Contents

Contents

Contents

Contents

Contents

Contents

Contents

Contents

Contents

Contents

Contents

Contents

Contents

Contents

Contents

Contents

Contents

Contents

Contents

Why Executive Desk

We are in the final lap of a decade of challenges, ready to enter the next century. Technology has accelerated the pace of business. The writing on the wall says: "Perform or Perish." So much to do, but so little time.

Time, there is never enough of it. Procrastination, desk clutter, improper delegation, interruptions, lack of reminders and feed-back are among the common "time robbers" in an executive work day. They steal Time, which could otherwise be invested for better returns.

We cannot manage time, but we can organize ourselves to make the best use of the time available, so that we can deliver more than usual. That's what Executive Desk is all about.

Be Effective, Not Efficient!!

Efficiency does not mean Productivity, Effectiveness does.

Efficiency is doing things right. Effectiveness is doing the right things right. It doesn't help if you become efficient doing things that shouldn't be done in the first place.

When you schedule a task, an appointment, a follow-up in your work day, ask yourself two questions:

- Is this the best use of my time?
- By doing this am I getting closer to my goal, my objectives?

This will make your priorities clear. Now plan your work-day to handle right things first, and then work as close to your plan as practicable. The best time to organize yourself for the next day is the day before. This will give you a feeling of being in control of yourself, and will free your mind to enjoy rest of the evening. And you will feel excited about coming to work the next day.

Most important, don't program yourself like a robot, plan for spontaneous opportunities and schedule fun in your work day. You'll see the results for yourself as you go along.

Good Luck!

Installing the Program

The minimum configuration to setup the EDesk is a PC or Compatible system with VGA Monitor, Microsoft Windows 3.1x or Win '95, and a floppy/CD drive to install from. The minimum free space required on the hard disk for installation is 2MB.

To install, first insert the Setup Disk/CD in the drive.

Windows 3.1x and Windows for WorkGroup installation:
a. From Program Manager choose File/Run
b. Specify the command as X:\SETUP (or X:\CDSETUP for CD version, where X: is the drive containing the installation disk.)

Win '95 installation:
For CD version, insert the CD in drive to AutoLoad the setup program
For the floppy disk version, click on Start in the task bar, select Settings/Control Panel.
In the control panel, select Add/Remove Programs option, and click on the Install button.

Follow the instructions to specify path (drive and directory) to install the software, setup will create the program icons within a new Program Group:

After installing the EDESK, you may assign a password to ensure security and privacy of your data. See "Customizing Your EDESK" for information on setting-up your password.

Some Do's and Don'ts

1. Do not install EDESK in a directory containing an earlier version.

2. Win3.1x users should ensure that the CONFIG.SYS file contains the following parameters: FILES = 40 and BUFFERS = 30

3. If using a Mono VGA monitor, make sure it is set as VGA and not VGA with Monochrome display through Windows Setup.

Working with EDESK

EDESK is a fuss-free PIM based on Time Management Principle to help you stay in control of your time and information. It provides you a system that supports: Delegation, Planning, Tracking and WorkGroup Interaction. The underlying principle is to help you make the best use of your time.

EDESK '97 goes beyond the ordinary PIMs. It is a "global workstation" for the Corporate Executives, Business Entrepreneurs and SOHO users. In the office, on a tour or at home, EDESK instantly sets up your electronic office, anywhere -- to keep you in command and in touch with anybody, anywhere.

To start EDESK, double click on the icon in the Windows desktop. If you are using a monitor with 640x480 resolution on Win '95, set the option in Customize/Parameters to select Default Screen.

EDESK displays various section (applet) icons in the tool-bar on the right hand side. To start a section, Click on the appropriate icon, or pull down the Option menu, to select a section, which is then highlighted in the menu.

On-line HELP can be viewed by selecting Help/Contents (F1 key) in the menu, except when you are in a dialog box. Options not available in the tool-bar, such as Reorganize are shown in the menu.

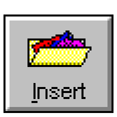
Sections in EDESK
Address Book : To manage your contacts.
Time Planner : To plan your time usage.
To-Do Lists : To prioritize your tasks.
Phone List : To manage your outgoing calls.
Follow-Up : To track projects and delegated tasks.
DayView : To manage your work load & flag completed tasks.
E-Dockets : To exchange data with peers and subordinates.
Mail Centre : To manage fax, email and internet mail messages.
Pop Run : To launch frequently used programs.
Archival : To keep history of completed schedules and tasks.

E-Dockets and Mail Centre are sections in EDESK '97, in Ver6 these are replaced in the tool-bar with Letter Writer and Reorganize icons.

There are five utility options in the DayView Section:
Calculator : Calculator with Currency Conversion.
Dialer : Dialer with Long Distance Dial Codes.
World Time : World Clock with daylight adjustments.
WeekView : Week-at-a-Glance display.
Trash Bin : To delete items in the DayView List.

EDESK system options:
Reorganize : Purges unwanted data and rebuilds indexes.
Customize : Customize your EDESK parameters.

Commonly used Commands

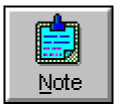


Adds new entries: Contacts in an Address Book, Appointments in Diary, Tasks in To-Do List, Items for

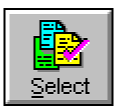
Follow-Up, Entry in Phone List
(*Keyboard ALT+I*).

To enter the Amend mode, double click on the item (*Keyboard ENTER*).

Deletes entries: Contacts from an Address Book, Appointments from Diary, Tasks from To-Do List, Items from Follow-Up and Entries in Phone List *(Keyboard ALT+D*).



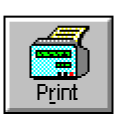
Opens a note-pad attached to entries for writing and viewing descriptive information (*Keyboard ALT+N*). A note in Diary, To-Do and Phone List is indicated by an envelope. In Follow-Up, the item itself is not active unless a note is attached to it. You can click on the system box for Clipboard cut, copy and paste or click the right mouse button in Win '95.



Activates item selection (*Keyboard ALT+S*). You can select items in a list by clicking on them (*Keyboard Spacebar*). The selection is like a toggle, re-click (or Spacebar) on a selected item to deselect it. Selection in To-Do list is based on a criteria. Undo or Cancel will reset to the original list.

Searches for text in the description of an entry (*Keyboard ALT+E*). Search is not Case Sensitive, it treats capital and small letters as same. When searched, only the matching items are redisplayed for further processing. Undo or Cancel will revert to the original list.

Displays phone numbers for the entry in the list (*Keyboard ALT+P*). If you dial through a modem, pick-up the hand-set when the phone rings and press Clear or Cancel to talk. Allows you to edit phone #s and converts alphabetic dial codes to numbers.



Activates printing of Lists, Reports and Labels *(Keyboard ALT+R*). All the printouts are designed to fit One-Up in Portrait orientation and Two-Up in Landscape orientation. Mailing Labels, however, are designed for standard stationery.

Certain HP Desk Jet and HP Laser Jet Printer Drivers distort the reports, in such cases install the HP Desk Jet Plus or Laser Jet Plus Drivers provided with Windows by Microsoft.

Once you request a command, the corresponding dialog will prompt you for the necessary inputs. The mouse pointer (*Keyboard: TAB* to move forward and SHIFT+TAB to move backward) allows you to move from one prompt to another in the dialog boxes.

GENERAL KEYS

ALT+ O	*Option Menu*
ALT+ Underlined Letter	*Command/Option Selection in Individual Sections*
ALT+ SPACE	*System Box*
ENTER	*Amend Item in List*
TAB	*Move Forward in the Dialog Box*
SHIFT + TAB	*Move Backward in the Dialog Box*

CLIPBOARD CUT & PASTE

CTRL + X/C/V	*Cut, Copy, Paste to and from Clipboard*

You can click on the right mouse button in Win '95 for Clipboard Cut, Copy and Paste.

EDITING KEYS

INSERT	*Toggle for insert/overwrite mode*
DEL	*Delete character right*
BACKSPACE	*Delete character left*
UP/DOWN Arrow	*Line Up/Down*
ALT +Down Arrow in date	*Pop-up Calendar*
LEFT/RIGHT Arrow	*Left/Right one character*
CTRL+ LEFT/RIGHT Arrow	*Left/Right one word*
SHIFT+LEFT/RIGHT Arrow	*Mark Text in Notes and Edit Box*
HOME/END	*Beginning/End of line*
PGUP/PGDN	*Up/Down one screen*
CTRL+ HOME/END	*Beginning/End of text block*
SHIFT+TAB	*Backward one field*

Quick Look at the Address Book

The Address Book stores the information you find on a business card: names, addresses, phone/fax, E-Mail numbers, birth dates and anniversary dates of your contacts. Address Book has two parts -- the Index and the Contact Page. The Index is an alphabetic list of contacts for quick location of contact information. You can classify contact information (cards) into any number of Address Books (Files).You can thus have separate Address Books for Business Contacts, Professional Contacts, Friends, Relatives, Customers and Suppliers. You may even use the Address Book to hold standard mailing lists.

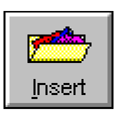
Apart from contact name, address, phone, fax, e-mail numbers the Contact Page provides a small note-pad for each contact. Notes are useful to store descriptive information such as categories, habits, professional interests, or directions to reach a client's office.

Features

> *Alphabetical Index for quick location by Name or Company.*
> *Classification of contacts into various Address Books.*
> *Simultaneous display of Index and Contact Page.*
> *Notes on Contacts in free format.*
> *Selection/Search on Contacts from Index.*
> *Copying/Extracting/Merging selections into another Address Book.*
> *Auto-dialing phone or Scheduling phone calls from Contact Page.*
> *Address/Phone Directory Printing.*
> *Mailing Labels in standard formats.*
> *Selective Printing.*

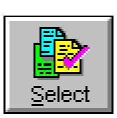
Commands

It lists address books in your directory. You can choose the Address Book (file) to work with, to transfer or to delete, by picking it from the list. To add a new Address Book double-click on <<NEW>> (*Keyboard Spacebar*).



Adds contacts to the current Address Book. Contact Page on the left provides the form for entry. The new contact is placed in the alphabetic Index, by the first letter of the name.

Removes contacts highlighted in the Index, and displayed in the Contact Page, from the current Address Book.

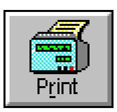


Allows you to selectively pick contacts in the Index, by just clicking on them. The selected entries are highlighted in the Index. The selection click works like a toggle, to deselect simply click on the selected entry (*Keyboard Spacebar*). You can copy, extract, delete, print or export the selected contacts or merge them with another Address Book.

You can search for a contact in the Address Book by name, part of address, phone, fax, Net-Mail number or information in notes. For example, you may search for contacts matching BIRMINGHAM in the address, or with EGGERT in the name.

Copies the name, title, company and address, of the current contact in the index, to ClipBoard. You can later paste this in applications like Word Processing.

Dials the phone or Schedules a call to the person displayed on contact page at Office, Home or at any Other Number, depending on the selection. It allows you to edit the phone number before you dial.

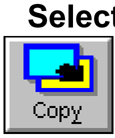


Prints Address Book information in various formats, such as:

Phone Index (*Keyboard ALT+P*)
Address Directory (*Keyboard ALT+D*)
Complete Contact Information (*Keyboard ALT+*I)
Birthday List (*Keyboard ALT+B*)
Anniversary List (*Keyboard ALT+A*)
Mailing Labels (*Keyboard ALT+M*)

Apart from Address Labels you can also print Contact Labels, which also include the phone and fax numbers. Contact Labels are ideal for a concise listing of the Address Book to carry on short trips.

Select/Search Sub-Menu Commands

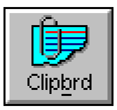


Copies selected/searched contacts into another Address Book, without removing them from the original Address Book. If you copy to an existing Address Book, it will merge the selected contacts with those present in it.

Removes selected/searched contacts from the current Address Book and copies them into another Address Book. Extracting into an existing Address Book, will merge the selected contacts with those present in it.

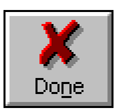
Removes selected/searched contacts from the original Address Book.

Exports selected or complete data from the current Address Book for use in another application or to a file that your Word Processor can use in a Mail-merge. Supports two formats xBASE compatible (.dbf) and Standard Data Format (.sdf). Do not specify file-extensions in export file name, they are attached as defaults.



Copies Contact Name and Address in Label format to ClipBoard.

Prints Address Book information for selected/searched contacts.



Exits from select/search sub-menu to display the original address book.

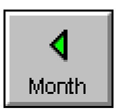
Quick Look at the Time Planner

The Time Planner is like a calendar and provides a monthly view of Events, Holidays and Key Diary Items. While the planner provides a monthly view, the Diary displays all time-slots for the entire work day, where you can schedule Appointments. Appointment reminder tracks your diary items and pops up on the screen to alert you to the schedule.

Features of the Time Planner

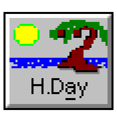
> Monthly Planner and Daily Diary.
> Appointment Reminder with Snooze.
> Recurring appointments - Weekly, Monthly, Quarterly etc.
> Override for recurring appointments.
> User defined Holidays, Events and Weekly Off.
> User defined start/end time and time-slot duration.
> User defined categories for Appointments.
> Recurring Events and Holidays.
> Event Highlighters.
> Appointment Rescheduling.
> Search on Diary Items.
> Scheduled Activation or any external program.
> Planner and Appointment List Printing.
> Drag-n-Drop on Address Book for look-up.
> Archiving completed schedules.

Time Planner Commands

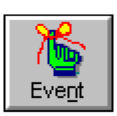


Browse planner pages by months.

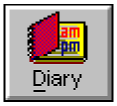
Leaf through the planner pages by year.



Sets a date in the planner as a holiday and changes the date display to red. Recurring holidays, which repeat every year, are prefixed with an asterisk (*) in the description.



Flags event for a date in the planner and changes the date display to blue. Recurring events are prefixed with an asterisk (*) in the description and displayed in purple.

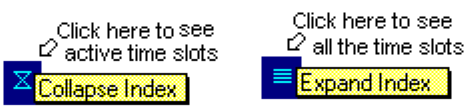


Displays diary page for a date in the planner, showing the work day broken down into time-slots. In the diary pages you can schedule appointments and non-diary items from To-Do and Follow-Up lists.

Searches appointments in the diary from the date in the planner and displays all appointments where search text matches the description. Select from the list to zoom into the diary page where the searched appointment is located.

Diary Sub-Menu Commands

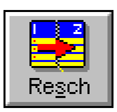
When you zoom into a date in the Planner, the Diary page is displayed.



The Diary supports two modes of display -- All Time Slots or Active Time Slots. The toggle switch at the bottom of the diary allows you to select the mode.

Inserts appointment in the selected time-slot along with type and frequency of recurrence.

Deletes highlighted appointment.



Reschedules appointment in the highlighted time-slot to another date and time. Use drag-n-drop feature to reschedule appointments to another time slot in the same day.

Zooms out to the Planner from Diary.

Opens a note-pad attached to an appointment in the Diary to view or write descriptive information.

Prints Month Planner, Today's Schedule, and Appointment List for a range of dates.

Quick Look at the ToDo Lists

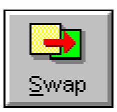
To-Do List is the cornerstone of priority-powered time management. This list contains tasks you have to do, with priorities and due dates assigned based on their relative importance. The Status indicator tracks the activity progress. There are two To-Do lists -- NOW List that has tasks to accomplish in the next 7-days time-frame; LATER List has tasks to do at some point in the future, not immediately, it is a wish-list to attend to when you have the time.

Features of the To Do List

> Separate Do NOW and Do LATER Lists.
> Swapping Entries between NOW & LATER.
> Drag-n-Drop from NOW to LATER and vice versa.
> Automatic Swapping from LATER to NOW.
> Status & Due-Dates for Tasks.
> Re-ordering of Entries using Drag-n-Drop.
> Selective Display by Priority, Status and Due Dates.
> Selective Printing.

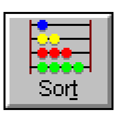
Commands

Adds tasks to the current To-Do List.



Swap tasks from one list to another -- DO NOW to DO LATER and vice versa. When you swap tasks from NOW to LATER list the due date is automatically adjusted to a minimum of fortnight from the current date. Tasks in To-Do Later are automatically swapped to To-Do Now when they are due within a week.

Displays selective list of tasks based on a combination of priority, due date and status.



Sorts (rearranges) To-Do List by rearranging tasks in the order of Priority, Due Date or Status.

Opens a NotePad attached to a task in the List to view or write descriptive information.

Prints the To-Do List displayed (NOW or LATER) with the notes, it   can be printed in full or selectively.

Quick Look at the Phone List

Phone is the single most major interruption in an executive workday. The phone activity runs parallel to your schedule. While you have no control over incoming calls, most certainly, you will be able to streamline your outgoing calls using the Phone List.

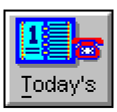
It is a simple date wise list of phone calls to make. When you add an entry to this list you can specify details such as: Person to call (WHO), Reason for calling (WHY), Date of call (WHEN) and Notes (WHAT) on key items to discuss. If you assign the time of call, it will even flash a reminder at the designated time. Completed calls are displayed with a strike-through in the list.

Features of the Phone List

> *Schedules Calls to be made.*
> *Lists calls by date and time of call.*
> *Address Book Link for Name and Phone Number.*
> *User-defined Reasons for Calling.*
> *Selective display of Today's Calls.*
> *Phone Call Reminder with Hold facility.*
> *Phone Dialer with Memory and Long Distance Codes.*
> *Auto-Dialing through modem.*
> *Phone Call List Printing.*

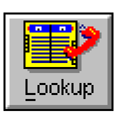
Adds an entry for outgoing call in the list with details such as: WHO, WHY and WHEN.

Deletes phone entry from the list.



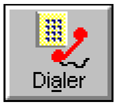
Displays calls scheduled for the current date. Toggles the button to Calls.

Changes from selective display of today's calls to list all calls.



Looks-up for a person in the Address Book,   to automatically include Business, Home or Other phone number from the contact information.

Dials/displays phone numbers for an entry in the list. If you dial through a modem, pick-up the hand-set when the phone rings and press Clear to talk. It converts alphabetic codes to numeric for dialing.



Pops-Up Phone Dialer to dial a number directly or from the memory list. You can store frequently dialed numbers and long distance codes in memory and select from an alphabetically arranged list.

Opens the NotePad attached to a phone entry for notes. Notes are useful to write key points discussed, or to be discussed, during a phone conversation.

Your Phone List can be printed, with or without the notes. Phone list with notes is for your secretary who can pass the messages on the NotePad, if you are not around. Phone list without notes is for the operator to dial your numbers.

Quick Look at the Follow Up

The need for follow-up on tasks planned and delegated cannot be over emphasized. EDESK allows you to maintain follow-ups with due dates for People in the organization, Projects on hand, Parties such as Suppliers and Customers, Personal items and Other miscellaneous items. The Index-Tabs are used to select the category of follow-up.

Follow-up categories for People and Project hold list of tasks similar to the ToDo List, while for the other categories follow-ups are notes. Follow-ups can be recalled while working on an activity, or during a discussion on items related to it and help you to ensure that tasks are being followed-up in time and that there is no slip on account of memory.

Features of the Follow-up List

> *Tracks People, Projects, Parties, Personal and Other Items.*
> *Due-dates for scheduling and Overdue signals.*
> *Task Lists for People and Project Categories.*
> *Links to assign Project Tasks to People.*
> *Free Format Follow-up Notes and Attachments.*
> *Search on Task Descriptions and Notes.*
> *Selective Printing.*
> *Two print formats -- as a list, and one-per-page.*

Follow-up List Commands

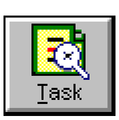
Inserts a follow-up item in the current category in alphabetic order, with a Note, Attachment and Due Date. The follow-up item will become active only when there is a Note attached to it.

