



Starfish Internet Sidekick[®]

User's Guide

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Introduction

Welcome to Internet Sidekick, the versatile organizer that brings you the power of the Internet to help you organize your activities and coordinate events with others, within your office or anywhere in the world.

Internet Sidekick uses a desktop workspace where you manage your calendar, address lists, expense reports, documents, and communications. Its easy and familiar design makes it a snap to learn.

What's in Internet Sidekick

Internet Sidekick includes many new features, including the following:

Internet scheduling—Schedule appointments with anyone who has an Internet e-mail account. Internet Sidekick automatically sends event invitations to everyone on your list, and collects replies when people accept or decline. The group event is automatically placed on your calendar. If some participants do not have Internet e-mail accounts, Internet Sidekick can send the message by fax or remind you to phone them.

Internet resource scheduling—Internet Sidekick automatically maintains a calendar for each resource, such as a conference room, projector, or vehicle. You request a reservation for the resource, and Internet Sidekick automatically confirms or declines your request, based on the resource's availability.

Activities view—Internet Sidekick provides a central place where you can view and manage all your appointments, calls, To Do items, group events, and resource reservations.

Caller ID and enhanced Phone Dialer—Internet Sidekick uses Windows telephony support to provide advanced features. Caller ID detects the number of an incoming call, if the number is in your current Cardfile, and displays details about the caller. A “While you were out” history log records the information about calls that are not answered. (These features require specific hardware, software, and phone service—see [“Requirements” on page 7.](#))

Launch Web browsers—You can launch your Web browser and jump directly to the address (Uniform Resource Locator—URL) of a World Wide Web site stored in your Cardfile.

E-mail address book—**Internet Sidekick** supports Netscape Navigator, Microsoft Exchange, and Eudora Pro (32-bit) address books.

Internet Time Synchronization— Internet time servers automatically correct your computer's system clock.

Conversions—Internet Sidekick converts any quantity among numerous English and metric (SI) units of measurement, including scientific and technical units.

Synchronize Cardfile and Calendar—With Internet Sidekick, it's easy to keep files on two computers in sync with each other.

New Calendar print format—Internet Sidekick adds support for new At-A-Glance forms for Calendar printing.

Enhancements to existing (Sidekick 95) features include the following:

Enhanced Expense view—Now you can use folders to organize your expenses by trip or time period. Internet Sidekick adds new categories, flexible reporting periods, and custom printouts, plus a field for value-added tax or goods and services tax calculation.

Time zone-smart appointments—Your appointments are stored with time zone information for the location where they occur. So you can easily schedule events for your upcoming trip, and view your activities in the correct local time when you arrive—as well as seeing your home events adjusted for the local time.

Auto spelling check—The Write view checks spelling in the background as you type, and unrecognized words are “lined out.” Right-click the word to see alternatives from the spelling dictionary.

Transferring data from earlier versions of Sidekick

If you have installed Internet Sidekick in a different directory than Sidekick 95, you can use Internet Sidekick's Backup and Restore feature to move data files from the old directory to the new one, where you can open them in Internet Sidekick.

For details, see the Write file “Internet Sidekick Tips.” There is a topic called “How Do I Transfer My Sidekick 95 Data to Internet Sidekick,” which explains the process. (You will find other many

helpful information in this file.) If this file is not already displayed when you switch to the Write view, use the File | Open command to open it. It is stored in your default data directory, usually called Userdata.

You can open files from Sidekick for Windows 1.0 and 2.0 as well. In the Calendar, Cardfile and Write views, use File | Open to locate and open the files you want. When you save the files, they are saved in Internet Sidekick format.

In this manual...

This *User's Guide* and the online Help system are designed to make information about Internet Sidekick easy to find.

To help you understand what you see, here are some conventions used in this manual:

- ◆ Multilevel menu selections are separated with a vertical bar (|). So, where you see **File | Save**, it is a shorthand way of saying “Open the File menu, and then select the Save command in that menu.” The menu choices always appear in the order you see them: Menu name first, then menu choice, then next menu choice, if there is one, such as Calendar | Events | Daily.
- ◆ When you need to type in some information, it's indicated in a different typeface: like this.
- ◆ Keys you press are indicated with a different typeface, like this: *F10*.
- ◆ Pressing two keys in combination is indicated with a plus sign (+), for example, *Ctrl+D*. Press and hold down the first key (*Ctrl*), and then press the second key (*D*).

Using online Help

The online Help system contains detailed information about Internet Sidekick. Help appears in a separate window with its own controls.


Major features of the product, such as the views, are discussed in a series of overview topics. Help topics that explain how to accomplish a task are in windows that you can leave displayed while you follow the procedure.

To open Help, do one of the following:

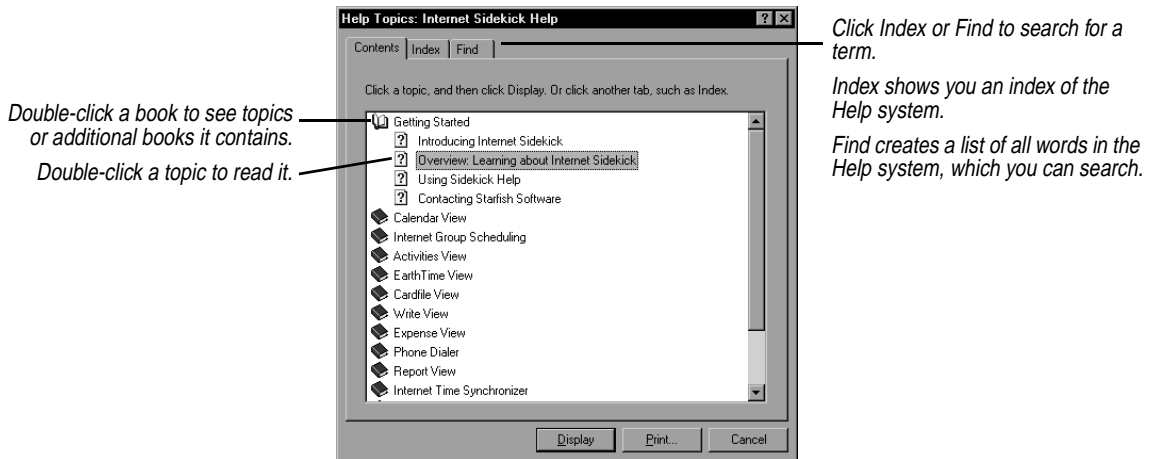
- ◆ Press *F1*. For help on a particular menu command, select the command and press *F1*.

- ◆ Click the Help button in a dialog box, or press *F1*, for help about dialog box controls.
- ◆ Choose a command from the Help menu on the Internet Sidekick menu bar.

The following figure shows the Help Contents page, where you'll find a series of book icons.

 Double click a book to “open” it and view its contents—which may be other books or topics. Double-click the open book if you want to close it again.

 Double click a page icon to view that help topic.



If you need assistance, see the Help topic on how to use Help.

ToolTips

If you pause while passing the mouse pointer over an object like an icon or Toolbar button, Internet Sidekick displays the name of that object. This feature, called ToolTips, makes it easy for you to identify what you see and find what you need.

For more information

Refer to this manual and the online Help system first if you need help and information about Internet Sidekick. This manual's index and Table of Contents can often help you pinpoint the information you need.

Sidekick Tips

We have provided a file of helpful hints and tips for using Internet Sidekick. In the Write view, open the file called Internet Sidekick Tips in the Userdata folder.

Windows 95 basics

This *User's Guide* assumes you have a basic understanding of Windows fundamentals—using the mouse or keyboard, working with windows, and so on. If you're new to the Windows 95 environment, see your Windows 95 manual, or take a few minutes to run the Windows 95 Tour from the Start menu. Click Start, Programs, Accessories, Tips and Tour on most Windows 95 installations, or click Help in the Start menu.

Technical Support options

In addition to extensive printed and online documentation, Starfish provides other support options. Use Starfish Technical Support to get you help when you need it. The following sections tell you how to contact Starfish Technical Support.

Fast Fax Information

For technical and product information sent directly to your fax machine in just minutes, any time of the day or night. You can request a listing of documents, and then request the document you need. The fax number is

800-503-3847

Free online information services

To discuss your questions and problems with other users and Starfish experts,

On CompuServe, Go Starfish

On America Online, Keyword Starfish

On Microsoft Network, Go Word Starfish

Be sure to visit our Web site for product updates, companions and news (no technical support): <http://www.starfishsoftware.com>

The Starfish BBS

To download technical information notes, utilities, and patches, 24 hours a day, phone

408-461-5930

Free up and running support

To receive no-charge assistance for installation and initial configuration, phone

970-522-4610

Monday–Friday, 6 a.m. - 5 p.m. Pacific Time

Support hotline

For all the help you need, at \$2 per minute, first minute free, phone

1-900-555-1010, billed to your phone bill

1-800-953-9995, charged to your credit card

Monday–Friday, 6 a.m. - 5 p.m., U.S. Pacific Time

International support

Information on how to contact Starfish Software outside the U.S. is found in Help. See the topic Contacting Starfish Software.

Installing and configuring Internet Sidekick

Before you begin installing Internet Sidekick, make sure you have the necessary hardware and software. Some features, such as Internet scheduling and Caller ID, require special configuring.

This chapter discusses:

- ◆ What you need to take full advantage of all Internet Sidekick's features
- ◆ How to install Internet Sidekick
- ◆ How to configure your computer to use telephony and Internet features

Requirements

To use Internet Sidekick, you need

- ◆ A computer running Windows 95 or Windows NT 4.0
- ◆ A minimum of 12 MB hard disk space for installation (including 1 MB of temporary space on the same drive as your Windows directory for installation)
- ◆ 256-color VGA video and monitor
- ◆ CD-ROM drive (a diskette set is available by special order)
- ◆ A mouse compatible with Windows 95 or Windows NT 4.0.

The following equipment is optional but recommended to fully use all Internet Sidekick features:

- ◆ A modem, to take advantage of the Internet Sidekick Phone Dialer. For advanced features, particularly Caller ID support, you need a modem compatible with the Microsoft UnimodemV driver, and

you must install the UnimodemV driver. Caller ID also requires that you have Caller ID service from your phone company.

The UnimodemV driver is available from the Microsoft Web site (<http://www.microsoft.com/windows/software/drivers/unimodem.htm>). Create a new folder, and copy the Unimodv.exe file to the new folder. Double-click Unimodv.exe to expand it. Among the files that are created is one called Readme.txt. Double-click this file to read installation instructions.

You also need Caller ID service from your telephone company

- ◆ For Internet scheduling, you must have access to the Internet. (You can also use group scheduling locally on a Local Area Network that does not have Internet access, or with fax or phone messaging.) For details, see **Chapter 4**.
- ◆ A sound card is required to play sounds (.WAV files) for appointment alarms.
- ◆ To use the automatic paging reminder option for scheduled events (see Chapter 3), you must have an alphanumeric pager with an electronic mail account with your pager provider.
- ◆ A printer supported by Windows 95 or Windows NT

Registering Internet Sidekick

Before you install, take a moment to read the Product License, Limited Warranty, and Limitation of Liability printed on the reverse side of the title page of this manual.

You should also be sure to register your Internet Sidekick, using the electronic registration option you see during setup.

Installing Internet Sidekick

Internet Sidekick is supplied on a CD-ROM disk. On most Windows 95 systems, inserting the CD-ROM in the drive will cause the Setup program to run automatically.

If this does not occur on your system, use the following instructions.

To install Internet Sidekick

- 1** Insert the Internet Sidekick CD-ROM disk into your CD-ROM drive.
- 2** Click Start on the Taskbar. Choose Settings and then Control Panel.

- 3 Double-click Add/Remove Programs.
- 4 Click the Install button.
- 5 Follow the instructions as they appear on screen. The Windows Install utility will find Internet Sidekick's Setup program on the CD-ROM, and run it for you.

As an alternative, you can select Run from the Windows Start menu, and type the drive letter and directory where SETUP is found. If your CD-ROM drive is D, you would type: D:\DISK1\SETUP

If you have installed an earlier version of Sidekick, it will be retained in its original directory. Internet Sidekick will be installed in a new directory called Internet Sidekick (unless you change the name). After installing, you can open your old files in Internet Sidekick, and use Save As to save them in your Internet Sidekick\Userdata directory. We recommend not deleting your old Sidekick files and directories until you are certain you have all the data you need in Internet Sidekick.

TIP

The Tips file has information about opening Sidekick 95 or Sidekick 2.0 files in Internet Sidekick. In Write, open the file Internet Sidekick Tips, found in your Userdata folder.

NOTE Internet Sidekick can be installed on systems that have Sidekick 95, since they each have separate entries in the Windows Registry, and either one can be uninstalled without affecting the other. However, they cannot both be run at the same time.

The Readme file

Any last-minute changes or additions to Internet Sidekick are documented in a file called Readme.txt. When the installation program has finished installing Internet Sidekick on your hard disk, you will see the README file. To view it later, click the README icon in the Internet Sidekick folder (click the Windows Start button, choose Programs, and then choose Starfish Internet Sidekick).

Configuring your system for Internet Sidekick

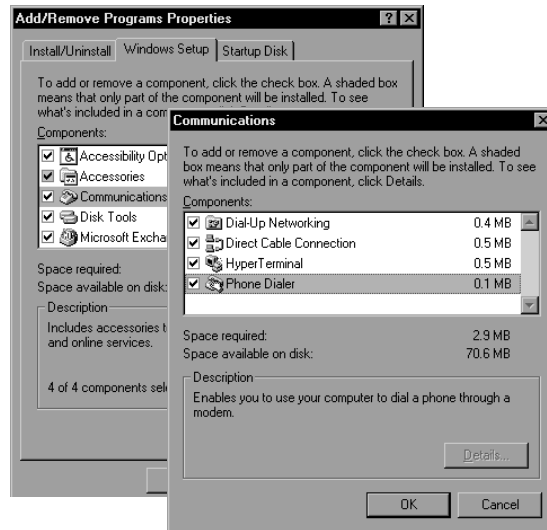
Some of Internet Sidekick's features require that you install specific Windows components. The following sections point out some of the configuration issues you may encounter. In addition, you need an Internet e-mail service to use Internet group scheduling. You are asked for information about your e-mail service the first time you start Internet Sidekick; see [“Starting Internet Sidekick” on page 13](#).

Phone Dialer and fax

To use Internet Sidekick's Phone Dialer you must install the TAPI communications feature. To fax documents, you must have Microsoft Fax installed.

To add required phone software

- 1 Click Start on the Windows Taskbar. Choose Settings and then Control Panel.
- 2 Double-click Add/Remove Programs.
- 3 Click the Windows Setup tab.
- 4 Click Communications, and then click the Details button. Be sure Phone Dialer is installed, or add it.



- 5 Click Microsoft Fax in the Windows Setup list, and click Details to confirm that it is installed or add it.

Caller ID

To use the Caller ID feature, you must install the Microsoft UnimodemV driver.

To install the UnimodemV driver

- 1 Copy the file Unimodv.exe from the Starfish Internet Sidekick CD-ROM (or the last disk of the disk set) to a new, empty folder on your hard disk.
- 2 Double-click the Unimodv.exe file to run it. A number of files will be created in the new folder.
- 3 Double-click Readme.txt for installation instructions.

Uninstalling Internet Sidekick

If you decide to remove Internet Sidekick from your computer, use the Uninstall program.

To remove Internet Sidekick from your system

- 1** Exit Internet Sidekick.
- 2** From the Windows Taskbar, click the Start button.
- 3** Choose Programs, and then choose the Starfish Internet Sidekick program group.
- 4** Click Uninstall.

Uninstall permanently removes all Internet Sidekick program files and Internet Sidekick entries in the Windows Registry. If you have personal files in the Internet Sidekick folder, Uninstall does not remove them. You can preserve them or remove them manually from your data folder (usually Program Files\Starfish\Internet Sidekick\Userdata), and then delete the folders if desired.

Overview

This chapter gives you an overview of the many features of Internet Sidekick that can help you organize and simplify your busy schedule.

The topics discussed in this chapter include

- ◆ The Desypad, icons, and Toolbars
- ◆ The major “views” of Internet Sidekick
- ◆ Desktop features, such as the Viewport and calculator
- ◆ Conversion of measurements
- ◆ Internet Sidekick shortcuts and preferences

Starting Internet Sidekick

Before running Internet Sidekick, you must complete the installation process described in Chapter 1. You should also read the material on configuring Internet Sidekick in that chapter.

To start Internet Sidekick

In the Windows 95 Taskbar, click the Start button and choose Programs, Starfish Internet Sidekick. Click the Internet Sidekick option.

NOTE If you plan to use Microsoft Exchange for your Internet scheduling tasks, you should be connected to your Exchange Post Office the first time you start Internet Sidekick. Doing this will ensure that the Setup Wizard detects your existing Exchange profiles.

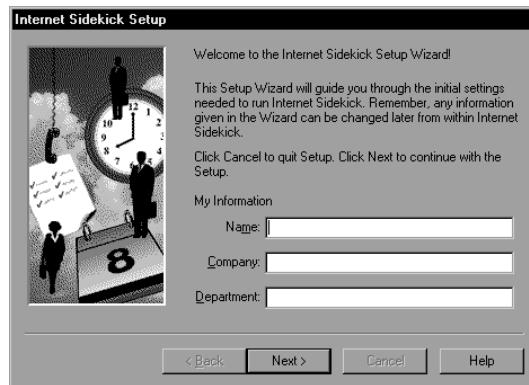
First-time startup

The first time you start Internet Sidekick, the Setup Wizard helps you provide information about your location and your computer system. The information you provide includes your location and your e-mail service type.

Internet group scheduling uses e-mail messaging to send meeting invitations and collect replies automatically. To use this feature you must be using either Microsoft Exchange or an Internet Service Provider (ISP) for POP3 e-mail. (POP3 is the Post Office Protocol, version 3, a communication standard that allows your computer to receive your mail from a remote computer on the Internet.)

You must have an Internet connection through either a modem or a local area network. If you don't know your e-mail service information, ask your system administrator or Internet service provider. For information about the e-mail configuration options, see Appendix A.

Most of the Setup Wizard panels should be self-explanatory. If you need assistance, click the Help button in any Wizard panel. You can run the Setup Wizard later, if necessary, by selecting it from the Tools menu.



NOTE The first two panels of the Setup Wizard are for your name and company information, followed by your city and time zone. These panels are required information that must be entered the first time Internet Sidekick is run. You can't select Cancel until you have completed these panels.

Fill in the information in each panel of the Setup Wizard and click Next to continue. You can click Back if you need to change the information in an earlier panel.

Changing your e-mail service

You can change your e-mail and group scheduling options once Internet Sidekick is running. To do so, either start the Setup Wizard

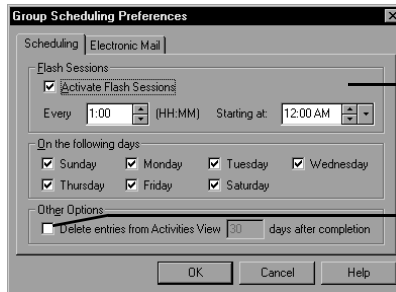
again from the Tools menu or open the Group Scheduling Preferences dialog box.

CAUTION Once you set up an e-mail identity, it is best not to change it. If you change to a different e-mail name or account, all the subsequent group scheduling messages will reflect the new identity.

To change your e-mail information using the Group Scheduling Preferences dialog box

- 1 In Internet Sidekick, choose Tools | Preferences | Group Scheduling. In the Scheduling page (click the Scheduling tab), set the options you want for flash sessions and automatic deletion of messages from your inbox after they are picked up by Internet Sidekick.

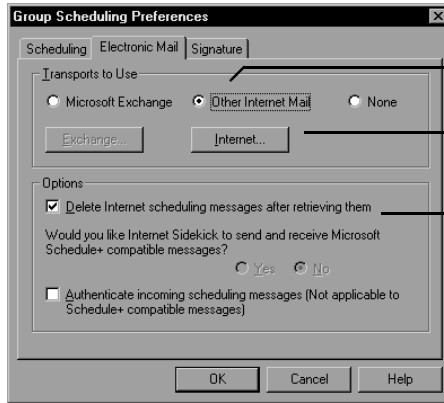
Flash sessions are automatic e-mail sessions that automatically send all your outgoing messages and collect all your incoming messages at regular intervals you specify.



Create the schedule you want for flash sessions, which send and retrieve your group scheduling messages.

Check to delete old Activities from the display after a specified period.

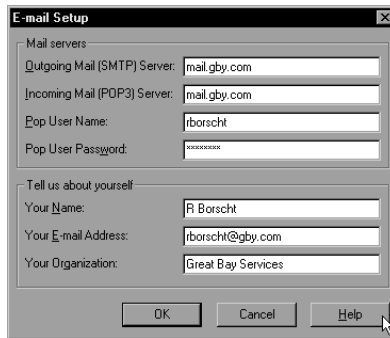
- 2 Click the Electronic Mail tab to see your e-mail settings. Select Internet Mail or Microsoft Exchange, as shown in the next figure.
- 3 Depending on which one you choose, click the Internet or Exchange buttons to see and change your configuration.



Click to choose your e-mail type.

Then click the button to see and change your e-mail settings (see the following figure).

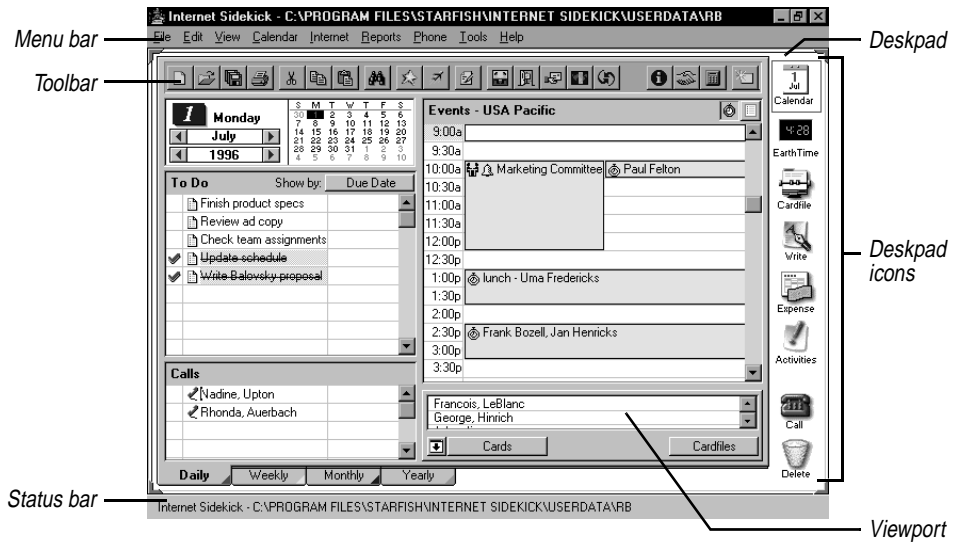
Check options for scheduling (see "Group Scheduling Preferences" on page 83).



Enter your e-mail information in the field. Click the Help button for information about the fields.

The Internet Sidekick screen

The major components of Internet Sidekick are shown in the following illustration, which shows the Calendar view and identifies the features common to most views.




The **Toolbar** buttons let you do certain tasks quickly, without using the menus. The Toolbar and menu bar change with each view. See [“The Toolbar” on page 19](#).

The **status bar** displays information about the current view. For example, if you are in the Calendar view, the status bar displays the name of the current Calendar file.

The working area of the Internet Sidekick screen is called the **Deskpad**. To make changes to the default Deskpad colors and other display options, choose Tools | Preferences | General. See [“Setting preferences” on page 25](#) for more information.

Icons and views

Click a Deskpad icon to change to a different view in Internet Sidekick. The views—and how to use them—are described in detail in later chapters of this manual. Since you’ll probably be moving back and forth among different views, here’s a helpful command you should know: save your work in all views at once by choosing File | Save All, or by clicking the Save All button. 



In the **Calendar**, you can create appointments (events) and use Internet messaging to automatically handle invitations and replies for scheduling group events. If you travel with your computer, your appointments adjust to the local time zone when you switch to the new local time in EarthTime. The Calendar helps you organize your daily tasks in a To Do list and keep track of calls. You can print your calendar in a variety of formats, including page sizes suited to the

most popular day planners, such as At-A-Glance, DayRunner, Day-Timers, and Franklin Planner. See [Chapter 3](#) for more information on the Calendar.



EarthTime

EarthTime tells you the current time in eight locations around the globe and provides other information, such as time difference, start and end of daylight saving time, and other important facts for over 540 cities. See [Chapter 8](#) for all the details on EarthTime.



Cardfile

The Cardfile lets you store names, addresses, e-mail addresses, phone numbers, and other information in your own personal address book. Or you can keep records of any other type of information, such as your music collection. The Cardfile works with the Internet group scheduling to address event invitations. You can use the Cardfile with the Phone Dialer to dial your calls and look up information about incoming calls using Caller ID. See [Chapter 5](#) for Cardfile information.



Write

The Write view provides you with a place to create and format documents, organized in folders and binders. Write is a fast, efficient tool for creating most letters and documents. And, if you like, Write checks your spelling as you work. Write lets you change fonts and format your documents, and you can create form documents for merging cards from the Cardfile. See [Chapter 6](#) for the details.



Expense

The **Expense** view lets you enter information from receipts. Your expenses are printed in a finished expense report, which you can create by date range, by week, or by folder. You can organize expenses in folders. For details, see [Chapter 7](#).



Activities

The **Activities** view presents information about all your group scheduling events plus other Calendar activities: your calls, To Do items, and individual appointments for the period you select. Use the Activities view to reply to group event invitations and view replies to group events you have originated.



Call

The **Phone Dialer** lets you quickly dial a number stored in the Cardfile. Simply drag a card from the Cards list to the Call icon on the Desktop. Or you can just click the Call icon and type any number you want to dial. If you travel with your computer, the Phone Dialer knows how to dial numbers at your destination as local calls, and how to dial home as a long-distance call. For incoming calls, the Phone Dialer can notify you of who is calling (this option requires certain hardware and software). See [Chapter 9](#) for more information.



Delete

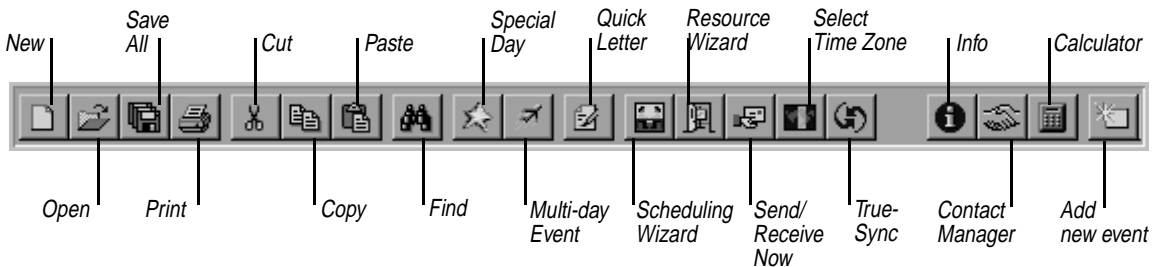
The **Delete** icon lets you delete items from Internet Sidekick. To delete a card, document, or calendar activity, simply drag it to the Delete icon on the Desktop.

The Toolbar

Each view in Internet Sidekick has its own Toolbar, which makes it quick and easy to perform standard actions in that view.

Tools that are standard to all views appear to the left on the Toolbar. Tools that are specific to the current view appear to the right. Point to a button with the mouse and pause to see a ToolTip identifying the button.

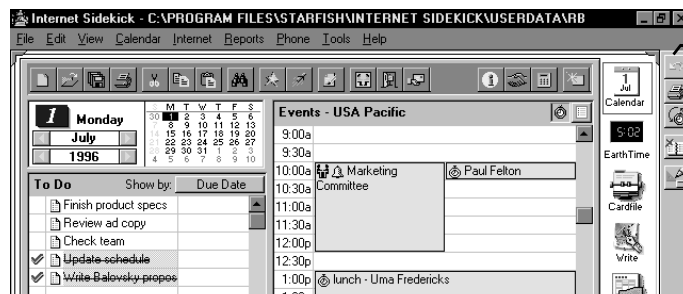
The Calendar Toolbar is shown here.



The Custom Toolbar

In addition to the Toolbar, you can display a Custom Toolbar if you find there are tools or functions you want to add. You can create a different Custom Toolbar for each Internet Sidekick view except EarthTime and Activities.

You can display the Custom Toolbar from the View menu. The Custom Toolbar appears by default at the right side the screen. You can move it to another area, if you like. You can leave your Custom Toolbar displayed, and turn off the standard Toolbar.



The Custom Toolbar

To move the Custom Toolbar

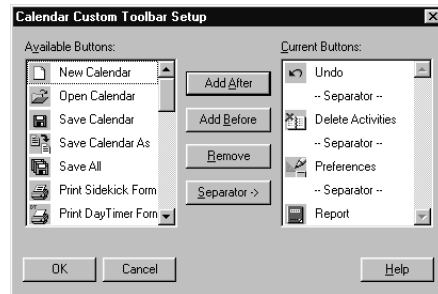
Click in a blank part of the Custom Toolbar and drag it to any side of the screen. You also can make it a floating Toolbar that you can position wherever you want on the Desktop.

To change the buttons on the Custom Toolbar

Choose Tools | Setup | Custom Toolbar. The following dialog box appears:

To add a button,

- 1 Click the button you want to add in the Available Buttons list.
- 2 In the Current Button list, click the button where you want to add the new button.
- 3 Click Add Before or Add After.



To remove a button,

- 1 Click the button you want to remove in the Current Buttons list.
- 2 Click the Remove button.

To add a separator,

- 1 In the Current list, click the button you want the separator before.
- 2 Click the Separator button.

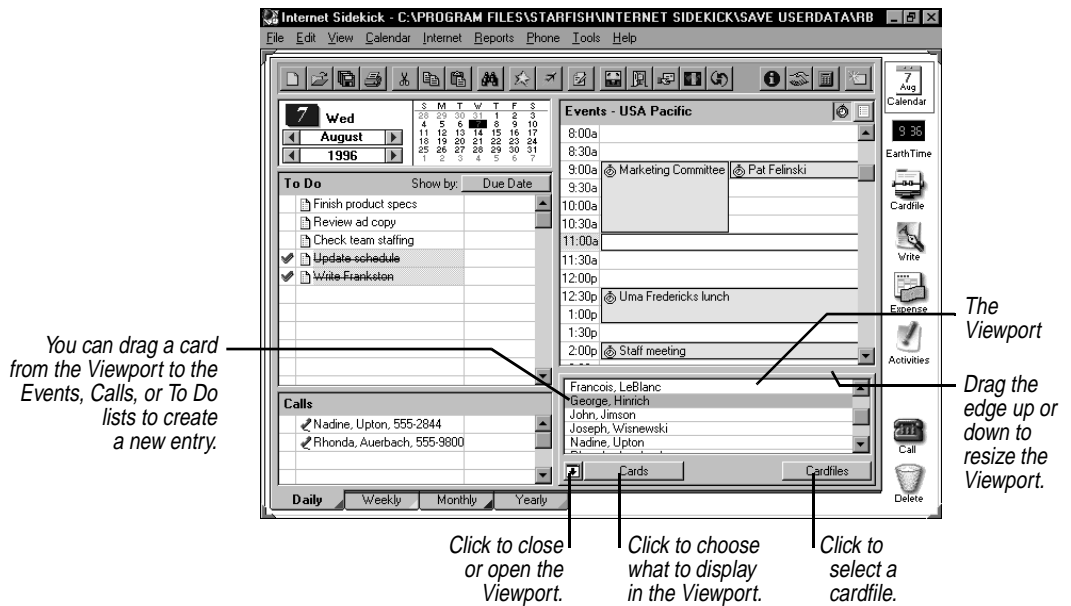
The Viewport

In the lower right corner of the Cardfile, Calendar, and Write views, you'll find the Viewport pane. The Viewport lets you work with another view without having to leave the one you're in. For example, while working in the Cardfile, you can enter or edit your appointments, calls, or To Do items without switching back and forth between the Cardfile and Calendar.

The Viewport gives you powerful connections between different views. Here are some examples:

- ◆ You can mail merge one or more cards with a document by just dragging the name from a cardfile in the Viewport to a document in Write.
- ◆ You can create an appointment with someone in your cardfile by dragging the cardfile entry in the Viewport to the corresponding pane in the Calendar.
- ◆ Like appointments, you can create a Calls list or To Do list entry by dragging a cardfile name from the Viewport to the Calls or To Do panes. If the Call entry contains a phone number, you can then place a call by simply dragging the entry to the Call icon on the Desktop (assuming you have modem dialing enabled on your system).

The following figure shows a Cardfile in the Viewport.



The information you can display in the Viewport changes depending on which view of Internet Sidekick you're working in.

- ◆ From the Calendar, the Viewport displays cards, the Contact Log of the current card, or the Goals list.
- ◆ From the Cardfile, the Viewport displays your appointments, calls, To Do items, the selected card's Contact Log, or the Goals list.
- ◆ From the Write view, the Viewport displays appointments, calls, To Do items, cards, or the Goals list.

Internet Time Synchronizer

The Internet Time Synchronizer lets you set your computer's system time using an ultra-accurate Internet time server.

To set up your system for time synchronization

Choose Tools | Synchronize | Time Synchronizer Setup in the Calendar, Cardfile, EarthTime, or Activities view.

The Time Synchronization dialog box appears. Use it to select a time server and specify a schedule for synchronizing, if desired. (For more information, click the Help button in the dialog box.)

To synchronize your system with an Internet time server

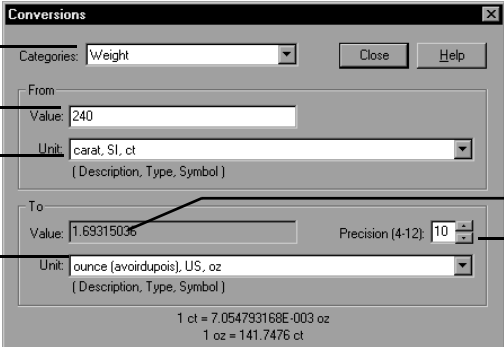
Choose Tools | Synchronize | Synchronize Now, or open the Time Synchronization dialog box and click the Synchronize Now button. The dialog box shows the results of the latest time synchronization in the bottom panel.

