To find the **disk file name** for the database maintained with Organizer Deluxe do the following:
  - start **Organizer Deluxe**
  - select **Load Database** command
  - in the Load Database window (**Available Databases** sections) find and select **Database Name**
  - the **disk file name** for the selected database is displayed in the **Real File Name** edit box

### Import from Text File

- The program imports the whole content of the selected text file.
- The import function will move the content of each row in the text file to a new row in the table field.
- To define columns (fields) in the text file use Tab character.

## Bar Codes

Organizer Deluxe allows you to print barcodes on labels. In your database a bar code should be represented by a text field. You can use the computer's keyboard or barcode scanners to enter data into your "bar code" field.

### How to print bar codes ?

- Select **File/Print** command from the main menu.
- Select **Labels** in the **Report Type** window.
- On the **Fields page** select fields that will be included on a label, select the field that represents a bar code.
- Define or select label type on the **Labels page**.
- Select **Bar Code page**. Define bar code attributes: bar code field, bar code type, font type, font scaling, bar code size, rotation, and options like density and text.

### Bar Code Settings Page

- Bar Code Field: select data field that represents a bar code;
- Bar Code Type: select bar code type;
- Font Name: select font type for the text (if Text Readable option selected);
- Font Scaling: allows you to define the size of the text;
- Height Scaling: allows you to define the height of the bar code;
- Bar Code Size: select normal or large;
- High Density: check this option to print barcodes in a high density form;
- Text Readable: if checked the text is printed under the bar code;
- Rotation: define the rotation of the bar code;

### Bar Code Types

Organizer Deluxe supports the following bar code types:

- Code EAN-8
- Code EAN-13
- Code UPC-A
- Code UPC-E
- CODE39
- Code 2of5 interleaved
- Code 2of5 for German "Frachtpost"
- Code 128, Table A
- Code 128, Table B
- Code 128, Table C
- Plessey barcodes
- Code A Bar (also known as "USD-4", "NW-7", "2of7")
- US Postnet
- Postnet FIM

[Printing Reports](#)

[Printing Labels](#)

## Export To Text File Using Template

### What is exporting data to a text file using template?

This operation will move all or selected records to a text file in a form defined by a record template file.

### How to find Export To Text File using Template?

The 'Export' function can be accessed in two ways:

- from the *Advanced* section on the speed bar: the *Export* button;
- from the *Advanced* section on the main menu: the *Export* option.

Then select *Export To Text File using Template* radio button and click on *OK*.

### How to use Export To Text File using Template?

- On the **Advanced** menu click **Export**, in the **Export Target** box select **Text File Using Template** and click OK
- In the **Select Template File** dialog box select the template file or enter a new file name in the File Name edit box and click Open. **Notes:** By default the Select Template File dialog box lists the content of the C:YOUR\_ORG\_DLX\DATA\EXPIMP directory. If a new template is created it will be saved in this directory.
- In the **Template File** dialog box you can do the following: 1) verify the loaded template file and execute the export function; 2) create/modify a template, save it, and execute the export function.
- To execute export function click on **Export** or **Save & Export** button.
- In the **Enter/Select Export File Name** dialog box select the export destination file or enter a new destination file name in the **File Name** edit box (example: result.txt) and press **Open** to continue (**Cancel** will abort the export process).
- To view export results, open Windows Explorer and go to C:YOUR\_ORG\_DLX\DATA\EXPIMP directory. Double click on the export destination file (example: result.txt).

### How to create Template File

To create a new template file you can use Organizer's **Template File** dialog box or a text editor application (example: Notepad).

**Template File** Dialog box:

- On the **Advanced** menu click **Export**. In the **Export Target** box select **Text File Using Template** and click OK. In the **Select Template File** dialog box enter a file name for your new template (example: your\_temp.txt) and click **Open**.
- In the **Template File** dialog box select a data field in the **Data Fields** list box and click **Include Field** or **Include Field With Label**. A keyword that represents the content of the field is inserted into the memo edit box (template file). You can type any text before and after the keyword. Select additional data fields and add text. To save the template click **Save & Export**.
- The Organizer Deluxe saves the template and opens **Enter/Select Export File Name** dialog box. Select the export destination file or enter a new destination file name in the File Name edit box (example: result.txt) and press **Open** to continue (**Cancel** will abort the export process).