Deletes a follow-up item from the list.

Searches follow-up Task Descriptions for People/Project categories and Notes in the other category list. When the searched items are displayed, click on the Undo button to revert to the original list.

Selects follow-up items in the list for printing.You can select items by just clicking on them.The selection click works like a toggle -- to deselect simply click on the selected card (*Keyboard Spacebar*).

In case of categories like Parties, Personal and Other, follow-ups are Notes for action and review, which you can view at the time of follow-up and amend them for the next follow-up and set a new due-date.



People and Project follow-ups are task lists, which can be linked. Project Tasks can be assigned (linked) to People, and vice versa, when linked the task appears in both the categories.

Prints the follow-up highlighted by selection bar in the normal mode. In the selective mode, it prints the selected items -- as a continuous list or in a one-per-page format.

Quick Look at the DayView

DayView the Control Centre

DayView is the Control Centre and is organized like an Executive's Desk. When you start the program this is the first section that is loaded. Most of the program features can be accessed from this single screen without switching sections (or jumping to applets).

Apart from the header, which shows day/date and holiday/event descriptions (if any), DayView shows the following items:

Daily Schedule List: Your complete schedule for the day
Calendar: To select date for viewing and for rescheduling
Applets: Calculator, Dialer, WeekView, World Time and Print and Trash Bin
Notes: Notes (and attachments) on the selected item in the list.
Trash Bin: To delete Items from the Schedule Lists
Net Browse: To surf on the Net

DayView provides you the functionality required to manage and balance your work-load, with simple mouse operations. Once you have entered your schedules and tasks, this is what you will require to manage your day.

What can you do with the DayView?

> *Add Items to the schedule list by double clicking on the category title.*
> *Reschedule Items by dragging and dropping on the calendar.*
> *Convert One Schedule Type to Another by dragging and dropping on the category title.*
> *Straight Dialing to a Phone List Item.*
> *Composing Mail Message.*
> *Transferring DayView Items to E-Dockets.*
> *Searching Contacts in Address Books.*
> *Archive Items in DayView.*

Quick Look at the E-Dockets

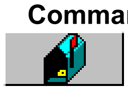
E-Docket is an Electronic Docket to Transfer EDESK information to and from your peers and subordinates. It works like an office docket where you put the memos, requests meant for a particular person. In EDESK, you can create an E-Docket for different people. Once these dockets are ready, through DayView you can selectively move schedules/tasks from your ToDo, Follow-Up, Appointment and Phone List into a given E-Docket, using simple drag-n-drop.

Some examples of the use of E-Dockets:
1. To send follow-up tasks to a person for her/his action and feedback.
2. To send your Appointment and Phone List to your secretary, so that s/he can update the appointments in her/his list and make the phone calls for you.
3. To send your appointment schedules to a person coordinating your meeting with five other colleagues to ensure that there is no conflict.

Features

> *Creates/Selects an E-Docket.*
> *Moves Information into an E-Docket.*
> *Sends/Transfers an E-Docket via Mail Centre.*
> *Receives an E-Docket.*
> *Uses an Incoming E-Docket.*
> *Clears an E-Docket.*

Commands



You can drop an E-Docket from the list on the Mail Box icon to compose a message with the docket attached.

Note : *To exchange E-Dockets using floppy disks, use the XBRIDGE program*.

Quick look at the Mail Centre

EDESK '97 is designed to be a global workstation. In the Office, on a Tour or at Home, it is the Mail Centre that connects you to your office and the outside world to exchange messages.

Mail is an important communication tool for every executive -- be it in the form of Fax, Corporate/LAN Mail or Internet Email. The incoming mail is an important action document which may trigger several activities (schedules or tasks) -- in the form of a ToDo, Follow-Up, Appointment or a Phone Call. Once you have taken an action on the incoming mail, this may have to be conveyed back by creating an outgoing mail. On the other hand, schedules and tasks may trigger a need for sending an outgoing mail. It could be to seek information, to confirm arrangements, to discuss terms or to provide a follow-up link.

EDESK '97 is a mail enabled application, which uses the Post Office created by mail applications such as MS-Mail (Win 3.1x) and MS-Exchange (Win '95) to communicate with other members of your group on a network or by remote access and with the outside world via the Internet.

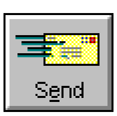
Mail applications provide you the facility to send/receive mail messages via Mail (Corporate/LAN Mail), Fax and EMail (Internet Mail). The Mail Centre provides you a seamless integration with these applications to access the incoming mail messages and use them in EDESK and also to create outbound mail messages from EDESK which are sent to the OutBox of the Mail application for delivery.

Features

> *Composes mail messages in OutBox with attachments and mail signature.*
> *Sends mail messages from the OutBox.*
> *Selects mail messages to View/Send/Delete.*
> *Views incoming messages in the InBox of the Mail Application.*
> *Drag-n-Drop incoming messages into EDESK schedule lists.*
> *Drag-n-Drop items from EDESK schedule list to compose out-bound messages.*
> *Profile selection for Internet Mail (E-Mail), Mail (LAN/Corporate) and Fax.*
> *Option to sign-on to Mail Application on EDESK start-up.*
> *Point to Point Private Electronic Mail-cum-Fax.*

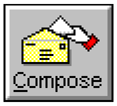
Commands

Sends all the messages to the OutBox of the Mail Application for delivery. Only messages pertaining to a specified profile (viz. Internet E-Mail, Mail or Fax) are sent.



Sends the current message to the OutBox of the Mail Application for delivery. If the message type does not match the selected profile the "send" is ignored.

Deletes the current or selected messages.



Looks up Addresses from the EDESK Address Books to compose an out-bound message in the OutBox of the Mail Centre.

Displays messages in the list based on selection by Profile, Priority or Date.

Prints mail messages - Current Item or All Displayed Items.

Quick Look at the Archival List

Business and record keeping go hand-in-hand. Look at the files and filing cabinets that occupy prime office space. Most of the time these records may not look worth the space they occupy (except perhaps those which are statutory in nature). But when they are required, just a single document could be worth all the investment in keeping these records.

Archival List is a *history of your past schedules*. It helps you document your past schedules for future reference. Archiving completed schedules is as easy as dragging and dropping your schedules and tasks from DayView or respective schedules like ToDo List, Diary, Phone List, Mail into the Archival Icon.

Once archived, the history of your past schedules is available for viewing, searching, printing and more. Archival List maintains all your schedules and tasks in a common format to facilitate a single point search.

Features of the Archival List

> Drag-n-Drop interface for sending items to the List.
> Auto Archive for completed ToDo tasks and Phone Calls.
> Selective view by date range.
> Selective view by combination of categories.
> Single format for all schedules to facilitate Search and View.
> Group delete to weed out trivial and unimportant items.
> Archival List Printing by Date, Schedule type or Searched List.

Commands in the Archival List

Deletes a specific or all selected/searched entries in the List.

Archival List is always displayed for a given Date Range and Schedule Type(s). Search command scans the list to display items matching the search text and changes the button to Undo, which reverts back to the list.

This pulls out the Notes attached to the archived items, which can be revised for future records.

Prints the list of items currently displayed in the List.

Timex Wrist Portability

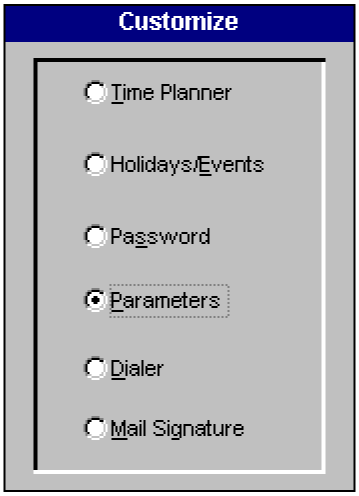
You can transfer information from EDESK into a Timex Data Link Watch. Send appointments, phone numbers, to-do lists, birthdays and anniversaries to your watch for true, on-your-wrist portability. These Timex watches are supplied with Timex Data Link software using which you can receive such information from your PC by pointing the watch at your monitor. In seconds, information is downloaded, without any wires or cables.

The minimum configuration required for using the Timex Data Link is the
Timex Data Link software v2.0 or higher supplied with the Watch
A VGA/SVGA Monitor and Win 3.1 or Win '95 (Win NT users must use Model 150)

Note: Will not work with any Laptop PC display (LCD, active matrix, super twist, etc.). Laptops will work if connected to an external CRT monitor.

Quick Look at the SetUp

Customize allows you to Setup the Executive Desk with user-defined parameters. When you choose Customize, the following menu is displayed:



To select the parameter to customize, click on the option button.

Time Planner: Sets Diary Page, Weekly Offs, Calendar Start Day and Appointment History Days.

Holidays/Events: Sets all Annual Holidays and Events in a single list.

Password: Defines Access Password for the Executive Desk.

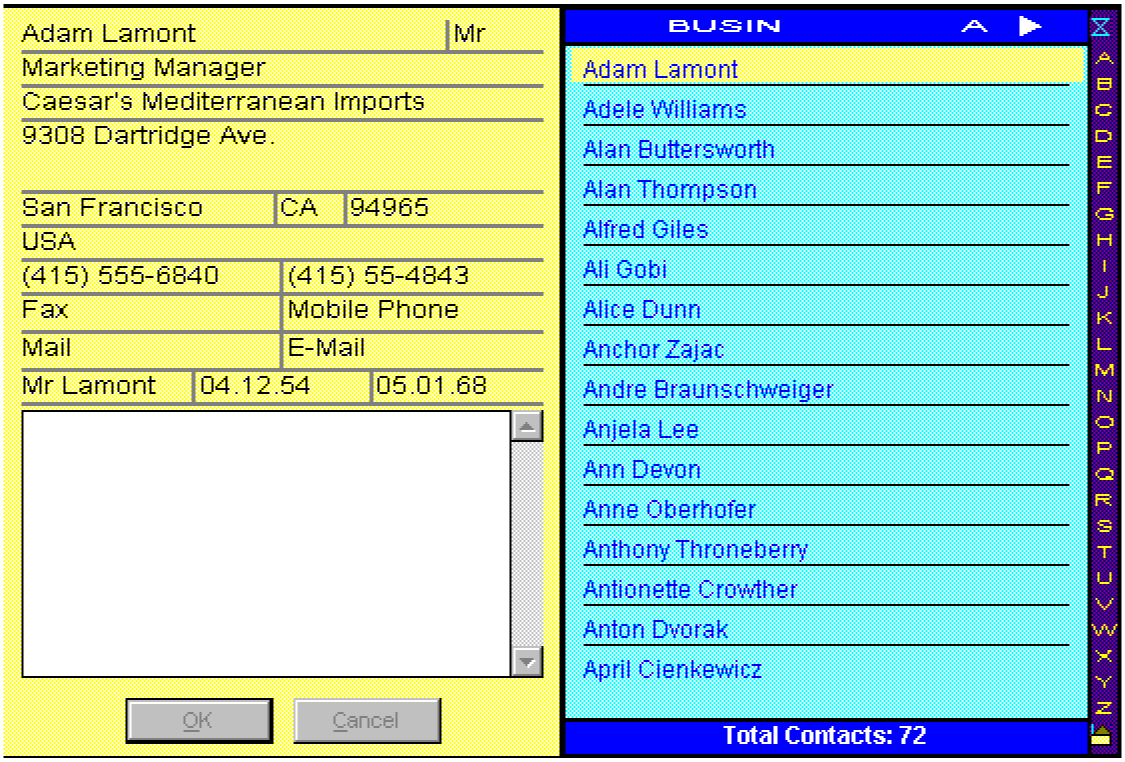
Parameters: Sets Alarm Sound Option, Birthday/Anniv check, Mail Log-On, Minutes between Mail Notifications and Screen Size.

Dialer: Sets modem parameters and dial codes for area, long distance and int'l dial.

Mail Signature Macros defined to include in Mail Messages.

Managing the Address Book

Business is a matter of contacts. Unless a buyer meets a seller there is no business. Contacts are not just Prospects, Customers and Suppliers, there are others -- Friends, Professional Contacts, Community Contacts, Neighborhood Contacts, Relatives and more. Your need for contact will differ for every category -- it should. It is, therefore imperative to classify your contacts.



The Address Book has two parts -- the Contact Page (left) and the Index (right). The Index displays contacts in alphabetic order, with the name of address book displayed on the top of the Index and the number of contacts at the bottom. If the index for an alphabet runs into multiple pages the arrow keys on top can be used to flip the index pages forward or backward.

The Contact Page supports two address formats:
  American: Two address lines, City, State, Zip & Country.
  International: Four Address Lines.
These formats can be setup by choosing Customize option.

You can have multiple Address Books to classify your contacts into categories like Prospects, Business, Contacts and Friends. Your Address Book should be labeled with a six letter name to cryptically describe its contents. For example, BUSIN for Business Contacts or FRIEND for Friends.

Files is the command to Create, Transfer, Use or Remove an Address Book.

To **Create** a new address book:
1. Double click on <<New File>>.
2. Enter the name of your new address book.
3. Click on OK.
The new address book is opened for use with an empty index and a blank contact page.

To **Transfer** an address book.
1. Click on the address book name in the list.
2. Drag-n-drop the address book in the Mail Box.
You can compose a message attach this address book and sent it to the recipient.

To **Use** (Open) an address book:
1. Click on the address book name in the list.
2. Click on OK.
The selected address book becomes the current address book.

To **Remove** an address book.
1. Click on the address book name in the list.
2. Click on Delete.
You cannot delete the address book that is currently open, hence it will not appear in the list.

Managing Contacts

The Contact Page holds the following contact information:

- Contact Name (Mandatory - Index is based on it)
- Name Prefix such as Mr/Ms/Dr etc.
- Title (Designation)
- Address: Four Lines
- Business Phone, Home Phone, Mobile Phone, Fax
- Internet Mail (E-Mail), Mail (LAN/Corporate)
- Greeting Name (Way you greet a person, Nick Name etc.)
- Birth Date (If year is not known, simply enter year as 00)
- Anniversary Date
- Notes (Free format information on the contact)

When you insert a Contact, the Greeting Name is constructed, by default, as Mr/Ms/Dr + First word of Name.

To Add a new contact in the address book, click on **Insert**, regardless of the current index page. This will accept the address details in the contact page and the name will appear in the index. Use TAB key to move forward from one field to another, SHIFT+TAB to move backward. The new contact will now appear in the Index, arranged alphabetically.

Whether you should enter the Contact Name as Family Name first (as in EGGERT, GEORGE) or Family Name last (as in GEORGE EGGERT), depends on how you want the Index organized. The Index is by the first letter in the Contact Name. If you enter a comma after the Family Name as in case of EGGERT, GEORGE the contact name in the reports and labels will printed as GEORGE EGGERT.

To **Amend** contact information in the Address Book, double click on the contact entry in the index (*Keyboard ENTER*). The changes can now be carried out in the contact page.

To Remove a contact from the Address Book, choose it in the Index and click on **Delete**. Check the contents in the contact page, before you confirm deletion.

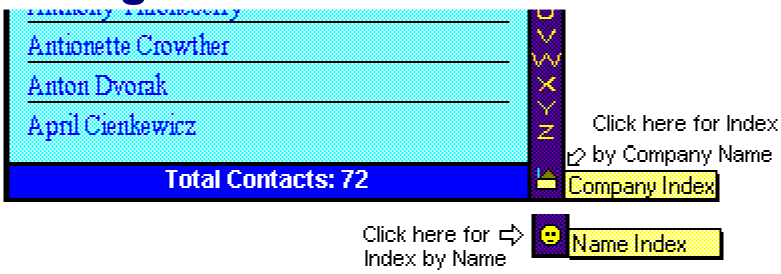
If you are using the Address Book to hold plain and simple mailing lists, enter the Company Name in place of Contact Name.

Notes on Contacts

You can include descriptive notes on contacts, using the specially designed Note Pad available for each contact. Usually, people use the reverse of a business card to do this. It could be personal information such as names of contact's spouse and children, hobbies; or business information such as line of business, annual sales; or even information like directions to the client's office.

The NotePad on the Contact Page, provides you text editing features to manage the notes. Refer to the section "NotePad and Attachments" for detailed explanation.

Using the Index for Quick Location



The Index displays an alphabetic listing of contacts in the Address Book, either by Name or Company (Business Name). The Index highlights the currently displayed Contact Page. Simply click on the Index entry to view the Contact Page for it, or use Up/Dn arrow keys to browse the contacts by scrolling through the list.

To jump to an Index for a specific alphabet, click on the alphabetic tabs (*Keyboard CTRL+PgUp/Dn*). When the Index for a given alphabet runs into multiple pages, the arrows for page flip appear on the top (*Keyboard PgUp/Dn*).

The default index is by Contact Name, if you want to switch the index to Company (Business Name) click on the toggle switch provided at the bottom of the index. Company Index comes handy to locate a contact by the Company/Business Name.

Printing Contact Info & Mailing Labels

Printing Contact Information

The **Print** command prints information from the current selection of Address Book and Index.

For selective printing, you must first use the **Select** or **Search** command.

The Address Book information can be printed as:
- Phone Index (Alt +P) - Name, Company, Phone/Fax#s
- Address Directory (Alt +D) - Phone Index with Address.
- Contact Information (Alt +I) - Address Directory with Notes.
- Birthday List (Alt +B) - Lists birth dates of contacts.
- Anniversary List (Alt +A) - Lists anniversaries of contacts.
- Mailing Labels (Alt +M) - Labels on standard forms.

Click on **Print**, for a menu of printing formats to select from.

Birthday/Anniversary Lists: If you select any of these options, you can either request a list for a specific month or for the full year separated month wise.

Mailing Labels

Labels are printed on standard label stationery or on regular fan-fold sheets or on plain sheets. There are a variety of label forms in the market, you must select the one that best matches your form.

Two types of labels are supported:

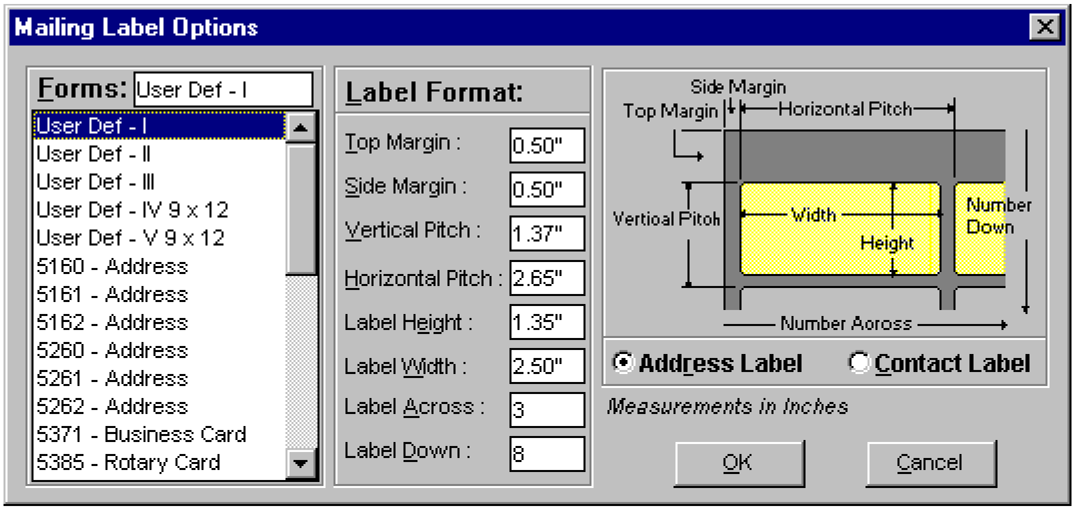
Address Label prints labels with Name, Title, Company and Address -- the way you will want labels printed, most of the time;

Contact Label provides you a convenient way to print a compact address book with as many as 44 contacts per page (4-across, 11-down) on a Letter or A4 paper.