Conversions

Internet Sidekick includes a convenient conversion utility that lets you instantly convert units of measure. You enter a number followed by the original units, and then specify the units you want to convert to. You can convert back and forth between the U.S. and metric (SI) systems, or between units within one system, such as U.S. acres to square feet. The available units include standard measure and numerous technical and scientific units.

To convert a value

Choose Tools | Conversions. The Conversions dialog box opens.



The screenshot shows the 'Conversions' dialog box with the following annotations:

- 1** Select the Category. (Points to the 'Categories' dropdown menu set to 'Weight')
- 2** Enter the value you are converting. (Points to the 'From Value' text box containing '240')
- 3** Select the unit you are converting from. (Points to the 'From Unit' dropdown menu set to 'carat, SI, ct')
- 4** Select the unit you are converting to. (Points to the 'To Unit' dropdown menu set to 'ounce [avoirdupois], US, oz')

Additional annotations on the right side of the dialog box:

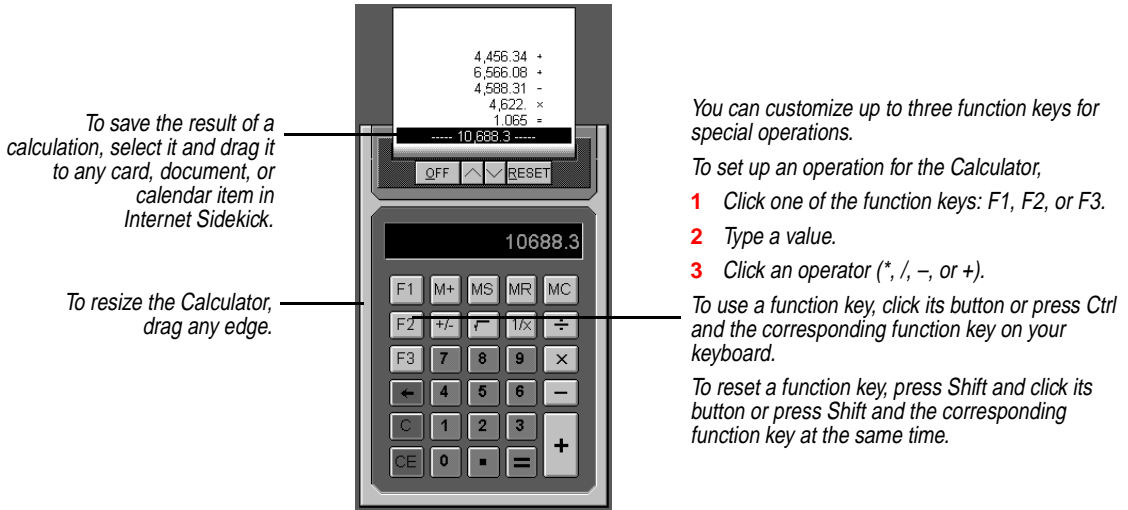
- The result appears here. (Points to the 'To Value' text box containing '1.69315036')
- You can specify the number of digits you want. (Points to the 'Precision (4-12)' spin box set to '10')

Conversion factors shown at the bottom of the dialog box:

```
1 ct = 7.054793169E-003 oz
1 oz = 141.7476 ct
```

The Calculator

Internet Sidekick comes with a tape calculator for performing simple calculations. You can show or hide the calculator at any time by choosing Tools | Calculator or by clicking the Calculator button on the Toolbar.



Shortcuts

Internet Sidekick has other features, discussed in this section, that simplify the work you can do with your computer:

- ◆ **Shortcut menus.** Perform actions in Internet Sidekick quickly by right-clicking.
- ◆ **Drag and drop.** Copy or move items using your mouse.

Shortcut menus

If you right-click certain Internet Sidekick objects, such as a card or activity entry, a context-sensitive shortcut menu appears. These menus provide basic commands such as Cut, Copy, Paste, or other commands specific to that object or view. For example, if you right-click on a word in a Write document, the Spelling Checker launches and checks the word. If the word is not recognized, alternative words appear at the top of the shortcut menu.

NOTE When you are moving activities to a different type of list, only the text description, attached document, and completion status check mark are retained. For example, the time and duration of an event are lost if the event is moved to the To Do list; similarly, To Do attributes cannot be moved with an item to the Events pane. You can, however, move entries between the To Do and Goals lists and retain all the entry information.

Drag and drop

Drag and drop is one of the easiest ways to move and copy entries from one area of the program to another.

Several of the objects on the Desktop are drag and drop “targets.” For example, you can drag a card, call, event, or To Do item containing a telephone number to the Call icon to dial the number. You can drag an entry you want to delete to the Delete icon.

To drag and drop a card or document

Point to it, hold down the left mouse button, and drag the pointer to the place you want to drop the object. Release the mouse button. In the Cardfile, point to the index line in the Card list; in Write, point to the subject line in the Documents list; in the Calendar, point to an activity’s icon. Many of these items can be selected as a group, as described in later chapters.

In the Cardfile view

In the Cardfile view, you can use drag and drop to

- ◆ Drag a card to the Delete icon to delete it.
- ◆ Drag a card to the Call icon to quickly dial a phone number on the card.
- ◆ Drag a card to a Calendar list in the Viewport to insert information in the Calendar from that card’s index.
- ◆ Drag cards to Cardfile tabs to move them from one open cardfile to another. (After you start dragging the card, hold down the *Ctrl* key if you want to copy the card instead of moving it.)

In the Calendar view

In the Calendar view, you can use drag and drop to

- ◆ Drag an activity to the Delete icon to delete the item.
- ◆ Drag an activity to the Call icon to quickly dial a phone number that appears in its description text.
- ◆ Drag an activity from one list to another in the Calendar.
- ◆ Drag a card from the Viewport to a Calendar list to insert information from that card’s index.

In the Write view

In the Write view, you can use drag and drop to

- ◆ Drag a document to the Delete icon to delete it.

- ◆ Drag a document to a folder tab to move the document to a different folder. (Hold down the *Ctrl* key as you drag to copy the document instead of moving it.)
- ◆ Drag a card from the Viewport to a blank document to insert the data from the first 10 fields on the card.
- ◆ Drag a card from the Viewport to a merge template to create a mail merge or form letter.

In the Expense view

In the Expense view, you can use drag and drop to

- ◆ Drag a receipt to a folder tab to file it in that folder.
- ◆ Drag a receipt to the Delete icon to delete it.

In the Activities view

- ◆ Drag a Call to the Call icon, to quickly dial the number.
- ◆ Drag an item from the Internet Events list to the Delete icon to delete it. (Deleting an item from the list does not affect your Calendar; it simply deletes the item from the list.)

Setting preferences

You can customize Internet Sidekick by setting its preferences. Choose Tools | Preferences | General for overall Internet Sidekick preferences.

Select which view you want to be the default, or check the box to return to the last view used before exiting.

Choose where you want the Desktop icons.

Click to change Desktop colors.

Choose the key that moves to the next field in the Cardfile.

Specify the default directory for your files.

Check the options you want.

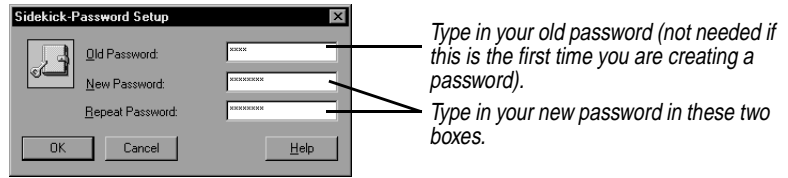
Change the display fonts for the Cardfile and Write views.

Set a password.

The individual Internet Sidekick views have their own Preferences menus, discussed in later chapters.

Using password protection

You can set a password so that no one but you can open Internet Sidekick. Check Password at Startup in the General Preferences dialog box (described in the preceding section). The Password Setup dialog box appears.



NOTE Passwords are case-sensitive. Be sure to enter your password using exactly the same capitalization each time.

Don't forget your password. Once you create a password, it is required to run Internet Sidekick.

The Calendar view



The Internet Sidekick Calendar is a powerful tool for helping you organize your events and activities. You can use the Calendar to schedule events, set reminders, and maintain a list of To Do items and phone calls. You can schedule group events and resources using Internet group scheduling (discussed in this chapter and in Chapter 4). Your events automatically adjust if you take your computer to another time zone (and change the Local Clock setting), making it easy to keep track of events where you travel and back home.

You can merge information from a Cardfile to insert a name and phone number in your Calendar item, and you can have Internet Sidekick automatically dial the number for you.

To switch to the Calendar view, click the Calendar icon on the Desktop, press *F6*, or choose View | Calendar.

This chapter explains how to

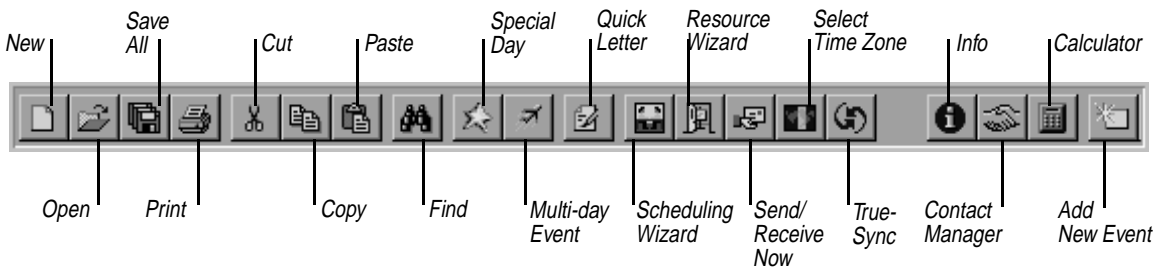
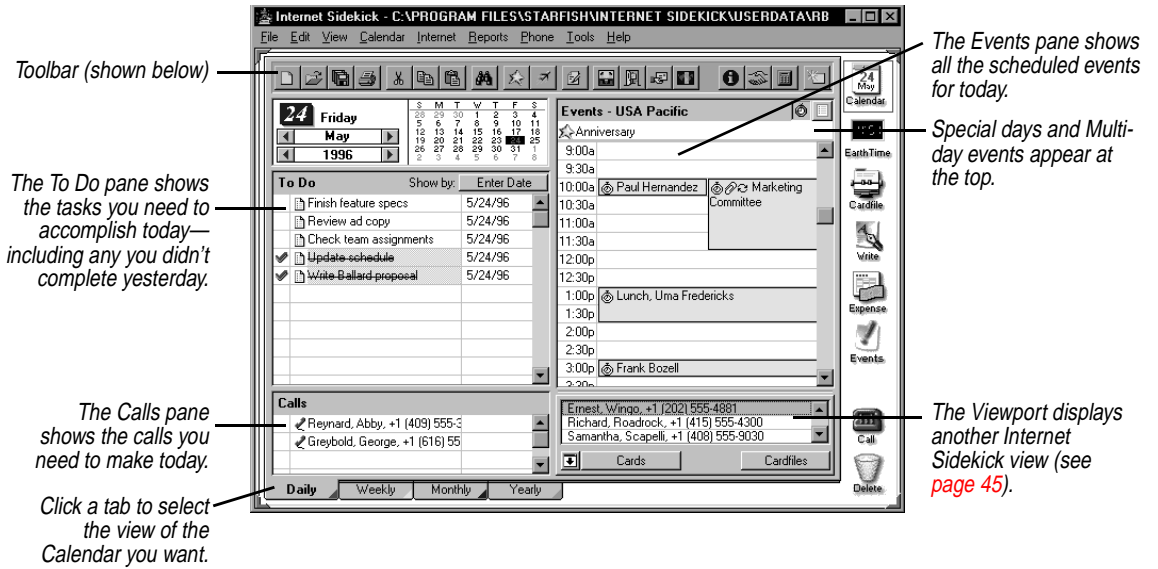
- ◆ Enter events, To Do items, and calls
- ◆ Schedule special days, recurring activities, and multi-day events
- ◆ Sort To Do items and goals
- ◆ Search for specific entries
- ◆ Use the Activities view for personal events
- ◆ Synchronize two Calendars
- ◆ Enter time zone information for events
- ◆ Set Calendar preferences and customize Calendar views

TIP

Be sure that you have set the correct Local Clock in the EarthTime view, so the Calendar View displays your events based on the correct time zone.

NOTE to Sidekick 95 users: When you open a Sidekick 95 calendar file in Internet Sidekick, the event times are converted internally to GMT (Greenwich Mean Time), which is used to store all times. Your time zone setting (for your Local City) is used to determine how to convert the time. Be sure you have the correct time zone set in Windows 95. You can double-click the time display in the system tray of the Windows 95 Task Bar. Or open the Date/Time Control Panel (click Start, Settings, Control Panel).

The following figure illustrates the Calendar view.



Viewing your calendar

You can view your personal calendar in several formats (including Daily, Weekly, Monthly, and Yearly views, which are discussed here and starting on [page 48](#)).

 **TIP**

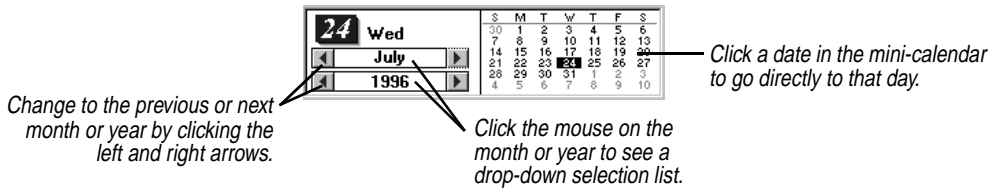
You can quickly jump to today's calendar from another date, or from weekly, monthly or yearly views, by pressing Ctrl+G.

To jump directly to today's calendar

Click the Calendar icon on the Desktop. If you've changed to another day and switched to another view, clicking the Calendar icon once returns you to the Daily view, and you can click it a second time to go to today.

Selecting dates in Daily view

In the Daily view, the selected date is highlighted in the mini-calendar. The following illustration shows how you can change the date using the mini-calendar.



List view and Time view

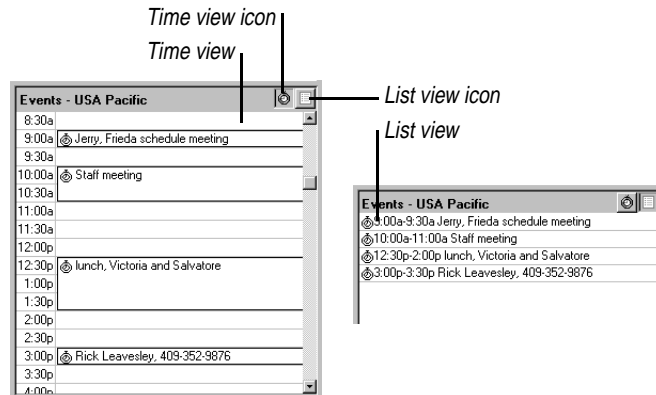
You can switch between two views of your calendar's events:

Time view shows the full view of your day, with booked and empty time slots displayed.

List view shows booked time only.

To switch between Time view and List view

Click the icon for the view.



Scheduling events

Enter your appointments and scheduled events on the Events list. You can have any number of events scheduled throughout the day (up to a maximum of 288 per day—that's three per 15-minute period for 24

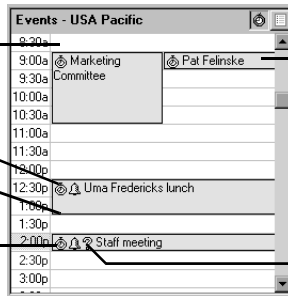
hours per day), and up to three overlapping events starting at the same time. Like To Dos, events can be checked off when completed, by right-clicking and choosing “Check as Complete” from the shortcut menu.

Create an event by typing in an empty time slot, or double-click the starting time to open the Schedule an Event dialog box.

To change an event's starting time, drag its clock icon up or down.

Click an event and drag its bottom edge to change its ending time.

Double-click the event icon, or right-click the event and choose Edit, to edit its details.



Overlapping events appear side-by-side.

Icons indicate an alarm and unconfirmed activity.

Creating an event in the Events pane

You can quickly create an event, without opening any dialog box, by typing in the time slot on the event day.

To create an event by typing in the time slot



Click in the Events pane on the time you want to start your event, and type a description. You can adjust the event's duration by dragging the lower edge of the event down or up to lengthen or shorten the time. When you're done typing, press *Enter*.

To create an event using a Cardfile entry

Drag a card from the Viewport to the appropriate time slot in the Events pane (displayed in Time view, not List view). All the card fields shown in the Viewport appear in the event. You can then type or edit the information, or adjust the event time, just as you would with a typed event. For more information, see [“Using the Viewport” on page 45](#).

To create an event from a Call or To Do item

Drag a Call or To Do item (discussed later in this chapter) to the appropriate time slot in the Events pane. The Call or To Do item information is entered in the event information.

Internet Sidekick automatically places an event icon to the left of the event text, whether it's a personal event  or a group event. 

Revising in the Events pane

To edit an existing event's description or time

Click anywhere in the event text to revise the description. You can change the starting time by dragging the event icon up or down in the Events pane. Change the ending time by dragging the bottom edge.

To specify time more precisely, add a detailed note, or set an alarm, use the Schedule an Event dialog box, described in the next section.

You can use drag and drop to move the event; simply drag the icon to the new time.



To check off a completed event

Right-click the event's icon and choose Check as Complete from the Shortcut menu. Completed events are marked with strikethrough.

Using the Schedule an Event dialog box

There are numerous details of an event that you can set or modify using the Schedule an Event dialog box.

To create or revise an event using the Schedule an Event dialog box, do any of the following:

- ◆ Choose Calendar | Events | Daily.
- ◆ Double-click the Clock icon  for an existing personal event.
- ◆ Double-click the Internet Event icon  for an existing event.
- ◆ Double-click an unused event time slot.
- ◆ Click the Add button and choose Appointment from the Schedule New Activity dialog box.



The Schedule an Event dialog box contains five tabs (pages) that provide all the details of your event. Fill in the information you need, as shown in the following illustrations, and click OK when you are done.

NOTE There is a difference between a personal event, for your calendar only, and a group event. Internet Sidekick creates an individual event, entered in your calendar only, unless you add participants in the Participants page. By adding one or more names in the Participants page, you tell Internet Sidekick to send invitations to your list. For more information about group scheduling, see Chapter 4.

The Date and Time page

When you finish with each panel, click the next tab you need for your event.

The screenshot shows the 'Schedule an Event' dialog box with the 'Date and Time' tab selected. The 'Subject' field contains 'Project and schedule review meeting.'. The 'Date and Time' section shows 'Fri 7/19/96' for the date, '12:00 PM' for the start time, and '2:00 PM' for the end time. The 'Location' section shows 'City and Country' as 'San Francisco, CA, USA', 'Time Zone' as 'USA Pacific', and 'Place' as 'Wharf Restaurant'. There are 'OK', 'Cancel', and 'Help' buttons at the bottom.

- 1 Type the subject.
- 2 Select the date by typing or using the arrows. The large arrow opens a calendar.
- 3 Type or use the arrows to select the start and end times.
- 4 Select the city, and the time zone fills in automatically, or you can specify time zone. See "Help for travelers: changing time zones" on page 34.

The Participants page

Notification methods

The screenshot shows the 'Schedule an Event' dialog box with the 'Participants' tab selected. The 'Select Address Book or Mailing List' dropdown is set to 'RHB'. The 'People' list on the left includes contact information for Janice Hartbloom, June Corsova, and Samantha Scapelli. The 'Participants' list on the right shows Ernest Wingo, Janice Hartbloom, June Corsova, and Samantha Scapelli. There are 'OK', 'Cancel', and 'Help' buttons at the bottom.

Select participants if you want to use group scheduling.

- 1 Choose the address book or mailing list (see "Using mailing lists" on page 75). Click the More button to open another cardfile.
- 2 Click the notification method for each participant.
- 3 Click > to add selections to the Participants or CC lists.

The Message page

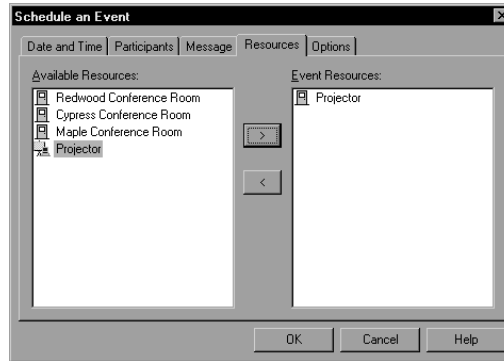
The screenshot shows the 'Schedule an Event' dialog box with the 'Message' tab selected. The 'Message' text area contains the text 'Please update your schedule estimates before the meeting.'. Below the text area are 'Attach URL...' and 'Message...' buttons. At the bottom, there is a 'File Attachment' section with a text field and a 'Browse...' button. There are 'OK', 'Cancel', and 'Help' buttons at the very bottom.

Type a message or agenda for the meeting.

You can click Message to import a text file into the message. Or click Browse and specify a text file to attach to the message (this can be a small text file of up to about 2000 characters).

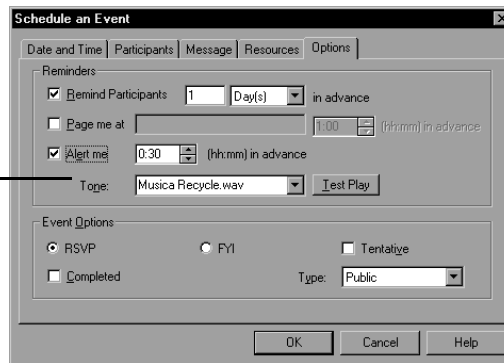
Click Attach URL to enter a Web address.

The Resources page



- 1 Select a resource from the Available Resources list.
- 2 Click > to add it to the Event Resources list.

The Options page



- 1 Specify reminders you want: by e-mail message to participants, or to yourself by pager or computer alarm.
- 2 Click the RSVP button to request a reply, or the FYI button to send an announcement only.
- 3 Check other options you want (see text).

A sound card is required for Tone. Sound (.WAV) files are stored in the Windows\Media folder.

When you are done entering event details, click OK.

Reminders

The Reminders in the Options page include the following:


- ◆ **Remind Participants**—Sends reminder messages to all group event participants in advance of the meeting.
- ◆ **Page me at**—Sends an e-mail to your pager to remind you in advance of the meeting. (You must have an alphanumeric pager with an electronic mail account from your pager provider.)
- ◆ **Alert me**—Sounds an alarm at your computer in advance of the meeting. Choose the sound you want from the Tone list.

Event Options

The Event Options include the following:

- ◆ **RSVP/FYI**—For a group scheduling event, clicking RSVP (which means “please respond” in French) indicates you want recipients to reply to your invitation, and Internet Sidekick to keep track of

reply information. If you click FYI (For Your Information), you send an announcement of the event, without requesting replies. Use this option for events such as a company meeting that will occur regardless of individual schedules.

- ◆ **Tentative**—Check for an event that is not confirmed. An icon  appears next to the event in the Events list. You can later select this event and click the Confirm button to send messages confirming the event and removing the tentative icon.
- ◆ **Completed**—Check for a completed item. The completed event will appear grayed in the Event list.
- ◆ **Type**—Specify an event type for your event: Public, Personal, or Confidential.

NOTE When you create a group event or accept an invitation to a group event, Internet Sidekick automatically makes an entry in the currently open Calendar. If you use more than one calendar, be sure you have the right calendar file open when you create or respond to group scheduling events.

Help for travelers: changing time zones

Internet Sidekick understands that the world isn't flat. Each scheduled event on your calendar is entered with time zone information, which you specify in the Date and Time panel (see [page 31](#)). Most of the time, this will probably be your Local Clock time. But if you are planning a long-distance trip and will be taking your computer, you can enter events with the time zone of your destination. Internet Sidekick can then adjust your events when you change time zones. Thus, as you travel, you can always check with Internet Sidekick to find out what's happening back home, or elsewhere, in terms of the current time.

You also can temporarily change the displayed time zone so you can view events in non-local time. See the next section for details.

Changing the time zone temporarily

You can temporarily change the displayed time zone, so you can view events you have made in another time zone. For example, if you are trying to schedule a meeting for your trip to New York next week, you can temporarily switch to New York time to see what your schedule will look like when you get there.

To change the displayed time zone



- 1 Choose Tools | Select Different Time Zone or click the Select Different Time Zone icon in the Toolbar.

- 2 In the Select Different Time Zone dialog box, choose the time zone you want, or choose the city and the time zone is automatically selected.

The time zone you select remains in effect for your current Internet Sidekick session or until you reset it. It affects your calendar display and all time-related activities in Internet Sidekick, except that the EarthTime Local Clock is not changed.

To restore your original (Local Clock) time zone

- 1 Choose Tools | Select Different Time Zone or click the Select Different Time Zone button.
- 2 In the Select Different Time Zone dialog box, click the Find the Local Time Zone button. Your Local Clock time zone will be selected. Click OK to use that time zone.

When you travel

When you travel, be sure you switch to EarthTime and change the Local Clock time to your destination. Then all events you have scheduled there will appear in the correct local time. In addition, you will be able to see any activities back home in “real time,” adjusted for your current location.

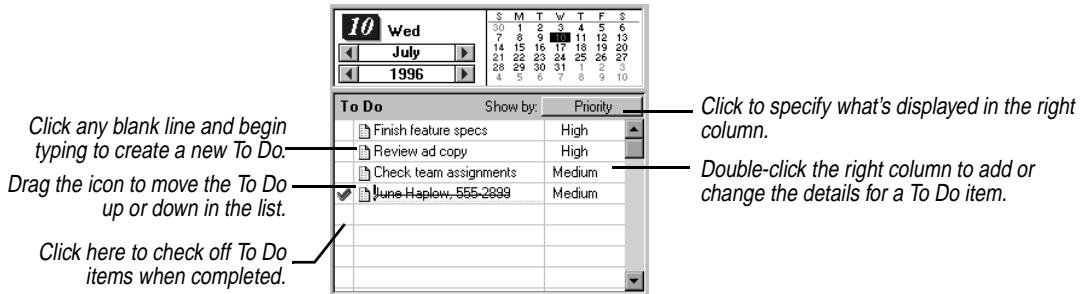
For example, when you enter the appointments for your trip to New York, you include the city (or time zone) for each one. Then, when you are in New York, change the Local Clock in EarthTime to New York time. Your events adjust to display correctly in New York time, whether those events are in New York or back home in San Francisco (or elsewhere). So an event you need to attend in New York at 10 a.m. will appear at 10 a.m. on your calendar. If you need to phone in during a meeting in San Francisco that occurs at 2 p.m. (San Francisco time), it will appear on your calendar at 5 p.m. (New York time), so you know when to make the call.

Internet Sidekick makes sure that you always see scheduled events at the current Local Clock time, making it easy for you to keep on schedule.

Entering To Do items

You can enter tasks into your To Do list, and check them off when completed. Internet Sidekick forwards any uncompleted tasks to the next day. You can also give a To Do item attributes like a priority,

category, due date, and person assigned to handle it. See the next section for details.



To create a new To Do item, do any of the following:

- ◆ You can click any blank line in the To Do pane and begin typing. When you begin typing, Internet Sidekick places a To Do icon in front of the text.
- ◆ Drag a card from the Viewport to the To Do pane. The three card fields shown in the Viewport appear in the event. If the card includes a telephone number, you can drag the To Do item to the Call icon to dial the number (assuming you are using modem dialing).
- ◆ Choose Calendar | To Do Items | Daily, which opens the To Do dialog box.

Revising To Do items

To edit the text of an existing To Do item

Click in the item and edit as needed. Or right-click the item and choose Edit from the shortcut menu.

To move a To Do item

Grab its icon and drag it to the new location.

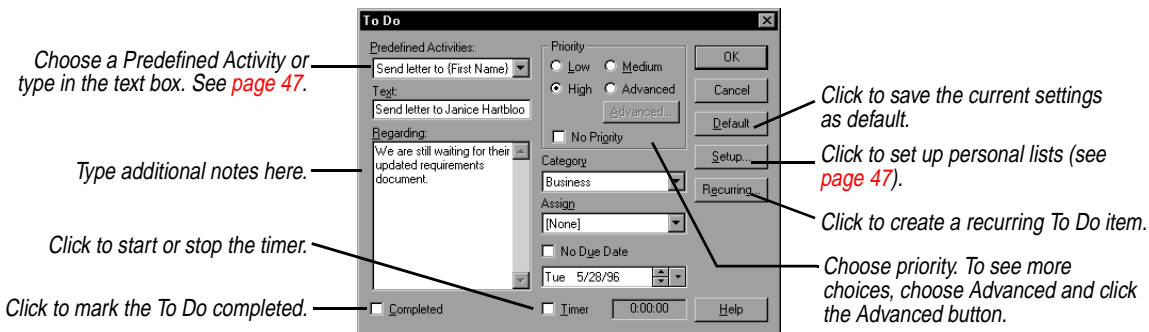
For information on sorting To Do items, see [“Sorting To Do and Goals lists” on page 46.](#)

Setting To Do attributes

You can set the attributes (for example, priority, category, due date, and person assigned to handle the item) for a new or existing To Do item.

To set attributes for a To Do item

Double-click a blank or existing To Do item’s right column. The To Do dialog box appears.



The attributes for To Do items are as follows:

- ◆ **Priority.** Priorities are set by choosing Low, Medium, or High. Click the Advanced button if you would like to set priority using two levels: A, B, and C, and 1 through 6 (for example, A1, A2, B1, and so on).
- ◆ **Category.** Choose one of three predefined categories: Business, Personal, and Other. You can edit or create your own categories as described in “Creating Personal Lists” on page 47.
- ◆ **Assign.** You can assign a task to someone else, and you can customize the list of assignable people (see “Creating Personal Lists” on page 47).
- ◆ **Entry date.** If you use the To Do dialog box, Internet Sidekick automatically remembers the date you enter a task. You can choose to display this date in the To Do list.
- ◆ **Due date.** If you assign a due date to a task, the To Do item turns red if not completed by that date.
- ◆ **Timer.** You can start a timer for a task any time after it has been entered. The timer stops when the To Do item is checked as completed. The total elapsed time is recorded and saved with the task.
- ◆ **Regarding.** You can save detailed information about a task, up to 640 characters. If a To Do item has Regarding notes, a paper clip icon appears in its right column.
- ◆ **Recurring.** You can make any To Do item recurring, so it automatically appears on your To Do list at specified intervals. See “Recurring activities” on page 40.

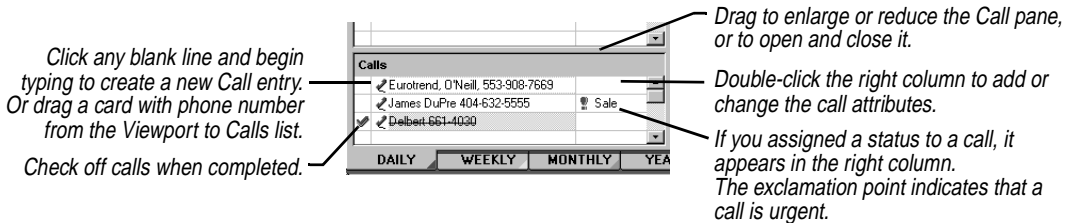
 **TIP**

You can use predefined activities to create a To Do item using information from a cardfile. For example, you can create a To Do item that automatically includes name and phone number of the current card. Then it's an easy matter to drag the To Do item to the Call icon when you want to dial the number. Personal lists are also used to define the items in the category and assign lists. For details on personal lists, see “Creating Personal Lists” on page 47.

NOTE The dates of To Do items are always based on Local Clock time, and are not related to a specific time zone the way events are.

The Calls list

If you prefer to keep your scheduled phone calls separate from your To Do list, you can enter them in the Calls list. Like To Do items and events, calls can have additional attributes—in this case, status and level of urgency.



To enter a call item, do any of the following

- ◆ Click any blank line in the Calls pane and begin typing. When you begin to type, Internet Sidekick places a call icon in front of the text.
- ◆ Drag a card from the Viewport to the Calls pane. The three card fields shown in the Viewport appear in the call item. If the card includes a telephone number, you can drag the call entry to the Call icon to dial the number (assuming you are using modem dialing).
- ◆ Choose Calendar | Calls | Daily, which opens the Call dialog box, described in the next section.

You can edit the text of existing entries in the Calls list by just clicking on the text and typing. Or right-click the item and choose Edit from the shortcut menu.

Setting call attributes

To set call attributes

Double-click in a blank or existing call's right column to enter or change details. The Call dialog box appears.

Choose a Predefined Activity
or type in the text box.
See [page 47](#).

Type notes about the call.

Select a status.

Click to define status choices and
predefined activities.

Click to check as completed.

Click to display the Urgent icon.

You can set the following attributes for each call:

- ◆ **Call status.** If you assign a call status, it appears in abbreviated form in the right column of the Calls list. The default choices for call status and their abbreviations are

Busy
Call
Call Back (CB)
Returned Your Call (RYC)
Voice Mail Message (VMM)
Will Call Back (WCB)

You can create your own status choices by clicking the Setup button (see [“Creating Personal Lists” on page 47](#)).

- ◆ **Urgent.** If you label a call as Urgent, an exclamation point appears in the right column of that call in the Calls list.
- ◆ **Regarding.** You can save additional information about a call, up to 640 characters in length. If a call has Regarding notes, a paper clip icon appears in its right column.
- ◆ **Recurring.** You can make any call recurring, so it automatically appears on your Calls list at specified intervals.

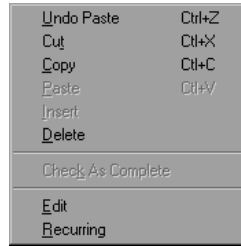
NOTE Calls are always based on Local Clock time, and are not related to a specific time zone the way events are.

Modifying and deleting activities

You can modify or delete an Event, Call, or To Do item using the shortcut menu.

To modify or delete an activity using the shortcut menu

Right-click the item, and choose a command from the shortcut menu.



Choose Edit to revise or reschedule the activity, or Delete to remove it. The Recurring option opens the Recurring dialog box. (Note that you can't have a recurring group event.) Check as Complete places a checkmark next to the activity to indicate that you have completed it.

Recurring activities

You don't have to type regularly repeated To Dos, events, and calls one-by-one. You can specify the intervals in the Recurring Appointment dialog box, and let Internet Sidekick add these activities automatically.