### Tip:

If you use a text editing application you can use the following keywords:

**!!--PRIMASOFT:N--**

or

**!!--PRIMASOFT:LN--**

**N** - represent the number of the field in the record

**L** - represents the field name.

**!!--PRIMASOFT: 1--**

- this keyword represents field 1, without field name (label),
- note there are not spaces inside the keyword

[Export](#)

## Command Line

Organizer Deluxe can start with command line parameters. Command line parameters allow you to define the name and the mode (read/write) of the database that will be opened when the program starts.

### **How to define command line parameters**

Right mouse click on the application icon displays popup menu. Select **Properties**. In the **Properties** dialog box click **Shortcut** Tab. In the **Target** edit box add the following text:

Data\_1.dbf read\_write

Data\_1.dbf read\_only

The content of the Target edit box should look like:

C:\YOUR\_ORG\_DLX\Deluxe.exe data\_1.dbf read\_write

## Copy Record To Clipboard

Using the 'Copy Record To Clipboard' function will help you move the content of the whole record to another application (example: Notepad, Microsoft Word, .. ). The content of all fields with their labels is copied to Windows Clipboard. The sample format is listed below. If you want to copy your record in a different format than listed below you can use [Copy Record To Clipboard From Template](#).

The function is accessible from the [right-panel popup](#) menu or from the [Record pull-down](#) menu.

Sample Format

```
FIELD_NAME_01
  Content of the field 01
FIELD_NAME_02
  Content of the field 02
...
...
FIELD NAME N
  Content of the field n
```

## Copy Record To Clipboard From Template

Copy Record To Clipboard From Template function copies the current record to Windows Clipboard using a template text file.

The function is accessible from the [Right-Panel \(Details Page\)](#) popup menu or from the [Record](#) pull-down menu.

- Select the **Copy Record To Clipboard From Template** command from the right-panel popup menu or from the Record drop-down menu, it opens **Select Template File** dialog box.
- **Select Template File** dialog box displays the content of the C:ORGDELUXE\DATA\EXPIMP directory. Select the previously created template file and click **Open**. Or, type a file name in the File Name edit box (example: CLIPTEMP.TXT) and click Open. It opens **Template File** dialog box.
- In the **Template File** dialog box you can: 1) verify the loaded template file and execute the copy function. 2) create/modify a template, save it, and execute the copy to clipboard function.

### How to create a template

- Select the **Copy Record To Clipboard From Template** command from the right-panel popup menu or from the Record drop-down menu, it opens **Select Template File** dialog box.
- **Select Template File** dialog box displays the content of the C:ORGDELUXE\DATA\EXPIMP directory. Type a file name in the File Name edit box (example: CLIPTEMP.TXT) and click **Open**.
- The **Template File** dialog box is opened. In the **Data Fields** box select the field that you want to include in the template and click **Include Field**. The keyword that represents the content of the field is displayed in the template file. You can type any text before and after the keyword. Click **Save & Copy** to save the template.

### Note

You can use this template file with [Export to Text File Using Template](#)



## Drop-Down List (Keyword Mode)

### Drop-Down List Field (Keyword Mode)

**Drop-Down List** data entry control has the **Keyword Mode** option. You can either type text in the edit box or select an item from the Keyword List box. Selected keywords are added to the content of the field. Pressing on the "drop-down" button of the edit box opens the **Keyword List** dialog box.

**Keyword List** dialog box:

- Add keyword: in the **Keyword** list box select a keyword and click **Add**. To add a keyword you can also double click on the keyword.
- Delete keyword: to delete the keyword click on the keyword (place the cursor on this keyword) and click **Delete**.
- The Keyword List dialog box does not allow you to add new keywords to the Keyword Selection list. You can do this by typing a new keyword in the edit box. New keyword is added automatically to the keyword selection list. You can also select Edit List command from the pop-up menu (right mouse click on the field) and modify keywords in the Edit Lists dialog box.

If you want to use a **Drop-Down List Field** in the **Keyword Mode** in your database:

- create a **Character** field in the [Create a New Database Definition](#) window ([Designer](#)).
- select a **Drop-Down** List type in the [Create or Modify Data Entry Layout](#) window ([Designer](#)). You do not define the Keyword Mode in Designer.
- start Organizer Deluxe. Select the **Keyword Mode** from the popup menu (right mouse click on the drop-down field)