There is a selection of pre-defined labels: 5xxx series, US standard and L7xxx series, European standard. DMP 4603 and DMP 16LBL for the Dot Matrix. DMP 4603 prints labels on Dot Matrix printer with Page Size of 11.5" (Fanfold), while DMP 16LBL prints 16 labels per page on Page Size of 9"x12" (Fanfold) stationery.

There is a provision for five user defined labels, the layout of which can be set to match specific label/envelope stationery. However, users may also change settings of standard labels and assign them new descriptions in the text box provided above the label list.

The mailing label dialog displays a diagram showing various label parameters to facilitate label setting by the user.


Mailing Label Options
Forms: User Def - I
User Def - I
User Def - II
User Def - III
User Def - IV 9 x 12
User Def - V 9 x 12
5160 - Address
5161 - Address
5162 - Address
5260 - Address
5261 - Address
5262 - Address
5371 - Business Card
5385 - Rotary Card
Label Format:
Top Margin : 0.50"
Side Margin : 0.50"
Vertical Pitch : 1.37"
Horizontal Pitch : 2.65"
Label Height : 1.35"
Label Width : 2.50"
Label Across : 3
Label Down : 8
Side Margin
Top Margin
Horizontal Pitch
Vertical Pitch
Width
Height
Number Down
Number Across
Address Label
Contact Label
Measurements in Inches
OK
Cancel

Phone Dialing a Contact

To dial the person displayed on Contact Page (highlighted in the Index), click on **Phone**.

You can choose where to dial by clicking on the option button for Business, Home or Other. If there are multiple phone numbers, you may edit them in the dialog to select the one to dial. Alphabetic dial codes such as 800-CALL-ABC are automatically converted to numbers.

Dial is the request for dialing, when the phone rings pickup the hand-set and click on Cancel to talk.

You can use the dial facility provided you have a phone line connected to your system through a modem. The modem should be configured for right Dialer Settings in Customize.

Schedule adds an entry to the Phone List to dial the contact at a specific time on a given date.

When you enter an international (long distance) phone number in the address book, use + sign before the number. This is an indication to the dialer to add the "international dial prefix" before dialing the number. The international dial prefix should be defined in the Dialer option of Customize menu.

Searching and Selecting Contacts

You can search for contacts in the current Address Book by matching search text in Name, Company, Address, Mail (Internet & Corporate) and Notes. (American address format will also support search on City, State, and Zip.) Besides locating a target contact, search can also select contacts matching a given search criterion. For example, if you are making a business trip to FRANKFURT, you can search for contacts where FRANKFURT appears in the address and print them. Click on **Search** to pop-up the specification dialog to select the field for searching.

You can select the field to search, by clicking the option buttons. Once the search is complete, all contacts matching the search specification are selected for further processing.

Search works like the Find command in Word Processors -- you can look for a character, word or a group of characters in the Address Book fields. For example, if you search for STEVENS in Name, all contacts with this word in name will appear in the Index.

As another example, let's say you have come across a magazine article on Old Belgium Coins, which you want to send to your contacts who are Coin Collectors. Now, if you have hobbies of your contacts stored in notes, you can simply select them by searching for Coin Collection. The selected contacts can then be processed further for Mail Merging or Label Printing.

Search is not Case Sensitive, which simply means you don't have to enter the search text in the same capital and small letters as it was spelt while making the entry. For example, whether the search text is entered as FRANKFURT, or frankfurt, or FrankFurt, they all would mean the same.

Number of contacts matching the search are displayed at the bottom of the index, you can now work with the searched contacts.

Selecting Contacts in the Address Book

Search helps you select contacts meeting a specific criterion, but when it comes to selection by individual choice you should use Select. For example, if you have to invite a few business contacts to a party, you will want to look-up their names and decide the selection. As another example, you may want to, occasionally, clean up the list of business contacts to separate a vital few from trivial many. Click on **Select** to switch the Index of the current Address Book to selection mode.

Once you are in the selection mode, you can pick contacts in the Index by just clicking on them (*Keyboard Spacebar*). The selected entries are highlighted in the index. The selection click works like a toggle, to deselect simply click again on the selected entry.

To select a range of consecutive contacts in the index hold down the SHIFT key and press the Down Arrow Key.

Number of selected contacts are displayed at the bottom of the index, you can now work with the selected items.

Working with Searched/Selected Contacts

Once you have selected/searched contact, you can process them in a variety of ways:

Copying Contacts into another Address Book

You can copy (duplicate) selected/searched contacts into another Address Book, without removing them from the original Address Book. Here are a few examples of copying:

> Select contacts from various Address Books to be invited to a party and copy them into Address Book File called INVITE -- one at a time. Later you can use the INVITE Address Book to print mailing labels for invitations.

> You have stored hobbies/interests of contacts stored in Notes. You have a few free passes to a show on a jazz concert and want to invite some of your contacts to the show. You can search for contacts interested in Jazz and copy them into Address Book File called JZSHOW, and later select those you would like to invite.

When you click on Copy the Files Dialog of Address Book appears: you can copy the selected/searched contacts to a new file, or to an Address Book from the directory list.

Extracting Contacts into another Address Book

You can remove selected/searched contacts from the current Address Book and copy (transfer) them into another Address Book. Here are a few examples of extracting:

> During you recent tour to Europe, you added all the new contacts into an Address Book called EUROPE. You can separate them country wise into GERMANY, FRANCE, ITALY, UK etc. by searching them in this Address Book and extracting them.

> Your Address Book for Business Contacts is growing bigger as you add more contacts every day. You can select the contacts that are inactive, dormant or not-so-important and extract them into another Address Book.

When you click on Extract the Files Dialog of Address Book appears: you can extract the selected/searched contacts to a new file, or to an Address Book from the directory list.

Deleting Selected/Searched Contacts

You may want to periodically review your business contacts and weed out unwanted contacts. To do this, select or search the contacts and click on Delete to delete all the selected/searched contacts from the original Address Book.

Exporting Contact Information

You can export selected, or complete, data from the current Address Book into two formats: xBASE compatible (.dbf) and Standard Data Format (.sdf). Refer to Exporting Contact Information.

Selective Printing of Address Book

When you are in the Select/Search Mode, the Print command prints the current selection of contacts only. Note that, Birthday and Anniversary List options are not available in this mode.

Exiting from Select/Search to Regular Mode

Click on Done to exit from select/search sub-menu, and display the original address book.

Copying or Extracting contacts to an existing Address Book will have the effect of Merging the selected contacts with the target Address Book.

Exporting Data from Address Book

You can export data from the Address Book for use in another application or to a file that your word processor can use in Mail-merge. You can mail-merge a letter template with the data exported from the Address Book, to print identical copies of the letter with only the names, addresses and greeting names changing in each copy. You may export all or selected/searched contact addresses.

When you specify the filename to hold the exported addresses, do not use file-extensions, standard defaults are affixed depending on the format selected.

Address Book supports two formats for data export:
xBASE format **.dbf** files -- for use in applications like dBASE, Clipper and FoxPro.
Standard Data Format **.sdf** files -- most other applications would support this format.

SDF is an ASCII text format where fields start and end with double quotation marks, separated by commas. The records (group of fields in contact data) are separated by CR_LF (carriage return and line feed).

SDF data includes field names as the first record. The list of fields and the sequence in which they are written to the target file is as below:

- Mr/Ms + Name
- Title (Designation)
- Company (Business Name)
- Address Lines
- Greeting Name
- Fax Number

If you are using AmiPro, specify the file type as Comma delimited for Mail-merge.

Using SDF file for Mail-merge with Word for Windows (v6.0 and v7.0)

1. Create your Form Letter using WORD for Windows.
2. Select Mail-merge from Tools menu.
3. In step 1. From Main Document choose Create/Form Letters.
4. In step 2. From Data Source choose Get Data/Open Data Source.
5. Enter/Select the filename containing your exported addresses.
6. Locate the cursor in form letter where you want to insert a mail-merge field.
7. Choose Insert Merge Field from the ruler.
8. Select mail-merge field name in the dialog box.
9. Repeat this for the fields you want to merge into your letter.
10. Select Mail-merge from Tools menu again and select Merge.

Using SDF file for Mail-merge with WordPerfect for Windows

1. Choose File/New.
2. Choose Tools/Merge to display the Merge dialog box.
3. Select/Enter filename with the letter as Primary File.
4. Select/Enter filename with exported addresses as Secondary File.
5. Select ASCII Delimited Text (DOS) and specify the following:
Field Delimiters Begin as double quote (").
Field Delimiters End as double quote and comma (",).
Record Delimiters End select the LF after CR.
6. Choose OK to create a new document with merged letters.

Birthdays and Anniversaries

At the start of day, you have the option to scan all the Address Books to display Birthdays and Anniversaries for the current date and the next day.The Birthday/Anniversary List displays the Name, Company and Address Book Name where the contact details are stored. The Address Book Name will help you reach the Contact Page for Phone and Address information to convey your greetings.

Today's list is to make sure you greet your contacts in time, while Tomorrow's list will give you the time to prepare yourself to greet them by way of a gift or a party.

Click on **Print** for a printed list of the dialog displayed above.

To switch off the Birthday and Anniversary check on start-up, you can disable this in the *Parameters* setting of *Customize*.

Layout of the Planner

Time Planner is the backbone of Executive Time Management.   While other sections help you arrive at priority based scheduling, it is   here that you plan your work-day. When you include items in your diary, be liberal with the use of notes -- this will help clarify the goal and purpose of the schedule.

Avoid two common mistakes: don't overschedule yourself, and try not to work on a task longer than you planned.

The Calendar

When you select the Planner, the current month calendar is displayed with Events, Holidays and Key Diary Items for each day. Today's date is highlighted with a square cursor around the date box. The AM/PM indicator in the right hand corner shows if you have any appointment in the morning (AM), afternoon (PM) or both.

To browse through the planner click on the appropriate Month and Year buttons. To move to a particular date in the planner, simply click on the box for that date.

Keyboard Controls:	Arrow Keys:	Move backward/forward by DAYS.
	PgUp/Dn:	Move backward/forward by MONTHS.
	Ctrl+PgUp/Dn	Move backward/forward by

JANUARY 1997

Sun	Mon	Tue	Wed	Thu	Fri	Sat
			1 New Year Day	2	3	4
5 PM	6 AM	7	8	9	10 PM	11
12	13	14	15 PM	16 PM	17	18 PM
19 PM	20	21	22	23 AM Retrn fm Hanov	24	25
26	27	28	29	30 AM	31	

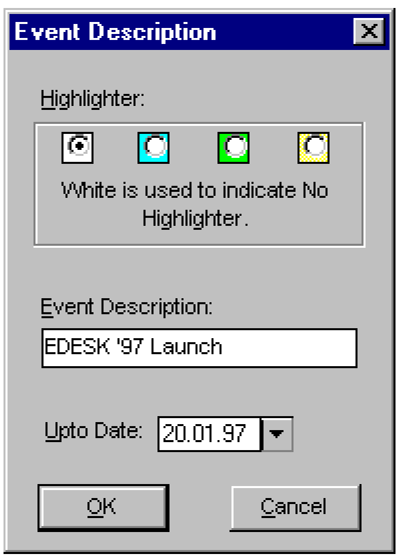
Setting Holidays and Events

You can set holidays in the Planner, in addition to weekly-offs like Saturday and Sunday. To set a holiday, click on the date once followed by a click on **H.Day**. The holiday dates and holiday description are displayed in red in the date box.

To change the holiday description, repeat the process for setting a holiday and change the text in the dialog. To cancel a holiday, set the description as blank.

Setting Events

Events are important dates for Travel, Board Meeting, Seminar, Exhibitions. You need to remember them as they signify important events in your job and in your life. To set an event, click on the date once followed by a click on **Events**.



You can define events for a range of dates. For example, you can flag an event "Foreign Tour" and set it from Feb 1, 97 to Feb 7, 97. In addition, you can set a Highlighter for this event in the Planner to enhance visibility of such time-periods.

There are four shades of highlighting: White, Blue, Green and Yellow. You can assign shades for various categories of events. For example, Blue for Tours, Green for Seminars/Training Sessions and Yellow for Vacations.

To define Recurring Holidays/Events, which repeat every year, simply prefix an asterisk (*) to the description.

Searching Appointments in the Planner

The monthly schedule displayed by the planner shows only one key diary item for each day.

If you have to look for a specific entry in the diary, you can search the diary pages right from the planner itself by clicking on **Search**.

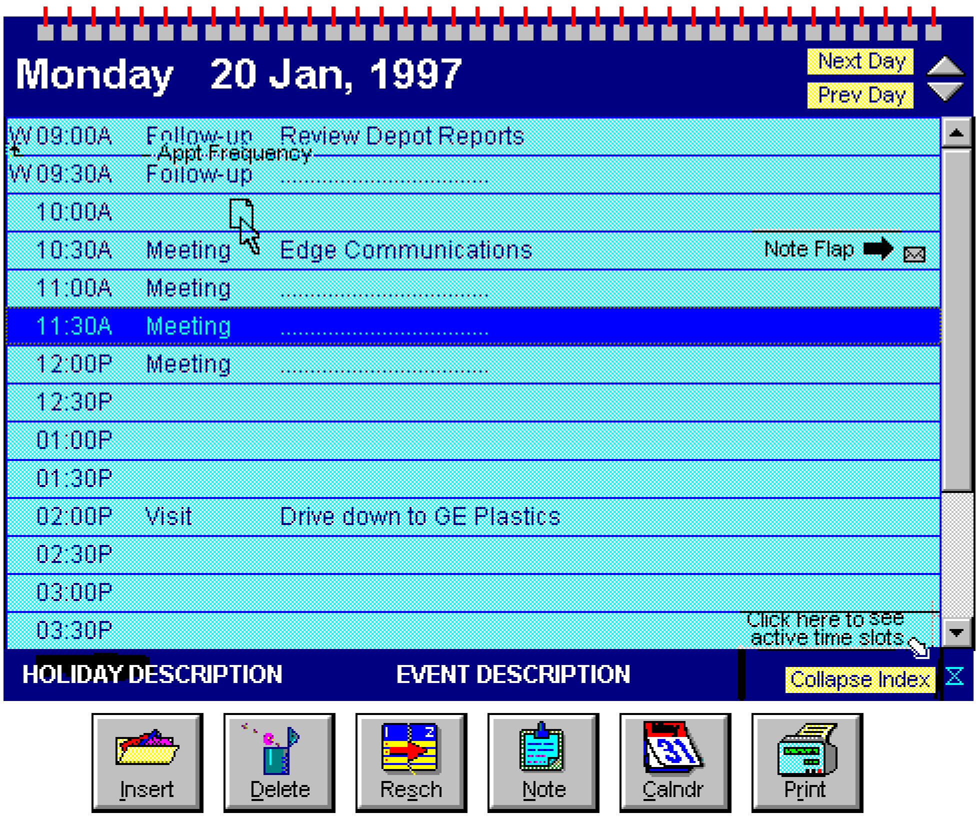
The search begins from the current date in the planner and displays all diary items (non-recurring) where search text matches the description. You can zoom into the diary page where the searched appointment is located by selecting it in the list.

You can set the "date to search from", by browsing the planner and making this the current date in the planner.

Layout of the Diary

Zooming into the Diary

The Planner shows the monthly schedule at a glance, but your work day is best shown in the diary pages. To zoom into a diary page double click on the specific date in the Planner or click on **Diary**. When in the diary, to zoom out to the calendar, click on **Calendar**.



You move into a diary page, either by zooming in from the planner or through the search list. Take a moment to understand the diary page. It shows the following:

> Day and Date on top left.
> Page Flip Arrow Keys on top right.
> Your complete work day broken down into time-slots.
- Recurrence Flag (frequency)
- Time Slot
- Category
- Description
- Note Mark
> Holiday Description at bottom left
> Event Description at bottom right.

The Page Flip Arrow Keys are used to browse through the diary, while the collapse/expand toggle switch at the right-hand bottom is used to select the display mode: all diary slots or active slots.

You can customize the diary page by changing the following parameters in Time Planner option of Customize:

Resolution : Time interval between two appointments 15, 30 or 60 minutes.
Begin/End Day : Start and Finish time for a work day.

When an appointment occupies multiple slots in the diary the first slot contains the appointment description and the other slots that are blocked are filled with dots to reserve these slots.

While it is good to maintain appointment history, it is necessary to purge the diary items to keep it lean and fast. The system has a built-in check to periodically purge the entries. You can set the number of days for which the appointment history should be uncleared, when you customize the diary pages.

The word Appointment has been used to generally refer to an entry scheduled in the diary pages.

Managing Appointments

To work on a time-slot in the Diary, you must first highlight it by clicking on it -- the time slot in the diary is now selected.

To Add an appointment, click on **Insert** (Keyboard ENTER).
To Amend an appointment, **double click** on it (Keyboard ENTER).
To Remove an appointment, click on **Delete.**

Take a moment to understand the appointment settings:

Time Upto
You can define an appointment for a time range, say 9:30 to 11:30, which will occupy multiple slots in the diary. The starting time is shown in the dialog header and Time Upto is the ending time.

Appointment Category
You can classify the appointment into pre-defined categories such as: Meeting, Visit, Letter, Personal, Seminar, Lunch, Dinner etc.

Appointment Frequency and Upto Date
For recurring (repeated) appointments set the frequency to repeat the appointment at pre-defined intervals. Such appointments are flagged with an alphabet to the left of the time-slot, indicating the frequency as: Daily, Weekly, Bi-Weekly, Monthly, Mth 1Wk, Mth 2Wk...Quarterly, Yearly (Annual). You can set end-date for such recurring appointments after which they will stop repeating in the diary/planner.

Appointment Type
This takes two values selected with option buttons: Key or Regular. Key appointment is your single most important diary item for the day.It is displayed in the Planner along with Events and Holidays. You can flag any appointment as a key item while inserting or amending it in the diary.

If you define multiple key appointments for a day, only the last one flagged as key is stored.

Notes on Appointments

When you schedule an entry in the Diary pages, it is with a purpose. You want to make sure that this purpose is served, by listing out things to discuss or preparation needed for the appointment/activity. This can be done by making a note on the appointment, such notes are indicated by an envelope mark in the diary page.

Click on **Notes**, to pop-up the NotePad attached to the appointment. NotePad provides text editing features to manage the notes.

Scheduled Program Launch

This is done by setting the appointment category to PROGRAM, which allows you to launch a program from EDESK at a scheduled time by including the program path + program name as description. For example, to activate your fax program at 4:00pm, define an appointment at this time as below:

```
4:00    PROGRAM    C:\WINDOWS\FAXDIR\FAXPRG.EXE
```

In the above example, C:\WINDOWS\FAXDIR is the program directory and FAXPRG.EXE is the program name.

Recurring Appointments

Recurring appointments are defined by setting the Appointment Frequency and Upto Date. You can repeat an entry in the diary at specified time intervals (frequency) and upto a given date (upto) starting from the day you define the appointment. Recurring appointments help you to:

- define a standard format for your work-day
- set reminders for recurring appointments or tasks

Here are a few examples of recurring appointments:
- Every Monday at 10:30 meeting with Sales Team.
- Every month on 28th payment of insurance premia.
- Every Last Friday Community Meeting
- Annual dates for filing tax returns.

Recurring appointments carry an alphabetic flag, to the left of the time-slot, which indicates the frequency of recurrence as: Daily,Weekly, Bi-Weekly, Monthly, Mth 1Wk, Mth 2Wk...Quarterly, Yearly (Annual).

Appointment frequency settings such as Mth 1st Wk, Mth 2nd Wk... Mth Last Wk, allow you to specify appointment recurrence for a given day for nth week of the month. Using these you can set appointments such as 3rd Monday of the Month, Last Friday of the Month, etc -- the "day" is the one on which the planner is set (focused).