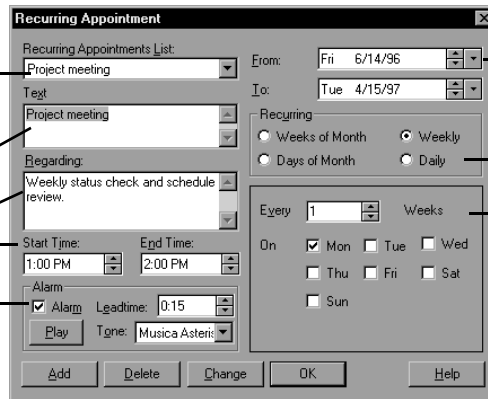
If you are modifying an existing recurring event, select it from this list before making changes.

Enter the text for your recurring event.

Types notes or comments.

Enter start and end times.

Check if you want an alarm to remind you about the event, and enter information.



Specify how long you want the event to recur. The default is one year.

Click your choice here...

...and then choose the interval in this panel (see "Picking the interval for recurring activities" on page 41).

To add recurring activities to the Calendar

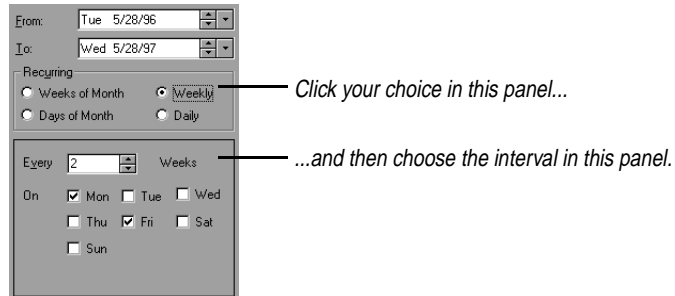
- 1 Choose the type of activity (Events, Calls, or To Do items) you want from the Calendar menu in the Daily view, and then choose Recurring (for example, Calendar | Events | Recurring).
- 2 Enter the description text, Regarding notes, and other options.
- 3 Set the range of days, weeks, or months that the activity will recur on using the From and To dates.
- 4 Choose the interval you want (see the following section). When you're done, choose Add.

TIP

Another way to create a recurring event is to right-click an existing event—not a group event—or a blank event time, and choose Recurring from the shortcut menu.

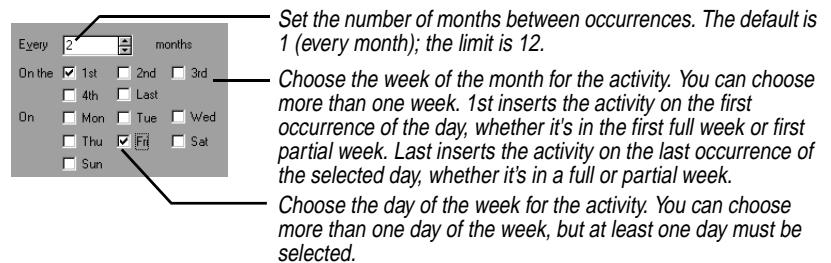
Picking the interval for recurring activities

You can pick one of four types of intervals for a recurring activity, weeks of the month, weekly, days of the month, and daily, as described in the following sections.



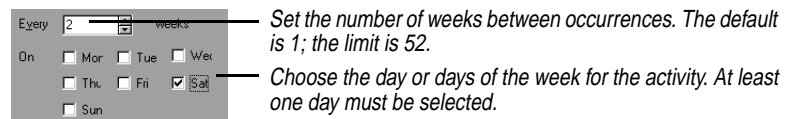
Weeks of the month

This option lets you set an activity to repeat on the same day of the week every month or every number of months (for example, the first Tuesday of every month or the third Friday of every other month).



Weekly

This option lets you set an activity to repeat on the same day every week, every other week, or any other weekly interval (for example, every Tuesday or every third Friday).



Days of the month

This option lets you set an activity to repeat on the same date every month or every number of months (for example, the 1st and 15th of every month, or the 25th of every other month.)



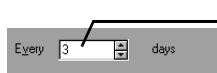
Set the number of months between occurrences. The default is 1 (every month); the limit is 12.

Select the dates for the activity from the generic month grid. At least one date must be chosen.

Click if the activity recurs on the last day of the month.

Daily

This option lets you set an activity to repeat after a day or a number of days (for example, every day or every 10 days).



Set the number of days between occurrences. The default is 1 (daily); the limit is 366.

NOTE You can change or delete recurring activities at any time, either individually from the Daily view or globally through the appropriate recurring activities dialog box.

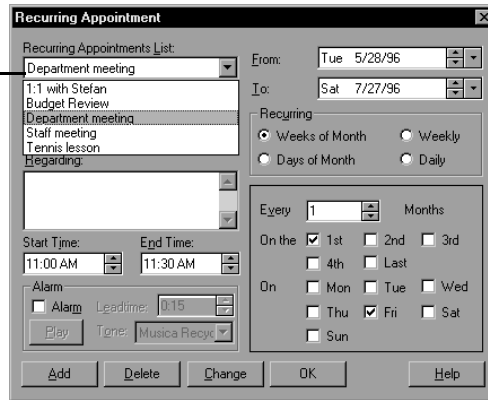
Modifying and deleting recurring activities

Modifying or deleting one instance of a recurring event does not affect others. You can, however, modify or delete all instances of the recurring event.

To modify or delete an existing recurring activity

- 1 Choose the type of activity (Events, Calls, or To Do items) you want from the Calendar menu in the Daily view, and then choose Recurring.
Or right-click a recurring event and choose Recurring from the shortcut menu.
- 2 In the Recurring list, click the arrow and choose the item you want to change.

Select the recurring activity you want to modify from the drop-down list.



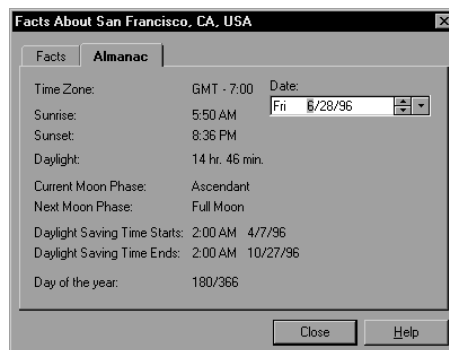
- 3 Make changes in the schedule or text information, if you are modifying it.
- 4 Click Change to modify the recurring activity. Or click Delete to delete it; you will see a dialog box asking you if you want to delete all occurrences, future occurrences, or past occurrences.

Using the Almanac

Internet Sidekick gives you solar and celestial information about the current day in its Almanac. The information applies specifically to the Local City set in EarthTime (see Chapter 8).

To see the Almanac for the current day in the Local City

Click the Almanac Information button in the Toolbar or choose Calendar | Almanac.



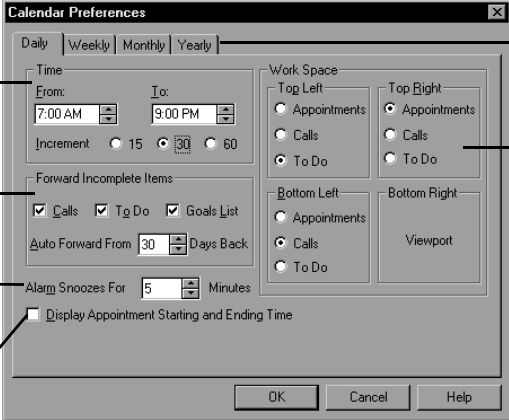
You can also see facts about the current Local City by clicking the Facts tab in the dialog box. See the EarthTime chapter for more information.

Customizing the Calendar

You can change in your Calendar configuration to suit you personal working methods.

Setting Calendar Preferences

To enter or modify the Calendar preferences, choose Tools | Preferences | Calendar while in the Calendar view. The Calendar Preferences dialog box appears.



The screenshot shows the 'Calendar Preferences' dialog box with the 'Daily' tab selected. The 'Time' section has 'From' set to 7:00 AM and 'To' to 9:00 PM, with an 'Increment' of 30 minutes. The 'Forward Incomplete Items' section has checkboxes for 'Calls', 'To Do', and 'Goals List', all of which are checked. The 'Auto Forward From' is set to 30 days back. The 'Alarm Snoozes For' is set to 5 minutes. The 'Display Appointment Starting and Ending Time' checkbox is unchecked. The 'Work Space' section has four panes: 'Top Left' (Appointment, To Do), 'Top Right' (Appointment, To Do), 'Bottom Left' (Appointment, To Do), and 'Bottom Right' (Viewport). The 'Top Right' pane has 'Appointment' selected. Annotations with arrows point to various parts of the dialog box.

Set the beginning and ending times, and the time increment to display. The range is 12 a.m. to 11:45 p.m.

Set the number of days Internet Sidekick looks back to check for incomplete To Do items.

Set the time Internet Sidekick waits before repeating an alarm.

Check if you want Start and End time displayed in the event slots.

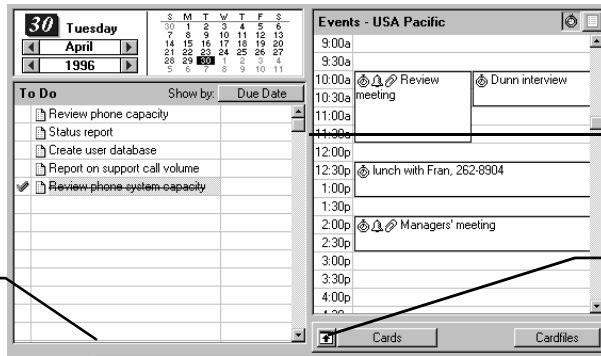
Click tabs to set preferences for other views (they are discussed later in this chapter).

Set up the arrangement you want for your work space.

The Forward Incomplete Items setting determines how far back Internet Sidekick looks to find To Do items you have not checked off as completed. For best results, leave this value set to its maximum of 30. If you set a shorter value, for example 2, and then leave your computer turned off for 3 days, uncompleted items will not be forwarded when you next start Internet Sidekick.

Customizing the Daily view

You can customize your Calendar's Daily view in many ways. You can resize the Events, Calls, and To Do lists by dragging their edges. You can make the Calls list disappear by dragging down its edge to the bottom of the To Do pane. You can open or close the Viewport. The size and position of each pane is retained the next time you start Internet Sidekick.



The Calls pane has been closed (some people prefer to enter calls in the same list as To Dos). Drag upward here to reopen it.

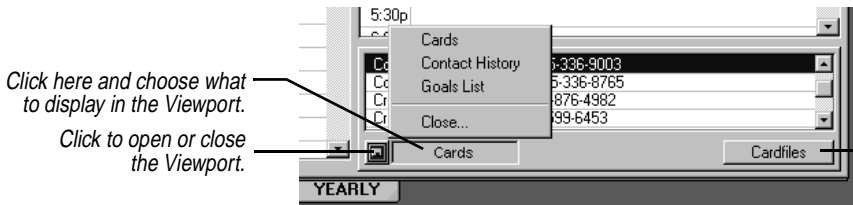
Drag the border to change the width of the panes.

Click to open and close the Viewport.

Using the Viewport

The Viewport is a powerful feature that provides a window from one view into another, so you can use the two views together.

In the Calendar, the Viewport can display the Card list, the Goals list, or the Contact Log of a specific card. Select what you want to appear in the Viewport from the list in the lower left corner.



Click here and choose what to display in the Viewport.

Click to open or close the Viewport.

If you display Cards, click here to select a cardfile.

TIP

Select a card in the Viewport, and then create a calendar event. Select a predefined activity in the event, To Do, or call dialog box to merge information automatically from the card. See **“Creating Personal Lists”** on page 47.

If you choose the Cards list, you’ll see the index of the active Cardfile. And just like in the Cardfile view, you can drag and drop cards to the Delete or Call icons. You can also drag a card onto the To Do pane, Events pane, or Calls pane to create a new To Do item, event, or call containing the text from the card’s index line. If the index line includes a telephone number, you can then drag the entry from the To Do pane, for example, to the Call icon to dial the number. You can also use the Edit | Add Card command to add new cards to the cardfile shown in the Viewport.

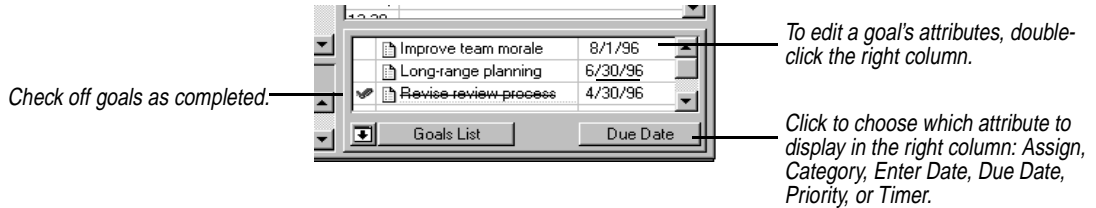
If you display a Contact Log, you see the log for the currently selected card in the Cardfile. You can edit the log. (See **“Using the Contact Manager”** on page 101.)

Using the Goals list

You can set up the Viewport to display the Goals list. The Goals list is like the To Do list, but for goals or tasks that don’t have specific due dates, are perpetually on the To Do list, or have due dates in the

distant future. These tasks might not need your immediate attention, but you don't want to forget them.

Enter and edit goals the same way as To Do items: type directly onto the list to create or edit them, and double-click the right column to set attributes. You can also choose Calendar | Goals to create a new item.



Goals have all the same attributes as To Do items, except Recurring. For detailed information on entering To Do items and setting their attributes, see [“Entering To Do items” on page 35](#).

If an item in the Goals list has a due date, Internet Sidekick automatically moves it to the To Do list when that day is reached. In addition, you can move goals to the To Do list manually when they need attention, by dragging and dropping them.

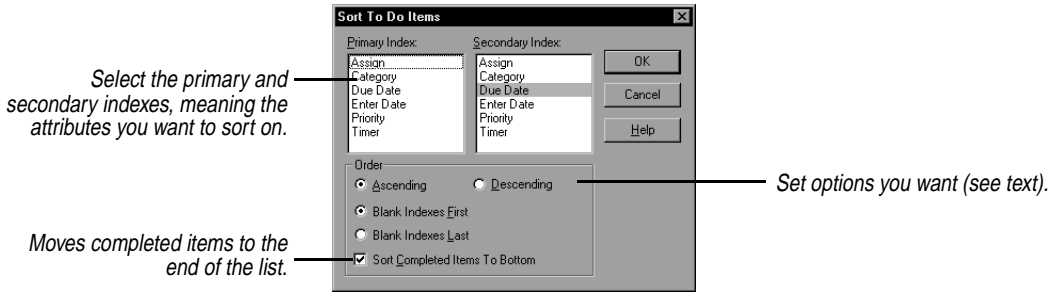
Sorting To Do and Goals lists

You can sort the To Do list and Goals list by any two attributes, in ascending or descending order. You can also place completed items at the bottom of the list.

NOTE Completed To Do items are automatically moved to the bottom of the list when you click in another part of the Calendar view. Similarly, completed Goals are sorted to the end of the list. If you do not want this automatic sorting to occur, uncheck the box at the bottom of the Sort dialog.

To sort To Do items or goals

Choose Calendar | Sort, then either To Do Items or Goals.



Choose from the following options:

- ◆ **Ascending** arranges the list from lowest to highest value (A to Z, 1 to 6).
- ◆ **Descending** arranges the list from highest to lowest value (Z to A, 6 to 1).
- ◆ **Blank Indexes First/Last** sorts cards whose Primary index field is blank to the top or bottom of the list.
- ◆ **Sort Completed Items To Bottom** moves all completed tasks to the end of the list automatically as you work.

Creating Personal Lists

Personal Lists can be a great time saver when you're creating events, calls or tasks. There are several kinds of Personal List items:

- ◆ Predefined activities can save you steps when creating an event, call, or To Do item. For example, you might create a predefined activity that says "Call {Firstname} {Lastname}, {Phone}." Then, to create a Call entry to phone someone, you select that person's card in the Viewport. Choose Calendar | Calls | Daily, and choose the item you created from the list of Predefined Activities. When you click OK, the new Call entry appears with the information from the selected card.
- ◆ Call status codes are selected in the Call dialog box (see "[Setting call attributes](#)" on page 38). They appear in the right column of the Calls pane, abbreviated by using only the first letter of each word—such as RYC for Returned Your Call. You can create or modify the status codes by checking Call Status in the Personal List Setup dialog box.

TIP

If the predefined activity includes a phone field, you can place the call by simply dragging the To Do or Call item to the Call icon.

- ◆ Category and Assign lists are available in the To Do dialog box. You can create or modify the Category and Assign lists by checking Category or Assign in the Personal List Setup dialog box.

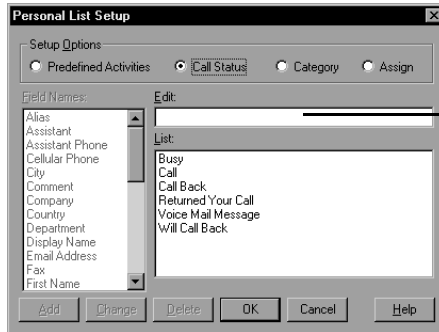
To set up Personal Lists

Choose Calendar | Personal List Setup, or click the Setup button from an activity's dialog box.



Select the list to set up in the Setup Options group.

For predefined activities, type text (including spaces) and double-click the field names you want from the list of fields. Choose Add to place the activity on the predefined list.



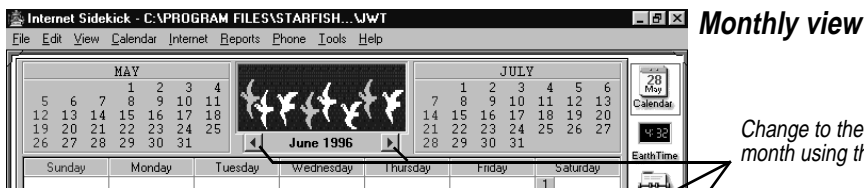
For call status codes, categories, or assign names, type a description (up to 48 characters) in the Edit box, and choose Add to place it on the list.

Up to 127 entries can be added to each list.

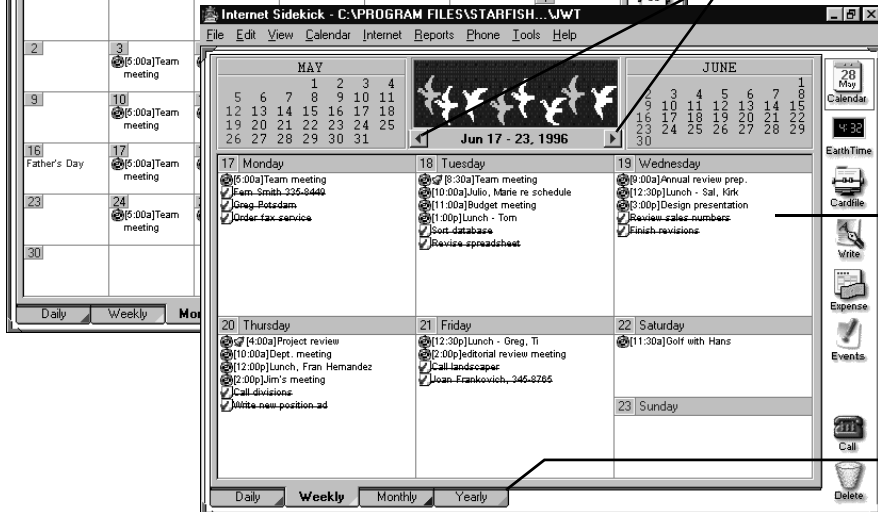
The Weekly and Monthly views

The Weekly and Monthly views display events, calls, To Do items, special days, and multi-day events in standard calendar formats. Goals list items don't appear in these views.

Switch to the Weekly or Monthly view in the Calendar by clicking their view tabs.



Monthly view



Weekly view

Double-click a day in the Weekly or Monthly views to quickly jump to that day.

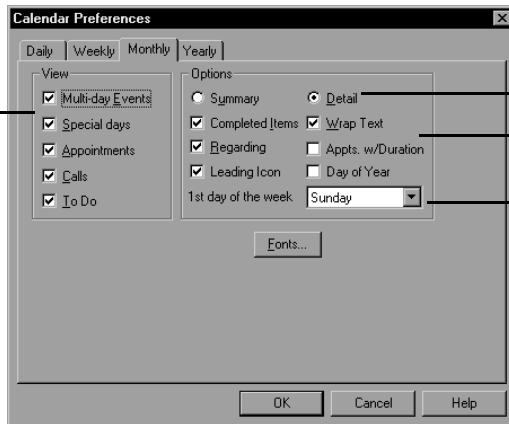
Click the tab to change to another view.

Setting Preferences

To customize the information displayed and printed in the Weekly and Monthly views

Choose Tools | Preferences | Calendar. In the dialog box, click the Weekly or Monthly tabs.

Check all events you want to see in the view.



Check Summary for number of events only, or Detail for event specifics.

Check options you want.

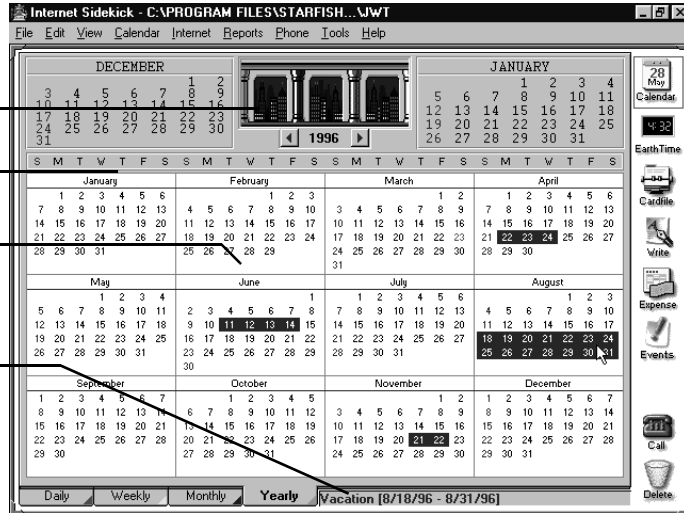
This option appears only for Monthly preferences.

The display options for the Weekly or Monthly views are as follows:

- ◆ **View** offers a list of what you can choose to display: multi-day events, special days, events, calls, and To Do items.
- ◆ **Summary** displays the daily totals for each type of activity, such as the number of calls and To Dos.
- ◆ **Detail** displays all checked details for activities.
- ◆ **Completed Items** displays activities checked-off as completed (incomplete activities always appear).
- ◆ **Regarding** displays any comments attached to an activity.
- ◆ **Leading Icon** displays the To Do, Event, or Call icon in front of the description text for each activity.
- ◆ **Wrap Text** wraps the full description text for an activity onto multiple lines, if needed. Otherwise, only as much text as fits on one line appears.
- ◆ **Events With Duration** shows the ending time for an event. (Events always show their starting times.)
- ◆ **Week Of Year/Day Of Year** shows the week of the year in the Weekly view, and the day of the year in the Monthly view.
- ◆ **First Day Of Week** lets you select the first day of the week (Monthly view only).

The Yearly view

The Yearly view displays the months in either a vertical or horizontal format, or as a yearly planner. Only multi-day events, such as vacations and conferences, appear in this view. Switch to Yearly view by clicking its view tab.



Change to the previous or next year using the left and right arrows.

Double-click a day to quickly jump to that day in the Daily view.

Drag the mouse over a range of dates to schedule multi-day events.

When you point to a multi-day event, its description appears on the status line.

Setting Preferences

To set Preferences for Yearly view,

Choose Tools | Preferences | Calendar, and click the Yearly tab. You can choose from a vertical, horizontal, or planner format display.

Entering activities from glance views

The Weekly, Monthly, and Yearly views are referred to as *glance views*.

To schedule daily activities from the glance views

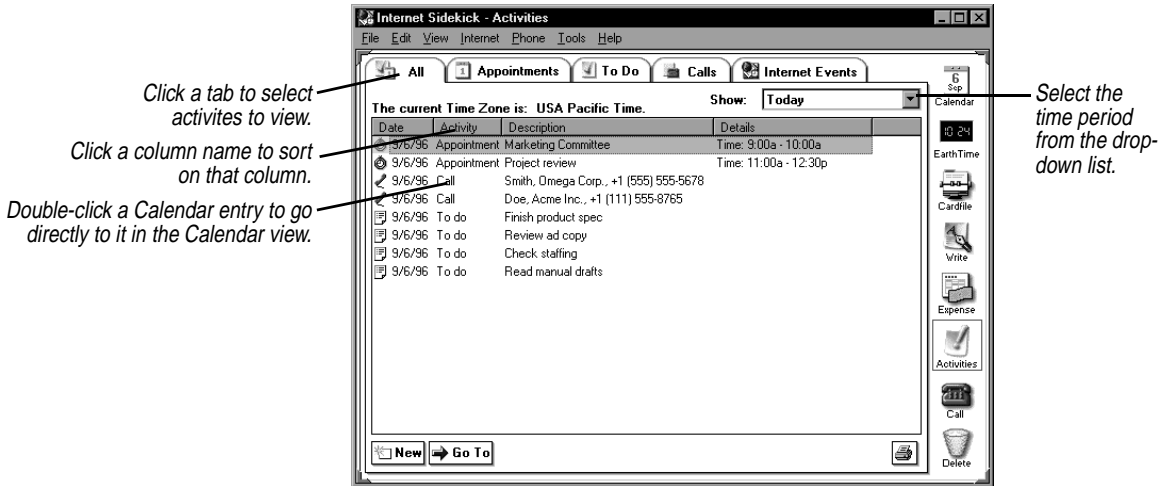
- 1 Choose Calendar | Daily Activity. The Schedule New Activity dialog box appears.
- 2 Choose the type of activity to add: Event, To Do, or Call. When you click OK, the corresponding dialog box appears.

Using the Activities view for Calendar items



The Activities view brings together your group scheduling events with personal events and other entries in your Calendar, all in one convenient location. This section discusses using the Activities view for personal appointments, calls and To Do items; using the Activities view for group scheduling is discussed in Chapter 4.

To open the Activities view, click the Activities icon on the Desktop, or choose View | Activities from the menu.



The tabs at the top determine which activities are displayed. The All tab includes all Calendar items, but not all items that appear in Internet Events—only those that have been added to your Calendar. The other Calendar tabs are labeled Appointments, To Do, and Calls.

The Activities view helps you manage your appointments, To Do items and calls by displaying them for a time period you specify: today, tomorrow, this week, next week, this month, next month. Select the time period in the Show drop-down list.

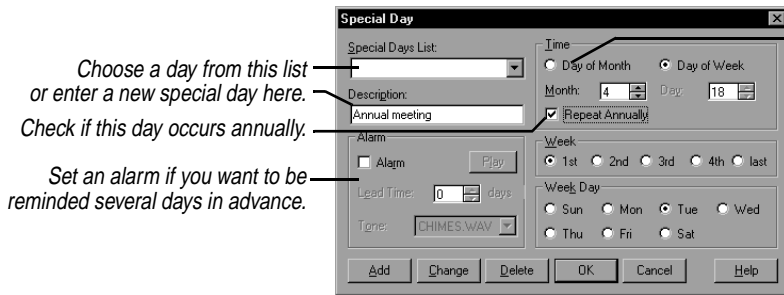
When you view events for tomorrow, Internet Sidekick lets you specify whether you want today's uncompleted To Do items to appear in the list. This provides a convenient way for you to see everything on your schedule for the day ahead, including today's unfinished items.

Adding special days

Special occasions, like birthdays, anniversaries, or other events that you want to be reminded of, can be added to the Calendar as *special days*. Special days appear on top of the Events pane in the Daily view. You can add special days to each day of the calendar year and set alarms to remind you several days in advance.

To add a special day

- 1 Click the Special Day icon in the Toolbar, or choose Calendar | Special Day. The Special Day dialog box appears.



Choose a day from this list or enter a new special day here. Check if this day occurs annually.

Set an alarm if you want to be reminded several days in advance.

If the special day falls on the same date every year, click Day of Month and choose the exact date.

If the special day is on a different date every year, click Day of Week and specify when the day occurs. (This example selects the first Tuesday in April.)

- 2 Enter a name of the special day into the Description text box, or choose a predefined special day from the Special Days list.
- 3 Select the type of special day.

Day of Month is the month and day on which the special day occurs, such as February 20.

Day of Week is the week of the month and the day of the week that the special day occurs.

- 4 To add an alarm to the special day, check the Alarm box. You can set a lead-time for the alarm of up to 31 days. Choose a tone for the alarm. The alarm sounds the designated number of days ahead when Internet Sidekick is first opened that day.

NOTE Alarms use .WAV files, and require that your system have a sound card. The .WAV files are stored in the Windows\Media folder.

- 5 Click Add to place the activity in the Special Days list.

Continue to add other special days following the same steps. All the special days are listed in the Special Days list.

To change the settings for a special day

Select the day in the Special Day list, make the changes, then click Change to save the changes.

To delete a special day

Select it from the Special Day list and click Delete.

Scheduling multi-day events

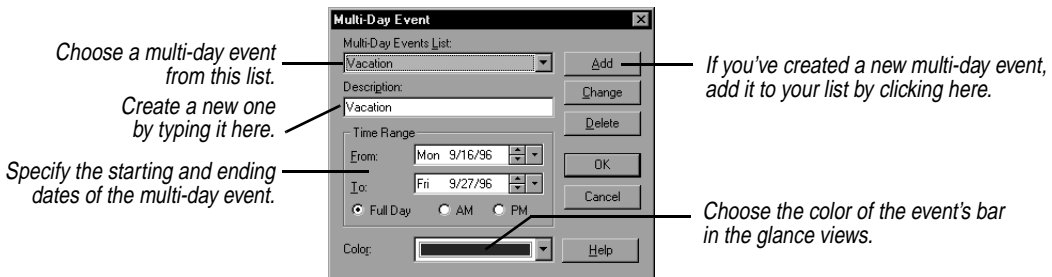
You can schedule multi-day events such as conferences, all-day meetings, or vacations. Multi-day events can be of any duration (even one day).

A multi-day event appears in the title bar of the daily Events pane. In the Weekly and Monthly views, the multi-day event appears as a bar extending from the starting date to the ending date with the description centered on the bar. In Yearly view, it also appears as a bar, but its description appears on the status bar in the lower right of the screen as you move the pointer over the event.

Up to three overlapping multi-day events can be displayed at one time.

To create a multi-day event

1 Choose Calendar | Events | Multi-Day Event. The Multi-Day Event dialog box appears.



- 2 Type the name of the multi-day event in the Description text box.
- 3 Select the month, day, and year for the starting and ending dates of the event.
- 4 Select Full Day, AM or PM (visible in Yearly Planner), and a color for the event's bar.
- 5 Click Add to place the event in the Multi-day Events list.

To reschedule a multi-day event

Select the event from the Multi-day Events list and change the settings for the starting and ending dates. Click Change to save the changes.

To delete a multi-day event

Select it from the list and click Delete.

To quickly schedule multi-day events from the Yearly view

- 1 Place the pointer on the date your event begins. Hold down the mouse button and drag to the ending date.

- 2 Release the mouse button. The Multi-Day Event dialog box appears.
- 3 Enter a description, choose a bar color for the multi-day event, and click Add.

Publishing HTML data

The Internet menu includes an option to publish data to the World Wide Web. This option requires the addition of the Internet Sidekick Web Publisher add-on pack.

Visit the Starfish Software Web site for more information:
http://www.starfishsoftware.com/products/sis/publisher/pub_to_web.html.

Using Eudora Pro or Netscape E-mail

The Eudora Pro Mail and Netscape Mail options in the Internet menu let you send e-mail from Internet Sidekick (you must have Netscape® Mail or Eudora™ Pro Mail installed and configured).

The Eudora Pro Mail command opens your Eudora Pro (32-bit) e-mail software so you can compose and send e-mail messages.

The Netscape Mail command launches your Netscape Navigator™ browser, opens the Netscape Mail window, and opens the Message Composition dialog. (If you have not configured Navigator for e-mail, this option just opens the Navigator browser.)

Searching the Calendar

It's easy to find specific entries in your Calendar by searching for text in the descriptions or Regarding notes.

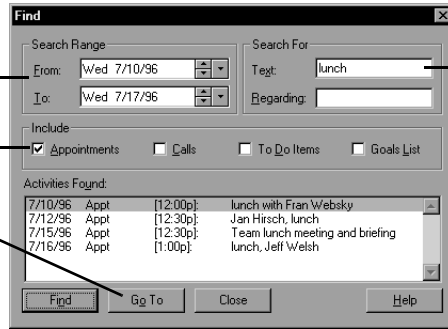
To search for calendar items

Choose Edit | Find from the Daily view, or type *Ctrl+F*. The Find dialog box appears.

Select the range of dates to search in the Calendar. The minimum time period is one day.

Select the activity lists to include in the search.

Select one of the found activities and click Go To to jump directly to that event. Choose Find, or click the Find button, to return to this list.



Enter the text for the description or Regarding note to find. If you enter text in both fields, only those entries that meet both criteria are found. (See the note on search text on page 102.)

When ready, click Find to search the Calendar. All activities that match the search criteria are listed in the Activities Found box. Double-click an activity in the list, or select the item and choose Go To to switch to it in the Daily view.

Working with Calendar files

A single Internet Sidekick Calendar is composed of as many as eight separate files. Internet Sidekick uses part of the filename to differentiate the different files. When working with Internet Sidekick calendar files, it is best to do it using menu commands, including Back Up and Restore to copy calendars. See Chapter 12 for information about Calendar file names and Back Up and Restore.

Using multiple calendars

You can create multiple calendars to keep different kinds of calendar information, although only one calendar at a time can be open. You might keep one calendar for yourself and one for your manager, for example, or you might want separate calendars for your business and personal use.

If you need multiple calendars, you can open and save them just like any other files.

CAUTION Internet Sidekick calendar files are not “sharable” in a network environment. Attempting to share them by storing them on a network drive and letting more than one user access them could result in data loss.