You can also attach notes to recurring appointments.You can override a recurring appointment by simply making another entry in the diary for the same time-slot.

Appointment Reminder

Amidst all the meetings and tasks, it is not uncommon for an Executive to forget when the next item on the schedule is due. Appointment Reminder tracks your schedule in the Diary and pops up on the screen to alert you five minutes before the schedule.

SNOOZE defers the reminder by two minutes, so that you can continue with the task on hand. Repeated Snooze will eventually time out (automatically deactivate) the current reminder and set itself for the next schedule in the diary. Clear treats the reminder as accepted and will not repeat it again for the current schedule.

The Appointment Reminder is timed by the system clock, therefore, it is necessary that the computer clock shows correct time.

This Reminder is active even when you are in another application, if EDESK is running in the background or is minimized.Reminders sound an alarm when they PopUp, the sound can be disabled by selecting the Alarm Disable option in Customize section.

To sound the alarm EDESK requires either the Sound Card or the PC Speaker drivers to be properly installed under Windows.

Rescheduling Appointments

This feature allows you to shift a diary entry to another date or time. For instance, you may want to shift your appointment with the Advertising Agency from 4:30pm to next day at 11:30am.

Rescheduling an appointment to another time-slot for the same day is as easy as dragging and dropping it into a new time-slot.

To reschedule to another date, highlight it and click on **Resch**, a dialog box will appear to request new date and time.

To pop-up a calendar for date selection, click on the arrow in the date box. Once you select the date to which you want to reschedule the selected appointment, the appointment schedule for that day is displayed in the List Box for you to select a new time-slot, which is unoccupied. If you attempt to reschedule an appointment into a time-slot that cannot fit the appointment, the system will flash a warning and disregard the request.

Appointments cannot be rescheduled to a past date, i.e. date prior to today's date. However, appointments of past date can be rescheduled to the current date or a future date.

Printing Schedules and Planner

Time Planner offers two print formats: Monthly Planner and the Appointment List. Click on **Print** to open the dialog for format selection.

Month Planner

This is your monthly planner in print. It will come handy to schedule your major appointments/events, when you are away on a visit or a tour and do not have an access to your computer system.You can browse the planner to display the month for which you want the planner printed.

You can print the planner either in the landscape or portrait orientation. The planner shows all the Holidays, Events and Appointments for the day as many as available in the space.

Appointment List

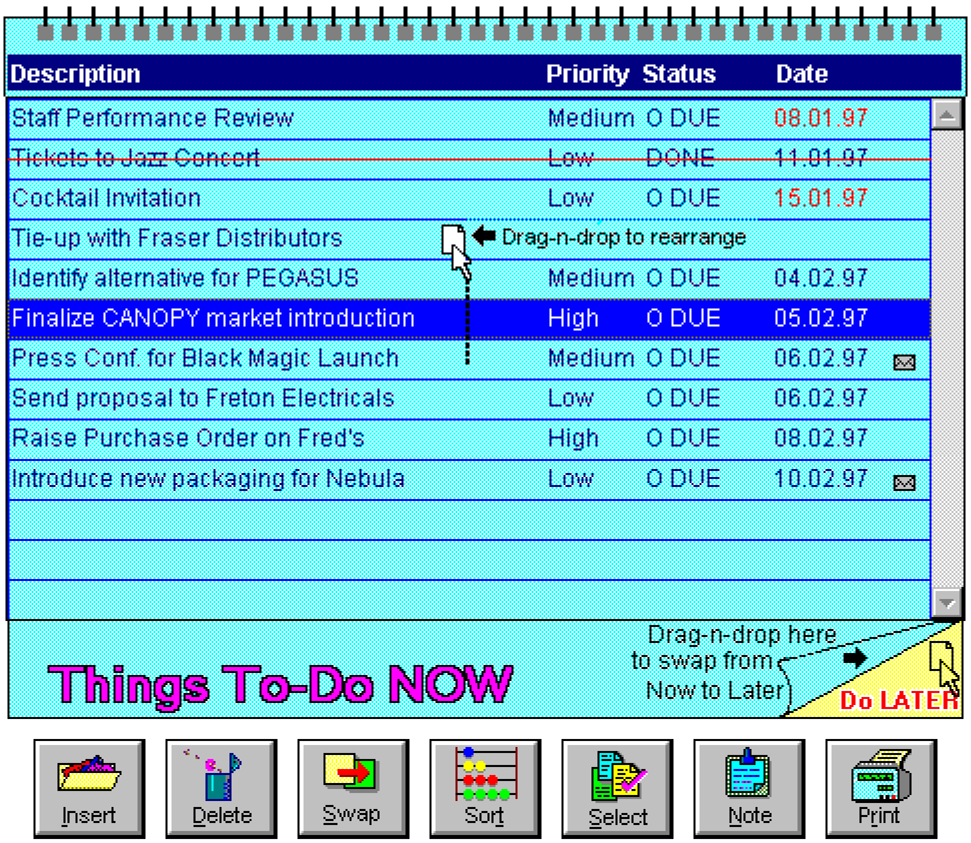
These are your diary pages in print, for a range of dates. You can click on the arrow in the date box to select from and to dates for the range. The date range facility is particularly useful if you have to carry your pre-arranged schedule when you go on a tour.

Working with the To-Do Lists

Perhaps things may not be done even if they get on the To-Do list. But once they get there, the chances are better. To-Do list is driven by priorities and due dates, with status to track the progress.

The best way to tackle a To-Do list is in the order of priority, with respect to the deadline. You must work on one item at a time, and keep at it until you complete it -- then enjoy your prerogative of striking it off the list.

There are two types of TO-DO lists. One is the list of tasks you should attend to immediately (may be in the next 7 days) -- we call this the DO NOW list. The other is a list of tasks that are at the back of your mind, but would be handled at a later date -- we call this the DO LATER list.



After the tasks in the DO List are completed, they can be dropped into the Archival List, so that you can have a complete history of accomplished tasks for reference later.

Managing the Tasks in the List

By classifying tasks as NOW and LATER, your approach towards handling your work becomes more focused. When you select this section, the first list displayed is the NOW list -- because you will be working with it most of the time. You can switch between NOW and LATER list by simply clicking on list-flip area at the bottom right (Keyboard F3).

Before you add a task to the list, ask yourself these questions:

- Is it necessary to give it my personal attention?
  Whether it should get into your To-Do list at all.
- Can it be delegated and monitored?
  Whether it can go into a follow-up list.
- How is it positioned against my goals and priorities?
  What priority it should be assigned.
- What is the time-frame to do it?
  What is the right date for completion.

To Add a new task to the list, click on **Insert**. New tasks are added to the bottom of the list. To **Amend** a task, double click on the entry in the list (*Keyboard ENTER*). To Remove a task from the list, click on **Delete**.

Take a moment to understand the task dialog box.

Priority: Priority levels indicate the relative importance of a task. They can be set as High, Medium or Low. The priority level setting is a matter of individual choice.

Status: Status indicators can be defined by the user while adding or amending a task. Here you can add a status indicator by double clicking on <<New>> (*Keyboard Spacebar*).

Notes: The task description describes your task in brief. This can be followed by details written in the NotePad attached to the task. There is no limit to the size of these notes, however, ideal size should not exceed four to five lines barring exceptional cases (which should not become the rule). Notes are indicated by an envelope mark in the list.

A click on **Notes** will pop-up the NotePad attached to the task.

Tracking Tasks in the List

As you execute tasks, and as time passes, the status of the tasks will change: from Waiting to Active, Hold to Delayed, Urgent to Overdue, depending on your status settings.

Status signifies task progress with respect to time, typical values are:

WAITING	To be started
ACTIVE	Scheduled/Being attended to
HOLD	Keep it pending
DELAYED	Behind Schedule
DONE	Completed

Status indicator DONE has a special meaning, it will strike off the task in the list.

Some users may find it appropriate to use status to indicate departments or persons responsible for accomplishing the task.

It is common to find a few overdue tasks in a To-Do list -- this could be due to simply slipping on your schedule, or a deliberate attempt to keep them pending. This would require readjustment of due-dates to accommodate changing priorities. Status coupled with due-dates can convey task progress more meaningfully. For instance: Status as HOLD and Due Date indicating Overdue, or Status as DELAYD and Due Date showing a future date.

Priorities will change as you tackle the tasks in To-Do list. Priorities not only reflect the importance of your task with respect to your short-term and long-term goals, but also with respect to time.

Right timing is essential to be effective -- for example, a mailer with a message “buy before budget and beat the price hike” will be pointless after the budget. As another example, a Low Priority task on HOLD may become URGENT High Priority task.

Moving Tasks between NOW & LATER

Tasks that are in the LATER list, may be required in the NOW list after some time. Similarly, tasks in the NOW list may be shifted to the LATER list due to changes in your priorities.

You can swap (move) tasks from one list to another, by dragging the task and dropping it on the right bottom flap of the list. Clicking on **Swap** button has the same effect of swapping the task from one list to the other.

At times, one is so preoccupied with the NOW list, that the LATER list is completely ignored for days together. To remind you of the tasks in the LATER list, they are automatically swapped into NOW list when they fall due in the next 7 days from the current date.

The LATER list signifies tasks that are not due in the time frame of next 7 days. Thus swapping an item from NOW to LATER list, forces a due date that is minimum 14 days from the current date.

Rearranging the Task List

It is a common practice to rearrange the task lists periodically, to reflect the changing priorities. One way is to move a task from the current position into a new position in the list. A simpler way, of course, is to arrange the list in the order of Priority, Due-Dates or Status by sorting the list.

Rearranging by Drag-n-Drop
To shift (move) a task, simply drag it from its current position and drop it on its new position. The selected task will be repositioned by reshuffling the entire task list.

Rearranging by Sort
Sorting is a simpler way of arranging the task lists. To do this, click on Sort to choose the sort order by clicking on the option buttons followed by a click on OK.

Sort on Due-date implies that tasks should be arranged by Priority level for a given Due-date, and sort on Priority implies that the tasks should be arranged by Due-dates within a Priority level.

Moving To-Do Items into Follow-Up

ToDo items are your tasks, while Follow-up items are tasks you assign (delegate) to others and monitor their progress. Once your part of a (ToDo) task is done, you may want to assign the follow-up to another person. To do this, **drag-n-drop the ToDo task on the Follow-up icon**. This will pop-up a list box to select the follow-up category to assign this task and delete the task from the ToDo list.

CTRL+drag-n-drop will strike-off the task from the ToDo list and then move it to the Follow-up.

Selective View

Your To-Do list may have many tasks, but when you are tackling the list you should selectively focus on few tasks that deserve your attention. These could be tasks with high priority, or tasks due till today, or tasks with status as PENDING. This will help you focus on *right things*, which is the fundamental technique for Working Smarter.

For a selective view of task list, click on **Select**, this will display the dialog for options.

You can select on *Status, Due Date, Priority or a combination*, by clicking on the option buttons followed by a specific selection criterion. The option buttons are toggle switches, you can disable an option by re-clicking on it.

Once in the selective display, you can only view Notes or Print the list of selected tasks. Selective lists will help you to focus on high-priority tasks and on those that are critical from the view point of committed dead-lines. Click on **Undo** to revert to the original list.

Printing Task Lists

The **Print** command prints information from the current To-Do List on display. Thus if you want selective printing, you must first use the Select command.

Ideally, you should print the To-Do lists at the end of a working day, for use on the next day. Some of you may prefer to do this first thing in the morning before the start of a working day. During the day, you should make remarks and jot down action taken on the task. This will enable you to understand the effort made on each task in view of the task priority, importance and dead-line.

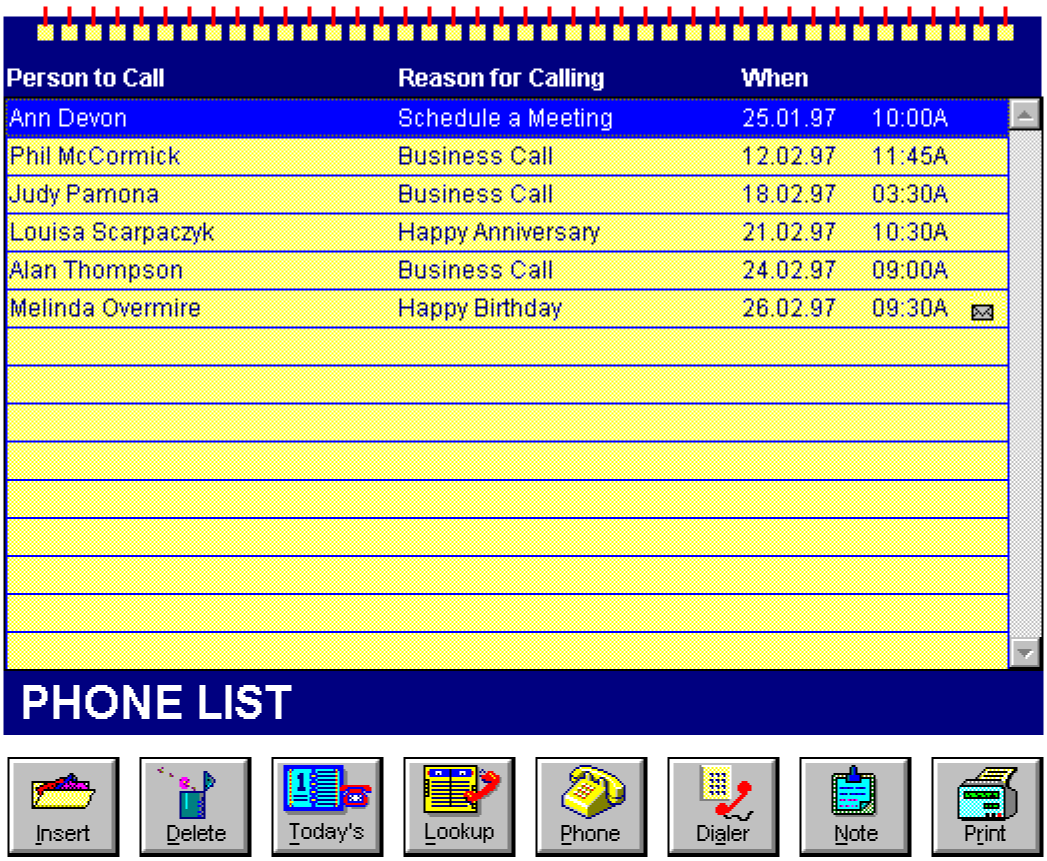
To print the list, click on **Print**. The printer management dialog will appear, after you specify all the options.

Working with the Phone List

Telephone interruptions can hamper your productivity like nothing else, yet you cannot conduct business without it. Handling incoming calls is a matter of your style and job function -- call screening and quiet hours won't work for everyone alike. But outgoing calls are certainly within your control.

Make a habit of planning each phone call -- where and when should you reach a person to make the right impact. Every phone call should accomplish something and get a definite response. Make a brief note of what you want to say or ask, so that the purpose of the call is clear in your mind. This will not only save you time, but will also make your communication concise, clear and friendly.

Use the phone for what you have to say and not a word besides.



Managing the Phone List

Before you schedule a phone call ask yourself:

Do I really want to talk to the person?
Can it be handled as best, or better, by someone else?

This will tell you whether it should enter your list at all.

Insert adds an entry to the phone list. To call a contact in your Address Book, use the Address Book Link (described later).

Take a moment to understand the phone list dialog.

WHO (*Person To Call*): Name of the person you want to call.

WHERE (*Phone Number*): Phone Number of the person to call.

WHEN (*Date & Time*): Find out when you will be able to speak to the other party and schedule your call for that time. This is also useful when you promise to call someone at a pre-appointed time. If there is no specific time to call, just leave it blank.

WHY (*Reason for Calling*): Enter this in the text box or click on the arrow to drop down a list of standard reasons for calling. To add new reason, double click on <<New>> (*Keyboard Spacebar*).

WHAT (*Notes*): What exactly you want to discuss or accomplish. Store this in the NotePad attached to the Phone entry, this helps you get to the point and end a phone call quickly. Notes are indicated by an envelope mark in the list.

To view calls scheduled for the current date, click on ***Today's****; to revert to full list click on* ***Calls*** *(this is a toggle button)*.

Address Book Link

To schedule a phone call to a contact in the Address Book, **Lookup** link allows you to import the Person's Name and Phone Numbers.

To link up the information in the phone list:

Select the **Address Book File**.
Select the **Person To Call**.
Specify **Where To Call**(Office, Home or Other).

Once you select the contact, the name and phone number are transferred into the list, all you have to do is assign the reason and set the date of call.

Dialing Phones in the List

The phone list shows all entries in the list. To view calls for the current date, click on **Today's**, this is a toggle button -- it will now switch to **Calls**, the command to revert to full list. To call a person in the list, click on Phone this will display the phone number:

Where entries are linked to the Address Book, this dialog displays Address Book name, Company and Title along with the number.

You can dial directly from your computer system, provided you have the phone line connected through a Modem. To use this facility, the modem should be configured for right Dialer Settings.

After you give the **Dial** command, listen to the modem speaker. *When you hear the ring from other phone, click on **Clear** to hang-up the modem and connect the phone line to your hand set for talk*. Clear command strikes-off the phone entry in the list and automatically files this into the Archival List. **Ok** will exit you from the dialog, back to the list.

Long Distance and International Dialing

If the number you dial is more than 7 digits and the area code is not same as the area code in the Dialer Setup, the dialer assumes it to be a Long Distance call and adds Long Distance prefix.

The international dial prefix (IDP) is used with phone numbers that have a + sign prefixed. For example, if the number is +44 23 4056262, it will add the IDP in place of the + sign.

Extension Dialing

The Phone Dialer supports direct extension dialing, where the called party's PBX system supports such call transfers.

The EDESK dialer allows you to include hook flash dial modifier, which the modem recognizes as a signal to sense the dial tone from the dialed PBX for further dialing the extension number.

To include the extension number the phone number should be constructed as : <Phone #>**!**<Extn #>.

The hook (**!**) will hang up the modem for 1/2 second and dial the extension after the dial tone is received.

Phone Reminder

For every entry in the list, a reminder flashes on the screen at the scheduled time of call. The Phone Reminder is active even when you are in another application, provided the EDESK is running in the background or is minimized.

If the phone reminder is an interruption on your current activity you can put it on Hold, this will defer the call until the next scheduled time (default five minutes later). This facility is also useful to reschedule the call when you cannot get through the number, or to the person.

Dial is the request for dialing, when the phone rings pick up the hand-set and click on Clear to talk.

Notes allow you to view key items to discuss and note down points discussed during the call, which you can paste into a To-Do or a Follow-Up list later.

Phone Reminder will not pop-up for calls not scheduled for a specific time. Such numbers can be dialed using the Phone command -- refer to Dialing Phones in the List.

Notes on Phone Calls

A click on **Notes**, will open the NotePad attached to a phone entry. Notes are used in the main section and in Phone Reminder.

When you decide to call up a person, it is with an objective. You want to make sure that your conversation is conclusive. To do this make a list of things you want to discuss. During the phone conversation, you can use the NotePad to jot down points discussed -- this may trigger off a task To-Do or a Follow-up. The cut-n-paste feature of the NotePad will help you transfer these notes into appropriate section.

Phone Dialer

Dialer provides quick memory dialing, simply enter the number and click on Dial.

Dialer Operation
MEM (ALT+M) Memory list of Phone #s
LG DIST (ALT+G) Long Distance Dial Codes
DIAL (ALT+D) Dial the phone
CLEAR (ALT+L) Clear the current Phone #
CANCEL (ALT+C) Exit Dialer

Long Distance Calls
If you are making a Long Distance Call, click on LG DIST and select the destination from the list. You can maintain this list to remove destinations which are not of interest to you and include new destination codes. Prefix International Codes with + sign.

Memory Dialing
You can store frequently dialed numbers in memory and select from an alphabetic list. To list phone numbers in memory, click on Mem, and the following dialog is displayed:

To select the number, click on the entry in the list followed by OK. Insert will add new numbers to memory list and Delete will remove them from the list. To Amend, double click on the entry in the list.

Printing Phone List

There are two formats for Phone List:

Without Notes: prints phone list with the name of person, reason for calling, and date/time of the call. This is typically a list for the phone operator, who can dial the numbers as scheduled.

With Notes: prints phone list as above with notes. This is the right selection, if you want the list handy for yourself with notes for discussion, or for your secretary who can convey the message in the notes to the other party.

If you want to print the list for current date, click on Today's before printing the list.

To print the list click on **Print** and the printer management dialog will appear.

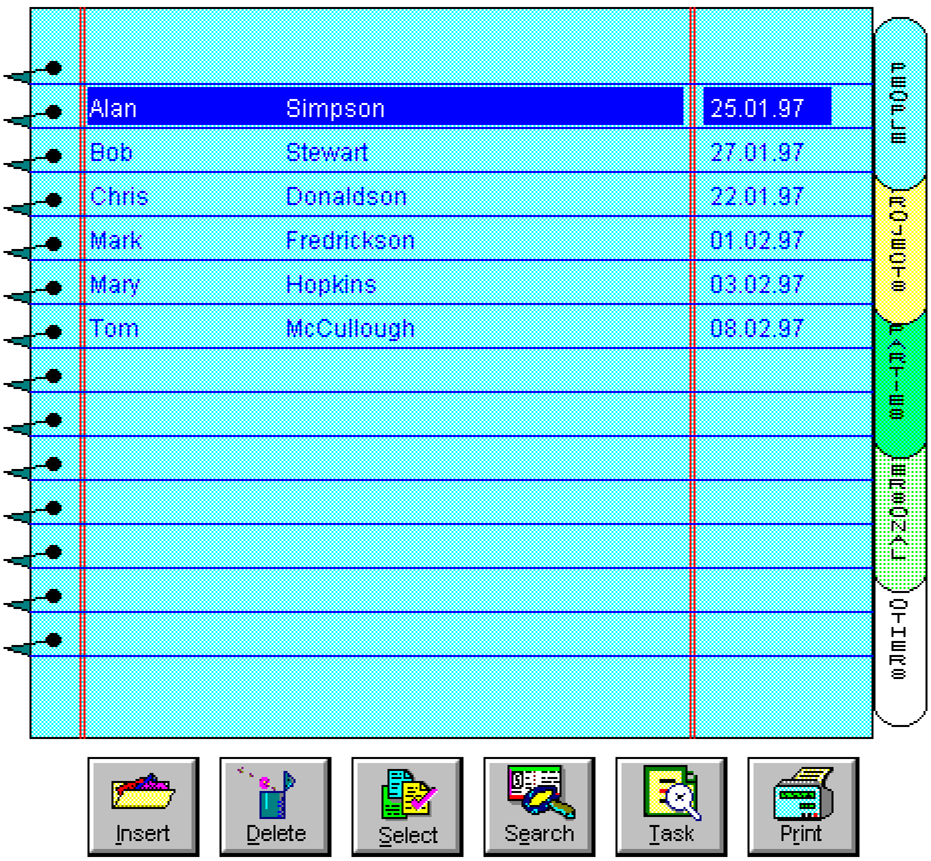
Working with the Follow-Up List

Management is all about getting work done through others and in time. Whether it is a delegated task under your watchful control, or supervision of a project team, or interaction with outsiders -- without timely follow-up it could eat into your productive time and give you sleepless nights.

Follow-up will organize you because you can now:

> Direct the projects methodically.
> Track projects by people to whom tasks are assigned.
> Provide periodic inputs rather than by frequent interruptions.
> Provide continuity on discussions.
> Set time-frame and check progress.
> Account for glitches and slips before they are out of control.

If you are going to be responsible for a task that someone else is carrying out, the least you can do is follow-up and be in control.



Managing the Follow-up List

The follow-up items are organized into a dossier with category wise alphabetic follow-up list (like a table of contents). These tasks and notes are driven by Due-Dates, which highlight overdue items in the list. Follow-ups are classified into five categories, the Index-Tab to the right of the dossier is used to select a category.

Take a moment to study the categories:

People: These are persons you work with -- seniors, peers and juniors -- those you interact with frequently. In this category list, you should enter the name of the person to follow-up. You simply add Tasks to each person and jot down the points on the NotePad, now imagine the effortless continuity to follow it up by simply displaying the Task List and digging into the NotePad for details.

Projects: These are major tasks, further broken down into activities or tasks, that you lead or manage. Since these tasks are carried out by a team rather than a single person, you should enter the description of the project in this category to follow-up. The project tasks can be further assigned (linked) to people in the earlier category. Project category can also be used for recording Minutes of Meetings, which can be followed-up to completion or compliance.

Parties: These are outsiders (persons/companies) you deal with: customers, suppliers, advertising agents etc. Very often you have ongoing discussions with them -- it could be for: an assignment, a policy matter, a shipment -- where commitments are made by one party to the other. Experience will tell you that these commitments tend to get ignored, unless you follow-up on them in time.

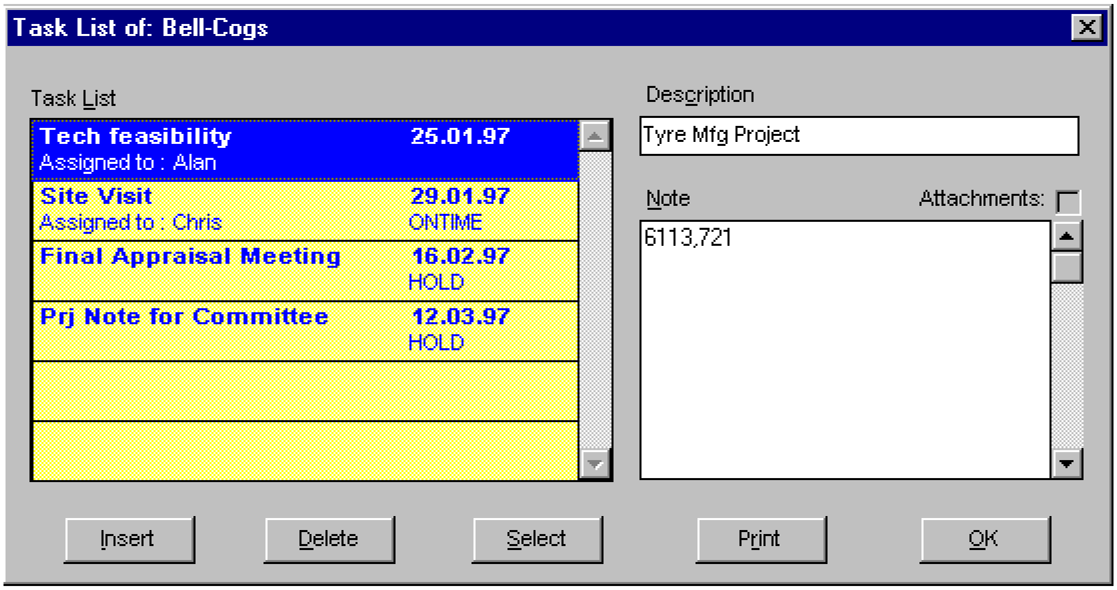
Personal: These are follow-ups of personal nature, not related to your office chores. Items like Car Insurance Details, Driving License Renewal, ATM Codes and Holiday Bookings will figure in this category. As another example, your health record (Blood Sugar, Cholesterol Level, Blood Pressure) is required when you go for your next check-up -- this could be the place to keep it.

Other: These are items that do not fit into any of the above categories. They are ideas, information, rate charts, relevant statistics etc. Ideas occur to you at the times you least expect, they are lost into oblivion unless written down -- file them here. You may even store Postal Rates, Industry Statistics and other items of your interest, so that they are available for quick reference.

To select a category, click on the Index-Tab (*Keyboard: CTRL+PgDn/PgUp*). Insert adds a new item to the current category in alphabetic order. Delete removes the item, while double clicking on the item allows you to amend it (*Keyboard ENTER*).

Managing People & Projects Follow-up

Follow-up categories for People and Project hold list of tasks (like the ToDo List) for each group item (Person or Project) in the category list. Unlike the ToDo list, however, these are the tasks delegated under your supervision and you have to keep track of their progress and ensure that they are done right and on schedule.



Each task has a Follow-up Date and Status. The follow-up date for group item is that of the earliest follow-up task. The Status field takes values of status defined in the ToDo list because the task tracking here is in no way different from that of the ToDo list.

You can attach notes to the tasks, the note is saved as it is entered, the OK button returns you to the main follow-up list. Besides notes, you can attach any no of files typically, Text File, Word Processor Files, Spreadsheet, Database and Compressed Files relevant to that Follow-up.

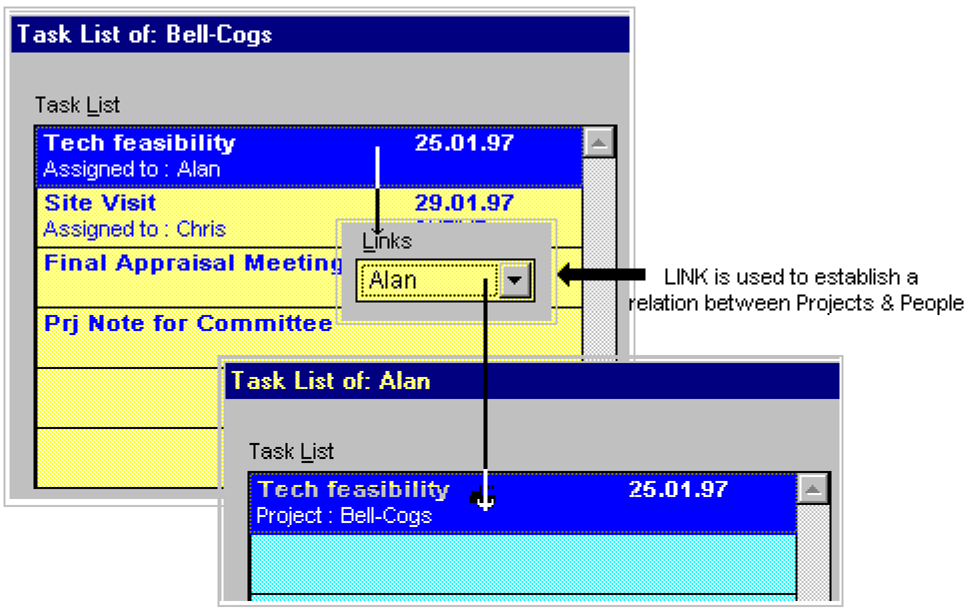
Linking People and Project Follow-ups

The categories of People and Projects have an unique relation, they can be linked.

For example, a project may be broken down into tasks which are assigned to multiple people. Also, a person could be working on multiple projects, simultaneously.

When you follow-up on a project, you are following-up tasks handled by various people for that project. Similarly, when you follow-up on a person you are following up tasks handled by that person for various projects.

To avoid duplication of tasks in People and Projects, EDESK allows you to link a task from Project to People and vice versa. Thus a single task will appear in both the categories as linked.



Rescheduling or deleting a linked task affects both the linked categories. Where tasks do not require linking, specify the link as <None>.

Selective View in Follow-up

The task list for a given People or Project follow-up may have many tasks, but when you are tackling the list you may want to selectively focus on few tasks that deserve your attention.

For example, when you are following up a person, you may want to focus on tasks due till to-day, and/or tasks with status as PENDING and/or tasks for a given project.

For a selective view of task list, click on **Select** for options, while in the task list.

You can select on **Status, Due Date, Link,** or a combination, by clicking on the option buttons to specify the selection criteria.

The option buttons are toggle switches, you can disable an option by re-clicking on it. In the selective display, you can only view Notes or Print the list of selected tasks.

To revert to the original list, click on **Undo**.

Managing Note-based Follow-ups

Other than People and Projects, the follow-ups are in the form of a note attached to each item. Take a moment to understand the settings in the follow-up dialog.

Next Follow-up Date: It is not necessarily a deadline, it could be a self-imposed date to act as a reminder. This date is used to highlight overdue items, and to select items for display in DayView.

NotePad: This is where you record notes, discussions and comments. Use it just like a post-it pad -- you can cut and paste notes from it into other sections of Executive Desk or into another Windows application.

Attach: This is where you can attach files of any type, viz. Text Files, Word Processing Files, Spreadsheet, Database and Compressed Files relevant to that follow up. Thus making it easy for you to have all the information at a single point.

There will be no follow up dates for items that do not contain notes.

On Line Follow-up Action

While most busy executives would prefer to print the follow-up notes for action, proponents of paper-less office (we are growing in number every day) will choose an on-line follow-up. To do this, simply click on **Notes** or **Tasks** and the highlighted item in the current category will be at your finger-tips for review.

Work on the attached notes, as you would on your scratch pad, during the follow-up. When you complete the follow-up, clean up the note to save only what is relevant and important -- focus on the right things -- vital few not trivial many. And do not forget to set the date for next follow-up -- be realistic in measuring effort and time requirements. To display calendar for date setting, click on the arrow in date box.

Searching a Follow-up Item

Using Search, you can locate a follow-up item in the current category. Besides using this facility to find a target follow-up item, you can use it to select items matching a given search criterion.

The search uses the following criteria to locate items:

> People and Project categories are searched by Task Descriptions
> Parties, Personal and Other categories are searched by Notes

Once the search is complete, items matching the search specification are displayed in the list. To revert to the original list click on **Undo**. You can print searched items and view notes on them.

Search works like the Find command in Word Processors -- you can look for a character, word or a group of characters in the Notes. For example, if you search for BELGIUM, all items with this word in Note/Task Description will be displayed in the list.

Search is not Case Sensitive, which simply means you do not have to enter the search text in the same capital and small letters as spelt while making the entry.

Printing Follow-ups

There are two formats for Follow-up printing:

> Task List for items in People and Project categories
> Notes for items in Parties, Personal and Other categories

The format of the Task List is similar to the ToDo list, but in this case it also shows the links, if any. The Notes format for other categories of follow-ups are printed one per item.

The follow-ups are printed one at-a-time unless you use the Select or Search option to print a group of selected/searched items.

Click on **Print**, to print the highlighted item in the list.

Selective Printing

For selective printing, you first have to **Select** or **Search** items to be printed. The search option is explained earlier.

For all categories of follow-up, you can switch the follow-up list to selection mode by clicking on Select. Once you are in the selection mode, you can pick items in the list by just clicking on them (*Keyboard Spacebar*). The selected entries are highlighted in the index. The selection click works like a toggle, to deselect simply click again on the selected entry.

To print selected/searched items there are two printing options:

One-a-page: prints each item on a fresh page, particularly useful if you want to send it as a memo.

For People and Project categories, you can click on Tasks to display the task list and then click on **Print**.

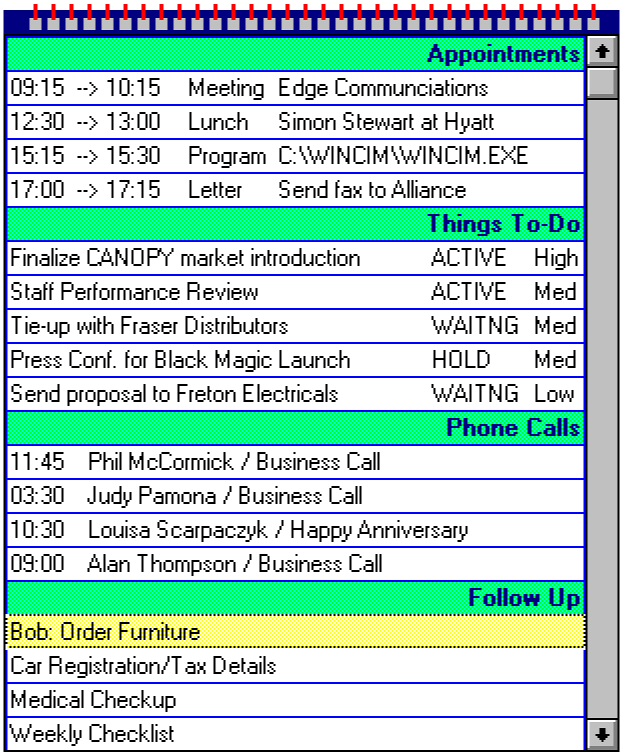
Multiple-per-page: uses paper more economically and is ideal when your follow-up notes are short and crisp.

People and Project categories have selection option to filter the task list. Refer to section on Selective View described earlier.

After selection, click on **Print** to do just that. The printer management dialog will appear, after you specify the format.

The Schedule List

This integrates all the schedules for the day into a single list.



Apart from the schedule for the current day, it includes all the incomplete schedules of the earlier days for ToDo, F/Up and Phone Calls, except for appointments since they are for a fixed date and time.

When you view the Notes, by clicking on the item in the list, the note pad displays:

Status and Due Date for To-Do Tasks.
Phone # and Reason for Phone List.
Due Date and Links for Follow-Up Items.

The NotePad here works in a unique way as it does not have an OK confirmation to save the note. If you make any change it is saved automatically, when you move to another item in the list.

Displaying DayView for a given date

To view the schedule for another day, click on the date in the calendar. Use the navigation keys (arrows) at the bottom of the calendar to display the required month and year and then click on the day to view the schedule for that day.

Schedule List for dates other than Today shows only the schedules and tasks due for that day, unlike the list for the current date which also shows carried forward (incomplete) items from the ToDo List, Follow-Up List and Phone List.

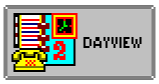
Click on center button at the bottom of the calendar to switch to Today's Date.

Note that the event highlighters are shown in the calendar.

Working with the DayView

Start your day by viewing your schedule. Make sure that your work-load is balanced -- not overscheduled or underscheduled.

Rescheduling helps you to balance the work-load so that you have a realistic and achievable schedule for the day. DayView is the most powerful feature of EDESK where you can Add, Archive, Reschedule and Convert your schedules from a single screen.



A. Adding items to the Schedule List in DayView

You can add items to the schedule list without going to the respective sections. The list uses green category-title bars to separate different schedule types. To add an item to a given category, double-click on the respective category title bar.

B. Converting One Schedule type to Another

You can convert one schedule type to another by dragging and dropping it on the category Title Bar of another schedule or on the right hand icon Tool Bar.

For instance, you have completed an appointment and want to follow it up at a later date, you can drag-n-drop the appointment on the Title Bar of Follow-up.

ToDo items are the tasks you are supposed to do yourself, while Follow-up items are tasks you assign (delegate) to others and monitor their progress.

Once your part of a (ToDo) task is done, you may want to assign the follow-up to another person. You can do this by dragging the ToDo task and dropping it on the Follow-up title-bar in the Schedule List, this will remove the ToDo task and add it to the required Follow-up category.

If you want the completed ToDo task to appear in the list with a strike-out, use CTRL+drag-n-drop. This will add the ToDo task to the Archival List, besides changing it into a Follow-up.

Similarly, on occasions, you may have to intervene and handle a Follow-up yourself -- a situation to convert a Follow-Up into a ToDo task. To do this drag the Follow-up task and drop it on the ToDo title-bar, this will add it to the ToDo category. Using CTRL+drag-n-drop will strike-out the Follow-up and add it to the ToDo task list as well as the Archival List.

C. Archiving items from DayView

You can drag-n-drop done items into Archival on the right-hand Tool Bar, this will delete the completed tasks from the schedule list after they are archived. Some users may want to flag the items as done, such users can use CTRL+Drag-n-Drop. This archives the task and shows a strike-out on the item description indicating that it is done.