Use the commands listed in the following table to work with multiple calendars.

| Task | Command |
|-------------------------|---|
| Opening a Calendar | Choose File Open Calendar and select the appropriate user name. |
| Creating a new Calendar | Choose File New Calendar. Begin entering data. |

| Task | Command |
|----------------------|---|
| Saving a Calendar | Choose File Save Calendar. Or, save changes to a new Calendar file by choosing File Save As, and entering a new user name of up to four characters. |
| Importing a calendar | Choose File Open. Select the format you want from the Files of Type list. |

Deleting activities

You can free up space in your Calendar files for new entries or delete information that is no longer needed. The activities that fall within a range of dates you set are deleted.

To delete activities

- 1 From the Daily view, choose Calendar | Delete. The Delete Activities dialog box appears.
- 2 Select the types of activities you want to delete. You can delete events, calls, To Dos, or Goals.
- 3 Select the range of dates in the calendar from which you want to delete all activities from the lists selected. One day is the minimum time period allowed. You cannot delete the current year's Goals list.

CAUTION Before you proceed, check your selections carefully. There is no undo option.

- 4 Click OK to delete the activities you specified in the date range you indicated.

Synchronizing events

You can combine the events of two Calendar files, reconciling the two calendars so they agree. Note that this is different from the Backup and Restore feature, which overwrites one file with another. Synchronizing sends data from each system to the other, so that both end up with matching calendars.

To synchronize events between two Internet Sidekick Calendar files, or between a Internet Sidekick Calendar and a calendar of a different type

- 1 Choose Tools | Synchronize | Appointments. The Synchronize Events dialog box appears.
- 2 Choose the Calendar file whose events you want to bring into the open Calendar file. Or choose a different file type in the Files Of

Type list to synchronize an Internet Sidekick calendar with one from a different product.

Internet Sidekick synchronizes the events between the two files.

If one file has any events that are identical (same start and end times, description text, and exact attribute settings) to events in the other file, the identical events are not added. However, if they are at all different, they are added as separate events.

NOTE Calendars can have up to three overlapping events that start at the same time. Internet Sidekick will add events for any block of time until this limit is reached.

Importing Calendar data

You can import calendar data from other products, including previous versions of Sidekick.

To import data from another product

Use the File | Open command. Specify the file format you want to import in the List Files of Type drop-down list. The list shows all file types you can import.

Starfish TrueSync™

The Starfish TrueSync button allows you to add the capability of synchronizing Internet Sidekick with portable electronic organizers and other devices. Visit the Starfish Software Web site for more details: <http://www.starfishsoftware.com/products/truesync/truesync.html>.

The Activities view: Scheduling Group Events

Internet Sidekick's powerful Internet scheduling lets you schedule events with people within your company or anywhere in the world. Internet Sidekick automatically invites your participants to an event you schedule, and collects their replies. The event is automatically placed in your Internet Sidekick calendar, as well as your recipients' calendars if they accept. You can also reserve resources for your event, such as conference facilities, projectors, and other items.



Most of your group event scheduling occurs in the Activities view, where you can see all group events in list form. Events you schedule, or that you accept an invitation to, are also posted automatically in your Calendar.

This chapter discusses

- ◆ Using the Activities view for viewing group events
- ◆ Scheduling a group event
- ◆ Receiving, reading, and replying to invitations
- ◆ Creating mailing lists
- ◆ Verifying the status of a meeting
- ◆ Scheduling resources

About Internet Scheduling

Internet Sidekick's scheduling uses electronic messaging to communicate with others to schedule events and book resources. Because it communicates via the Internet or your company's intranet, Internet Sidekick can provide group event scheduling with users anywhere in the world at any time.

To schedule an event, you enter the details of the meeting and the list of people you want to invite. Internet Sidekick automatically notifies the recipients and collects their responses for you.

NOTE When you initiate a group event or accept an invitation to a group event, Internet Sidekick adds the event to your currently open calendar. If you use more than one calendar, be sure you have the right calendar file open when you create or respond to group scheduling events.

In addition to Internet messaging for group events, you can use fax or telephone messaging for people without e-mail accounts. If you specify a fax number for notification, the event invitation is automatically sent using Microsoft Fax software and your fax modem. Selecting phone notification puts a reminder in your Calls list in the Calendar view.

Supported e-mail systems

Internet Sidekick schedules group events using either of the following mail systems:

- ◆ Internet Mail using a POP3 account (POP stands for Post Office Protocol).
- ◆ Microsoft Exchange with a connection to the Internet if you want to schedule group events via the Internet.

If you need to modify your e-mail information, run the Setup Wizard (Tools | Setup | Wizard) or use the Tools | Preferences | Group Scheduling command in the Calendar or Activities views. You should change your e-mail address information only if absolutely necessary, however, since changes affect all your group event messages. For assistance, click the Help button in the Preferences dialog box; also see [“Group Scheduling Preferences” on page 83](#).

Requirements

Before you can use Internet Sidekick for scheduling events and resources, you need to check a few things about your system:

- ◆ If you want to schedule events with people outside your local network, you must have a modem or direct network connection to the Internet.
- ◆ You must have an account using one of the supported e-mail systems listed in the previous section.
- ◆ To send fax invitations, you need a fax modem, and you must install Microsoft Fax in the Windows Mail and Fax Control Panel.

For additional information about these requirements, see Chapter 1.

Scheduling group events

Internet Sidekick provides a convenient Scheduling Wizard to assist you in entering event information. It helps you enter all the information about the event and identify the participants you want to invite. You also can create a group event using the Schedule an Event dialog box discussed in the previous chapter (see “[Using the Schedule an Event dialog box](#)” on page 31).

You can include a message with your invitation. Your participants’ replies can include a message and, if the recipient can’t attend at your scheduled time, a report on free time.

If you notify some people by fax or phone, you can enter their reply status manually.

NOTE To use Internet scheduling, you must have a cardfile that contains properly identified e-mail addresses for the people you will be inviting (see “[Using special field names for e-mail](#)” on page 91). Or you can use your Eudora Pro address book, Netscape address book, or Microsoft Exchange address book for addressing (see [page 97](#)).

Using the Scheduling Wizard

The easiest way to enter group event information is with the Scheduling Wizard.

To schedule an event

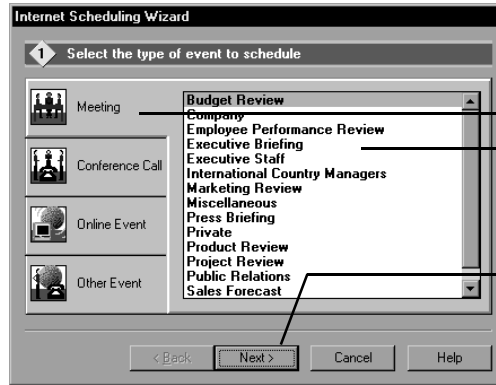
In the Activities, Calendar, or Cardfile view, choose Internet | Scheduling Wizard.

The Scheduling Wizard consists of a series of panels that prompt you to enter the information for your event—participants, resources, agenda or notes, and options. Enter the information in each panel; click Next to proceed to the next panel. You can go back to earlier panels if you need to change something.

When you have finished, you’ll see an Event Summary. You can review your choices and make changes, if necessary, by going back to previous panels. When you are ready to schedule the event, the Wizard adds it to your queue of outgoing messages and puts it on your calendar.

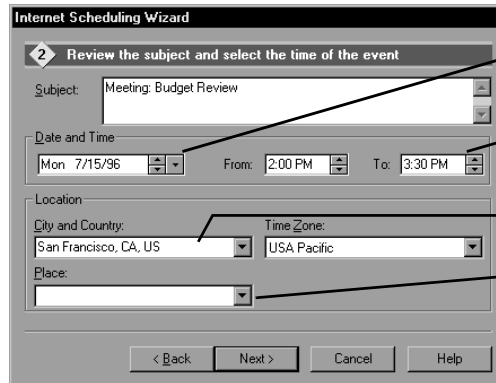
The following illustrations describe the Scheduling Wizard’s panels.

Scheduling Wizard Event Type



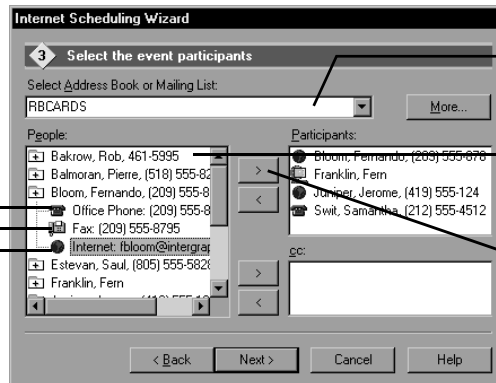
- 1 Click an event category... and click the event type.
- 2 When you have completed each Wizard panel, click Next to continue or click Back to return to an earlier panel.

Scheduling Wizard Date and Time



- 1 Select the date by typing or using the arrows. The large arrow opens a calendar.
- 2 Type or use the arrows to select the start and end times.
- 3 Select the city. The time zone fills in automatically.
- 4 Type or select the place—building, restaurant, etc. (It can be up to 63 characters.)

Scheduling Wizard Participants



Notification method:
Telephone
Fax
Internet

- Select participants:
- 1 Choose the address book or a mailing list (see page 75). Click More to open a different address book.
 - 2 Click the folder next to each name, and click the notification method for that participant.
 - 3 Click one of the > buttons to add each selection to the Participants or CC lists.

Scheduling Wizard Message

- 1 Type the agenda or notes, or click the Message button and select a file containing the message.
- 2 Click Attach URL to add an Internet address. See page 64.
- 3 Click Message to insert a text file.
- 4 Select a file to send as an attachment to the meeting invitation.

Scheduling Wizard Resources

- 1 Select one or more resources from the list.
- 2 Click the > button to add the resources to the Event Resources list.

Scheduling Wizard Event Options

- 1 Check the box to send a reminder, and set advance notice time.
- 2 Check Page Me or Alert Me, and set the time, if you want a reminder.
- 3 Click RSVP to request a reply or FYI to send an announcement only. Tentative events are marked with a "?".
- 4 Specify other options (see "Event options" on page 64).

Scheduling Wizard Schedule the Event

Internet Scheduling Wizard

7 Schedule the event

Event Summary

Date: 7/8/96
Time: from 2:00 PM to 4:00 PM
Location: San Francisco, CA, USA
Subject: Meeting: Project Review

Participants: Francois, LeBlanc; George, Hinrich; Joseph, Wisniewski; Nadine, Upton; Rhonda, Auerbach

Resources: Rose conference room

< Back Finish Cancel Help

- 1 Review your selections. Click the **Back** button if you need to make changes.
- 2 When settings are correct, click **Finish**.

Event options


The Scheduling Wizard Options panel provides the following event options:

- ◆ **RSVP/FYI**—If you choose RSVP (which means “please respond”), recipients can send a reply, and Internet Sidekick collects the information for you. If you choose FYI (For Your Information), you send an announcement of the event, without requesting replies. Use this option for events that will occur regardless of individual schedules.
- ◆ **Tentative**—A tentative event is marked with a ? icon in your calendar and your recipients’ calendars. You can select the event later and click the Confirm button to send a message changing the event to confirmed status and removing the ? icon.
- ◆ **Type**—Specify a type for your event: Public, Personal, or Confidential.

Attaching a URL

You can attach a URL (Uniform Resource Locator—the address of a site on the World Wide Web) as part of the message information on the Wizard Message page. People receiving the URL can click that address in the Information pane of the Activities view to launch their Web browser and jump to the site.

Using the New button

You can schedule a new event by clicking the New button in the Activities view.  **New** When you do, the Schedule an Event dialog box opens; see “[Using the Schedule an Event dialog box](#)” on page 31.

(If you are in the Calendar view, use Calendar | Event | Daily to open the same dialog box.)

The New button, like other buttons in the Activities view, changes its function depending on the currently selected item type. To create a new group event, be sure a group event is selected when you click New. If you have another item type selected, the New button creates a new item of that type. For example, clicking New while a resource message is selected creates a new resource reservation.

Participants who do not have e-mail


You can include participants who do not have e-mail in your list of event invitees. You have two options for addressing invitations to them: fax or telephone.

If you direct an invitation to someone using a fax address, Internet Sidekick launches Microsoft Fax and faxes the invitation for you (you must have Microsoft Fax installed, and Exchange must be your selected messaging system). If you select someone's telephone number as the address, a reminder to call that person is added to your Calls list in the Calendar.

When you hear from these people, you can enter their replies by right-clicking on each participant's name in the Details pane and manually selecting the appropriate status: Accept, Decline, Reschedule Request, Delegate. See [“Entering replies manually” on page 72](#).

Sending event messages

Once you have created an Internet event, or when you reply to an invitation or do something else that requires communicating with another computer, an e-mail session must occur for the message to be sent.

If you have scheduled flash sessions in Group Scheduling Preferences, the message will automatically be sent during your next flash session. To send the message right away, click the Send/Receive button  or choose Internet | Send/Receive Now. If you have not scheduled flash sessions, you must use the Send/Receive Now command (or button) to send your messages. Any unsent messages will be sent when you exit Internet Sidekick.

If you are working offline, see [“Using Internet Scheduling offline” on page 84](#). If you are using a dial-up connection, see [“Using a Dial-Up connection” on page 85](#).

Incoming event invitations

When you receive an invitation, it appears in the Activities view in **bold** type. An icon in the New column indicates a new event. In addition, the Activities view icon on the Desktop is animated and changes color when you have incoming messages.

You will see the incoming event invitation in your e-mail inbox, with <SIS>, for Starfish Internet Sidekick, in the subject. You should disregard it in your e-mail inbox, because Internet Sidekick will automatically handle it for you; do not delete it or make any changes to it.

Users who do not have Internet Sidekick can open the message like any other e-mail; it contains instructions on how to accept or decline the invitation so the originator's Internet Sidekick will be able to record the reply.

NOTE The event message may not appear in Internet Sidekick even though it appears in your e-mail inbox. Internet Sidekick will recognize it after you use the Send/Receive Now command, or after a scheduled flash session.



Click the Activities icon, or choose View | Activities, to open the Activities view. Then click the Internet Events tab.

The screenshot shows the "Internet Sidekick - Activities" window. At the top, there are tabs for "All", "Appointments", "To Do", "Calls", and "Internet Events". The "Internet Events" tab is selected. Below the tabs, there is a table of events with columns for "Type", "New", "Outbox", "Date and Time", "Subject", "Initiator", and "Location". The table contains several rows of event data. Below the table, there are two panes: "Details" and "Information". The "Details" pane shows information about the selected event, including the initiator, received time, and participants. The "Information" pane shows details like date/time, duration, time zone, location, and subject. At the bottom of the window, there are buttons for "New", "Send/Receive", "Minutes", "Accept", "Decline", and "Delegate".

Icons indicate message type, new message, unsent message. See text.

Click an item to see information about it in the Details and Information panes.

Click an item in the Details pane to view its information in the Information pane.

These buttons change depending on what kind of event is selected.

Click the Internet Events tab.


Select the events you want to see.

Click a column head to sort on that field.


Click to expand the Details and Information panes.


Status information for Internet events is represented by icons in the three left columns:


The **Type** column displays an icon for the event type. The icons include:

 *New event you initiated*

 *New incoming RSVP event*

 *Incoming RSVP event you have opened*


 *Resource message*

 *FYI message*


The **New** column displays an icon for all new items. When you click one of these items to read it, the New icon disappears. The icons include:

 *New event information*


 *Reply has arrived*

 *Canceled event*

 *Minutes*

 *Rescheduled event*

The **Outbox** column indicates queued messages to be sent during your next e-mail session. Use the Internet | Send/Receive Now command to send pending messages immediately. For example:

 *Message waiting to be sent*

Reading and replying to invitations

When you receive an Internet Sidekick invitation to a group event, the invitation appears in the Activities view.

To read the details of the event invitation

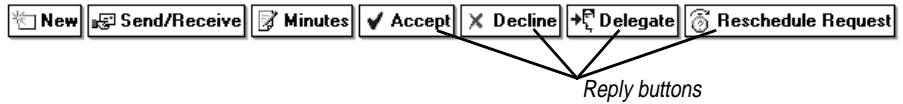
In the Activities view, click the incoming invitation (be sure the Internet Events tab is selected). You can then

- ◆ Click the message and read about the event in the Details and Information panes.
- ◆ Click each item in the Details pane to see more in the Information pane. For example, click each Participant who has replied, and check the Information pane for any message sent with the reply.
- ◆ If a + appears next to any item in the Details pane, click the + to expand the list. Click the - to collapse an expanded list.

To reply to an event invitation

Review the event specifics in the Details and Information panes. Then click your reply choice from the buttons at the bottom of the

Activities view. Or you can right-click an event in the top pane and choose a reply option from the shortcut menu. Your reply is sent only to the originator, not to others invited to the event.



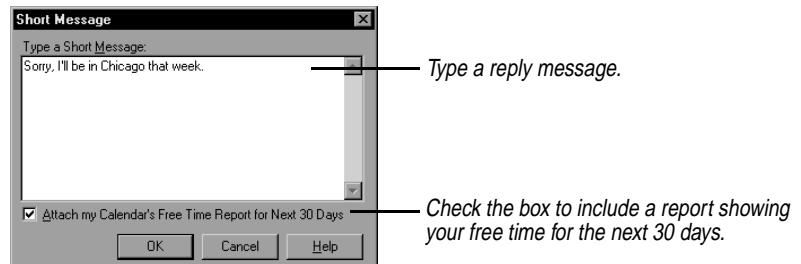
The reply choices are described in the following sections.

Accept

This option lets you enter a short reply message (up to 2,048 characters), and then sends your acceptance to the initiator. The event is automatically added to your currently open Internet Sidekick Calendar.

Decline

This option sends a reply to the initiator saying that you will not be able to attend. The event is *not* added to your calendar. You can include a Free Time report that shows your booked and unbooked time for the next 30 days. See [“Creating a Free Time report” on page 69](#).



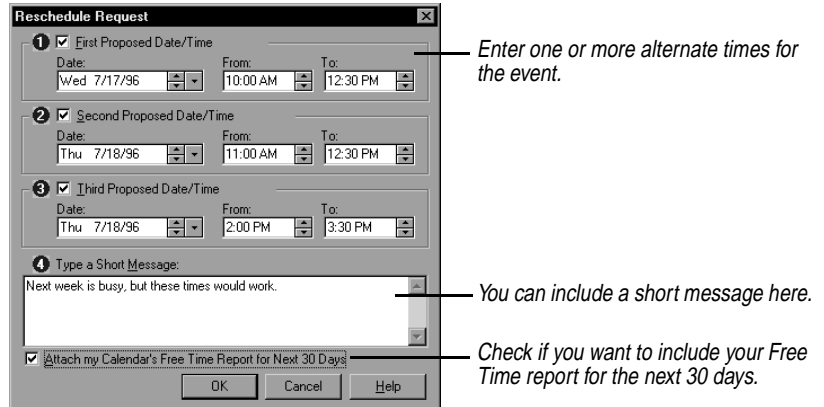
Delegate

If you cannot attend the event and want someone else to go in your place, use the Delegate option to forward the invitation to that person. The meeting originator is notified that you have delegated the event to someone else.

NOTE If your monitor uses VGA (640 x 480) screen resolution, you may not be able to see the Reschedule Request button. You can choose this option by right-clicking the event and choosing Delegate from the shortcut menu.

Reschedule Request

This option sends a reply requesting that the event be moved to another time or date.



Creating a Free Time report

When you decline or request rescheduling of an event, you can include a Free Time report to assist the meeting originator in rescheduling the event. Included in the Free Time report is an indication of when you are booked and when you have free time during the next 30 days.

No information about specific events on your calendar is sent, beyond the indication that the time is booked. To view this report, see [“Viewing the Free Time report” on page 71.](#)

Replying for non-Sidekick users

People who have an e-mail account but do not have Internet Sidekick installed can still reply to incoming invitations in a way that is automatically recorded by Internet Sidekick.

The event invitation appears in the e-mail inbox. Non-users of Internet Sidekick can open it like any other e-mail item and read the contents, which is stored in formatted text. The body of the message includes instructions that briefly explain how to reply. (The reply choices for a non-Internet Sidekick user are limited to accepting or declining the invitation.)

To reply to an invitation using e-mail software

- 1 Open the invitation in your e-mail inbox, like any other message.
 - 2 Select Reply, and include the body of the message in the reply. (Do not modify the contents.) The subject field of the reply includes <SIS> indicating a Starfish Internet Sidekick message. Do not modify the subject.
 - 3 In the body of the message, find the section labeled Your Reply. Type an X in the brackets next to I Accept or I Decline, so it reads [X] I Accept or [X] I Decline. You can type a brief message in the space between the markers reading <BEGIN REPLY MESSAGE> and <END REPLY MESSAGE>.
- Be sure not to change anything else.
- 4 Send the reply.

The originator's copy of Internet Sidekick processes the reply automatically and marks the appropriate status for that recipient.

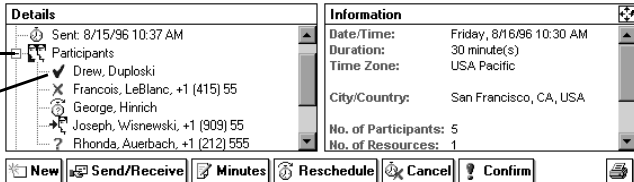
Incoming replies

Internet Sidekick automatically collects reply messages from people you've invited to an event and displays the replies in the Activities view. When you have unread replies, or other incoming messages, the Activities view icon on the Deskpads is animated and changes color.

Checking replies and messages

As replies arrive, an icon in the New column of the Activities view shows their status: 

You can click the participants' names in the Details pane and read their replies in the Information pane.



Click the + sign by Participants, if necessary, to expand the list.

Click a participant's name to view the reply in the Information pane.








Expand the Details and Information panes to full screen.

| Details | Information |
|-----------------------------------|--------------------------------------|
| Sent: 8/15/96 10:37 AM | Date/Time: Friday, 8/16/96 10:30 AM |
| Participants | Duration: 30 minute(s) |
| ✓ Drew, Duploski | Time Zone: USA Pacific |
| ✗ Francois, LeBlanc, +1 (415) 55 | City/Country: San Francisco, CA, USA |
| ⊕ George, Hinrich | No. of Participants: 5 |
| ⊕ Joseph, Wisniewski, +1 (909) 55 | No. of Resources: 1 |
| ? Rhonda, Auerbach, +1 (212) 555 | |

New **Send/Receive** **Minutes** **Reschedule** **Cancel** **Confirm**


To see reply status for an event you initiated

Look in the Details pane in the Participants category to see each participant's status. (If the list is not displayed, double-click Participants or click the + icon to see the names.)

| |   | Participants |
|----------------------|---|---|
| Accepted | <input checked="" type="checkbox"/> |  Drew, Duploski |
| Declined | <input type="checkbox"/> |  Francois, LeBlanc |
| Reschedule Requested | <input type="checkbox"/> |  George, Hinrich |
| Delegated | <input type="checkbox"/> |  Joseph, Wisnewski |
| No Reply Yet | <input type="checkbox"/> |  Rhonda, Auerbach |

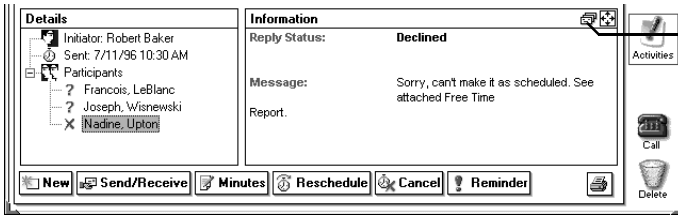
To read reply messages

Click a participant's name in the Details pane and read the message in the Information pane.

Click the Expand button  to display the Details and Information panes full-screen.

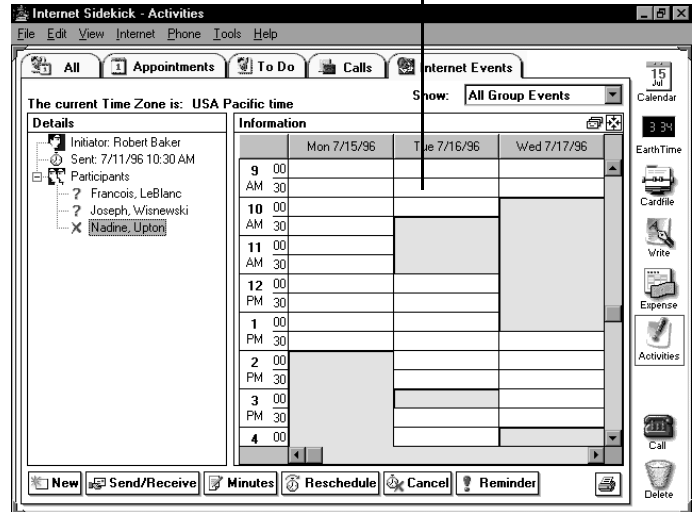
Viewing the Free Time report

If a recipient declines your invitation or requests rescheduling, he/she can check a box to include a Free Time report with the reply. The Free Time report shows when the recipient has events booked and what times are free, during the next 30 days. The Free Time report is useful in determining an alternate meeting time, especially when several people who decline send Free Time reports.



If a Free Time Report is attached to the selected reply, this button is available when you select the Participants name in the Details pane.

Click the button (and click the Full Screen View button next to it) to view the report. The white areas are available for reservations.

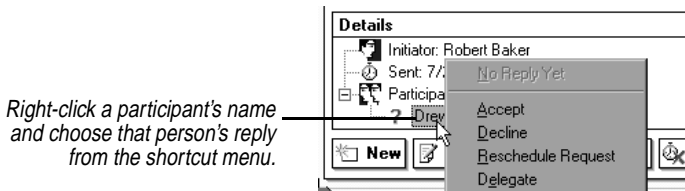


Entering replies manually

For people you have invited by fax or phone, you can enter their reply status manually in the Details pane.

To enter reply information manually

- 1 Click the event in the list.
- 2 Find the participant's name you want in the Details pane and right-click it.
- 3 Choose their reply from the shortcut menu.



The reply options are discussed beginning on [page 68](#).

Managing your events

The buttons at the bottom of the Activities view provide convenient options for managing events you have created. Select an event and then click the button; or right-click the event and choose the option from the shortcut menu.




The reply choices are described in the following sections.

Distributing minutes

Any participant can use the Minutes button to send notes or minutes to all other participants.

Click the Minutes button, and write the minutes in the Compose the Minutes window. You can attach a file by clicking the Browse button. When you click OK, the minutes are automatically added to your Outbox, to be sent during the next flash session, or when you choose Send/Receive Now.

When minutes are received, the New column displays the minutes icon. 

To view incoming meeting minutes

Click the event and click Minutes in the Details pane. The minutes appear in the Information pane.

Rescheduling events

You can reschedule an event you originated by selecting the event and clicking the Reschedule button.

Enter the new date and time information, and any other changes, in the Schedule an Event dialog box (see [page 76](#)). When you click OK, you are asked if you want to notify all participants and resource managers about the change. If you click Yes, notification is automatically sent.


Canceling events

You can cancel an event you originated by selecting the event and clicking the Cancel button.


You will be asked to confirm that you want to cancel the event and notify all participants. Click Yes to cancel the event (see [“Canceled events” on page 75](#)).

Sending reminders

You can send a reminder to all event participants in advance of the meeting. You can set up the reminder when you create the event (see [page 63](#)), or you can select the event and click the Reminder button.

When you send a reminder, the event is marked with a reminder icon  in each recipient's Activities view.

Confirming tentative events

For a tentative event, the Reminder button is replaced with a Confirm button.  Click Confirm to send notification to participants that the tentative event has been confirmed. The ? icon marking a tentative event is removed for the event.

Deleting events

You can delete group scheduling events in the Activities view to clean up your events list. Select an event and press the *Delete* key. Or you can right-click an event and choose Delete from the menu. To delete multiple events, use Ctrl+click to select each one, or Shift+click to select a range of events. Then press the *Delete* key.

Deleting group events in the Activities view does not remove them from your calendar, nor does it notify meeting participants. Use it only to clean up the Activities list display.

NOTE You should not delete items from the Activities view, Internet Events tab without considering the following cases:

1. If the item is for a group event that you initiated and that has not been completed, you will not be able to track and modify the deleted event.
2. If the item is a group event that is still in your calendar, deleting the item will delete all participant and resource information for the event. You can safely do so after the event has taken place.
3. If you delete an item in Activities view and then delete it from the Calendar, you will not be prompted to send cancellation notices to participants, because the participant and resource information has been deleted.
4. If you delete an event, incoming replies to that event are discarded.

To delete a group event you have originated and notify participants, click the Cancel button or delete the event in your Calendar.

You also can have events automatically deleted a specified time after they have passed. In the Group Scheduling Preferences dialog box, check the option Delete Entries from Activities View ___ Days after Completion, and type the number of days.

The only events you can delete in Activities view are those that appear on the Internet Events page. The other pages (All,

Appointments, To Do, Calls) are Calendar events; change to the Calendar view if you need to delete one of them.

Canceled events

If you receive notification of a canceled event, the notice appears in the Internet Events list with the canceled icon. ❌

Recipients of the cancellation notice who have accepted the invitation can have the event automatically removed from their calendars. Click the notification message and then click the Clear This Event button to remove the event from the calendar.

Using mailing lists

Mailing lists make it easy for you to schedule events with specific groups of participants. You create one or more mailing lists for specific groups, and then just select a mailing list when you schedule an event with one of those groups.

To create a new mailing list

In the Activities, Calendar, or Cardfile views, choose Internet | Mailing List | Edit Mailing List. Type the name of the new mailing list, and click Add.

Once you have created the mailing list, use the Manage Mailing List command to add participants to the list.

To add names or make other changes to a mailing list

In the Activities, Calendar, or Cardfile views, choose Internet | Mailing List | Manage Mailing List to open the Manage Mailing List dialog box. Select an existing mailing list to modify as shown below.

2 Select an address book. (You can add names from more than one address book.)

3 Click the + by a name, and click the notification method you want for that person.

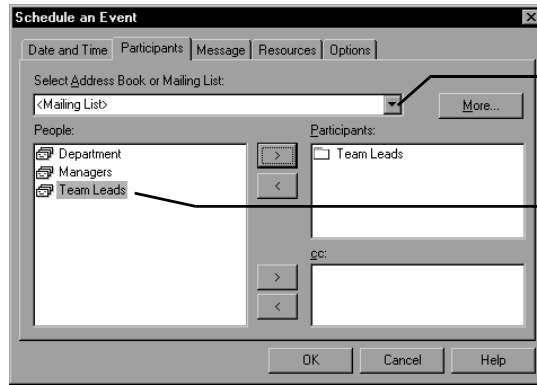
1 Click the arrow and select an existing mailing list.

4 Click > to add the person to the mailing list.

Select a name in the Contacts list and click < to remove that person.

Addressing with mailing lists

To use a mailing list for addressing event invitations, select the mailing list instead of individual names in either the Scheduling Wizard or the Schedule an Event dialog box.



- 1 Click the arrow, and choose <Mailing List> in the drop-down list. Your mailing lists appear under People.
- 2 Choose the mailing list you want, and click the > button to add it to either the Participants or CC list.

Scheduling resources

Resources are facilities such as conference rooms, or equipment such as projectors, that you want to reserve. Internet Sidekick uses the following resource types:

- ◆ Facilities—a resource such as a conference room or other immovable location. Facilities can have a maximum occupancy setting. (The maximum occupancy can be up to 32,000.) Internet Sidekick maintains a calendar for facilities and automatically confirms or denies bookings based on the calendar.
- ◆ Equipment—a movable resource such as a projector or vehicle. Internet Sidekick maintains a calendar for equipment and automatically confirms or denies bookings based on the calendar.
- ◆ Other—private resource which an individual user wants to keep track of, such as booking a conference call operator, or catering service for a meeting. There is no calendar for this category, but entries are recorded in the event and displayed in the Information pane.

Each resource has a *manager*, usually the person who creates the resource in Internet Sidekick. The manager's e-mail account is used to handle the calendar and messaging for reserving the resource. Internet Sidekick handles this automatically in the background, and the manager is not involved in these transactions. Once a resource has been added, the manager can distribute it to others to make it available to them for booking.

TIP

Resource managers should keep Internet Sidekick running on their computers, and have flash sessions at frequent intervals, to handle resource reservation requests.

Reserving resources

You can reserve a resource as part of creating a group event. But you may want to reserve a resource separately. For example, you might need to know when the resource is available before scheduling an event. (If you reserve the resource and then schedule a group event, be sure not to include the resource when you schedule the event, since you have already reserved it. You can notify people of the location in the event message, if necessary.)

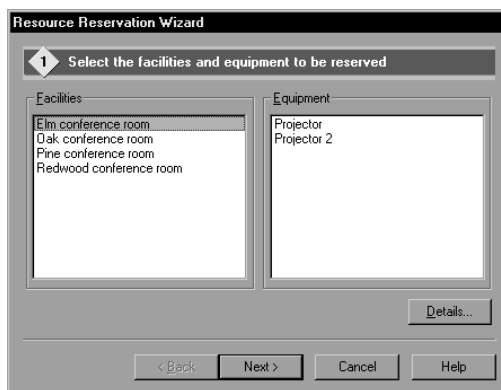
To reserve a resource without scheduling an event, use the Resource Reservation Wizard.

NOTE Before you can reserve a resource, it must be in your resource list, meaning it has already been distributed to you (and others), or created by you. For details, see [“Adding resources” \(page 78\)](#) and [“Distributing resources” \(page 79\)](#).”

To reserve a resource

Choose Internet | Resource Wizard. The Resource Reservation Wizard opens.

Resource Wizard Facilities and Equipment



Choose the facilities and equipment you want to reserve. Click an item and click the Details button to see information about it.

You can reserve multiple resources by clicking each one.

To de-select a resource, click it again.


Resource Wizard Purpose and Time

Enter the purpose of the reservation.

Then enter the start and end times and date.

Click Finish to send the reservation request.

When you click Finish, the Resource Reservation Wizard sends out a request to book the resource for the specified time. Internet Sidekick automatically processes the request and returns a reply, without requiring any action by the resource's manager.

Internet Sidekick lets you know if the resource is available. If your request is denied, the Resource is marked **X** in the Details pane. You can click the resource and click the Free Time Report button  at the top of the Information pane to see the resource's booked and available times.