D. Rescheduling items in DayView

You can reschedule any item from the DayView to another date by dragging the item from the list and dropping it into the given date on the calendar. Normally, the calendar is displayed for the current month, but you can use the navigation keys (arrow buttons) to move forward/backward in the calendar. Rescheduling means moving the scheduled item from the current due date to another date.

You cannot reschedule items to past dates. Drag-n-drop of an appointment to the current date will allow you to assign a fresh time-slot to it.

You can reschedule a group of items from the same category by first selecting them in the list using SHIFT+ Click, except for Appointments.

You can copy the schedule to another date and flag the current item as done. This is done by CTRL+drag-n-drop. This will copy the item to another date, flag the current item as done and also archive it.

E. Searching the Address Book

You can search for contacts in Address Book by dragging and dropping an item from DayView list on the Address Book icon on the right hand Tool Bar. This will pop-up a dialog box for you to specify your search criteria (searches on Name and Company Name). You can search in a specific or all Address Books.

The searched contacts are displayed in a list, click on View to see the contact information. You can highlight and copy the selected information to the clipboard by clicking on the Clipboard button.

F. Composing Mail Messages

To compose a mail message, drag-n-drop your schedules, tasks, delegation lists from the DayView list on the Mail Centre icon on the right hand Tool Bar. A dialog box pops up for you to select the recipient from the Address Book, select the profile, compose a message. You can add a note and attach files of any type. The composed message is saved in the OutBox for you to send at a convenient time.

G. Transferring DayView items to E-Dockets

You can exchange follow-ups, feedbacks, memos with your peers and subordinates by selecting the items from the schedule list and dragging and dropping them onto the E-Dockets icon on the right hand Tool Bar.

To know the current E-Docket, place the cursor on the E-Docket icon on the right hand Tool Bar.

H. Straight Dialing to a Phone List Item

The Phone Calls items for the day will pop-up a reminder to dial at the scheduled time unless the time has lapsed. The same is true for carry forward Phone Calls from the previous day.

To straight dial, simply drag-n-drop it on the Dialer button in the DayView Tools.

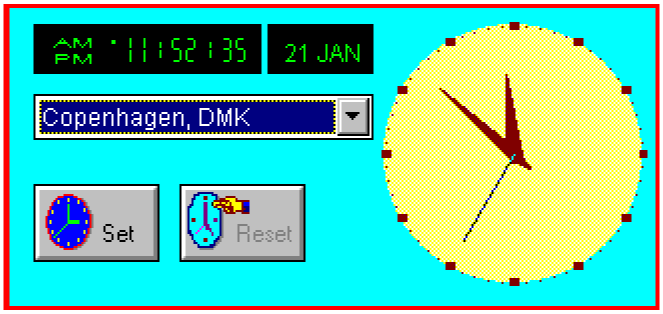
I. Multiple Selections in DayView

You can select multiple schedules/tasks in DayView for drag-n-drop into the Calendar for rescheduling or the Archival List. Use the SHIFT+ Mouse Click to select multiple items in the DayView list and then use the drag-n-drop or CTRL+drag-n-drop into the Calendar to reschedule them for another date or drop them into the Archival List icon.

World Time

It displays the local time (from the system clock) and corresponding time at four international locations of your choice. You can view time at over 175 locations covering major cities and time zones across the globe. The world clock automatically adjusts time for daylight savings.

If you change the local city, that appears in the centre of the screen, the time display at the other four locations change automatically with reference to the local city and time.



You can set the four international locations, around the local clock, by selecting the city/time-zone. Click on the arrow of the drop down list box to display an alphabetical list of locations.

To select Time Display as AM/PM or 24-Hr, set the Time Format through the Control Panel in Windows.

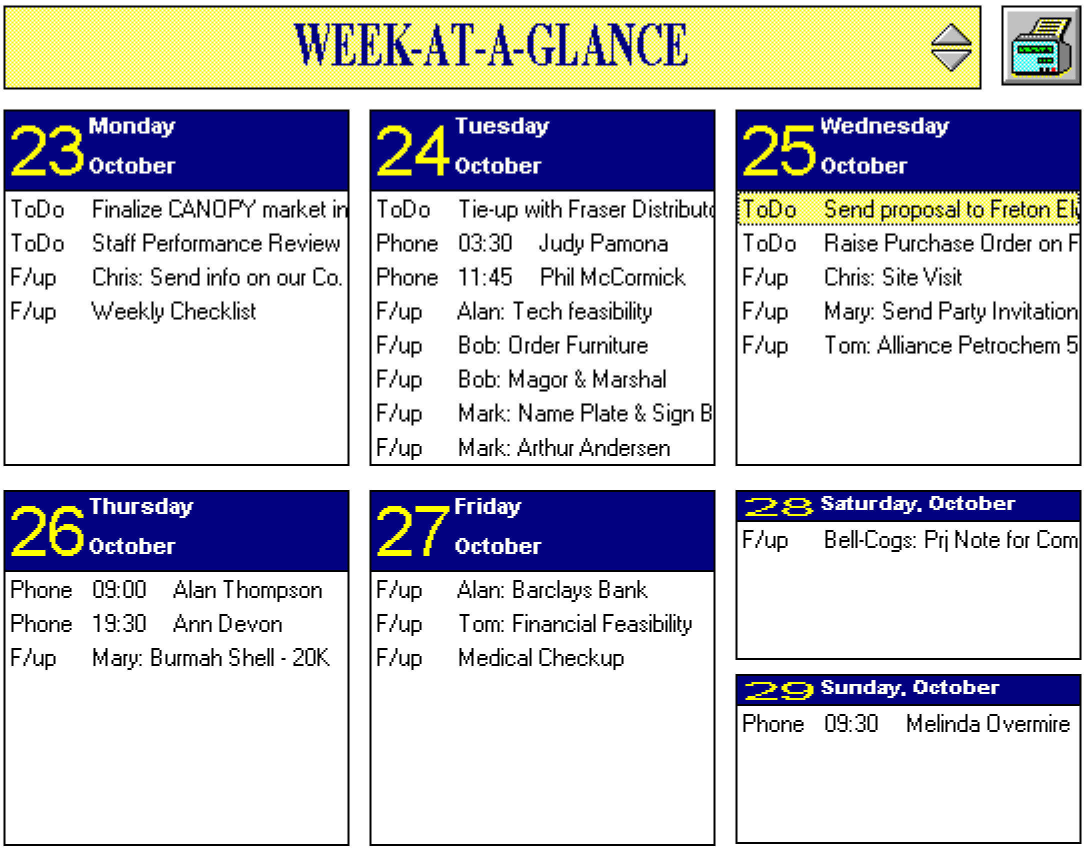
To view time at other locations for a specific local time you can temporarily **Set** local clock for the new time. **Reset** will revert to the system time.

Day-light savings are automatically adjusted on the last monday of October and last monday of March.

Week View

While the DayView shows your schedule for the day, if you click on the WeekView button, you will see your complete schedule for the week. You can browse next/previous week by clicking on the respective arrow buttons.

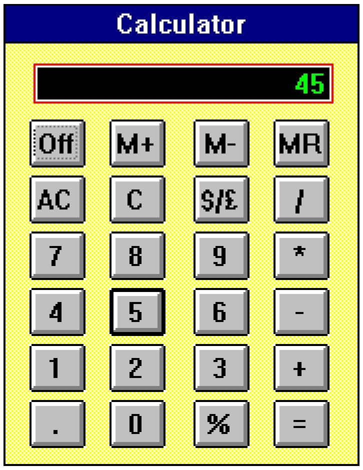
WeekView combines all the scheduled items for the week to display them on a single screen -- it automatically carries forward incomplete/unattended schedules to the current date. The events and holidays marked for the days are also shown in blue and red respectively.



To view/record notes on any schedule, just double click on it.

Weekly schedule is printed in a single page format by clicking on the **Print** button.

Calculator with Currency Converter

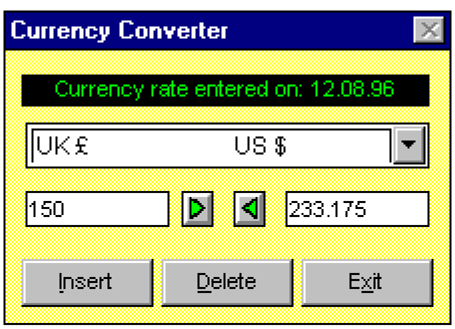


A handy calculator is an indispensable tool. This one is a simple model with percentage and memory functions.

Keyboard Commands:

ALT & + Add to Memory (M+)
ALT & - Subtract from Mem (M-)
ALT & M Recall Memory (MR)
ALT & C Clear Earlier (C)
ALT & A All Clear (AC)

Click on the [$/£] button, to activate the currency converter, which converts most of the international currencies. You must, however, change the conversion factors for the latest rates.



Converting Currencies

Click on the arrow to drop down the conversion list, select the required currency pair for conversion by clicking in the list. The boxes with arrow buttons are value boxes that represent the currency units highlighted above them. Enter the number (amount) to be converted in the appropriate box and click on the arrow indicating the direction of the conversion, the converted value is then displayed in the other box. (*Keyboard: ALT+F Forward, ALT+B Reverse*).

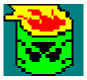
Adding and Amending Conversions

To amend a conversion factor, or to add a new combination of the conversion factor, click on Insert.

Select the two currencies and enter the new rate, if an earlier conversion for the same currency combination exists, then it is replaced with the new rate and the system date.

Currency Converter stores the date on which the currency factor (rate) was inserted/amended.

Trash Bin



Schedules can be deleted by dragging and dropping them into the Trash Bin. To select multiple items use SHIFT + Mouse Click. When you click on the Trash Bin the following dialog box will pop-up.

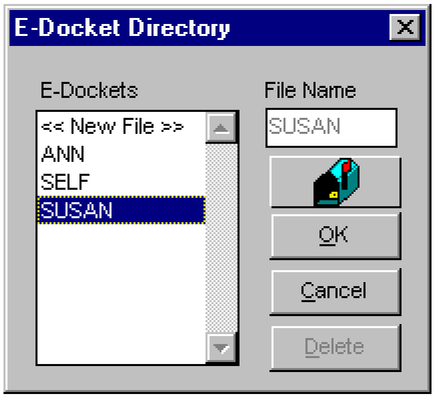
You can delete either All Done Items or the Current Done Item by clicking on one of the option buttons.

Net Browse

You can now go surfing on the net through the DayView or the Address Book module of EDESK. Ideally, you can store the WEB site addresses and HTML file references in the notes section of any module. You can highlight a WWW address and click on Net Browse to begin surfing in the World-Wide-Web, without leaving EDESK. This will pop up a dialog box prompting you for the path of the browser you wish to activate and then hook onto your favourite WEB Browser.

Creating /Selecting an E-Docket

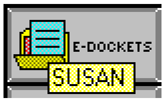
Click on E-Docket icon in the Tool Bar -- this will open a dialog similar to File dialog of the Address Book.



Double-click on <<New>> to create a new docket (name is max 7 letters). The new docket is then displayed in DayView format. You can create as many dockets as required, but at a time only one docket is active (selected) to receive the data.

To establish a standard, we recommend the following nomenclature for naming the E-Dockets: SSS-RRR, where SSS are the initials of the sender and RRR those of the recipient. For example, when Adam Taylor sends it to Julia Pratt it will be AT-JP and other way around it would be JP-AT.

Moving Information into an E-Docket



Click on E-Docket icon to select a docket from the list -- this will make it current. Moving cursor over the E-Docket icon will confirm the name of the current docket. Now switch to DayView or go to respective lists such as Diary, ToDo, Follow-Up or Phone Calls and drag-n-drop these entries on the E-Docket icon on the Tool Bar.

To select multiple items from DayView to drag-n-drop use SHIFT+Click.

Sending/Transferring an E-Docket

If you are sending this E-Docket via Mail Centre all you have to do is click on the E-Docket icon, pick the docket from the list and drag-n-drop it on the Mail Box icon in the dialog box. If you are not using the Mail Centre, you can use XBRIDGE to export this E-Docket to a floppy and send it to the recipient, who can use XBRIDGE to import this into his EDESK.

Receiving and Using an Incoming E- Docket

Each E-Docket is stored as two files in the EDESK directory, if the name of the docket is SUSAN the two files will be _SUSAN.DFT and _SUSAN.DXT. When you receive an E-Docket, these are the two files you receive -- either via Mail as attachments or simply copied on a floppy. First save these attachments (or copy the files) into your EDESK directory. Now if you click on the E-Docket icon on the Tool Bar, this docket will appear in the list. Select it in the list and click on OK to open this docket and display the contents in the DayView format.

The incoming E-Docket may have fresh task assignments, request for information, scheduled meetings, phone calls received while you were out, follow-up information on delegated tasks, feed-back on tasks and more.

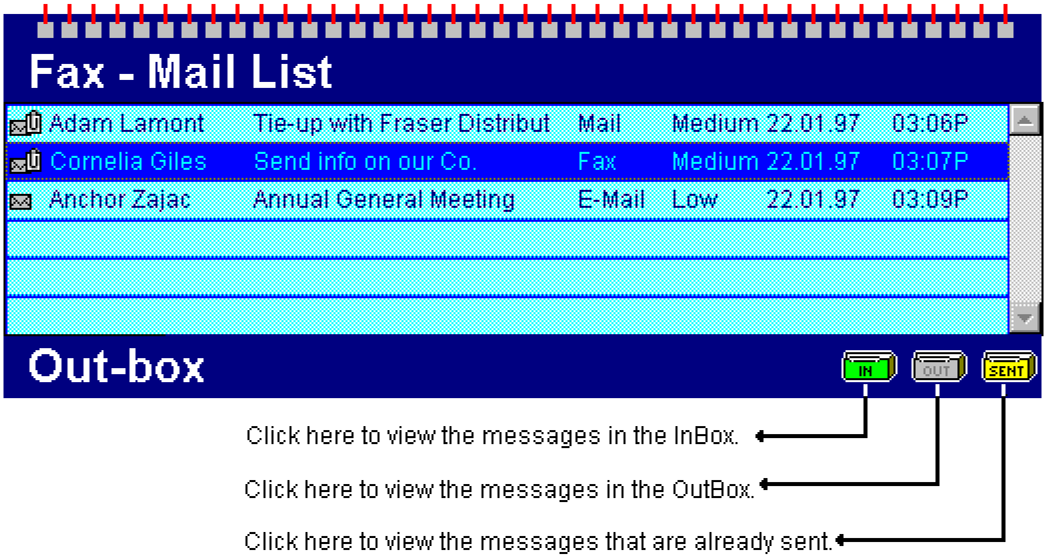
You can now drag-n-drop (move) entries from this incoming E-Docket on your schedules lists such as Time Planner (Diary), ToDo List, Follow-up Dossier or Phone Call list, so that they now become a part of your schedule/tasks. Entries moved using drag-n-drop are removed from the E-Docket automatically. However, if you want to retain the original entries in the E-Docket, you should use CTRL+drag-n-drop, which works like a copy command.

You cannot edit entries in an in-coming docket, they should first be moved into your schedule/task lists, where you can work on them and later put them back into an outgoing E-Docket.

Clearing an E-Docket

As you drag-n-drop (move) entries from an E-Docket (usually an incoming one) into your schedule/task lists they are deleted from the E-Docket, you can also delete them by dragging-n-dropping them on the Trash Bin. To select multiple items for deletion using SHIFT+Click, but remember you cannot select a group of entries for deletion from different schedule categories at a time.

Getting started with Mail Centre



Mail Centre uses the Post Office of Mail application, it is imperative that you have Mail setup on your Windows. Please ensure that you have the right profiles setup to process various types of mail-messages. Refer to the topic Checklist for MS-Mail/Exchange Users.

Mail Centre is compatible with Mail applications that support simple MAPI.(Mail Application Program Interface).

Mail Centre has three boxes/trays:

- **In-Box** to hold the incoming mail
- **Out-Box** to hold the mail to be sent
- **Sent-Mail** to hold despatched mail

When you enter the Mail Centre, it first displays the contents of the OutBox in the list. Click on the box icon at the bottom of the list to display its contents.

You can transfer mail from OutBox to SentMail and vice versa by dragging-n-dropping it on the icon of the target box at the bottom of the list.

You can sign-on to your Mail Application automatically when you start EDESK (set the option in Customize/Parameters to do this) or by clicking on the InBox of the Mail Centre. Once you sign-on and connect to mail the Disconnect caption in the menu is enabled.

Once connected, EDESK is ready to send/receive via the Mail application it also keeps track of incoming messages to notify you. The time-interval between mail notifications (in minutes) can be set in Customize/Parameters.

Users on a Corporate Network may prefer to sign-on at start-up to remain connected and get periodic notifications on incoming mail.

To disconnect the Mail, click on Disconnect caption in the Menu.

Off-line and On-line Mode
Two modes in which you may connect to the Mail are: On-line and Off-line.

In the case of Corporate/LAN Mail, on-line mode simply means that you are connected to the Mail

Post Office, while off-line mode means that you are working only with the message files (.MMF for MS-Mail and .PST for MS-Exchange).

In the case of Internet Email, on-line mode means that Mail application should establish the Internet connection using the dial-up networking (if it is not already on), while off-line mode means that you will be working with the message files without actually sending the messages over the Internet or checking/retrieving incoming messages from the Internet.

If you are working in Off-line mode, Mail Centre queues-up your outgoing mail from EDESK into the OutBox of the Mail application, while in the On-line mode messages are delivered to the Post Office or to the Internet Mail server immediately. Further, in the On-line mode, incoming mail is available immediately as received, while in the Off-line mode you can only access what's already lying retrieved in the InBox of the Mail Application.

Workgroup/LAN Mail connections are usually on-line (unless you have copied the message files to another PC where you cannot connect to your Post Office).

However if you connect to Internet directly from your PC, you may wish to work in off-line mode most of the time and once your messages are in place in the out-box, connect in on-line mode to send them -- this will minimize your connect time. You can do this easily by creating two separate profiles (on MS Exchange) one for off-line connection and another for on-line connection.

For FAX connections, the Mail application goes into an off-line mode if the modem does not respond to its initialization.

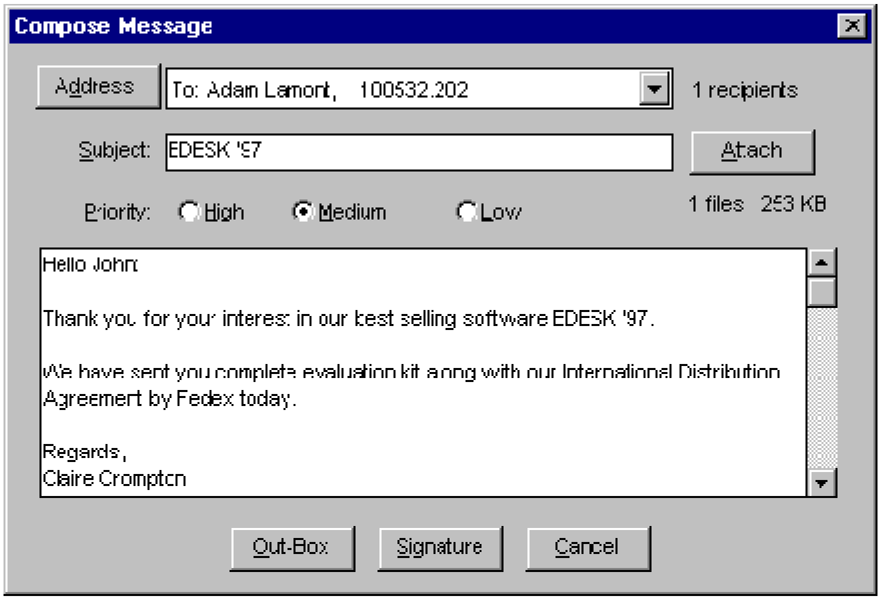
Mail Processing Interface

To process (send/reply/forward) the mail, you have the option to use the EDESK Mail Centre compose dialog or the familiar Mail Application's compose dialog. EDESK compose dialog offers you one great advantage: you can at any time compose and store messages for all types of services in the Mail Centre OutBox, but send only those for the selected profile. However, it is not suited for sending attachments to Internet addressess and it does not support the Rich Text Format.