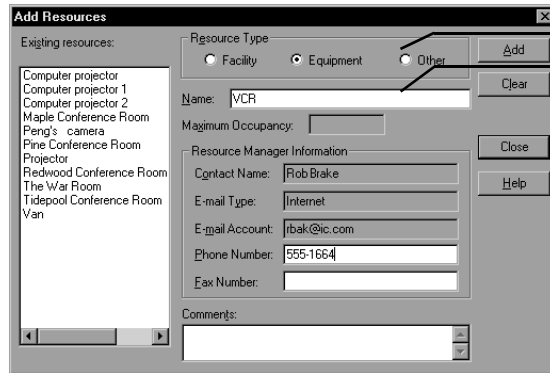
To reschedule, choose Internet | Resource Wizard. Change the times as needed before re-sending your request.

Adding resources

The person who is going to manage the resource is usually the one who adds it to the list of available resources. To do this, use the Add command.

To add a new resource

Choose Internet | Resources | Add.



Click the resource type...
 type the resource name...
 and enter additional information in the spaces provided.
 When done, click Add to add it to the Existing Resources list.

You must enter the following information. The rest is optional:

- ◆ Name of the resource
- ◆ Your e-mail type and account information. (This information is automatically picked up from your group scheduling preferences.)

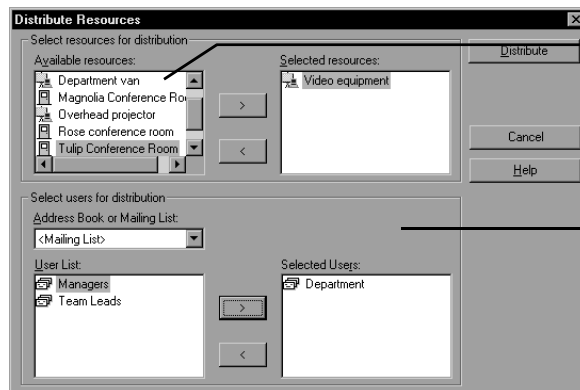
The phone number and other fields are included for convenience, in case there are questions about resource reservations.

Distributing resources

To make a resource available to others, the manager distributes it to the users who will be reserving it. Anyone to whom the resource is distributed can redistribute it to additional users.

To distribute a resource

Choose Internet | Resources | Distribute. The Distribute Resource dialog box opens.



Click one or more resources you manage that you want to distribute.

Select users to receive distributed resources.

Managing Resources

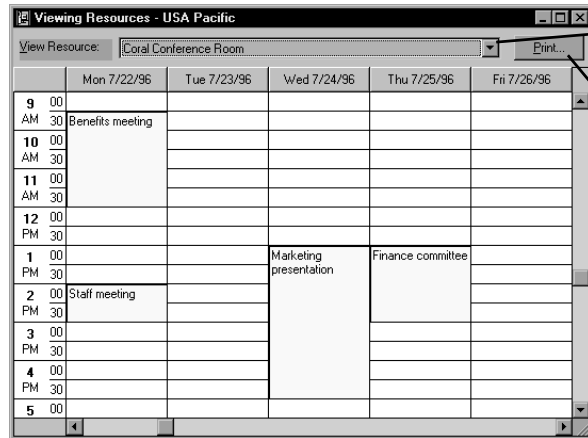
Internet Sidekick also provides tools that let you print resource schedules and modify or delete resources from your system.

Viewing and printing resource schedules

You can view and print the schedule of any resource that you manage.

To view the resource schedule

Choose Internet | Resources | View.



Click to select the resource.

Click to print the schedule in Weekly or Monthly view.

Modifying resources

To change the properties of a resource

Choose Internet | Resources | Modify. The Modify Resource dialog box that opens is the same as the Add Resource dialog box (see [page 79](#)), but you cannot modify the resource name.

You might modify a resource that was distributed to you and then transferred to a new resource manager. If you know the new manager's e-mail information, you can enter it using the Modify Resources dialog box, rather than waiting for the resource to be distributed by the new manager.

Removing resources

To remove a resource

Choose Internet | Resources | Remove. Select the resource from the list and click Remove.

CAUTION Removing a resource that you manage deletes all scheduling information for that resource on your system. Once removed, it cannot be recovered.

When you delete or modify a resource

If you modify or remove a resource you do not manage, you affect only your local resource file. For example, you might want to delete a resource that you never use, or you might want to change a resource's comments. These changes affect only your local system, not others who also reserve that resource.

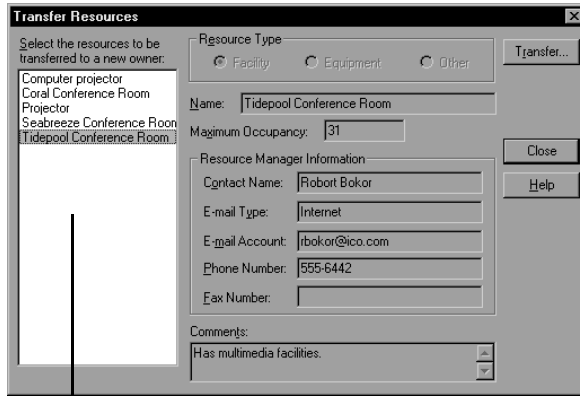
If you are the manager of the resource, deleting it has wider impact. By deleting a resource, you remove the resource's calendar, making it impossible for anyone to schedule that resource. You should delete a resource only if you are certain that no one needs to book that resource or the resource is no longer available. When you delete a resource that you manage, anyone trying to book that resource sees an error message saying that the resource does not exist. If you simply want to transfer management to another person, use the transfer function described in the next section.

Transferring a resource

You can transfer management of a resource to another person, who becomes the new manager. The person you transfer the resource to must be an Internet Sidekick user.

To transfer a resource to another manager

Choose Internet | Resources | Transfer. The Transfer Resources dialog box opens.



Choose the resources (up to 50) and click the Transfer button...

and enter the new manager's information.



NOTE The new manager must distribute the resource to everyone who needs to reserve it.

The new manager must accept the transfer before it goes into effect. If the new manager declines, the transfer is cancelled.

Undoing a transfer

If necessary, you can undo a resource transfer, provided the new manager has not already accepted. Click the resource transfer item, and click the Undo Transfer button.

Retransferring

Occasionally, a resource transfer message may not be received successfully. If you need to retransfer the resource, click the resource transfer item, and click the Retransfer button.

Using Eudora Pro or Netscape E-mail

The Eudora Pro Mail and Netscape Mail options in the Internet menu let you send e-mail from Internet Sidekick.

The Eudora Pro Mail command opens your Eudora Pro (32-bit) e-mail software so you can compose and send e-mail messages.

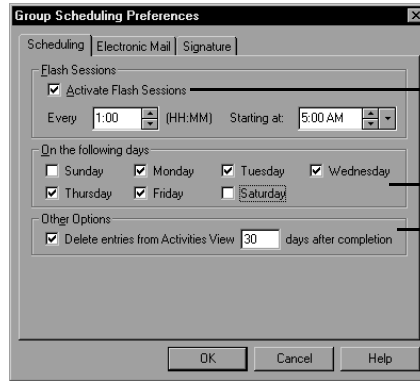
The Netscape Mail command launches your Netscape Navigator browser, opens the Netscape Mail window, and opens the Message Composition dialog. If you have not configured Netscape Mail, this command opens the Navigator browser.

Group Scheduling Preferences

Use the Group Scheduling Preferences command to set options relating to group events and e-mail.

To change your group scheduling preferences

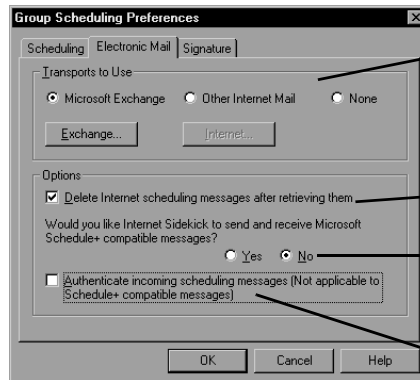
In the Calendar or Activities view, choose Tools | Preferences | Group Scheduling.



Check to activate flash sessions to automatically send and receive group event messages, and specify the frequency.

Select the schedule for flash sessions.

Check the box if you want old messages deleted, and specify when they should be deleted.



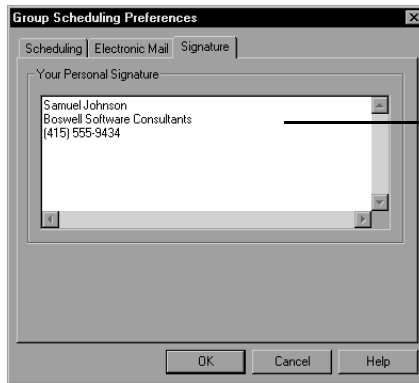
Check the e-mail transport you use Microsoft Exchange or Other Internet Mail (POP3). Click the button below your choice to configure.

NOTE: Changing e-mail systems affects all future group event messages.

Check if you want messages deleted from the e-mail server after Internet Sidekick retrieves them (see text).

Click Yes if you want Schedule+ compatible messages (which cannot be authenticated). You must be using Microsoft Exchange.

Check for authentication (see text).



Enter a brief “signature” with information about yourself, to be included in Internet messages. (Internet Sidekick creates a default signature for you.)

Delete group scheduling messages—This option in the Electronic Mail page determines whether messages are automatically deleted after Internet Sidekick retrieves them. You might not want them deleted if you want to retrieve your messages from more than one computer (see the next section).

Authenticate incoming group scheduling messages—This option in the Electronic Mail page determines whether Internet Sidekick tests each incoming group scheduling message for authenticity. One reason messages might fail the authenticity test is if users alter the return message in the area marked “Do Not Modify.” If this option is checked, any message that fails verification is discarded with a warning.

 **TIP**

If a message fails authentication, you should open it in your e-mail program, and enter the reply or make the change manually (see [page 72](#)).

Using more than one computer

If you use more than one computer, you may want to leave group event messages on the server, so they can be retrieved from more than one computer. To do this, uncheck the box labeled Delete Group Scheduling Messages after retrieving them in the Electronic Mail page of the Preferences.

Other ways to coordinate calendars on multiple computers are to use the Synchronize Appointments command (see [“Synchronizing events” on page 57](#)) or Backup and Restore (see [Chapter 12](#)).

Using Internet Scheduling offline

When you are offline (not connected to your Exchange Post Office or POP3 server), observe the following guidelines:

- ◆ Turn off Flash Sessions. In either the Calendar or Activities view, choose Tools | Preferences | Group Scheduling. Click the Scheduling tab and uncheck “Activate Flash Sessions.”

- ◆ Reply to incoming events, initiate new events and take other action as usual on event items in the Activities view. However, do not use the Send/Receive Now command or button, since you are not connected.
- ◆ The next time you are connected, be sure to click the Send/Receive button to send all pending messages and receive any new ones.

NOTE Exchange Users: You must click the Send/Receive button in Internet Sidekick to deliver the messages that are in the Exchange Outbox. Selecting Tools | Deliver Now in Exchange will not send these messages.

Using a Dial-Up connection

You can use Dial-Up Networking to dial into your company's computer and use Internet scheduling. (Your computer must have a modem, and your network must also have modem access.)

To install a dial-up networking connection

- 1 Click the Windows Start button and choose Settings, Control Panel.
- 2 Double-click Add/Remove Programs.
- 3 Click the Windows Setup tab, and click the Communications item. Click the Details button.
- 4 Check the Dial-Up Networking item. Click OK.
- 5 Click OK again to install Dial Up Networking.

To create a new connection

- 1 Double-click the My Computer icon on the desktop.
- 2 Double-click Dial-Up Networking.
- 3 In the Connections menu, choose Make New Connection.
- 4 Enter the information in the Make New Connection Wizard. When you complete the steps of the Wizard, click Finish to save the new connection.

For more information, double-click Dial-Up Networking in My Computer, and click Help Topics in the Help menu. Click the Help Index tab, and type Dial. Find the topics for Dial-Up Networking. In particular, refer to the topic on "setting up a new connection."

Dial-Up Networking settings

To use dial-up networking for Internet Sidekick scheduling messages, you must have the Prompt setting enabled in the Dial-Up Networking settings dialog box.

To see this dialog box, open the Dial-Up Networking folder in My Computer, and choose Connections | Settings. Be sure the option Prompt to use Dial-Up Networking is selected.

Using Dial-Up Networking

When you click the Send/Receive button or have a flash session in Internet Sidekick, you will see the Connect To dialog box. When you type your password and click Connect, your connection can be established and your scheduling messages sent and received.



NOTE There is a 2-minute period during which this connection and send/receive process can occur. If you have a slow connection, you may want to establish the connection first, and then use the Send/Receive command in Internet Sidekick.

The Cardfile view

The Cardfile lets you store, manage, and retrieve all your personal information. Each Cardfile card can contain full address information and numerous other details about your contacts. You can store World Wide Web addresses (URLs—Uniform Resource Locators) in a cardfile, and jump directly to a Web site using Internet Sidekick's launch URL capability. You also can store electronic mail (e-mail) addresses in the Cardfile for use in Internet scheduling.

You can use the Cardfile to store almost any other kind of information, such as a catalog of your CD collection or an inventory of your favorite wines.



Cardfile

To open the Cardfile view, click its Deskpads icon, choose View | Cardfile, or press *F5*.

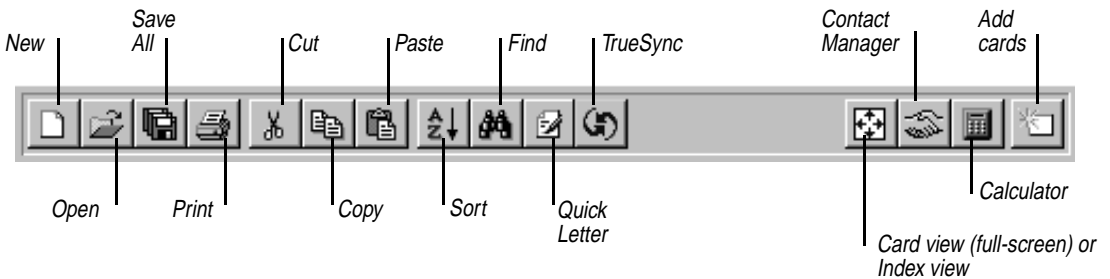
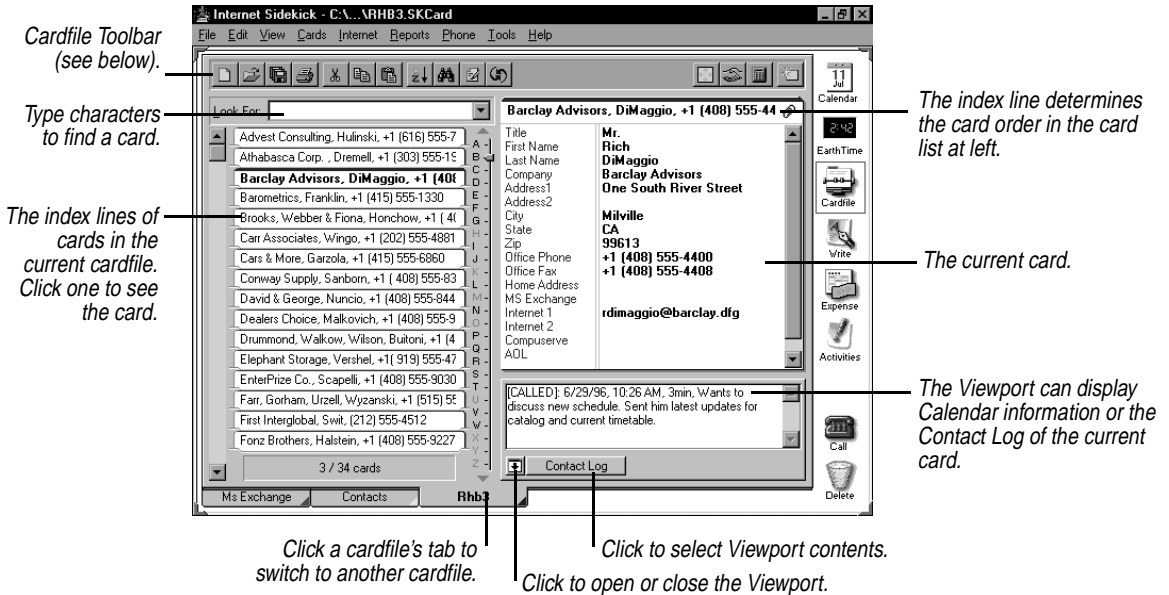
This chapter explains how to

- ◆ Create a cardfile
- ◆ Work with multiple cards and cardfiles
- ◆ Use a URL to jump directly to a Web site.
- ◆ Create a cardfile from your Eudora Pro (32-bit), Netscape Navigator, or Microsoft Exchange address books.
- ◆ Send cardfile data by e-mail
- ◆ Search for and extract information from a cardfile
- ◆ Use the Contact Manager and Contact Log

Cardfile basics

In the left pane of the Cardfile view is the card list, your visual index to the cards in the *active cardfile*—the cardfile whose tab is selected. In the right pane is the *current card* in the cardfile. You can review and edit the information in the current card directly.

The following figure shows the Cardfile view.



Here are some of the key concepts of cardfiles:

- ◆ The *cardfile* contains customizable fields that you can use to organize the information on the cards. Each cardfile can have up to 30,000 cards.
- ◆ A cardfile consists of *fields*. Each card can have up to 100 fields.
- ◆ At the top of each card is the *index line*, which can contain any three fields in the card. Cards are sorted alphabetically, in ascending (A–Z) or descending (Z–A) order by their indexes. You can specify which fields appear in the index.

- ◆ The *field names* describe the contents of each field. A field name can be up to 39 characters in length.

On the bottom of the screen are tabs indicating which cardfiles are currently open. The tab that appears to be on top of the others is the active cardfile.

Opening, closing, and saving cardfiles

You can choose File | Open Cardfile to open as many cardfiles as you like. Each open cardfile appears as a tab at the bottom of the screen. If there isn't room for all the cardfile tabs, Internet Sidekick displays scroll buttons you can click to bring additional tabs into view.

To go directly to any cardfile

Choose Edit | Go To Cardfile or click its tab. (You must have at least two cardfiles open.)

To reorder the cardfile tabs

Choose Cards | Reorder Tabs or press *F11*. In the Reorder Cardfile Tabs dialog box, move cardfiles up or down in the list to create the order you want.

To save a cardfile

Choose File | Save Cardfile. Choose File | Save Cardfile As to save the file under a different name or to save in a different format.

NOTE Internet Sidekick and Sidekick 95 cardfiles must have the extension .SKCard.

To close cardfiles

Choose File | Close Cardfile to close the current cardfile. To close several cardfiles at once, choose File | Close Cardfiles and select the files you want to close in the dialog box; use Shift+click or Ctrl+click to select multiple files.

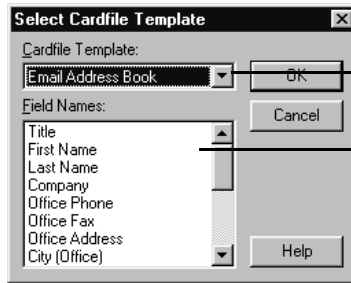
Creating a cardfile

When you create a cardfile, first decide what fields you want on each card. You can create all these fields yourself, or you can use a *template*—an empty cardfile that already has fields in place. If you select a template, you can customize it, keeping some or all of its fields and adding your own. (If you're creating a cardfile based on an imported file with its own fields, see [“Importing and exporting cardfile data”](#) on page 111.)

To create a new cardfile

Choose File | New Cardfile. Choose the template you want from the list that appears, as shown below.

NOTE: If no cardfiles are open, use Cards | Define Fields to open this dialog box.

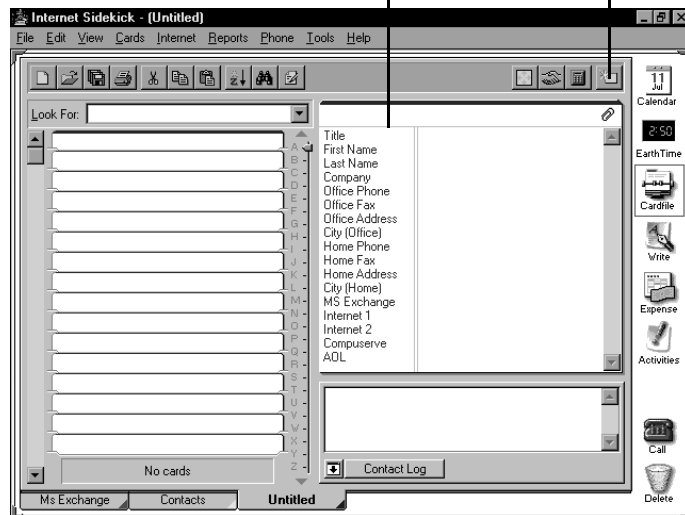


Click the arrow and choose possible templates one-by-one from the list.

You can see the predefined fields for each template. When you find the best template for your needs, click OK. If you want to define all your own fields, choose None from the list.

The new cardfile contains the field names from the template, but no data until you add cards.

Click to add cards (see page 93).



TIP

If you want to create an Address Book for use with Internet Sidekick's group scheduling feature, you should select the E-Mail Address Book template from the Template pick list (see the next section).

You can use any of the cardfile templates provided with Internet Sidekick, or create your own (see **“Creating and editing cardfile templates”** on page 98). In most cases, you'll find it easiest to use or customize existing templates, rather than using no template and creating all the fields yourself.

If you want to define fields or change any fields after creating the cardfile, see the next section, **“Adding and changing cardfile fields.”** If you're ready to begin entering data into your new cardfile, see **“Adding cards”** on page 93. For another way to create new cardfiles from existing cardfiles, see **“Extracting cards”** on page 106.

Adding and changing cardfile fields

The Define Cardfile Fields dialog box is where you create new fields for a new cardfile, edit existing fields that were provided by a template, or change field names.

Using special field names for e-mail

If you are using Internet Sidekick's group scheduling feature (see Chapter 4), the electronic messaging it uses makes some assumptions about field names. If your field names don't contain the right keyword, they won't be recognized by Internet Sidekick for e-mail messaging. The following field names must be used for group scheduling:

Internet mail: The word *Internet* must appear in the field name.

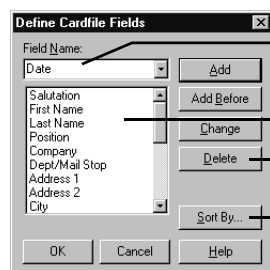
Microsoft Exchange mail: The word *Exchange* must appear in the field name.

When you create a new cardfile, your cardfile will have e-mail fields with the correct names if you select the template named E-Mail Address Book.

Adding and modifying fields

To add or modify cardfile fields

Choose Cards | Define Fields. The Define Cardfile Fields dialog box opens.



To add a field, type a name in the Field Name box or choose from the drop-down list. Then click Add, or click an existing field and click Add Before.

To change a field name, first select it from the list. Then type the new name and click Change.

To delete a field, select it from the list and click Delete.

Click Sort By to set which fields to sort the cardfile by.

When you're done defining fields, click OK to save the changes you made and update the cards in the cardfile.

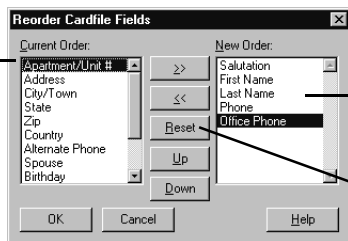
CAUTION Be careful when deleting a field; deleting removes the field itself and, for a cardfile containing data, any data contained in that field on every card. There is no Undo when you delete a field.

Reordering fields

To change the order of the fields in a cardfile

Choose Cards | Reorder Fields to open the Reorder Cardfile Fields dialog box.

Double click fields in the order you want them, or click each and then click the >> button.



To rearrange fields, click a field and then click Up or Down to move it within the list.

Click Reset to return to the original order of the fields.

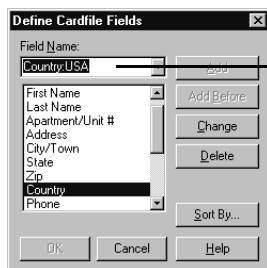
Default field data

When you add a new card, you can have a default value in any field that appears automatically when you create a new card. For example, you can have Internet Sidekick automatically enter USA in the Country field for every new card added to a file. You can change the information once it appears on a card, just like any other information you've entered.

NOTE If you already have cards in the cardfile, specifying this default text won't add it to them. It only adds the text to new cards you create after specifying the text.

To specify default data for a field

Choose Cards | Define Fields. The Define Cardfile Fields dialog box appears.



Select the field and type a colon (:) followed by the default information you want. In this example, "USA" will appear in the Country field of new records. (You can change it for non-US addresses by typing over it.)

Using numbers in fields

Cardfile fields are text fields, not numeric fields. This means that when you enter numbers, you should use leading zeroes if you want the number to be sorted correctly. For instance, if you enter the numbers from one to twenty into fields, Internet Sidekick sorts them as 1, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19, 2, 20, 3, 4, 5, 6, 7, 8, 9

If you use leading zeroes, they would sort properly:
01, 02, 03, 04, and so on.

If you want to use numeric dates in an index line for sorting, you should enter them in year/month/date format, such as 96/10/14 or 68-06-19.

Adding cards



To add a card to the cardfile

Choose Cards | Add, or click the Add Cards button on the Toolbar. The Add Cards dialog box appears with a list of the fields that are set up in the cardfile.

Type the data for each field in the list. To move from one field to the next, use the up and down arrow keys or either Tab or Enter (depending on what you specify in Tools | Preferences | General).

Click Add to insert the card in the cardfile. You can then begin entering data for another new card, or click Close.

Each field can hold up to 255 characters in the Add Cards dialog; when typing in the Cardfile view, you can enter up to 4,800 characters in a field. If more than 10 fields exist for the current cardfile, a scrollbar appears at the right of the dialog box.

Duplicating cards

Sometimes it is useful to make several copies of one card, and then customize the information as needed. For example, if you are entering information for several people who work at the same company, you can duplicate the shared company information, and then add the individual name and phone information for each person.

To duplicate the current card

Choose Cards | Duplicate. Select the number of copies to make and choose OK.

Entering telephone numbers

When you enter data in telephone number fields, you can type the number just as you would dial it, for example, 555-1234. This approach will work for a computer that always stays in one location. However, if you have a portable computer and want to be able to dial numbers automatically from any location (including or excluding area

code and country code as needed), you must enter the number in a format that Windows 95 recognizes. For details, see “**Telephone number format**” on page 161.

Editing and viewing cards

Once a card has been added to the cardfile, you view its contents by clicking its index, as shown in the figure on page 95. You can change or add information by typing directly on the card.

To edit a card

- 1** Select the card by clicking its index.
- 2** Click in the field you want to edit. Type new data or make whatever changes you want.

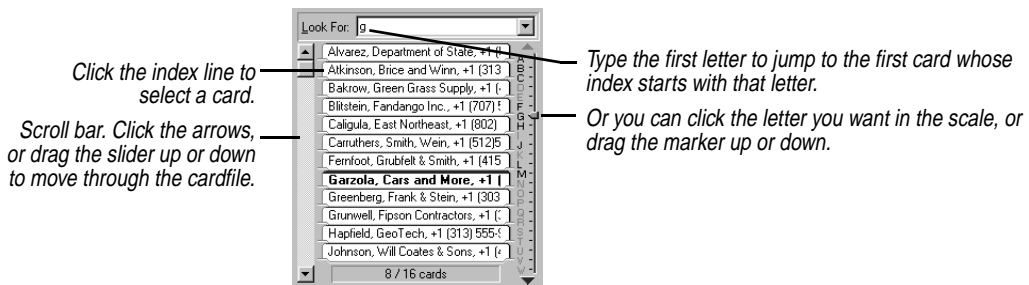
Navigating through the cardfile

If you have a large cardfile, there are several ways to navigate through it quickly to find the card you want.

To navigate quickly through large cardfiles

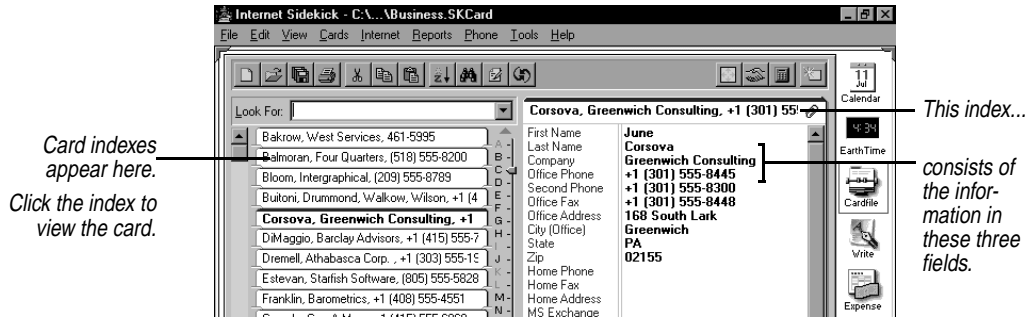
Type the first letters in the Look For box. The cursor jumps to the first card whose index starts with that letter or group of letters. See “**Quick searches**” on page 103.

The navigation aids are shown in the following figure:



Sorting the cardfile by index

Every card has an *index*, or title line, with up to three fields. For example, you could use Company, Last Name, and Office Phone fields for an index, as shown in the following figure.



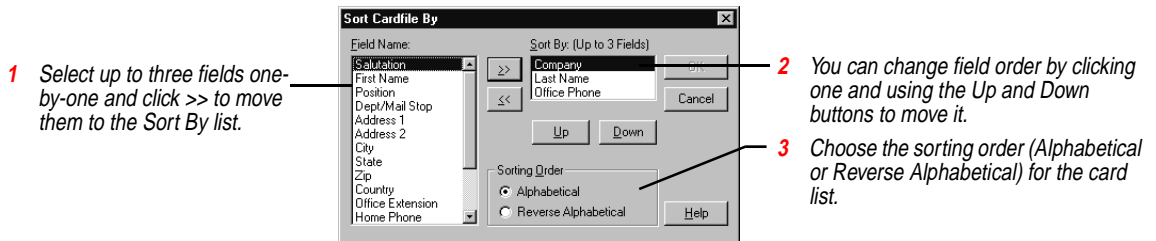
Internet Sidekick sorts the cards alphabetically (or reverse alphabetically, if you choose) according to its index. If you choose Last Name, First Name, and Company for the index line, the cards are arranged alphabetically by last name, then first name, and then company name.

In addition to determining the sort order, the index determines what appears in the left side of the screen and in the Viewport of other views. If you want to be able to see a telephone number for each card in the left side of the window, be sure to include the telephone field in the index.

To define the index



Choose Cards | Sort or click the Sort button on the Cardfile Toolbar. The Sort Cardfile By dialog box appears.

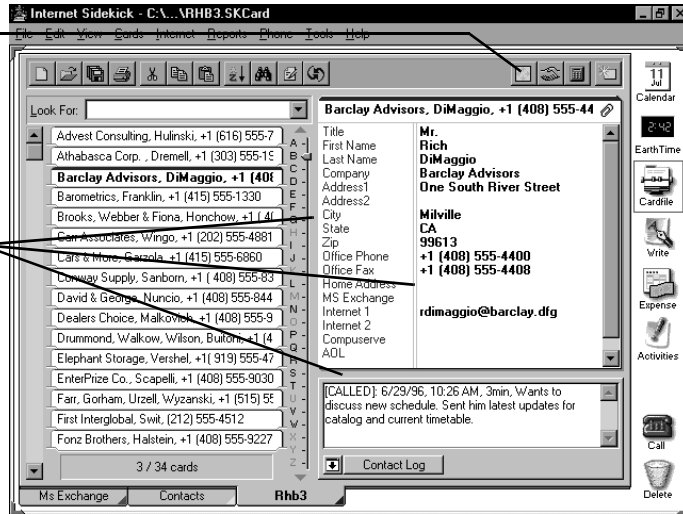


Changing the view

There are several options for changing the way your data appears in the Cardfile view, as shown in the following figure:

Click to switch between Index view (shown) and Card view (full screen, one card at a time).

Drag any of these borders to adjust viewing areas.



If you drag the divider between field names and data all the way to the left, you completely hide the field names from view.

Resetting fonts

You can also change the fonts for various parts of the Cardfile view. Right-click a text area, and choose Font.

Using the Internet and e-mail tools

Internet Sidekick works with your existing Internet software and e-mail systems to help make your Internet activities more productive and easier.

Storing and using URLs

You can store World Wide Web addresses (called URLs, or Uniform Resource Locators), and then use them to launch your Web browser and jump directly to the site (requires a 32-bit browser).

Store the complete URL. They usually look something like the Starfish Software URL: <http://www.starfishsoftware.com>

To launch your default browser and jump to a Web site

Select the record containing the URL and choose Internet | Launch URL. Internet Sidekick finds the first field in the card containing a URL, and jumps to that site (launching your default browser if necessary).

If you have more than one URL in a record, select URL you want to jump to before you select the Launch URL command. If you don't

select the URL first, Internet Sidekick finds and uses the first URL in the current record.

Sidekick recognizes a variety of URL types such as http:// (the World Wide Web), ftp://, gopher://, wais://, file://.

Importing the Eudora Pro address book

You can import the “nicknames” from your Eudora Pro (32-bit) address book.

To open the Eudora Pro address book

Choose Internet | Eudora Pro Address Book.

Internet Sidekick and imports your Eudora address book as a cardfile with the name Eudora.skcard. It is stored in the Data directory.

Importing the Netscape address book

If you use Netscape Navigator for your e-mail, you can open your Netscape address book in the Cardfile, and use it for addressing e-mail and group scheduling.

To open the Navigator address book

Choose Internet | Netscape Address Book.

The address book opens as a new tab called Netscape in the Cardfile view. You can save it as a cardfile; the default file name is Netscape.skcard. It is stored in the Data directory.

Importing the Microsoft Exchange address book

You can open your Microsoft Exchange address book as a cardfile in Internet Sidekick. Once you save the file in Internet Sidekick, you can select cards from the imported Exchange address book for sending e-mail and for group scheduling.

To open an Exchange address book

Choose Internet | Exchange Address Book. Choose the address book you want in the dialog box that appears.

The Exchange address book appears as an “Untitled” tab in your current cardfile. You can have only one Untitled cardfile at a time; use File | Save to save the file before attempting to import another address book.

To edit a card in the imported Exchange address book

Double-click any field in the card. The Properties dialog box for that card opens, and you can make editing changes there.

NOTE You can edit imported Microsoft Exchange address data only for a personal address book. The primary post office address book can be modified only in Exchange by the administrator. You can, however, use Tools | Extract to create an editable copy of the post office address book.

Eudora Pro or Netscape mail

The Eudora Pro Mail and Netscape Mail options in the Internet menu let you send e-mail using those programs. See [“Using Eudora Pro or Netscape E-mail” on page 55](#).

Sending card data by e-mail

You can send Cardfile information by electronic mail using Eudora Pro or Microsoft Exchange.

To send a card by e-mail

Right click in the data area of the card you want to send, and choose Send To from the shortcut menu. Select Eudora Pro or Exchange from the menu.

If you choose Eudora Pro, your Eudora Pro e-mail software launches and a new message created with the card data as a text attachment. Complete the To and Subject information, and click the Send button.

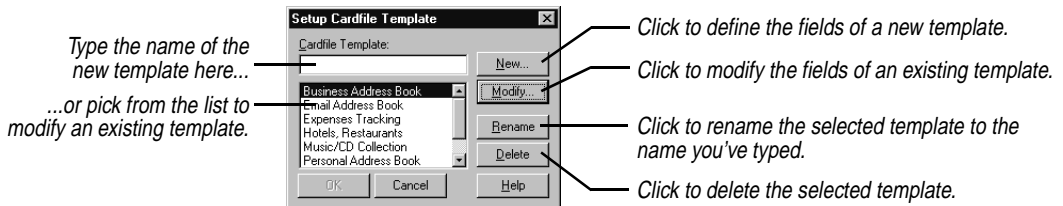
If you choose Exchange, Exchange edit window opens, and you can complete the addressing information. The card data is sent as text.

Creating and editing cardfile templates

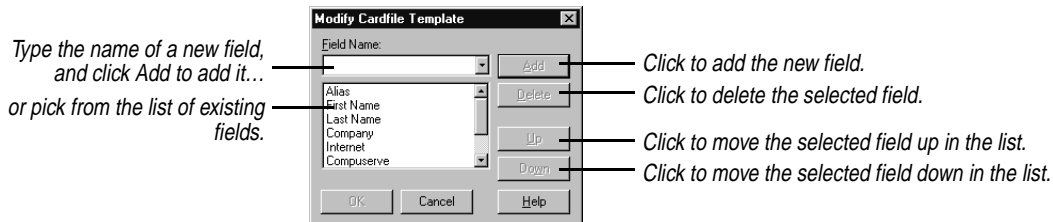
Cardfile templates help you create a new cardfile quickly and easily (see [“Creating a cardfile” on page 89](#)). Not only can you use the templates that Internet Sidekick provides, but you can also create your own, or edit the existing ones.

To create or modify a template

Choose File | Template. The following dialog box appears.



If you click New or Modify, the Modify Cardfile Template dialog box appears.



The Viewport

The Viewport can display the Contact Log for each card, and can make cardfiles available in other views.



The Viewport lets you use the information in your cardfile in a number of different ways:

- ◆ In the Cardfile, you can use it to view your Contact Log for any card.
- ◆ In the Calendar, you can drag a card from the Viewport to an appointment time, the To Do list, or the Calls list to create an entry using that card's data. See **“Using the Viewport” on page 45.**
- ◆ In the Write view, you can send electronic mail or fax a document to one or more cards selected in the Viewport. You can also create a merge template, and then drag a card from the Viewport to the template to instantly create a personalized letter or document. See **“Personalizing documents” on page 131.**
- ◆ In any view you can drag a card to the Call icon to dial the phone number on the card. See **Chapter 9.**

TIP

The Viewport is a powerful feature that lets you use data from your cardfiles with Internet Sidekick's other views.

Selecting and working with multiple cards

In addition to editing the information in the fields on a card, you can perform various actions—like deleting—to the card itself. You can even perform these actions on several cards at once, after you select them.

To select multiple cards, do either of the following:

- ◆ Click a card's index line in the card list, and then press *Shift* and click another card's index. The two cards and all cards between them are selected.
- ◆ Press *Ctrl* and click several cards' indexes in the card list. Only those cards you *Ctrl*-click are selected.

You can perform many functions on multiple cards:

- ◆ Deleting
- ◆ Printing (see Chapter [Chapter 10](#))
- ◆ Copying or moving cards from one cardfile to another (see [“Moving cards between cardfiles” on page 109](#))
- ◆ Merging cards with Write documents (see [“Personalizing documents” on page 131](#))
- ◆ Creating reports (see Chapter [11](#))
- ◆ Extracting (see [“Extracting cards” on page 106](#))

Marking cards

Marking cards gives you another way to specify a group of cards for certain functions. It is more lasting than merely selecting multiple cards, because marked cards will remain marked until specifically unmarked. Marked cards are distinguished by a red triangle on the left side of their indexes.

To mark the current card

Choose Cards | Mark Current Card, or press *Ctrl+K*, or right-click the card's index line in the card list.

To unmark a card

Choose Cards | Unmark Current Card, or press *Ctrl+K* again, or right-click the index.

To unmark all marked cards in a cardfile

Choose Cards | Unmark All.

Deleting cards

To delete cards

Select each card in the card list and drag it to the Delete icon. Or choose Cards | Delete to open a dialog box where you can choose to delete the current card, selected cards, marked cards, cards with blank indexes, or an index range.

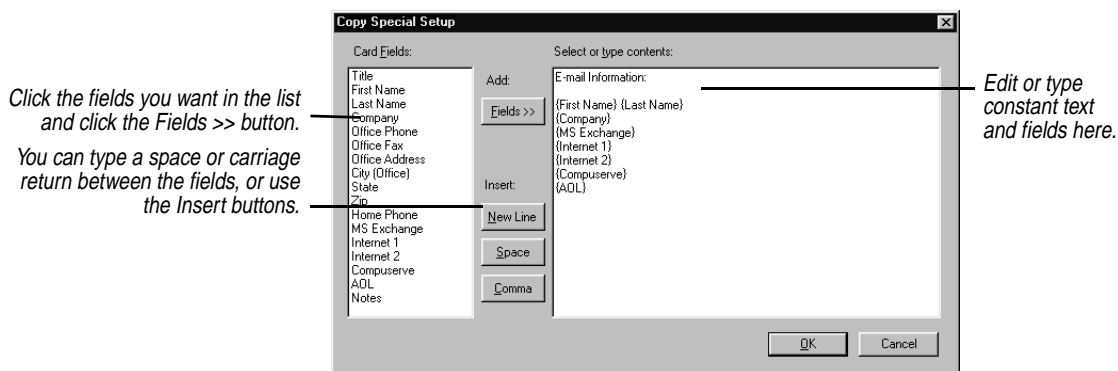
Copying addresses

You can copy the name and address information, or any other information you specify, from a card to the Windows Clipboard. From there, you can paste it into a Write document or anywhere else you can paste from the Clipboard.

Internet Sidekick lets you specify which fields you want to copy.

To define the fields to copy

Choose Edit | Copy Special Setup.



To copy addresses and paste them into a Write document

- 1 Click the index of the card and choose Edit | Copy Special.
- 2 Switch to the Write view (see Chapter 6).
- 3 Position the cursor where you want the address, and choose Edit | Paste, or press *Ctrl+V*.

Using the Contact Manager

Use the Contact Manager to search your events, calls, To Do items, and Contact Log for all activities involving specific contacts or people in your cardfile. The Contact Manager displays all activities involving a contact in one place for you to review. You can then schedule new activities with that person using the Contact Manager.

For example, if you search for John Smith in your cardfile, you might find that you've made an appointment with him for tomorrow, called him twice last week, and have plans to send him a letter at the end of next week. All the contacts that pertain to John Smith appear in the Contact Manager dialog box.

Searching for contacts



To search for contacts

Choose Tools | Contact Manager from the Cardfile view, or click the icon in the Toolbar. The Contact Manager appears, and it immediately performs a search based on the fields in the current card's index.

The current card index is used for the Search. You can type other text to search for here.

Specify the range of dates to search.

Click to specify where to search.

Click to create a new appointment, To Do, or call.

Click to start new search after entering new contact text.

Click to go to the selected activity.

All contacts found appear in the Contact Manager list, including appointments, calls, To Do items, and Contact Log entries.

The broader your search is, the longer it takes to complete. If your searches are very slow, use the Date Range and Change Criteria options to narrow your searches to include only necessary information.

NOTE A space in the search string indicates an “or” condition. For example, if you enter Mary Smith, the search will find any record containing either Mary or Smith (matching whole words only). If you want to include the space in the search string, use quotation marks: “Mary Smith”—although usually two names would be in separate fields. See [page 104](#) for more on conditional searches.

Scheduling new activities

To schedule a new activity for a contact

- 1 Click the Schedule New button in the Contact Manager dialog box. The Schedule New Activity dialog box appears.

- 2 Choose the type of activity you want to schedule—Appointment, Call, or To Do.
- 3 Choose the date for the contact from the drop-down calendar.
- 4 Click OK. The dialog box opens for the type of activity chosen. Enter the event, call, or To Do as described earlier in this chapter.

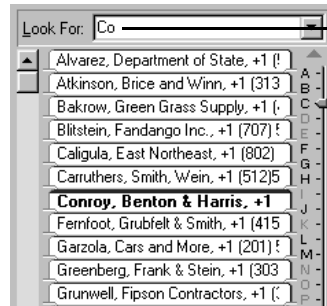
Searching

Internet Sidekick has several powerful tools for finding data in a cardfile. You can search for simple text strings, such as names, cities, numbers, and so on, or specify conditions to search for in particular fields of a cardfile. Internet Sidekick displays the first card matching the search criteria as the current card.

Quick searches

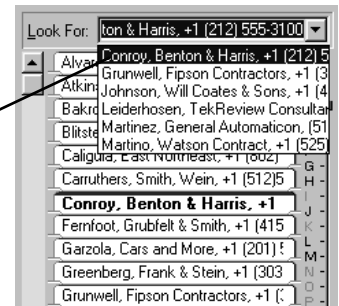
You can search the Card list for text contained in the index lines of each card. As you type text into the Look For box, Internet Sidekick displays the first card whose index begins with the characters you're typing.

In the following example, typing “c” takes you to the first record whose index begins with the letter “c”. Adding a second letter to make “co” takes you to the first record whose index begins with “co”.



When you type Co in the Look For box, Internet Sidekick moves immediately to the first record whose index begins with “co”.

If you press Enter after typing “Co”, Internet Sidekick displays the first 20 records that contain “co” anywhere in their index (to see this drop-down list, click the down arrow button to the right of the Look For box).



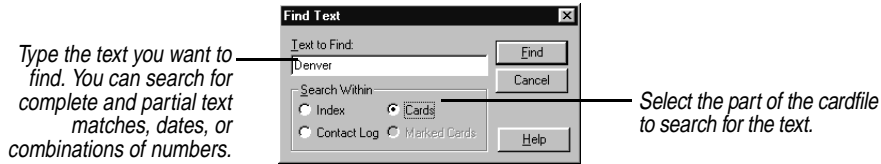
Searching for text within a card

You are not limited to searching card indexes. You can search all information in the active cardfile for any text string. It can be any letter, number, word, or combination of letters, numbers, or multiple

words. For example, you can find the card for the person whose company name you remember but whose name you've forgotten, or you can find all cards with the same city entry.

To search for a text string in a cardfile

Choose Edit | Find | Text, click the Find Toolbar button, or press *Ctrl+F*. The Find Text dialog box appears.



Click Find to begin the search. Internet Sidekick locates the first matching card.

Choose Edit | Find Next or press *F3* to continue the search and go to the next match. Choose Edit | Find Previous or press *Shift+F3* to move to the previous match.

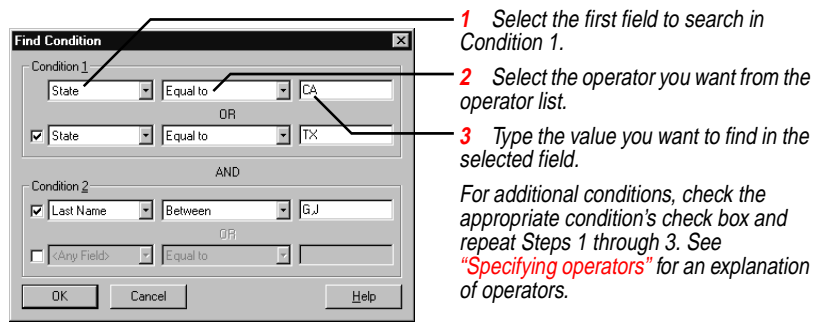
Finding specific conditions

You can search the active cardfile for specific conditions. For example,

- ◆ You might want to find cards that show rates of more than \$50 but less than \$100.
- ◆ You might want to review records of customers living in either Texas or California.
- ◆ You might want to find people you have identified as attorneys or accountants in your address list.

To perform a conditional search

Choose Edit | Find | Condition. The Find Condition dialog box appears.



When you have specified all the conditions you want, choose OK. The first card in the active cardfile meeting the specified conditions appears.

Choose Edit | Find Next or press *F3* to continue the search and go to the next match. Choose Edit | Find Previous or press *Shift+F3* to move to the previous match.

Specifying operators

When searching for conditions on cards, the contents of the fields are compared to values you specify. The comparison is done with a *condition*. A condition is an equation consisting of a field name, an operator, and a value.

For example, a simple equation might be State equal to TX. As Internet Sidekick searches the active cardfile, it compares data on each card with the equation. If the equation is true—when the State field on a card equals TX—the card meets the condition.

Conditional operators can be used with letters or numbers. For example, finding a card with a name greater than Baker would find the first name alphabetized after Baker, such as Bridges.

| Field name | Operator | Sample value | Search result |
|-------------|--------------------------|---------------|---|
| City | Equal to | San Jose | Any card with San Jose in the City field. |
| Country | Not Equal to | United States | Any card that doesn't have United States in the Country field. |
| Income | Greater than | 10000 | Any card with a number greater than 10000 in the Income field. |
| Age | Greater than or Equal to | 18 | All cards with the number 18 or higher in the Age field. |
| Investments | Less than | 500 | Any card with a number smaller than 500 in the Investments field. |

| Field name | Operator | Sample value | Search result |
|------------|-----------------------|--------------|---|
| Price | Less than or Equal to | 49.95 | Any card with the number 49.95 or lower in the Price field. |
| Last_Name | Between (range) | Bas,Smi | Any card with a last name entry that begins with the letters Bas through Smi. |
| Zip | Outside of (range) | 91000,95000 | Any card with a Zip code that is less than 91000 or greater than 95000. |

Specifying conditions

Keep these tips in mind when specifying conditions:

- ◆ Don't use commas in numbers. They are reserved for ranges. To enter a number like ten thousand, type 10000, not 10,000.
- ◆ When entering a range with the Between operator, separate the high and low ends of the range with a comma. For example, to indicate the range of years from 1990 to 1997, type 1990,1997. To indicate the range of words from smi to tru, type smi,tru. Searches are not case sensitive.
- ◆ Don't use quotation marks around words unless the data in your fields have quotation marks as well.
- ◆ Use <Any Field> to search all fields for text. For example, <Any Field> Equal to SMITH searches for the cards in the cardfile that contain Smith regardless of the field it's in. <Any Field> works only with the Equal To or Not Equal operators.

Extracting cards

Extracting cards is a way of searching for cards and automatically copying them into a new, untitled cardfile. All the types of searches described previously can be the basis for extracting cards into a new file.

Extracting on index range

To copy a range of cards to a new cardfile

- 1 Be sure the field you want to use for the range is the first field in the index. If necessary, click the Sort button and change the index.
- 2 Choose Tools | Extract Cards | On Index Range.
- 3 Type the letters you want to begin the range in the From text box, and the letters to end the range in the To text box.
- 4 Choose OK.

A new cardfile appears containing copies of only those cards from the original cardfile that were found within the alphabetical range specified.

Extracting on text **To copy all the cards in a cardfile that contain a specified text string to a new cardfile**

Choose Tools | Extract Cards | On Text. The Extract On Text dialog box appears. Type the text you want to find and choose the part of the cardfile you want to search.

When the search is complete, a new, untitled cardfile appears containing copies of only those cards from the original cardfile that were found with the specified text string.

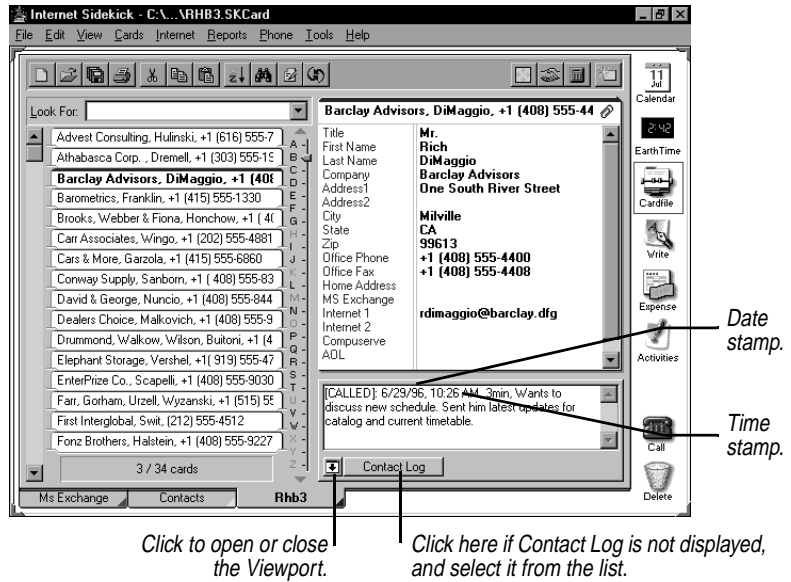
Extracting on condition Extracting cards on condition is just like searching a cardfile for specific conditions. The only difference is that instead of merely jumping to the first card matching your condition, the Extract Cards On Condition function creates a new cardfile containing *all* the cards matching your conditions.

To copy any cards in a cardfile that meet certain conditions to a new cardfile

Choose Tools | Extract Cards | On Condition. The Extract Cards On Condition dialog box is similar to the Find Condition dialog box discussed on [page 104](#). When the search is complete, a new cardfile appears containing copies of only those cards from the original cardfile that meet the specified conditions.

Using the Contact Log

You can display the Contact Log in the Viewport to see the history of the current card.



The Contact Log can store a great deal of additional information about a card (up to 14 kilobytes of data). You can save the following information in a card's Contact Log:

- ◆ Additional comments about a card. Just type them in the Contact Log window (although comments you type are not found by the Contact Manager).
- ◆ Phone calls that have been dialed or answered through the Speed Dial feature. (See **“Entering information in the Contact Log”** on page 160.)
- ◆ Events that were saved to the log.
- ◆ Mail merges that have been performed with Write documents. (See **“Personalizing documents”** on page 131.)

The log of the current card is visible by default in the Viewport.

To stamp today's date at the insertion point in the Contact Log
 Right-click the mouse and choose Date Stamp from the Shortcut menu, or press *Ctrl+D*.

To stamp the current time at the insertion point in the Contact Log
 Choose Time Stamp from the shortcut menu, or press *Ctrl+T*.

After a mail merge, Internet Sidekick stamps [DOCUMENT] to the Contact Log along with merge information.

NOTE If you export a cardfile, the Contact Log data is not exported.

Moving cards between cardfiles

You can move a group of selected cards between cardfiles by dragging them. (See “**Drag and drop**” on page 23.) Dragging a group of cards onto another cardfile’s tab moves those cards into the other cardfile. If you want to copy cards instead of moving them, press and hold *Ctrl* while dragging and dropping them.

When you move cards between two cardfiles that use different field names, the Match Cardfile Fields dialog box appears. This dialog box lets you choose how to map the different fields from one cardfile to another.

The cards are being moved from the file *BUSINESS.SKCARD*, which contains these fields.

Select a field from each file to match, and click the Match button.

Click to have Internet Sidekick use these matches the next time it finds the same fields.

The cards are being moved to the file *PERSONAL.SKCARD*, which contains these fields.

Matched fields appear here.

The Match Cardfile Fields dialog box automatically matches fields that share the same name in both cardfiles. You can match other fields manually, by selecting a field from each cardfile and clicking the Match button. You can remove an incorrect match by selecting it and clicking the Remove button. To change the list of remembered matches, click Delete Match Fields.

The cards you dropped into the target cardfile now have that cardfile’s fields. If you matched fields between the two cardfiles, information is moved accordingly. Information from unmatched fields will be placed in the last field of the new card.

Merging two cardfiles

You can merge data from one cardfile into another. For example, you might want to combine the addresses from your personal address cardfile with your business address cardfile to create a single address cardfile. When you merge cardfiles, Internet Sidekick adds the fields and the data from one cardfile into another.

CAUTION There is no undo option for merges. When you merge cardfiles, the cardfile you add data to changes to accommodate the data and fields being merged. If you want to keep a copy of the original cardfile, save the merged cardfile to a different name. Of course, you can always discard the merge result by closing the cardfile without saving.

To merge two cardfiles

- 1 Open the cardfile you want to add cards to. If the cardfile is already open, click its tab to select it.
- 2 Choose Tools | Merge Cardfile. The Merge Cardfile dialog box appears.
- 3 Select the cardfile you want to merge into the open cardfile, and click OK.
- 4 The Remove Duplicate Cards dialog box appears.



Choose how to handle cards that have the same index line.

- ◆ **Replace Cards** replaces the cards in the currently open cardfile with the cards from the second cardfile.
 - ◆ **Retain Cards** retains the cards in the currently open cardfile and ignores the cards in the second cardfile.
 - ◆ **Do Not Remove Cards** keeps all cards, including any duplicates.
- 5 The Match Cardfile Fields dialog box appears (see [page 109](#)). Specify any matches you want between fields by selecting a field from each cardfile and clicking the Match button. Click OK when done.

The merge combines all of the information from the two cardfiles into the open cardfile.

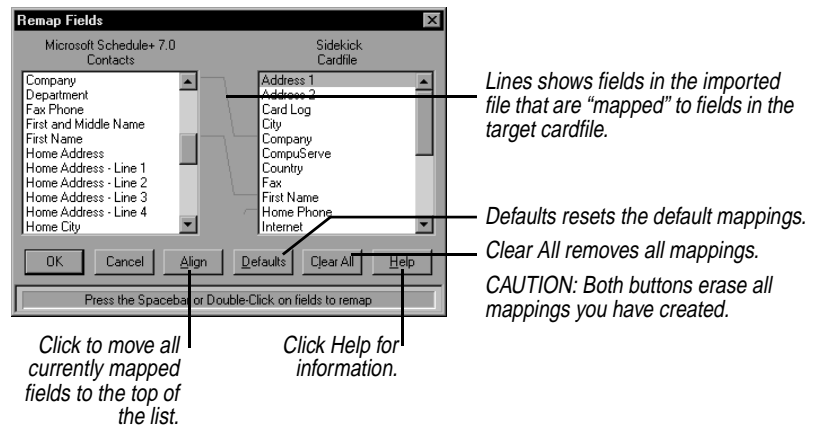
NOTE A cardfile is limited to 100 field names and 30,000 total cards. If the number of cards resulting from a merge would be greater than 30,000, you will see a message, and the merge will not occur.

Synchronizing data from other applications

Internet Sidekick can synchronize data in one cardfile with data in another, or with data created in another application. The process involves passing information from each file to the other, so the two contain the same data.

To synchronize two card files

- 1 In Internet Sidekick, open the cardfile you want to synchronize.
- 2 Choose Tools | Synchronize | Cards.
- 3 Specify the file to synchronize with. If it is a non-Sidekick file, select the appropriate type in the Files of type field. Click Open.
- 4 The Remap Fields dialog box opens. Use it to show what fields in the imported cardfile relate to fields in the target cardfile (called “mapping”). Double-click a field in one list, and then in the other list, to establish the relationship.



Note that fields that end with an asterisk (*) must be mapped.

Importing and exporting cardfile data

You can import cardfile data from and export cardfile data to other applications. If you use an application that can save in one of these formats, Internet Sidekick can import the data. The formats Internet Sidekick can import from or export to include the following:

- ◆ Sidekick 95, Sidekick 2.0
- ◆ dBASE III, IV, V
- ◆ Paradox 3.5, 4.x, 5.x, 7.0
- ◆ ASCII Text-delimited text files

NOTE Some conversions, such as the Lotus Organizer conversion, require the original application to be running for the conversion to occur. You may be able to speed up the import/export process by starting the application before you begin the import or export.

For more information about the specific conversions, click the Help button in the Import or Export Cardfiles dialog box.

Importing

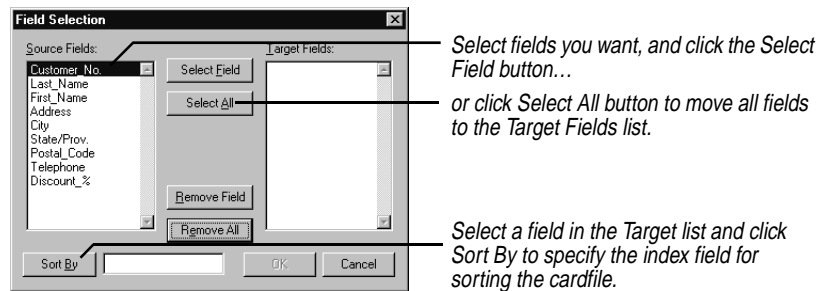
When you import data from other applications, Internet Sidekick converts the data to the Sidekick cardfile format.

Since the Internet Sidekick Cardfile is a text-only database, special fields found in other file formats for dates, numbers, labels, and so on are converted to standard text fields on import. Some formatting for these special fields might not be retained in the resulting cardfile.

To import text data into a cardfile

- 1 Choose File | Open Cardfile. The Open dialog box appears.
- 2 In the Files of type field, choose the file type you want to import.
- 3 Select the file, and click the Open button.

The Field Selection dialog box appears, showing the fields available from the source file.



- 1 Select the fields for the target file. You must select at least one field. You must also select a field in the Target Fields list and choose Sort By to specify the index line for sorting the cardfile. Later, after you've imported the file, you can specify up to three fields for the index, as with any other Internet Sidekick cardfile. Click OK to begin importing.

If no fields are available, you might need to open the file in another application, such as a text editor, and add the field names you want to use in the cardfile before continuing with the import.

Exporting

When you export data from a cardfile to another application, Internet Sidekick converts it to the appropriate file format. The Contact Log is not exported with the card data.

To export a cardfile

- 1** Choose File | Save As.
- 2** Choose the export format you want from the Save As Type list.
- 3** In the Remap Fields dialog box, match the fields in the cardfile with fields in your exported file. (Click Help in this dialog box for more details.)
- 4** Click OK.

The Write view

The Write view lets you create letters, reports, and other documents and save them in folders and binders. The new AutoSpell feature works in the background as you write to flag misspelled words. You can apply formatting to your document, and you can even create form documents to merge with names from a cardfile. A simple right-click on a document lets you send it to others by e-mail or fax.

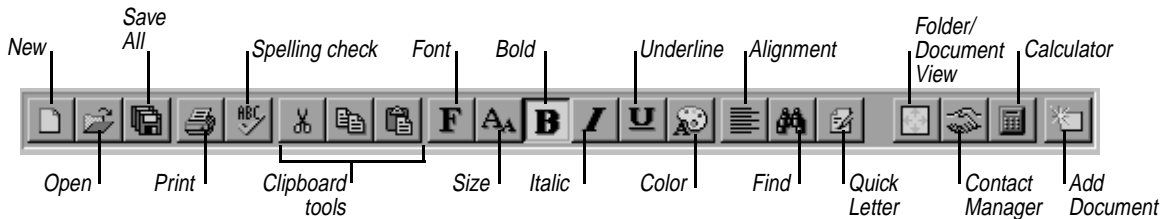
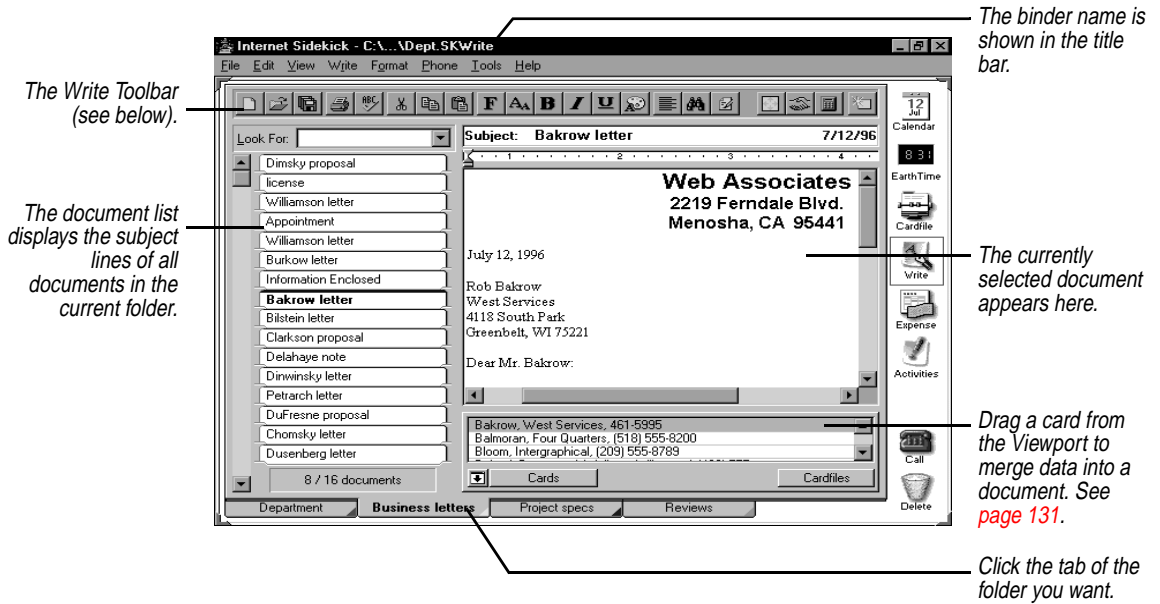


To open the Write view, click the Write Deskpad icon, press *F7*, or choose View | Write.

This chapter explains how to

- ◆ Create and edit Write documents, and organize them in binders and folders
- ◆ Check spelling automatically while you work
- ◆ Use Write templates provided with Internet Sidekick
- ◆ Send documents via e-mail or fax
- ◆ Use Quick Letter and mail merge
- ◆ Import to and export from Write

The following figure shows the Write view.



Binders, folders, and documents

Binders help you organize your documents by topic. A Write binder can contain many folders. Each folder contains one or more documents. Here's how a binder might be organized:

Binder (only one can be open at a time)

Folder 1

Document 1

Document 2

Folder 2

Document 1

Document 2

Document 3, etc.

Each folder in a Write binder is identified by a tab at the bottom of the Write screen. Using folders, you can organize documents according

to projects, tasks, people, subject, or any other grouping. You can set up as many as 256 folders for documents, and add, rename, or delete them at any time.

Creating documents

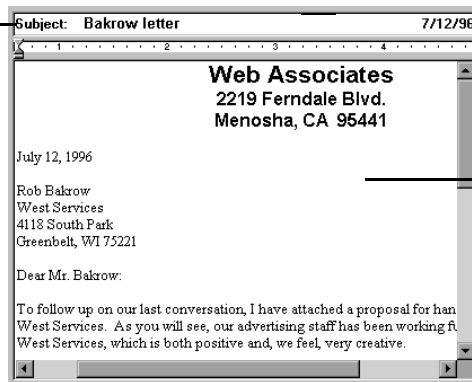
A Write folder can contain as many documents as you want.

To create a document

- 1 Click the tab of the folder where you want the document.
- 2 Click the Add Document button or choose **Write | Document | Add**. A new, blank document appears, with the insertion point in the subject line.
- 3 Type a subject, and then press *Enter* to move into the body of the document. Type your text.



When you create a new document, you type its subject line first.

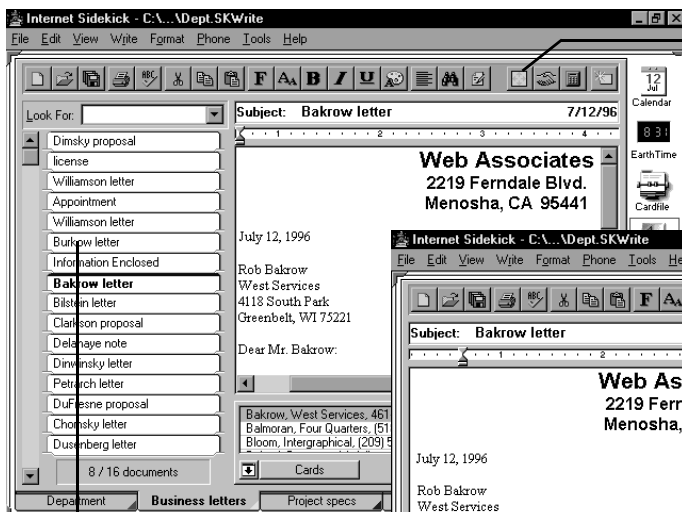


The date the document was created appears here.

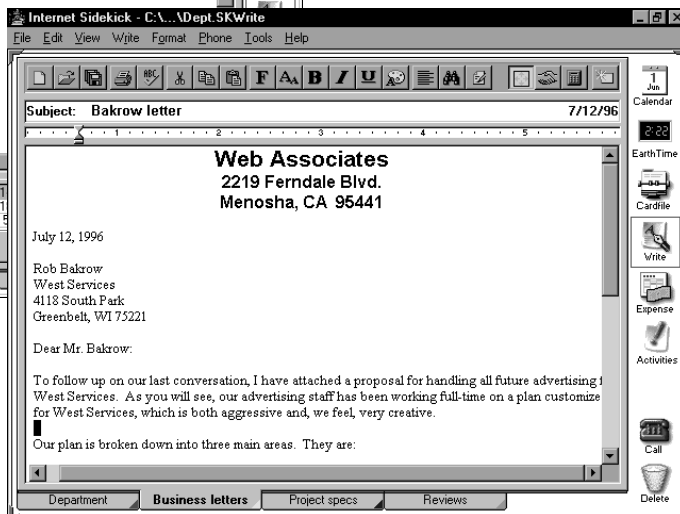
Type directly in the document.

Using full-screen editing

You can edit documents in a full-screen Document view or in Folder view. The Folder view makes it easy to find a document title. Full-screen editing in Document view is easier when you have a lot of writing or formatting to do.



Click to switch between Folder view (left) and full-screen Document view (below).