Using the Mail Application's compose dialog you can compose RTF messages and drag-n-drop attachments into it from the Win '95 Explorer (File Manager on Win 3.1x) for sending to Internet (or Workgroup/LAN) email addresses. To choose this option use the check box in Customize/Parameters.

Messages composed/sent using the Mail Application's compose dialog will not use the OutBox and SentMail box of the Mail Centre.

Composing Mail Messages



To compose a mail message to send click on Compose follow the steps below:

1. Select the Mail Type: Fax or Mail (Corporate/LAN) or Email (Internet).
2. Select the Address Book -- shows only addresses matching the mail-type.
3. Select recipients (To and Cc), pick in the list and click on Copy.
4. Use Delete, if required, to remove recipients from the list.

If using Mail App's compose dialog: (a) Mail Type is one in the Profile;
(b) Recipients can also be selected from Mail Application's address book.

Once the envelope is created click on OK to proceed to write the message.
The message comprises of :
Message Subject: Appears in the message list of the recipient
Message Body: The actual message/note.
Signature: This is your sign off line/para -- setup in Customize/Mail Signature.
Attachments: These are files/data that you want to send to the recipient(s).
Priority: This sets a flag for the message in the recipient's message list.

Composed messages are stored in the OutBox ready to send.
Double click to edit, click on Address to change recipients.

MS-Exchange users should compose FAX message as an RTF attachment.

Composing from DayView and Schedule/Task Lists

You can compose a mail message from the other modules of EDESK such as DayView, ToDo List, Time Planner (Diary) and Phone Calls by dragging the task/schedule and dropping it on the Mail Centre icon in the Tool Bar.

This will create a message with Schedule/Task Description as the Subject and Note as the Message Body.

Sending Mail Messages

Since Mail Centre creates three different types of messages: Fax, Mail and Email, you should have the right profile connection before you send the message.

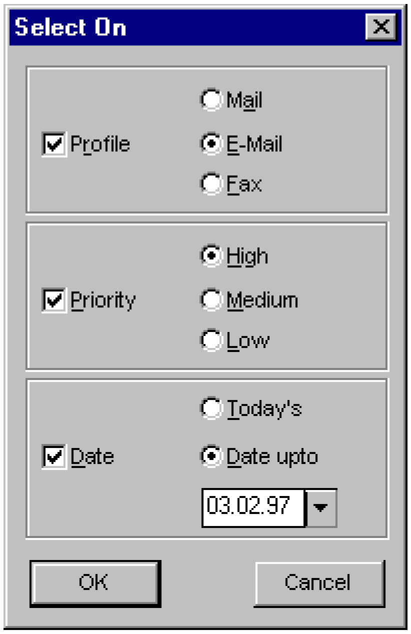
Those on a corporate mail network where Internet and Fax Mail servers won't have to bother because their Mail application will handle this for them.

Those working with stand-alone PCs will have to ensure that they have a proper connection: Modem on-line for Fax, Internet Connection for Email and Post Office (remote) connection for Mail. If you are connected to an incorrect profile, your message will not be delivered.

To send a single message, pick it in the list and click on Send.
If you have all messages of the same type, choose Send All.

Send, sends the message to the OutBox of the Mail application for delivery.
Sent messages are transferred to Sent-Mail box, from where you can drag-n-drop it into the Archival List. If an outbound message delivery fails, or you want to resend a message, you can drag-n-drop it from the Sent Mail box on the OutBox icon at the bottom of the list.

Selecting Messages to View/Send/Delete



Select allows you to filter messages based on: Profile, Priority and Date -- selection works like a toggle.

Selection helps you to work on a group of messages.

Here are a few examples:
> Send all Email messages with High priority.
> Delete all messages prior to a given date.
> View all Mail (LAN) messages received Today.

Incoming Mail Messages

You can click on the InBox icon at the bottom of the list to view incoming messages, this will sign-on to the Mail application, if you have not already done so. If on-line, it will check and retrieve new messages for the selected profile.

Double click on an incoming message in the InBox to view the message. Click on Attach to view attachments -- you can Save attachments or simply double click on them to start the application they belong to. This may, however, not work with Internet Messages which should first be saved.

You can Reply/Forward an incoming message. Replied/Forwarded messages include the original message and are stored in the Mail Centre's OutBox until you send them. However, messages forwarded using Mail Application's compose dialog are sent directly to the OutBox of the mail application.

Mail Centre is geared more towards exchanges of messages to and from EDESK rather than like a Mail application to send large file attachments.

Working with Mail Messages

Mail Centre allows you to drag-n-drop incoming messages into any of the EDESK schedule lists such as Time Planner, ToDo List, Phone List or Follow-up on the Tool Bar.

If you drag-n-drop a message from any mail-box into the Archival List, it is removed from the original list. Using CTRL+drag-n-drop with retain the message in the list, but with a strike-through.

Point to Point Private Electronic Mail cum Fax

To setup a point-to-point Private Email-cum-Fax communication with Mail Centre, at both the ends set-up the profiles/connections as below:

> Fax Profile for MS-Exchange or Fax Mode for MS-Mail
> Fax format: "Editable..." for Exchange and "Email if Possible" for MS-Mail.
It is alright to have Exchange as Mail app at one end and MS-Mail at the other.

Check your Mail program documentation for exact settings.

You are now ready to send Email (even with attachments) or Fax using the Phone Number as the destination as you would while sending a fax.

This is an ideal and inexpensive setup for a small company that wants to setup communication between their two locations to exchange faxes, mail, reports, document files and data files. What's interesting is that it does not require a hot-line or dedicated connection or phones or expensive and sophisticated communication software.

Mail Notification

When you are connected to mail (signed-on) Mail Centre checks the InBox of the Mail Application periodically for unread messages and notifies you with a pop-up display. To switch to the InBox list, click on See Mail.

The time interval in minutes for mail notification (reading new messages to notify you) can be set in Customize/Parameters.

Checklist for Mail Centre

Here is a checklist for users of Microsoft Mail products (MS-Exchange and MS-Mail) to review before using the Mail Centre.

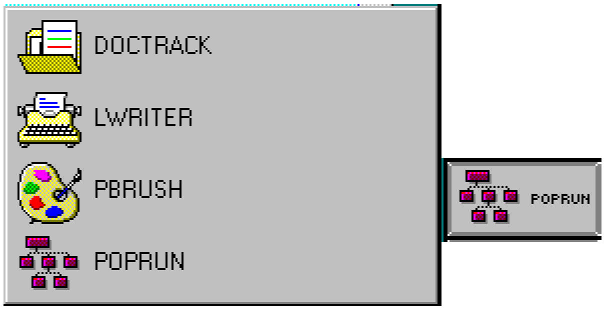
To send/receive messages via Corporate/LAN Mail:
> Check if MS-Mail or MS-Exchange is installed.
> Check if you have an access to the Post Office.
> LAN Mail Administrator or System Manager should provide you the support.

If your WorkGroup/LAN/Corporate Network supports FAX and Internet Email directly via the Fax Servers or Mail Servers there is no need for you to setup separate Fax or Internet connection though a modem on your PC.

To send/receive FAX messages via a modem connected to your machine:
> Setup a FAX profile in MS-Exchange (Microsoft at Work Fax for WFWG).
> Check if your modem works with the FAX profile (in the fax mode).

To send/receive Internet messages via a modem connected to your machine:
> You should have a TCP/IP Internet account with a service provider.
> You should have Dial-Up Networking and TCP/IP connection installed.
> You should have a connection to your Service Provider in Dial-up networking.

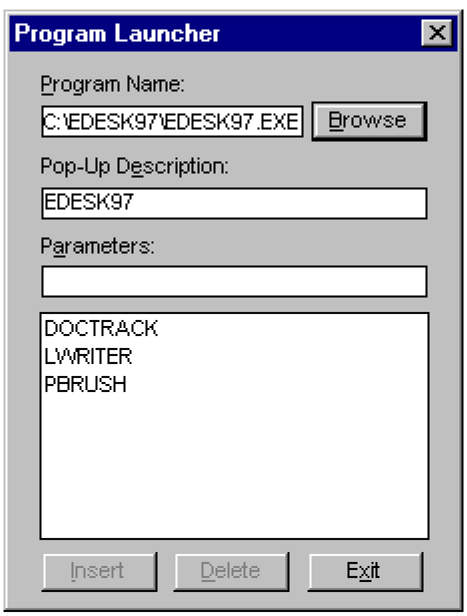
PopRun - The Program Launcher



PopRun is a program launcher which allows you to integrate 12 external application programs and run them without leaving EDESK. When you click on PopRun, it displays the list of applications in the list along with respective icons.

To launch an application click it in the list. Applications thus invoked run concurrently with EDESK as independent program tasks. Closing or exiting from EDESK will not close the launched applications.

To maintain the list of PopRun applications, click on **POPRUN** in the application list. The following dialog box will pop-up.



Adding Applications

1. Select the **path** (**drive and directory**) for the program by clicking on the Browse button.
2. Select the **program file** (EXE, COM, PIF or BAT) from the directory list.
3. The selected application will appear as PopRun Description, you can change the program name to assign another name to the application.
4. Click on Insert to add this program to the application list.

Removing Applications
1. Click on the application, you want to delete, in the list.
2. Click on Delete (there is no delete confirmation).

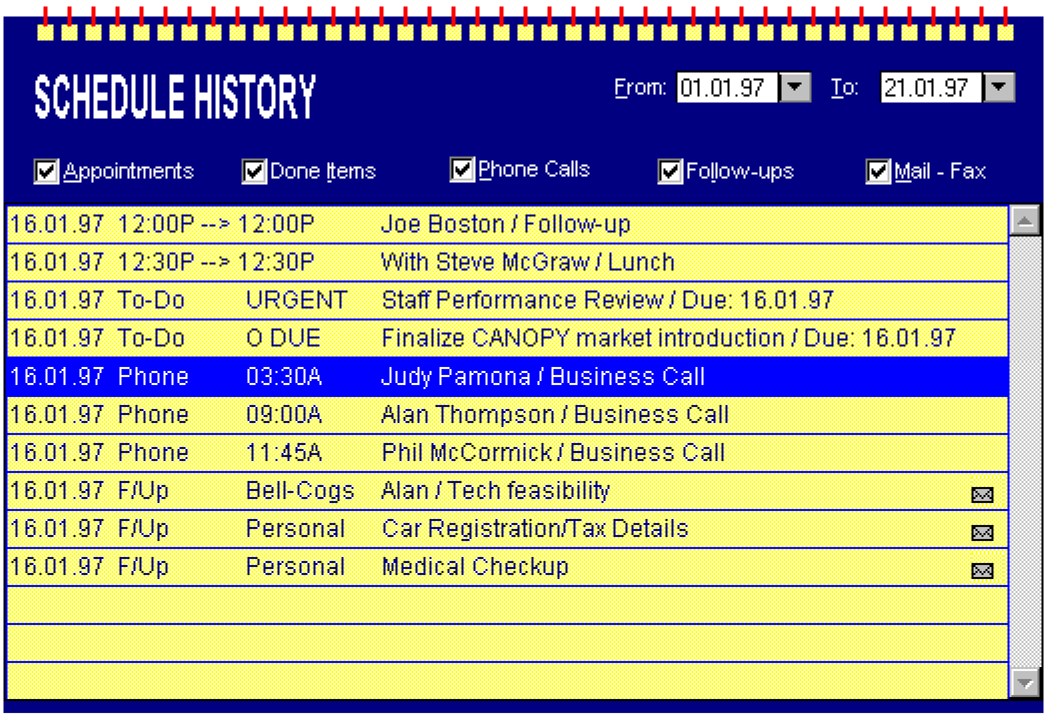
Specifying Application Parameters

If you want to start an application with command line parameters, these can be specified in the Parameters text box.

For example, if you add FAXHEAD.WRI as the parameter with WRITE.EXE, when you click on this application icon in the PopRun List, WRITE will start with opening FAXHEAD.WRI file, which could, as an example, contain your fax message header.

Using the Archival List

Archival List is a complete history of what you did and when -- your appointments, meetings, tasks, phone calls, follow-ups, faxes and mail. Use it as data to analyze your past performance, or to fall back on information about your past activity when you need it.



This Schedule History is particularly useful to business executives, who wish to document their past schedules for management meetings or for appraisal sessions. It can also help you perform various types of analysis. Take an example of tracking follow-up on a prospect, you want to know what interaction you have had with the prospect over the past three months -- simply search on the prospect and the Archival List will pull out items relating to the prospect, which will show the phone calls you made, the meeting you had, the lunches you had, the things you did and more...

Diary Schedules, ToDo Tasks, Follow-Up Tasks, Phone Calls and Mail/Faxes can be archived into this List from the respective section lists.

Archival Modes

There are two ways to archive a completed schedule.

Drag-n-Drop: This files the item into the Archival list and deletes the item from the primary section.

CTRL+Drag-n-Drop: This flags the item as Done/Cleared in the primary section from where it is archived.

Using a particular mode is simply a matter of personal choice. Some people like to see items completed during the day with a strike-out and derive inspiration from viewing their achievements, while others like to keep their lists clean and feel that the strike-out items are a distraction.

You can use the drag-n-drop facility to archive the schedules/tasks either from the respective lists (except for Follow-up) or from the DayView list (including the Follow-up).

Once you have completed a schedule, you can drag-n-drop it into the Archival List icon in the tool bar. This will delete the item from the schedule list. Once archived, the history of past schedules is available in the Archival List for analysis.

Managing the Archival List

Archived schedules are stored for the past one year (+90 days),   items beyond this period are purged automatically. While you can build a massive archival list with every tiny item ready to be recalled at your finger tips, you should endeavour to keep this list trim, manageable and effective (focus again on the vital few than indulge in collecting a mass of trivial many).

Selecting Items to View

The caption (header) of the Archival List has selection for date range and check boxes to select the categories you want to view. You can thus view archived items by category (ToDo, Phone, Follow-Up, Appointment, Mail/Faxes) and for a date range, in other words this filter helps you view only what you want to see.

Notes on Archived Items

Notes attached to the archived items may be changed. This enables you to attach specific comments to the archived notes.

Deleting Items in the List

While every single item of your schedule can be archived for later reference, in practice you must retain only those items in the Archival List which relate to important activities.

You can delete individual items in the list or a group of selected and searched items on display.

Searching Items in List

Search scans the description and displays the items meeting the search criterion, you can revert to the original list by clicking on Undo.

Printing the Archival List

You can get a hard copy printout of the items displayed in the list. For selective printing, you may use the search options.

Creating Data for Timex Data Link

Create an E-Docket named "TIMEX" and make this the "current" E-Docket.
You can see the "current" E-Docket by moving the cursor over the icon on the right hand Tool Bar.

You can drag-n-drop Appointments, Phone List, To-Do and Follow-up items from the DayView or the respective Schedule Lists into the "TIMEX" Docket.
Entries in Phone List scheduled for a specific time are exported as Appointments so that they sound an alarm, while those not scheduled for a specific time are exported as ToDo items. Follow-ups are also exported as ToDo items.

Phone Numbers and Birthday/Anniversaries are generated from the Address Book.
You can create a subset of an Address Book by filtering contacts using select/search.
Ideally the subset thus created should be named "TIMEX" for your convenience.

Exporting Data to Timex Data Link

Click on the Timex button to begin export. A dialog box will pop-up for you to select the data to export.

To export Appointments, PhoneList, To-Do and Follow-ups click on the respective check boxes.
To export Phone/Fax Numbers and Birthdays/Anniversaries, select the Address Book from the drop down list.

Specify the Timex Data Link directory to export the Data.

Using Timex Data Link to Transfer Data into your Watch

Start Timex Data Link software.

1. From the Main Menu screen choose **File/Import**.

2. In the dialog box that appears, select the Timex Data Link database that will receive the data and specify the corresponding CSV file as below:

EDLAPPT.CSV	(Appointments)
EDLTODO.CSV	(ToDo and Follow-Ups)
EDLPHONE.CSV	(Phone Numbers)
EDLANN.CSV	(Anniversaries)

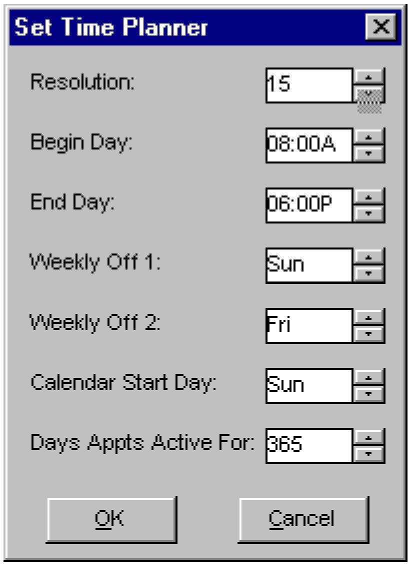
4. Select **Merge** to add the new data to your database or **Replace** to overwrite the existing Timex Data Link database.

5. Click on the **Import** button to proceed.

Note: *Please refer to the Timex Data Link documentation for limitations on the number of entries and the length of descriptions/names that can be imported.*

Setting up the Time Planner

You can customize the Diary Page of the Time Planner using the following options:



To select the parameter to customize, click on the option button.

Resolution: is the time interval between two appointments -- it can be set at 15, 30 or 60 minutes.

Begin Day and End Days: Define the start and end time for a work day in the diary pages.

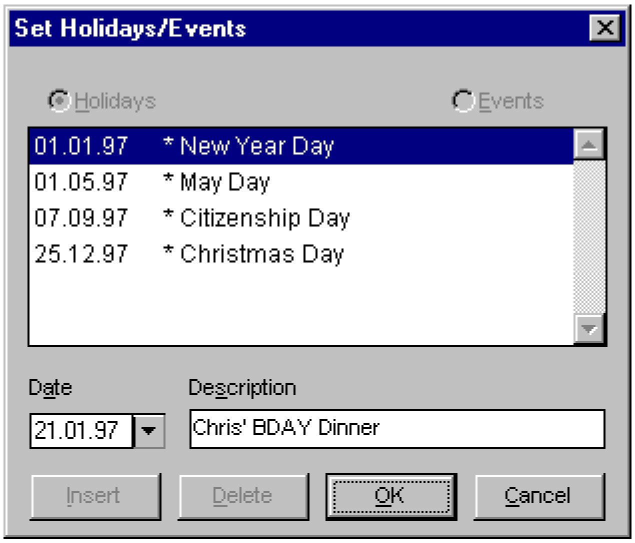
Weekly Offs: are the regular weekly holidays, like Sundays and Saturdays. You can set two weekly offs, however, if you want a single weekly-off, set the weekly-off-2 to blank.

Calendar Start Day: Sets the calendar to begin from the day specified. By default the start day is set to Sunday.

Active Appointments Days: are number of days for which appointment history is maintained in the Diary. You can thus have past appointments retained for 90, 180 or 365 days.

Setting up Holidays and Events

While you can setup holidays and events for a given day in the Planner, it is more convenient to set annual holidays and events in a single go. This option displays a complete list of holidays and events in the Planner to which you can add, amend or delete items.



You can choose Event or Holiday list by clicking on the option button.

To Add Holidays/Events, click on **Insert**, enter the date and description (pop up calendar for date), confirm with a click on OK.

Recurring holidays and events, which repeat every year, should be prefixed with an asterisk (*) in the description.