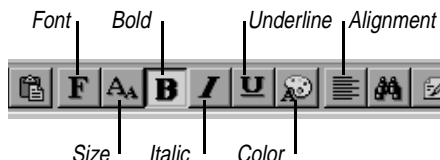
The index shows the subject line of each document in the folder.

Fonts and formatting

The editing Toolbar provides options for changing type size and style. You can also change paragraph alignment—left-aligned, centered, right-aligned. (To change the default font for new documents, use Tools | Preferences | Write.)

To change the type size or appearance

Drag the mouse through the text you want to change, and then click the formatting button you want.



To change paragraph alignment

Click in the paragraph, or drag through at least part of all paragraphs you want to change. Then click the Alignment button.

To add a “bullet” to a paragraph

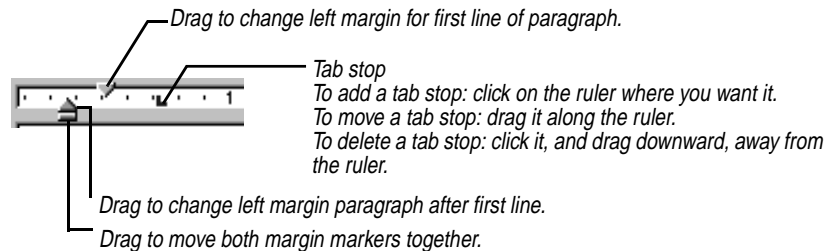
Click in the paragraph, or drag the mouse through several paragraphs. Then choose Format | Bullet.

Changing margins and tabs

Use the ruler when you want to change margins or set a tab stop. To change more than one paragraph, select the paragraphs before you adjust the ruler.

To see the ruler

Choose View | Ruler.



If you create a new paragraph by pressing *Enter* at the end of an existing paragraph, the new paragraph retains the margins and tabs of the existing paragraph.

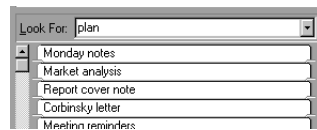
Finding text

You can search through the document indexes or the text documents at the click of a button. You can search for text in two ways—with the Look For box or with the Find dialog box.

The Find dialog box gives you more flexibility in searching for text. It searches through the current document, all documents in the current folder, or in all folders you specify in the current binder.

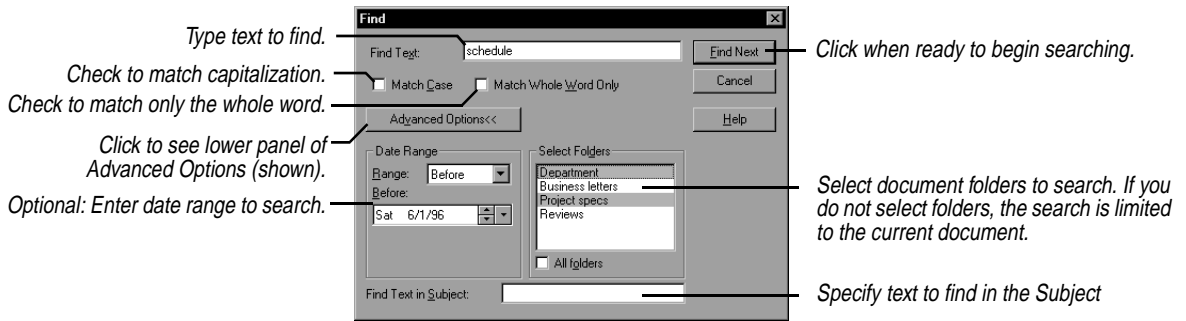
To find text in the document indexes using the Look For box

Type the characters in the Look For text box, and press *Enter*.



To find text using the Find dialog box

Click the Find icon to open the Find dialog box.



Setting search options

The default is to search the current document. Clicking Advanced Options lets you choose other search criteria.

The options available in the Find dialog box are

- ◆ **Match Whole Words Only.** Find only if the characters you entered appear as a separate word in the text.
- ◆ **Match Case.** Find only if the capitalization matches the characters you entered.
- ◆ **Date range.** Limits search to dates before a date, between two dates, or after a date.
- ◆ **Select Folders.** Specify all folders or only certain folders.

Found text

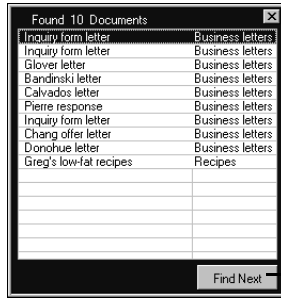
Once you have completed a search using the Find dialog box, you can see all instances that Internet Sidekick has found of the text you entered.

To see all instances of your Find text

Choose Edit | Found Text. You'll see the dialog box shown below, listing all documents containing instances of the text you entered.

TIP

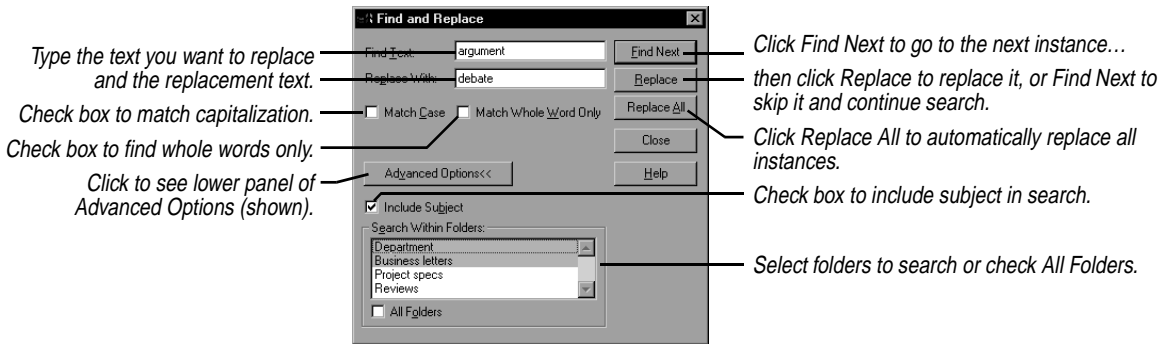
If you use any Advanced Options in the Find dialog box, Internet Sidekick automatically opens the Found list to show you all documents where the text was found.



Click to go to the next instance of the found text in any of the documents.

Replacing text To find and replace text

Choose Edit | Replace to open the dialog box shown here.



Checking your spelling

Internet Sidekick gives you the option of having your spelling checked as you type, or checking the document or a selection in one pass when you have finished typing. You also can type a word you are unsure of and have the Spelling Checker correct it.

The Spelling Checker uses a dictionary of 90,000 words. Use the Add button to create a personal dictionary of words and names that you want to be recognized as correctly spelled.

Using AutoSpell

AutoSpell can find your spelling and typing errors as you type, working silently in the background to check for mistakes. Unrecognized words are marked with strikeout so you can easily find and correct them.

To turn on AutoSpell so checking occurs as you write

Choose Tools | Auto Spell Check. You also can turn on AutoSpell as the default in the preferences (Tools | Preferences | Write—see [page 128](#)). As you type, each word is checked for spelling.

To correct or ignore an unrecognized word

Right-click a word that is marked with ~~strikeout~~ (like ~~continuous~~) to see the spelling options:

Corrections—Possible corrections are listed at the top of the menu. Click your choice to replace the word in your document.

Ignore All—Click this choice to ignore the current spelling everywhere it appears in your document. The strikethrough will be removed from all instances of the term. The ignored word will not be considered a misspelling during the current Internet Sidekick session.

NOTE To avoid conflicts with marked misspellings, you should avoid using ~~strikeout~~ in your text.

To turn off AutoSpell

Choose it again from the Tools menu, so it is unchecked.

If you leave words flagged as misspellings in your document you probably want to turn off the ~~strikeout~~ marking when you print.

To turn off the ~~strikeout~~ when you print a document

Uncheck the box labeled Print Misspelled Words in ~~Strikeout~~ in the Print dialog box.

Checking a single word

If you are unsure how to spell a word, you can type your best guess and have the Spelling Checker verify or correct it.

To check a single word

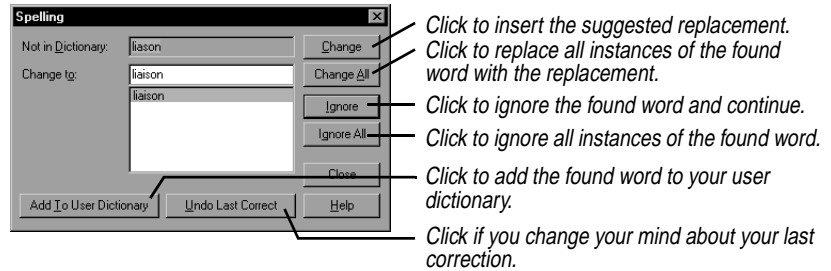
Right-click anywhere in the word you want to check (AutoSpell does not need to be on). If the word is not recognized, you will see a list of possible alternatives at the top of the shortcut menu. Click the correct spelling to replace the word in your text.

Single-pass spelling check

To check the spelling of selected text or an entire document

Choose Tools | Spelling. If you have selected text in a document or subject, only the selection is checked. Otherwise, the spelling check

begins at the start of your document. When an error is found, the Spelling Check dialog box opens.



Counting words

When you need a count of the words in a document, let Internet Sidekick do the work.

To count words in the current document

Choose Tools | Word Count. The Word Count dialog box appears with the totals for your document.

Sending e-mail

Once you have created a Write document, you can send it by e-mail with a click of your mouse. (This feature requires that you have Eudora Pro or Microsoft Exchange installed.)

Sending e-mail using Eudora Pro

To send a document using the Eudora Pro (32-bit) e-mail program

- 1 Right-click in the text of the document and choose Send To from the shortcut menu. Choose Eudora Pro from the menu.
- 2 Eudora Pro opens. Enter address and subject information.

Your document is sent as an attachment to the e-mail message. The attachment includes text formatting (rich text format).

Sending e-mail using the Microsoft Exchange address book

To send a document using the Microsoft Exchange address book

- 1 Right-click in the text of the document and choose Send To from the shortcut menu. Choose Exchange from the menu.
- 2 Microsoft Exchange opens, with your Write document in the text pane. Click the To: button, and complete the addressing information.
- 3 Click the Send button. Your document text is sent to the recipients you specified in the message body.

Sending e-mail using the imported Exchange address book

The text of the document, without formatting, is sent.

You can send e-mail to people in your Microsoft Exchange address book. First you must import the address book as an Internet Sidekick cardfile (see [“Importing the Microsoft Exchange address book” on page 97](#)).

To send e-mail to your Exchange address book cardfile

- 1** In the Write page, set the Viewport to display Cards. Select the cardfile that is your imported Microsoft Exchange address book.
- 2** Select one or more cards in the Viewport that you want to send e-mail to (use Ctrl+click to select multiple cards). If you don't make a specific selection, Internet Sidekick uses the current card.
- 3** Right-click on the Write document you want to send and choose Send To from the shortcut menu. Choose Exchange from the menu.

The Microsoft Exchange window opens with the addresses you selected filled in and the document in the text field. Formatting is not included.

Faxing a document

You can fax a document directly from Internet Sidekick using the Windows 95 Fax capability.

NOTE Your computer must have a fax modem, and you must install the Windows 95 Fax software to fax documents. To install the Windows 95 fax software, open the Control Panel and double click Add/Remove Programs. Click the Windows Setup tab and choose Microsoft Fax. If you have selected Other Internet Mail in the Group Scheduling Preferences, the fax option will not be available, since it requires Microsoft Exchange.

To fax a Write document

- 1** Select one or more cards in the Viewport (use Ctrl+click to select multiple cards). These cards must have a field that includes the word “fax” in the field name, and there must be a fax number in the field. If you don't make a specific selection, Internet Sidekick uses the current card.
- 2** Right-click the document and choose Send To | Fax from the shortcut menu. The document is faxed to all cards you selected.

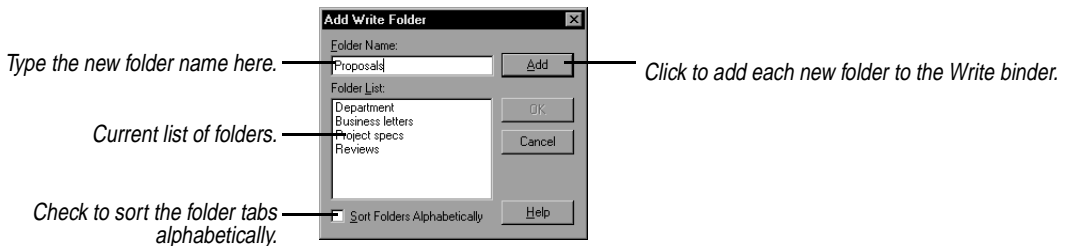
To change the cover page sent out with your faxes

- 1 Open the Windows 95 Control Panel and double-click the Mail and Fax icon.
- 2 Select Microsoft Fax.
- 3 Click the Properties button.
- 4 Select a cover page from the list, and make any other changes you want in the fax settings.

Working with folders

To create a new folder

- 1 Choose Write | Folder | Add. The New Folder dialog box appears.
- 2 Enter a name for the folder (up to 24 characters). Choose Add and click OK.



To delete a folder

- 1 Choose Write | Folder | Delete.
- 2 Select the folder from the list and choose Delete.

WARNING All documents contained in the folder will be deleted.

To change a folder's name

- 1 Choose Write | Folder | Modify or right-click the folder tab. The Edit Folder Name dialog box appears.
- 2 Select the folder from the list, make any change to its name, choose Change, and click OK.

To go to a folder without clicking its tab

- 1 Choose Edit | Go To Folder.
- 2 Choose the folder from the list and click Go To.

This can be useful when you have a large number of folders.

To reorder the folder tabs

- 1** Choose Write | Binder | Reorder Tabs.
- 2** Select each folder name and choose Up or Down to move the folder in the list.

Working with binders

A new Write binder initially contains one unnamed folder and no documents.

To create a new Write binder

Choose File | New Binder.

See also “**Extracting documents**” on page 134 to create a binder containing a specific group of records.

To save a Write binder

Choose File | Save Binder, or click the Save All button in the Toolbar.

If you want to save a binder under a new name, choose File | Save Binder As and specify the name.

To open an existing Write binder

Choose File | Open Binder and select the binder.

Working with multiple documents

In addition to editing the information in a document, you can perform various actions—like deleting—to the document itself. You can also perform these actions on several documents at once by selecting them.

Selecting documents

To select multiple documents, do either of the following:

- ◆ Click a document’s subject line in the document list, and then press *Shift* and click another document’s subject. The two documents and all documents between them are selected.
- ◆ Press *Ctrl* and click several documents’ subjects in the document list. Only those documents you *Ctrl*+click are selected. Once you have selected multiple documents, you can also use *Ctrl*+click to deselect individual documents.

You can perform several functions after selecting multiple documents:

- ◆ Deleting (see below)

- ◆ Exporting (see “Exporting documents” on page 133)
- ◆ Printing (see Chapter 10)
- ◆ Moving documents from one folder to another (see “Moving documents between folders” on page 128)

Marking documents

Marking documents gives you another way to specify a group of documents for certain actions, like deleting or printing. It is more lasting than merely selecting multiple documents, because marked documents remain marked until specifically unmarked. Marked documents are distinguished by a red triangle on the left side of their subject lines.

To mark a document

Choose Write | Document | Mark Current Document, press *Ctrl+K*, or right-click the document in the Documents list.

To unmark a document

Press *Ctrl+K* or right-click it in the Documents list.

To unmark all marked documents

Choose Write | Document | Unmark All.

Deleting documents

You can delete a single document, selected documents, or marked documents.

To delete multiple documents

Select them from the Documents list and drag them to the Delete icon (see “Drag and drop” on page 23). Or choose Write | Document | Delete, where you can choose to delete the current document, selected documents, or marked documents.

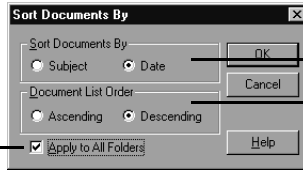
Sorting documents

The indexed view contains a listing of document subjects in the current folder. You can sort documents by subject or date created, in ascending or descending order, for the current folder or all folders.

To sort the documents in the current folder (or all folders at once)

Choose Write | Document | Sort. The Sort Documents By dialog box appears.

Check *Apply To All Folders* to sort all documents. Leave unchecked if you want to sort only the documents in the current folder.

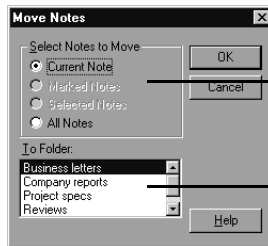


Select either *Subject* or *Date* for the sorting.
Select either *Ascending* or *Descending* to order the documents.

Moving documents between folders

To move documents from their current folder to another

Drag the documents from the Documents list to the tab of the target folder. Or you can choose *Write | Document | Move*, which displays the *Move Documents* dialog box.



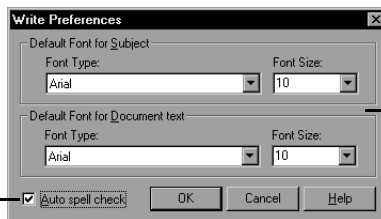
Choose which documents to move.
Select the destination folder.

Setting preferences

To set preferences for the Write view

Choose *Tools | Preferences | Write*.

Check to have *AutoSpell* turned on by default.



Select the default font for the document subject and text.

Changes you make to the subject and document fonts take effect for documents you create after the font changes.

Quick Letter

Internet Sidekick's *Quick Letter* feature instantly creates a letter from information in the current card, formatted and ready for you to just type in the text. Although *Quick Letter* operates in *Write* view, you can activate it from *Cardfile* and *Calendar* views as well.

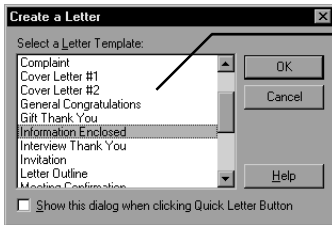
Quick Letter makes use of merge templates that specify where different pieces of information from the card should be placed in the document. Internet Sidekick comes with predefined templates, based on the fields used in the Business and Personal cardfile templates.

You can create or modify merge templates, and you'll need to do so if you want to merge using cards that are not in the standard Business or Personal cardfile formats (see "Creating merge templates").

Using Quick Letter

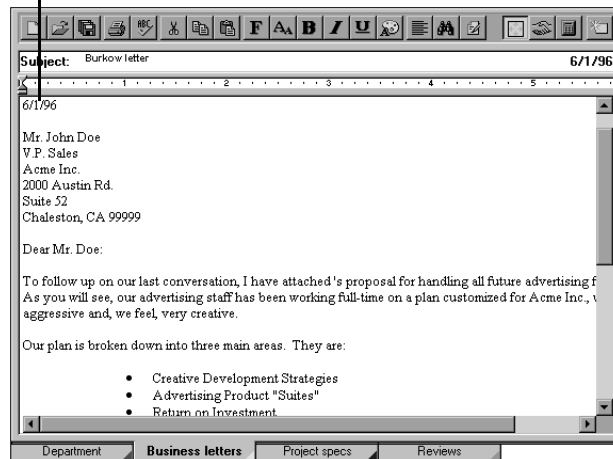
To create a Quick Letter from a template

- 1 In the Cardfile, or with the Cardfile displayed in the Viewport, click on the index of the card you want to address your letter to.
- 2 Click the Quick Letter button or choose Tools | Quick Letter.
- 3 From the dialog box, choose the template you want.



Choose the template you want from the Create a Letter dialog box.

The information from the current card is inserted in the template to create an instant letter.



Creating merge templates

A merge template is composed of *constant text* and *fields*. Constant text, like "Dear," or the text of a letter, remains the same on all the merged documents. Fields, like {First Name}, insert different text into the merged documents depending on the information in the cardfile. By combining both of these kinds of text, you end up with, for example, Dear Jennifer on one document and Dear Patrick on another.

Internet Sidekick recognizes the following field codes:

- ◆ Field names enclosed in { }, such as {Last Name}. The information is drawn from the current card in the active cardfile.
- ◆ Field names with a leading # are replaced with system information. These include {#Username}, {#Company}, {#Date}. (The date format used is set in the Windows 95 Control Panel, Regional Settings. Internet Sidekick uses whatever you have selected as the Short Date format.)
- ◆ Field names surrounded by # #, such as {#Product#}. You will be prompted to fill these in at merge time. (This option is not available with QuickLetter.)

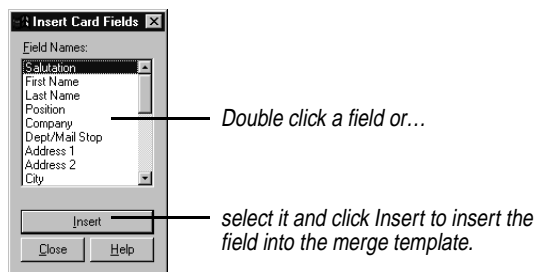
To create a merge template

1 Open the Binder called Templates.SKWrite in the Userdata folder. (The full path is usually \Program Files\Starfish\Internet Sidekick\Userdata.)

2 Create a new document and write the constant text, such as the content of a letter.

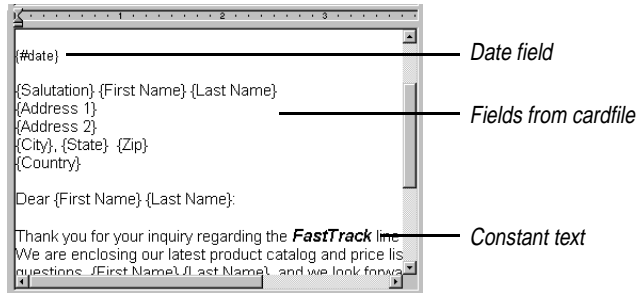
Be sure to include such unchanging information as your return address at the top. You can apply whatever fonts and formatting you need for an attractive letter.

3 Insert fields from the active Cardfile where appropriate. To insert fields, choose Write | Mail Merge | Create Template. The Insert Card Fields dialog box appears.



Inserted fields appear in the merge template between braces, such as {Last Name}.

You also can type field names, including the special types for system information and fill-in information.



4 Save the binder.

5 If you want to use the template for Quick Letter as well as Mail Merge, use Write | Document | Export to save the template in rich text format (.RTF), in the Internet Sidekick\Template folder. Note, however, that Quick Letter does not recognize the manual fill-in field types such as `{#Product#}`.

You can modify any of the templates provided with Internet Sidekick by editing them in the Templates.SKWrite binder. Again, if you want to be able to use them with Quick Letter, export them in .RTF format in the Template folder.

Personalizing documents

Internet Sidekick makes it easy to create custom documents by merging any number of cards from your Cardfile to create personalized letters.

Internet Sidekick's mail merge uses templates similar to those used by Quick Letter. Using a template, you can select one or more cards and drag them from the Viewport to the template to create personalized letters.

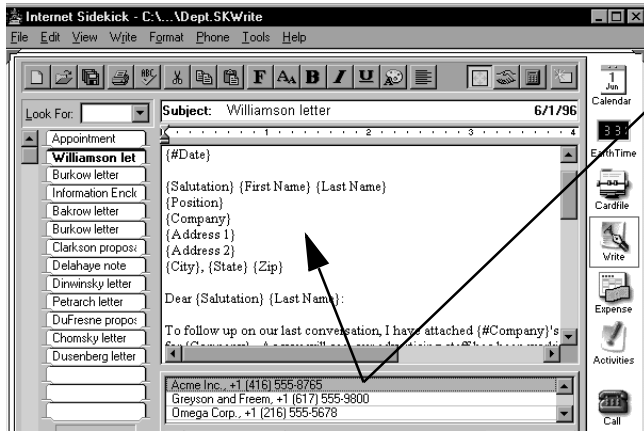
Merging cards

When you perform a merge, the field names in the template are replaced with the field information for one or more people in the Cardfile.

NOTE If there are no merge fields in the selected document, the contents of the first ten fields on the card are copied into the document. If a field in the template is not found on the card, the Fill In Information dialog box appears prompting you for text to replace the empty field with.

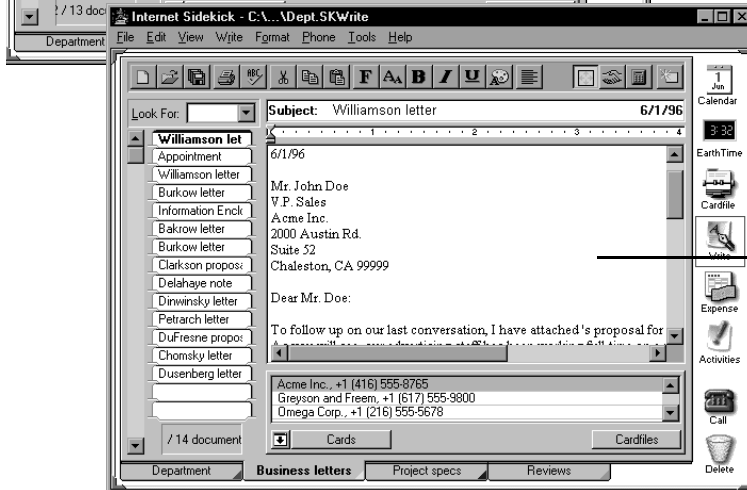
To merge single cards using drag-and-drop

Drag the card or cards from the Viewport to the Write template. Or you can choose Write | Mail Merge | Cardfile.



1 Drag a card from the Viewport to the merge template.

2 The Merge Card dialog appears. Check Current Card if you want to merge a single card. Check other options you want.



3 The merged letter appears as a new document, or is automatically printed for you, or both, depending on the options you selected in Step 2 above.

Use the options in the Merge Card dialog box if you want to stamp the subject lines of these new documents to the selected cards' Contact Logs.

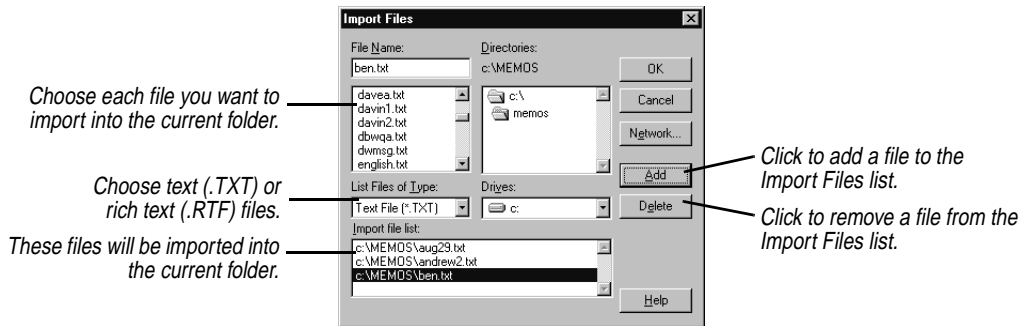
To merge multiple cards, select or mark them before you drag them from Viewport to the document window. You can also use the command Write | Mail Merge | Cards to open the Merge Card dialog box and perform the merge.

Importing text and .RTF files

You can import any text or rich text (.RTF) file into a document, and you can import several files at once. Imported text files are added to the current folder.

To import a text file

Choose Write | Document | Import. The Import Files dialog box appears.



Opening other file types

Internet Sidekick can open files created in other applications.

To open a file created by another application

- 1 Choose File | Open Binder.
- 2 Click the arrow at the Files of Type box and choose the file type from the list.
- 3 Specify the file location and name.

Exporting documents

You can export the current document to rich text format (RTF).

To export the current Write document to RTF

Choose Write | Document | Export. Specify the name you want for the .RTF file and click Save.

You can also export multiple documents and folders to the Clipboard, to a text file, or to a rich text format (.RTF) file.

To export documents or folders

Choose Write | Binder | Export. The Export dialog box appears.



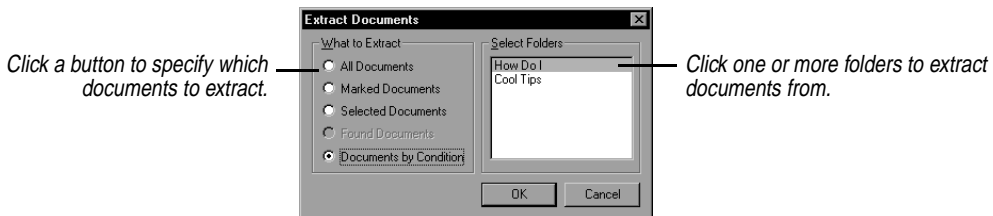
When you've chosen the documents to export, click OK. If you're exporting to a text file, the Save As dialog box appears. Type a name for your new text file and click Save.

Extracting documents

You can use the Extract command to create a new Write binder containing a specific group of the records in an existing binder. You can select the records yourself, by marking or selecting, or use conditions to specify the records to extract.

To extract documents into a new, unnamed Write binder

- 1 Select, mark, or use Find to locate the documents you want to extract, if appropriate. The options to extract marked documents, selected documents, or found documents are dimmed unless you use one of these methods to select documents before using the Extract command.
- 2 Choose Write | Document | Extract.
- 3 Specify what to extract, and the folders to extract from. If you extract by condition, another dialog box opens when you click OK where you specify the conditions.



- 4 Click OK.

Internet Sidekick creates a new binder containing only the documents you have specified.

Combining documents

To add all the documents and folders from another binder to the open binder

- 1** Choose Write | Folder | Combine. The Merge With dialog box appears.
- 2** Select the document file you want to merge with the open file and click Open.

Internet Sidekick adds the second file's folders and documents to the open file. If the second file has any folder names in common with the open one, new folders are not added. Instead, their documents are added to the open file's in the folder of the same name.

The Expense view

The Internet Sidekick Expense view makes it easy to enter information from expense receipts, and create an expense report. You can organize your expenses in folders, and create reports based on a specific date range, a particular week, or a folder.

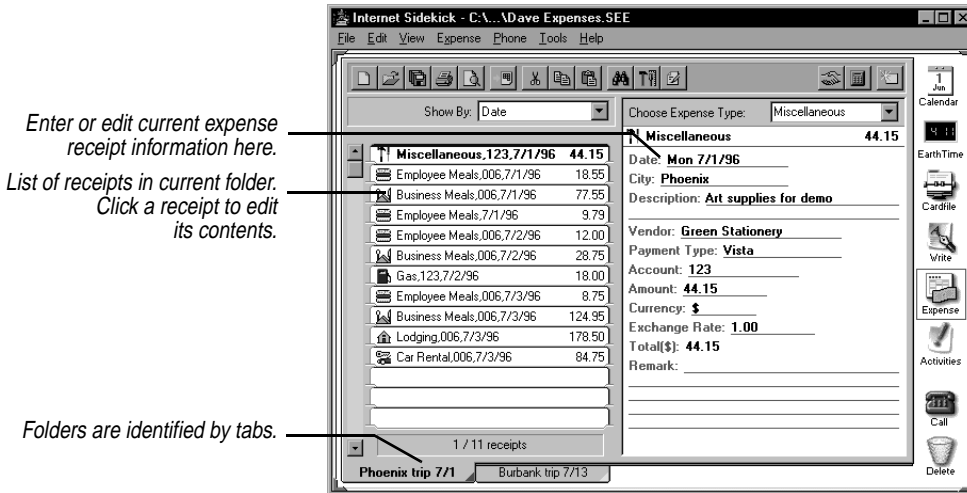


To open Expense view, click the Expense icon on the Desktop, or choose View | Expense, or press *F8*.

This chapter discusses

- ◆ Entering information from your receipts
- ◆ Creating and using expense folders
- ◆ Using expense categories
- ◆ Creating the expense report
- ◆ Setting preferences for expense files and folders

The following illustration shows the Expense view.



An expense file contains folders, which you can tailor to represent separate trips or projects, for example. Within a folder you enter expense receipts, which are organized and totaled in expense reports. You can have an unlimited number of receipts and folders in a file.

Creating a new expense file

Create a new expense file when you want a new container to hold multiple folders. For example, you might want to have an expense file called 1996 Travel, in which you have folders for each trip. You might have another expense file for project-related expenses. Or you might prefer to have one expense file for the year, with folders for different expense types.

To create a new expense file

Choose File | New Expenses. The New Expense File dialog box opens.

Enter information about the new file.
Folder names can have up to 32 characters.

Currency to use. You define this list in the Tools | Preferences | Expense dialog, Pick List page.

De-select any expense types that you do not want to appear in reports. You also can remove any you are not using later in the File Properties option.

Select the Country setting (determines whether Value Added Tax, or Goods and Services Tax and Provincial Sales Tax is included in report information).

Entering and editing receipts

Creating an expense report usually begins with a pile of receipts. Internet Sidekick lets you start entering directly from the receipts, without the need to sort or categorize them first.



To enter a new receipt

Click the Add Receipt button.

1 Click to add a new receipt.

2 Click to choose expense type. Or you can type a new expense type in the field.

3 Enter receipt information in the fields by typing or clicking the arrow choosing from the drop-down list.

If you type new information in a field that has a list, the new name is added to the list so you can select it the next time.

To edit information in a receipt you've already entered

Click the receipt in the display window (left side), and then edit the information in the entry window (right side).

Show By: Date

| | | |
|--|---------------------------|--------|
| | Employee Meals,006,7/2/96 | 9.50 |
| | Miscellaneous,123,7/1/96 | 44.15 |
| | Employee Meals,006,7/1/96 | 18.55 |
| | Business Meals,006,7/1/96 | 77.55 |
| | Employee Meals,7/1/96 | 9.79 |
| | Employee Meals,006,7/2/96 | 12.00 |
| | Business Meals,006,7/2/96 | 28.75 |
| | Gas,123,7/2/96 | 18.00 |
| | Employee Meals,006,7/3/96 | 8.75 |
| | Business Meals,006,7/3/96 | 124.95 |
| | Lodging,006,7/3/96 | 178.50 |
| | Car Rental,006,7/3/96 | 84.75 |

Click to choose the sort order of receipts.

Click the receipt you want to edit

You can sort the display of receipts you've entered using the drop-down list box in the display window. You can sort receipts by account, cost, expense type, or date, or choose no sort order.

Entering cash advances

To enter a cash advance

Follow the procedure for entering a receipt, but choose Cash Advance as the expense type.

Using drag and drop

You can drag a receipt from the list to a folder tab to move the receipt to that folder.

You can also drag a receipt from the list to the Delete (trash can) icon on the Desktop.