To Amend Holidays/Events, **double-click** on the item in the list, modify the date and description, and confirm with a click on OK.

If you modify the date, the original item in the list is retained, delete if it is not required.

To Remove Holidays/Events, select the item in the list, click on **Delete** and confirm deletion with a click on OK.

Regular weekly-offs, like Sundays and Saturdays, should be set in the Time Planner Setup.

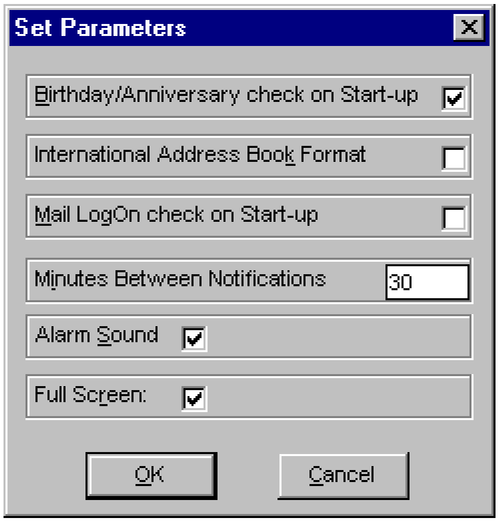
Setting up your Password

You can restrict access to your EDESK by setting up a six letter password.

Next time you load EDESK,   you will be asked for this password, before granting you access to the data. *To void the password, set it as spaces.*

If you setup a password make sure you don't forget it! *The password should be exactly six letters.*

Setting up General Parameters



These are general parameters to customize your Executive Desk.

Birthday/Anniv Check: If enabled, EDESK will scan all the Address Books at the start of a new day and display a list of Birthdays and Anniversaries that fall due on that day and the next day.

Int'l Address Book Format: International format has 4 address lines, American Format has 2 address lines, city, state, zip & country.

Mail LogOn Check: If enabled, EDESK will automatically log on to the Mail Box.

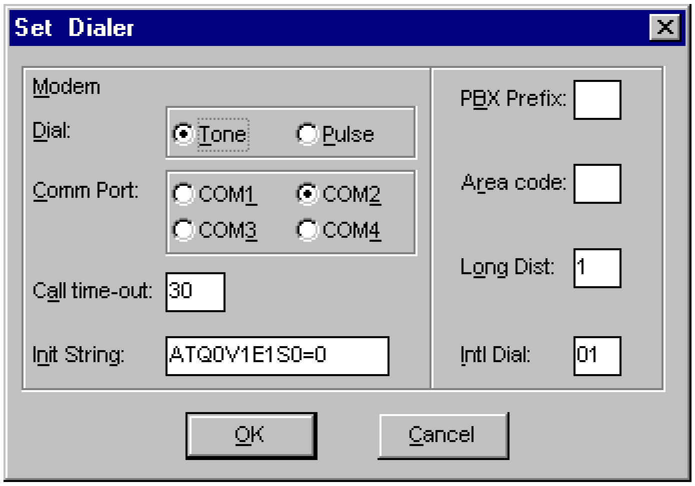
Minutes Between Mail Notifications: You can specify the time interval for checking the Incoming Mail Messages.

Alarm Sound: If enabled, will emit an audible tone when the reminders are flashed. Your PC should have either a Sound Card or PC Speaker Drivers installed.

Full Screen: If enabled, sets the Monitor with 640x480 resolution on win'95 to Full Screen and hides the Tool Bar.

Setting up the Phone Dialer

To dial a phone from EDESK, you should have a phone connected through an internal or external modem to your system.   This option configures your modem and other dialing parameters.



Dial Mode: This is the method of dialing used on your phone line -- Tone or Pulse. Set it to Pulse only if your phone system does not support Touch Tone or DTMF (dual tone multi-frequency) dialing.

Comm. Port: Here you must specify the serial communication port to which your modem is connected -- it takes values from COM1 to COM4. Usually it is COM2 or COM3, because most systems have mouse connected on COM1.

Init String: This is the initialization string that sets your modem before the dialing can commence.

Call Time Out: Wait time (seconds) for successful dial response.

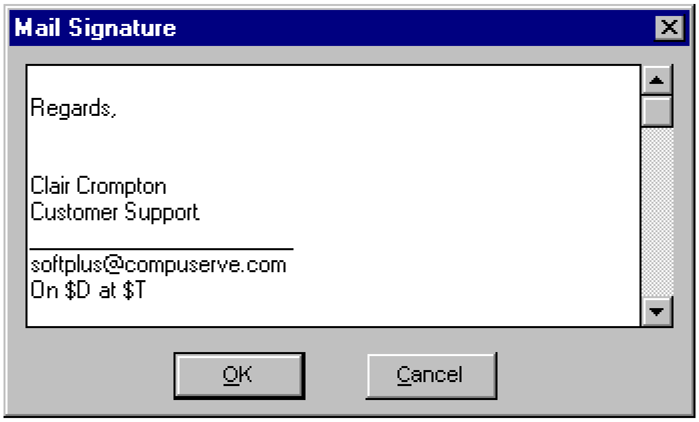
PBX Prefix: If your modem is connected to the phone line through an EPABX or PBX, you are required to first dial a PBX prefix, usually 9 or 0 before you dial the number. Enter here the PBX prefix if applicable to your system, else just leave it blank.

Area Code: This is the local area code to identify whether the call is local or long distance.

Long Dist Code: This is the prefix to be attached to the phone number while making a Long Distance call.

Int'l Dial Code: This is prefix to be attached to the phone numbers which have + sign as a prefix, to indicate an international call.

Setting up the Mail Signature



Signatures are Macros defined to include in Mail Messages. It may contain Date and Time ($D for Date and $T for Time).

Reorganization

This function reorganizes the Executive Desk database. It purges unwanted data and packs the indexes to improve the efficiency of access. It also reconstructs indexes corrupted due to accidental failure (crash) of the hardware.

At the start of day, reorganization process begins automatically. Similarly, when you load the Executive Desk, after a previous abnormal exit, the system forces reorganization. The progress of reorganization is shown on the odometer.

In an ideal situation, you may never have to use this option yourself as the system will do this for you automatically. However, if you discover a peculiar case of data corruption, reorganization will help you salvage your data in most situations

XBRIDGE : The Data Bridge

XBRIDGE is a useful utility that builds a bridge between two EDESK user areas on two different PCs. It performs the following functions:

1. Import data from into EDESK from an earlier version.
2. Backup EDESK data to a floppy disk or another directory.
3. Restore EDESK data from a floppy disk or another directory.

The Restore and Backup functions, called as Import and Export functions in XBRIDGE, allow you to move data between two EDESK user areas.

Importing data into EDESK from earlier versions.

You can use the **Import** option of XBRIDGE to transfer data from an earlier version of EDESK (v2.2 upwards) by directly importing it from the existing directory.

Alternatively, you can copy *.dft and *.dxt files from the directory of the earlier version to a floppy and import this data into the directory of the new version.

Specify the "Directory to Import From" as the directory where the data of the earlier version resides, if it is on a floppy disk specify this as A:\ or B:\ (as applicable).

When you import data from the earlier version, XBRIDGE checks the data structure and converts the data into the new EDESK data format.

Typically, the import sub-option that you should use is **Replace**, which will overwrite the existing data in the new EDESK version with that from the old version.

CAUTION: Importing Follow-up Data from earlier version.
The structure of the follow up system used in EDESK is different from that in the earlier versions, particularly for People and Projects. So, when you upgrade and move data from an earlier version, the follow-up items for these categories are moved to Personal category, which you can later transfer to People and Projects to suit the new structure.

Copying EDESK data for Backup to floppy or hard disk.

The check boxes allow you to select the modules for which the data is to be exported. In case of Address Book data, you can further select the address books to export by highlighting them with selection. This dialog shows you the size of the data to be exported (Source) and the Free area on the disk or the floppy to which the data is to be exported.

Importing EDESK data from a floppy or hard disk Backup.

You can use the Import Option of XBRIDGE to transfer data from another directory or from the Backup disk/directory (created with Export Option) into the current EDESK directory. You can thus use XBRIDGE to transfer EDESK data from one PC to another. For example, you can backup data from your Office PC and import it to update your Home PC, and vice versa. As another example, you can use this to perform cross-updates between Boss' and Secretary's EDESK data sets, by importing data one area into another.

The import option allows you to import the data in two ways:

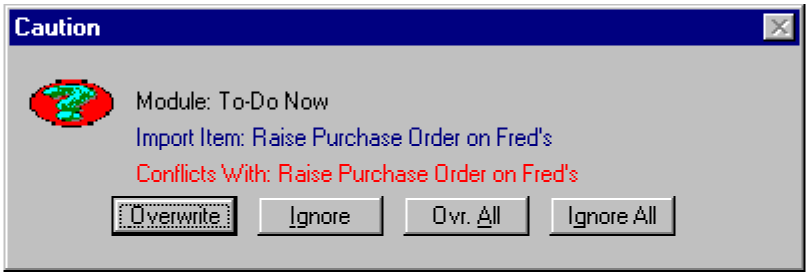
Replace Mode
This mode replaces (overwrites) the data in the current directory with the imported data.

Update Mode
This Mode does not affect the import of Address Book, Archival List and Mail Centre OutBox, because both the modes overwrite (replace) the Files in the current directory.

However, this mode does affect the data import into other sections. **Update** essentially checks each schedule/task in the current directory with the one being imported, and where it finds a conflict, it provides the user an option to **Overwrite** the schedule/task in the current directory or to **Ignore** the import for this conflict.

A schedule/task conflict is detected on the following basis:

Diary:	Date+Time/Slot
To Do	Description
Phone:	Description/Reason/Date
F/Up:	Description (and Links in case of People/Projects)



Update Mode also allows the user the following options:

Overwrite All conflicting schedules with the imported data.
Ignore All the imports where there is a conflict.

The Update for Time Planner data works as below:

1. Event/Holidays are overwritten (replaced) with imported data.
2. All Recurring Appts are checked/updated with imported data.
3. Diary Appts are checked from the date of import and updated.
4. Past diary appointments are not imported in the update mode.

Thumb Rule:
Use Update mode while moving data between two areas which are in use concurrently and where the schedules are updated simultaneously -- typically to synchronize Boss/Secretary data in EDESK.

While moving data between Home/Office PC, use Replace option, if you are using one PC at a time and not both simultaneously.

Password Protection:
For intruder detection, XBRIDGE uses the same password as your EDESK. However, you will not be asked for the password if you have not setup one for your EDESK.

Address Book Import

DBF2ABK is another utility provided with EDESK which imports data from DBF (xBASE) and Comma Delimited ASCII files into the Address Book.

This utility is for the benefit of those who want to migrate to EDESK and need to convert/transfer their Address Data from the earlier program. It is also useful for those who wish to include the Address Data from another application like Accounts Receivables or Sales Invoicing or Client Prospecting.

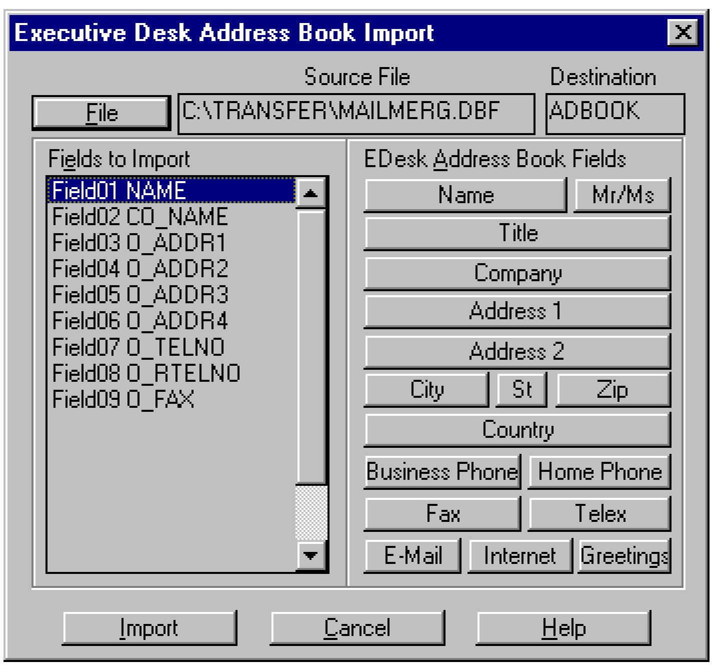
Select File from which to Import the Data

Click on File to open a file browse dialog for you to select the file for import. The import file you select should either be a DBF format file with extension DBF or a Comma Delimited ASCII File with any other extension.

Note: The comma delimited files should have field data enclosed in quotes (") separated by commas (,). For example: "Alan Thomas", "Manager", "Green's Food Store", "4699, Old Ironsides Drive", "Santa Clara", "CA", "95054", "408-980-1978", "408-980-1255"<CR/LF> i.e. end of line at the end of the record followed by next record and so on.

It is not necessary that the data being imported should contain all the fields of the address book, however, the **Contact Name (name of the person) is mandatory**.

Warning: *If you select a file that is neither a DBF nor Comma Delimited File, an unexpected error may occur.*



Assign Import fields to Address Book

Once the file is selected, the input fields available for import are displayed and along side the fields of the Address Book. Locate the cursor on the field name in the import file and assign it to the Address Book field by clicking on the Address Book field name.

This assignment works like a toggle switch, if you click again on it, the assignment will be removed. Once assigned the import field will be displayed in the corresponding space of the Address Book field.

Continue the process until you have assigned all the fields.

Specify the Address Book

On the right hand side of the import file name is the space to specify the name of Address Book into which you want to import the data. Address Book name should be 6 characters (Alphabets or Numbers only), this address book will be created in the EDESK area from which you are running the DBF2ABK program.

If you specify the name of Address Book that is already present, then you will have the option to Append to it.

Notes and Attachments

Notes

It is unusual to find an executive office without scribble sheets or post-it pads. They are invaluable for jotting down notes for various items -- it could be information on a contact, meeting agenda, phone discussions, things to carry on a tour, the list is endless.

EDESK offers you a NotePad attached to most of the items -- Contacts, Appointments, Things To-Do, Follow-ups and Phone Calls. The use of notes is left to the creativity of the user.

EDESK NotePad provides text editing features to jot down notes, with a default word-wrap facility. To activate the NotePad, click on Notes, this will open the notes for display. If you must write on this page, click in the note pad and an insertion point will appear. Working with text in the NotePad is same as working with text in any other Windows application.

Use scroll bars to move in the NotePad (Keyboard Arrow Keys).

Keyboard Action:

HOME	Beginning of a line
END	End of a line
CTRL+HOME	Beginning of NotePad
CTRL+END	End of NotePad.
ALT+T	Date and Time Stamp

EDESK NotePad has a very useful feature called the **Date and Time Stamp** (*Keyboard: Alt+T*). For example, in a note for a Contact in the Address Book, you may use this to stamp the date and time of each entry in the NotePad to maintain chronological records.

Notes are indicated by a special *envelope symbol* in To-Do Lists and Diary Pages, while in Follow-Ups, without a note the due-date do not appear.

NotePad supports **Clipboard** operations like *Cut, Copy and Paste*. You can mark (select) text and cut/copy the selected text onto the Clipboard. Similarly, you can paste from clipboard into the NotePad. To use this feature, click on the System Box (*top left-hand corner*).

Take a look at few examples of using the Cut/Paste feature:

1. You have to phone a person for follow-up -- you can cut the required text from Follow-up and paste it into Phone List Note.

2. During a meeting you have discussed and jotted down certain terms of business in the Appointment Notes. Now you have to send a letter confirming them -- you can cut the note and paste it into any Word Processor.

3. During a phone conversation, you have discussed and noted certain agenda for a meeting. You can cut this text from the Phone Notes into that of the meeting schedule in Diary.

The possibilities are best left to the user's imagination. While notes can be really long, remember **brevity is the soul of wit**.

Attachments

Apart from the notes, you can attach files to the notes, viz. Text Files, Word Processing Files, Spreadsheets, Databases and Compressed Files. Double click on the attachment in the list to start the program associated with this extension. This is particularly useful when you want to view Spreadsheets or Word Processing files right from within EDESK.

As another example, if you have a zip file as an attachment, double clicking on it will automatically start the WINZIP program (if you have the program on your system).

Printer Management

EDESK generates several reports in printed format. These reports facilitate hands-off operation -- so that you can Work Smarter even when you do not have an access to your computer system.

While printing you have the option to select and setup the printer for your report.

All printed lists and reports, except *Mailing Labels*, can be printed either in Portrait or in Landscape Orientation.

You have further option of selecting **Two-Up** printing, where the reports are printed in A5-size (half of A4) with two pages at a time in Landscape Orientation (sideways).

If you select Two-Up option and have the paper set to Portrait Orientation, EDESK will force Landscape Orientation to fit two pages sideways.

The Left Margin check box tells EDESK whether to force left margin or not, usually it should be crossed. However, some ink-jet printers like HP-520C have a fixed (hard-set) left margin, in which you should leave this check box blank.

If you find that the fonts on printed reports run amok on your HP Desk Jet or Laser Jet printers, try changing the driver to HP Desk Jet Plus or HP Laser Jet Plus supplied with Windows by Microsoft.

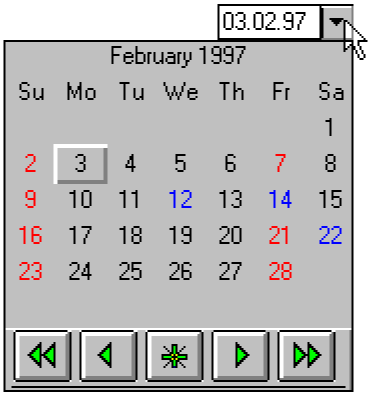
Mailing Labels fit on standard stationery -- when you select a mailing label size, make sure that the page size matches the label stationery. You can select an appropriate page size through printer setup -- if your printer driver setup does not show this size, set it up as User Defined Size.

Trouble Shooting :

1. Sometimes, regardless of the label option you select you may get the message Label Format does not match Page Size, this could be due to hard margin settings of the printer -- try changing the Top Margin in the label setting to zero.

2. Sometimes, Printing Mailing Labels on HP Deskjet 600 Series gives error. Set a dummy default printer (other than Deskjet series) through the Control Panel. When you print mailing labels choose the HP Deskjet printer from the list.

Pop-Up Calendar



To-Do, Follow-Up and Phone Calls Modules require you to set and revise due dates. Pop-up Calendar is useful in such cases, so that you can look up the day-of-the-week before you commit a date.

The calendar is displayed from the date beginning from the day specified in the Calendar Start Day in the Time Planner Settings of Customize.

To activate the calendar, click on the arrow in the date box. The calendar shows holidays in red and event dates in the highlighted colour. To browse through the calendar there is a VCR panel at the bottom. To select a date, simply click on it in the calendar; keyboard users can place the cursor on the date and press ENTER key.

Keyboard Action for Calendar Browse:

Previous Month	*PgUp*
Next Month	*PgDn*
Previous Year	*CTRL+PgUp*
Next Year	*CTRL+PgDn*

Archiving Completed Schedules

Once you have completed a schedule, you can drag-n-drop it into the Archival List icon in the tool bar. This will delete the item from the schedule list. Once archived, the history of past schedules is available in the Archival List for analysis.

Archiving Phone Calls

EDESK allows you various ways of making a phone call (and even dialing through a modem) -- using Dial button in the phone list, dragging and dropping the phone item on the Dialer in DayView and through Phone Reminders. When you complete a phone call, it is cleared (flagged as done) which is shown with a strike-out on the list. All such CLEARED phone calls are automatically filed into the Archival system. However, you can also drag-n-drop a phone list item into the Archival List. Once archived, the history of past phone calls is available in the Archival List for analysis.

Quick Look at Timex Wrist Portability