Viewing the expense report

The Expense Report view arranges the receipts you have entered by date and category, and totals them.



To see the expense report

Click the Go To Report View button or choose View | Report View.

Click to specify report content.

Click to go to Receipt view.

Click to edit name and report information.

| DATE | MON 7/1/96 | TUE 7/2/96 | WED 7/3/96 | TOTAL |
|----------------|---------------|---------------|---------------|-----------------------------------|
| Airfare/Rail | | | | |
| Car Rental | | | 84.75 | 84.75 |
| Gas | | 18.00 | | 18.00 |
| Mileage | | | | |
| Parking/Tolls | | | | |
| Transportation | | | | |
| Employee Meals | 28.34 | 21.50 | 8.75 | 58.59 |
| Lodging | | | 178.50 | 178.50 |
| Phone/Fax | | | | |
| Tips | | | | |
| Business Meals | 77.55 | 28.75 | 124.95 | 231.25 |
| Entertainment | | | | |
| Miscellaneous | 44.15 | | | 44.15 |
| TOTALS | 150.04 | 68.25 | 396.95 | |
| | | | | Less Amount Advanced Due Employee |
| | | | | 615.24 |

Click to select account.

If you have entered a cash advance, it appears here. It is subtracted from the total.

TIP

If you have expense items that don't occur on successive days, choose the Range or Folder options in the By list. These report types display only days on which there is an expense entry within the date range you specify.

The expense report is not directly editable (except the report information fields at the top). To change information, return to Receipt view and make changes in the receipts.

You can change the content of the report by choosing from the By list, which lets you specify a date range (choose Range in the By list), by Week, or by Folder. You also can limit the report to only a specific account, or all accounts.

You can specify the report range:

by Week

By:

by Date Range

By:

by Folder

By:

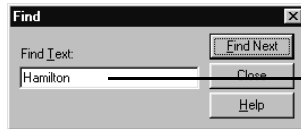
Finding receipt information



To locate a specific receipt, use the Expense view's Find function.

To find information anywhere in your receipts

Choose Edit | Find, or click the Find button in the Toolbar.



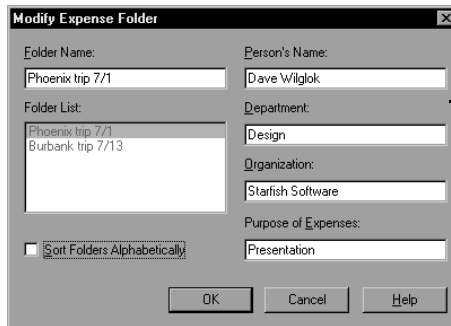
Type the text you want to find and click Find Next.

Internet Sidekick searches all fields of all receipts, including fields with information chosen from pick lists.

After the first instance is found, you can press *F3*, or choose Edit | Find Next, to go to the next instance.

Modifying the folder

Use the command Expense | Folder | Modify to change the properties of the current folder.



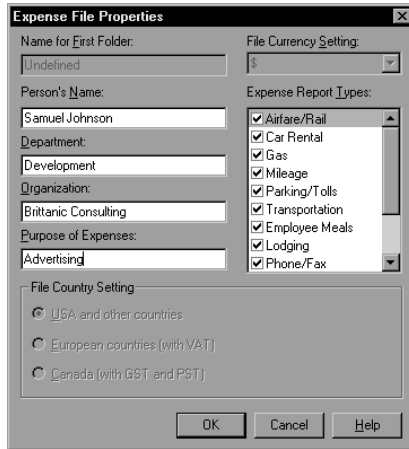
Information you enter here will appear in expense reports for this folder.

Setting expense file properties

File properties affect your entire expense file. Most of them are set in the dialog box you see when you create a new expense file.

To view and change the expense file properties

Choose Expense | File Properties. Make the changes you want in the Expense File Properties dialog box.



NOTE Once an Expense file is created, you can no longer change its currency or country setting.

Setting preferences

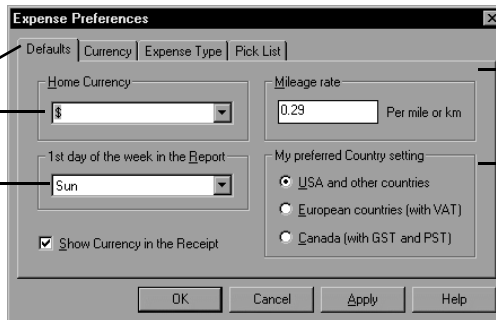
The options in Tools | Preferences | Expense apply to the entire Expense View. Many of them are defaults that appear in the properties when you create a new file.

Defaults page

Click tabs to set other properties.

Choose home currency from the list.

Starting day of week (usually Sunday or Monday).

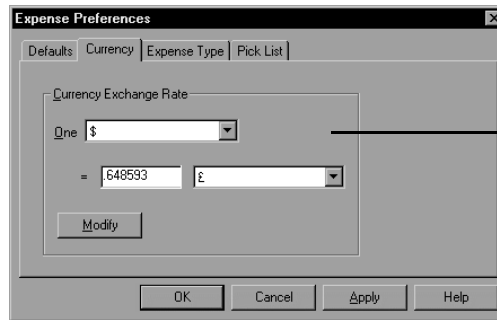


The reimbursement rate per mile or kilometer.

Country tax policy:

No tax
Value Added Tax
Goods and Services Tax,
Provincial Sales Tax
(Canada).

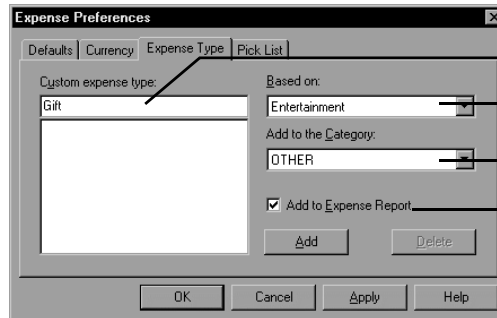
Currency page



Enter a currency exchange rate, such as \$1 = 0.648593 £. The upper field should contain the units your expense report is in.

Note: If you don't enter an exchange rate, the value 1 is used for conversion.

Expense Type page



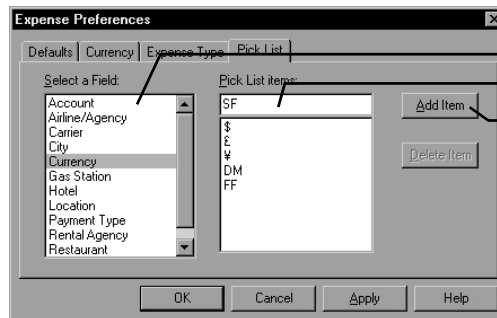
Enter a new expense type.

Existing expense type it is to be based on.

Category the new type belongs to.

Check to add the new type to the Expense Report.

Pick List page



To add to a pick list,

Click on a Field

Type the item name...

and click Add Item.

Pick lists automatically grow as you type new entries in expense receipts.

The example in the Pick List page of the preceding illustration shows how to add a currency. Type the new currency in the Pick List Item field, and click Add Item to add it to the list. Use the Currency page to enter the conversion rate for the currency.

The EarthTime view

EarthTime displays a map showing daytime and night around the world, and shows the current time at eight different locations you select. You can use EarthTime to calculate the difference in time between two locations, and you can configure it to show both your home location and the local time as you travel. EarthTime includes helpful information about over 540 cities in its database.

The first time you run Internet Sidekick, the Setup Wizard asks you to specify your local city. For information, see “[EarthTime settings](#)” on [page 151](#).



To open EarthTime, click the EarthTime icon in the Desktop or choose View | EarthTime. The Desktop icon can be displayed as a digital or analog clock, and it shows the current time.

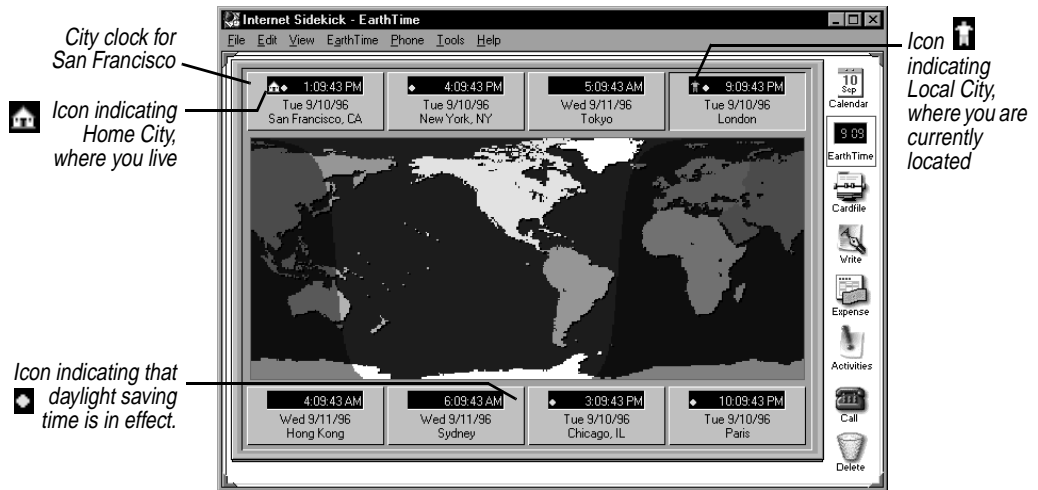
This chapter discusses

- ◆ Selecting cities
- ◆ Setting and changing the Home Clock and Local Clock
- ◆ Checking Facts about the City
- ◆ Determining time differences

The EarthTime globe

When you click the EarthTime icon, you see a map of the globe. Light areas are in daylight, and the shading represents nighttime.

The leading edge of the sunlight area, as it moves from east to west, is where sunrise is occurring, and the trailing edge of sunlight is where the sun is setting. The position of the shading is updated automatically every minute. In addition, you can see the light and shadow area move as the seasons change.



Above and below the map of the globe are the names and local date and time information for eight cities. EarthTime has a database of over 540 cities you can select from in choosing city clocks to display.

Selecting cities

To change one of the displayed cities

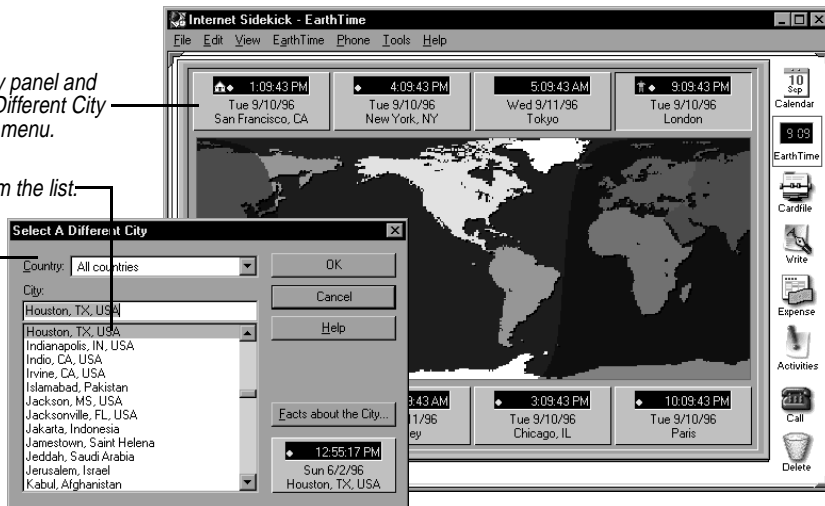
Right-click the panel containing the city you want to change. Or you can click the city panel, and then choose **Edit | Select a Different City**.

If you want to display GMT (Greenwich Mean Time) without daylight saving time, select **GMT/UTC/Zulu** in the city list.

1 Right-click the city panel and choose **Select a Different City** from the shortcut menu.

2 Choose a city from the list.

You can specify a country or view cities from all countries.



Home Clock and Local Clock

EarthTime lets you designate the time where you live as your Home Clock. Most of the time, the Home Clock will match the local time where you are. If you travel with your computer to another time zone, you can set another city as the Local Clock.


When you change the Local Clock, Internet Sidekick adjusts all your events to display correctly in the current local time. Internet Sidekick also sets your system clock to the Local Clock time, so all time-related events can use the local time. For more details, see [“Help for travelers: changing time zones”](#) on page 34.

Changing the Local Clock

Change the Local Clock when you travel with your computer to another location in a different time zone than your Home Clock.

To change the Local Clock

- 1 Set one of the eight city panels to display the local city.
- 2 Right click the panel containing the local city and click Choose As Local Clock from the shortcut menu. In the confirming dialog box, click OK to change the local clock.

An icon appears to indicate the Local Clock city. 

Changing the Home Clock

Your Home Clock should be set automatically when you first start Internet Sidekick. Use the following procedure if you need to change it.

To change your Home Clock

- 1 Set one of the eight city panels to display your home city.
- 2 Right click the panel containing your home city and click Choose As Home Clock from the shortcut menu.


An icon appears in the Home Clock panel. 

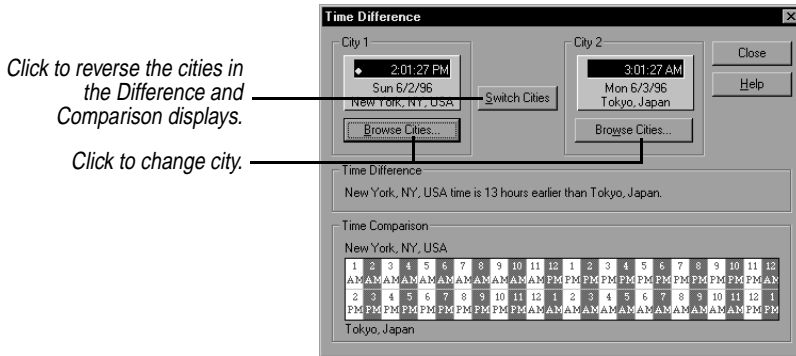
Time differences

Time differences between any two locations can be displayed graphically in EarthTime.

To view time differences

- ◆ Right-click one of the city panels and choose Time Difference from the shortcut menu.
- ◆ Or you can drag from the time numerals of one city clock to another to open the Time Difference dialog box for those two

cities. When you drag from the first city, the cursor changes to a double clock  indicating that you are performing a time comparison of the two.



If you open City Difference by right-clicking, the City 1 displayed by default is the Local City. City 2 is the city you right-clicked to open the shortcut menu. You can change the cities by clicking the Browse Cities button in either panel.

The Time Difference dialog box displays the difference in hours between the two cities. The comparison at the bottom of the window lets you look up the time of either city in relation to a specific time at the other.

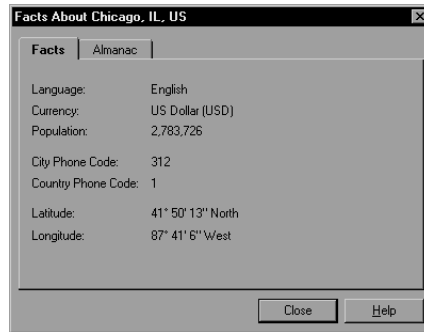
Facts about the city

EarthTime provides a number of useful facts about the cities in its database, including telephone codes, language and currency, latitude and longitude, and other data.

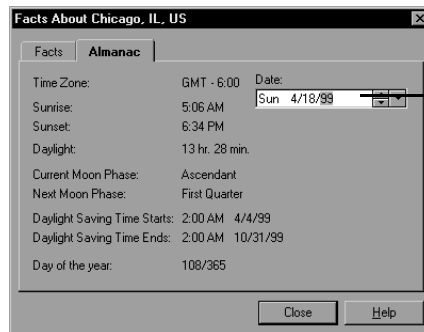
To see facts about the city

Right-click the city panel, and choose Facts About The City from the shortcut menu.

Facts page



Almanac page



Changing the date updates sun, moon, and other information for the date and city you select.

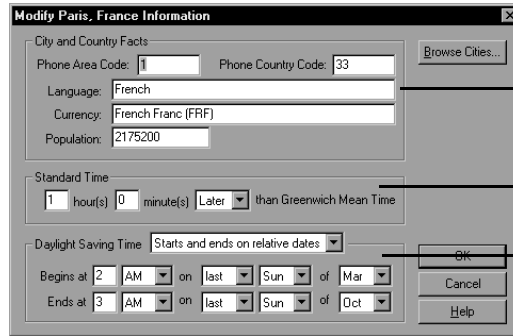
The Almanac page gives sunrise, sunset, hours of daylight, and other calendar related information. If you change the date, the information is updated for the date you choose. For example, you can advance the year to see when daylight saving time starts and ends in that city next year—or 10 years from now.

Modifying city information

You can change some of the information about each city in the EarthTime database. This feature lets you update certain parameters that might change for some cities.

To modify the information for a city

Right-click a city and choose Modify City Information, or click the city and choose Edit | Modify City Information.



You can type new values for the telephone codes and other information about the city.

Standard time is measured in hours earlier or later than Greenwich Mean Time (GMT).

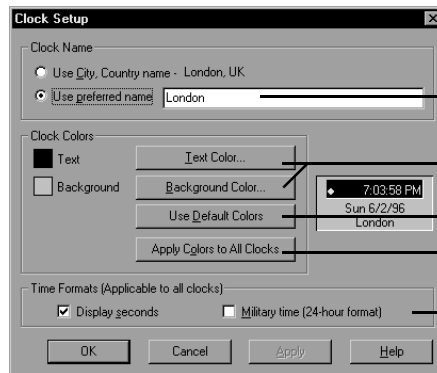
Daylight saving time dates occasionally change for some locations.

Configuring EarthTime clocks

You can configure EarthTime clocks according to your preferences.

To change a clock's options

Right-click the city panel and choose Clock Setup from the shortcut menu. Choose the options you want to change from the dialog box.



To change the displayed city name, type it here.

Click to choose text or background color.

Click to restore default colors.

Click to apply the colors to all clocks.

Click the appropriate box to show or hide seconds, and to display time in 12-hour or 24-hour format.

To reset the current city panel to its default color, click the Use Default Colors button.

The Apply Colors to All Clocks button lets you find a color setting you prefer, and apply it to all buttons at once.

Centering a map location

The EarthTime map can be shifted left or right to put your city, or any map location, at the center.

To center one of the eight displayed cities

Right click the city panel and choose Make (city) the Map Center.

To center another map location

Point to the map location you want at the map center and right-click. Choose Center Map Here.

Rearranging city clocks

You can change the order of city clocks in EarthTime using drag-and-drop.

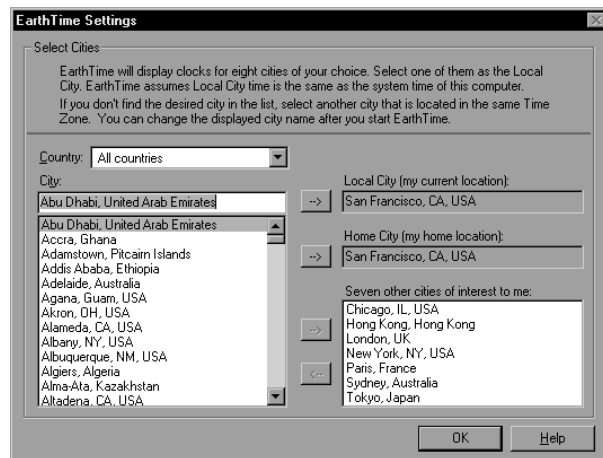
To switch the position of two cities

Drag the city name from one of the displayed cities to another.

Dragging from one clock's time display (rather than the city name) to another opens the Time Difference dialog box (see [“Time differences” on page 147](#)).

EarthTime settings

In some circumstances, including damage to the Clocks.dat file which contains your clock settings, you see the EarthTime settings dialog box when you run Internet Sidekick. Use this dialog box to select cities and specify your Home and Local cities.



You can specify eight cities to be displayed around the EarthTime map.

NOTE Internet Sidekick cannot run until you have completed the information in this dialog box, since the Local City information is used by the Calendar and other parts of Internet Sidekick.

The Phone Dialer

The Phone Dialer dials your voice phone using phone numbers from your cardfiles or appointments, or phone numbers you type in. When you receive an incoming call, the Caller ID feature shows the caller's number and finds the caller's card in the current cardfile (requires special hardware and software—see Chapter 1).

The Phone Dialer automatically enters call information, plus notes you type, in the Contact Log for the person you called. Placing a call is as simple as dragging a Cardfile card, Calendar appointment, or To Do item to the Call icon on the Desktop.

Phone calls are dialed using your modem and sophisticated telephone technology known as TAPI (for Telephony Application Programming Interface).



Call

You can open the Phone Dialer by clicking on the Call icon on the Desktop, by dragging a card to it, or using other methods described in this chapter.

Even without a modem you can still take advantage of the Phone Dialer's call management features to keep a log of calls made and received.

This chapter includes the following topics:

- ◆ Setting up your modem and phone information
- ◆ Selecting the card to dial
- ◆ Using Caller ID
- ◆ Viewing “while you were out” messages
- ◆ Specifying the default cardfile SpeedDial field for the dialer
- ◆ Entering information in the Contact Log

What you need to use the Phone Dialer


There are several requirements that must be met before you can use the Phone Dialer to dial your calls.

- ◆ Your Windows 95 installation must include the TAPI option (TAPI stands for Telephony Application Programming Interface). See **“Configuring your system for Internet Sidekick” on page 9**.
- ◆ You need a modem if you want Internet Sidekick to dial your calls, and you need to provide some information about your modem, your dialing preferences, and your location. You might have already entered this information in Windows 95; if so, Internet Sidekick will find it, and you don’t have to enter it again. For details on how to set or modify this information, see **“Setting up the Phone Dialer” on page 162**.
- ◆ The Caller ID feature requires that you have Caller ID service from your phone company. In addition, you must be using the Windows 95 driver called UnimodemV, which is available on the Internet Sidekick CD-ROM. You also must be using a modem that supports UnimodemV, such as the following:
 - Creative Labs Phone Blaster
 - Compaq Presario models 520, 720, 820, and 920
 - Logicode 14.4 data/fax/voice PCMCIA
 - Cirrus Logic
- ◆ You also need to specify which field in a cardfile contains the telephone number, as discussed in **“SpeedDialing” on page 160**. This field is selected by default as the number to dial, although you can switch to another phone number for any card. If you create cardfiles using the Business or Personal templates, an appropriate phone field has already been selected.
- ◆ For information about dialing with area codes and international country codes, see **“Telephone number format” on page 161**. There is also more information in the Internet Sidekick Tips file in Write, which was added to your user data directory when you installed.
- ◆ Your telephone must be plugged into the phone port in your modem.
- ◆ If you have a voice modem, you still must use the handset with your calls.

Opening the Phone Dialer

There are a number of ways to open the Phone Dialer and place a call.

To open the Phone Dialer, do any of the following:

- ◆ Click the red Call icon on the lower right of the Desktop. 
- ◆ Choose Phone | Dialer from the menu or press *F9*.
- ◆ Drag a card containing a phone number from the Cardfile or Viewport to the Call icon.
- ◆ From the Calendar, drag an Event, Call, or To Do item that contains a phone number to the Call icon.
- ◆ From the Activities view Calls tab drag a Call to the Call icon.

TIP

The quickest way to dial a number is to select (highlight) a number in the Cardfile, Calendar, or Write and press *F9*.

The Phone Dialer opens with the phone number from the current card (if there is one), or the number you dragged to the phone icon, ready to dial.



Other phone numbers from the current card appear in the window. Click one to choose it as the number to dial.

The dialing status appears here.

The Phone Dialer opens with the phone number from the current Cardfile card ready to dial.

You can type a phone number directly into this field to dial it.

You can use the keypad to enter a number.

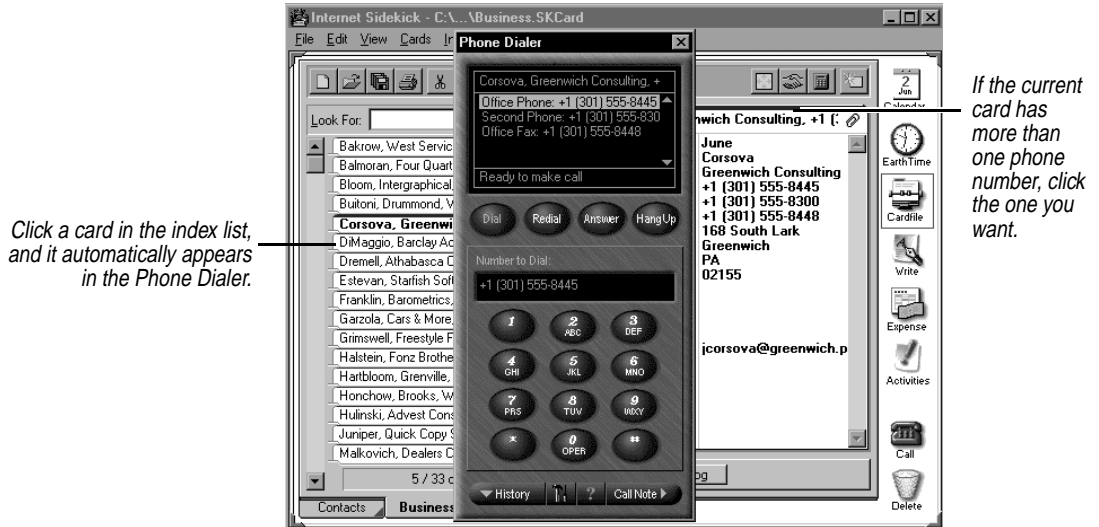
Setup Help

Selecting the card to dial

If the right phone number is not displayed, you can type the number yourself or switch to the right card in the Cardfile.

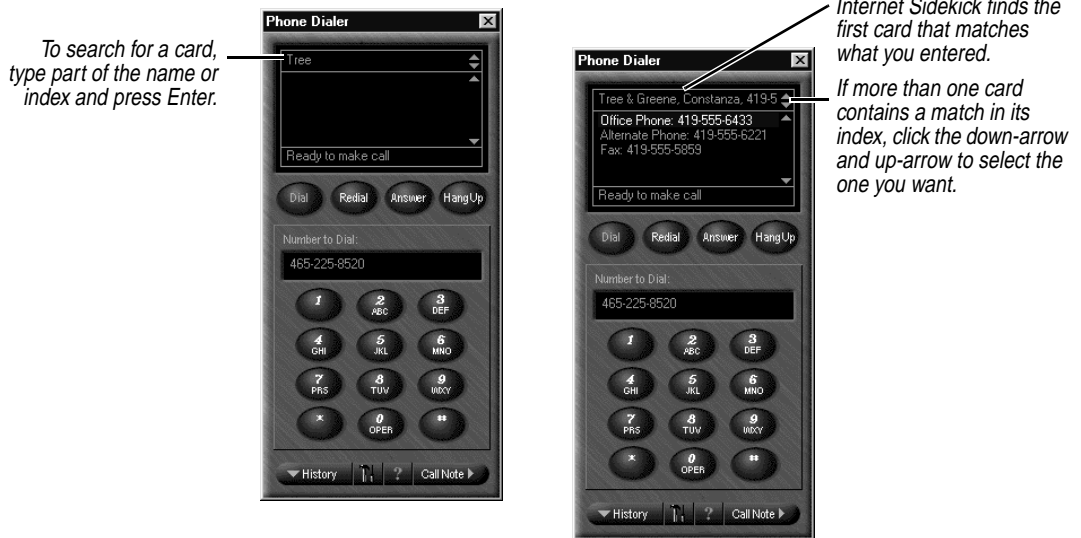
To change to a different card

Leave the Phone Dialer displayed and change to the Cardfile or open the Viewport and display a cardfile. Click another card. The Phone Dialer window remains on top of other Internet Sidekick views, and the new numbers appear in the Phone Dialer fields.



Finding a card

You also can use the Phone Dialer to find the card you want in the current cardfile, as shown in the following illustration:

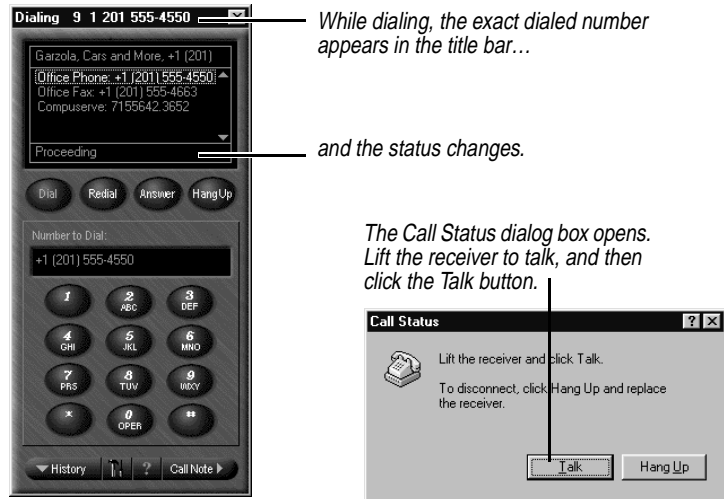


Dialing the call

Once the right number appears in the Number to Call panel of the Phone Dialer, you are ready to make the call.

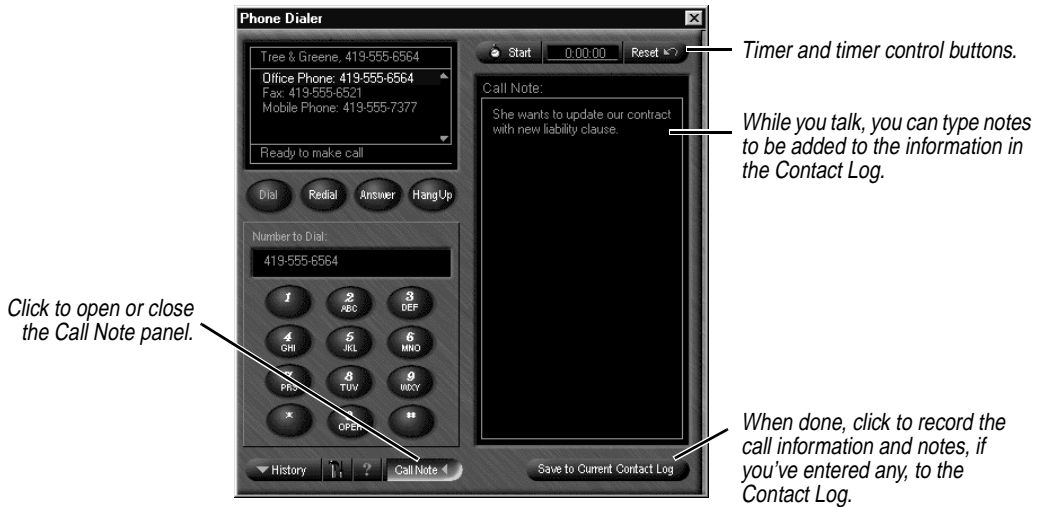
To dial the phone call

Click the Dial button in the Phone Dialer. When you hear the dial tone or see the Call Status dialog box, pick up your telephone handset and click the Talk button. Internet Sidekick disconnects the modem so you can use the telephone handset.



Entering call notes

After you dial a call, the Call Note window automatically opens, if it is not already open, and the timer starts. During the conversation, you can make notes by typing in the Call Note panel.



Ending the call

When you finish the call, hang up the telephone handset. You may also want to stop the timer in the Call Note window, and click the Save to Current Contact Log button.

If the modem fails to disconnect, you can force it to hang up.

To hang up the modem

Click the Hang Up button or close the Phone Dialer. The Time and Call Note are automatically stamped to the current Contact Log when you click the Hang Up button (if you have checked the option Automatically enter call information into the Contact Log in the Phone Dialer Setup—see **“Setting up the Phone Dialer”** on page 162).

Answering incoming calls

When you receive an incoming call, Internet Sidekick opens the Phone Dialer automatically (if you select “Yes” for the option labeled Monitor current modem for incoming calls in Phone Dialer Setup). You can pick up the phone, and click the Answer button in the Phone Dialer. When you do, the Call Note window opens and the call timer starts.

Caller ID and card lookup

If you have Caller ID service (see page 154 for requirements), Internet Sidekick displays the phone number in the Phone Dialer. In addition, Internet Sidekick searches the current cardfile’s SpeedDial field for a match for the caller’s number. If it finds the number, it displays the caller’s card.

For automatic lookup of incoming numbers in the Cardfile, you need to have the correct settings in the Setup dialog box (see **“Setting up the Phone Dialer”** on page 162).

Call History: While you were out

Internet Sidekick keeps track of incoming calls and displays a list, including incoming calls that you didn’t answer. You can see this list by clicking the History button at the bottom of the Phone Dialer. If you have Caller ID service, the History list includes the phone number of the call, when available.

Calls you answered are preceded by an “A” (if you clicked the Answer button).



Click the History button...
...to open the Call History
window in place of the keypad.



Click to delete the
selected entry in the
Call History.
Click to save the call
history to a card.

Click the Keypad button
to restore the keypad.

To use the Save to Card button, select a call in the Call History window and click Save to Card. If no matching card was found for the call, a new card is created in the current cardfile, using the name “Unknown Caller”. The phone number is stored in the default SpeedDial field.

Entering information in the Contact Log

Internet Sidekick makes an entry in the Contact Log of the current card, if you have checked the automatic call log option in Phone Dialer Setup (see “[Setting up the Phone Dialer](#)” on page 162). The entry includes the word CALLED or ANSWERED, plus time and date information. This is followed by any additional information or notes you type in the Call Note window.

To enter the call in the Contact Log manually

Click the Save to Current Contact Log button when you have placed the call and finished writing notes.

NOTE The information is saved to whatever is the current card. So if you want to save call data to a different card, select that card before you save the data.

To view the Contact Log

- 1 In the Cardfile, choose the card you want.
- 2 Open the Viewport and select Contact Log.

If you click another card in the Cardfile, the Viewport displays that card’s Contact Log information.

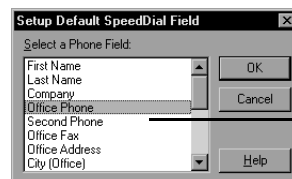
A Setup option (see “[Setting up the Phone Dialer](#)” on page 162) lets you have Internet Sidekick automatically stamp an entry in the Contact Log at the end of every call. The entry will begin with [CALLED] if it was a call you originated, or [ANSWERED] if it was an incoming call.

SpeedDialing

When you drag a card to the Call icon, Internet Sidekick dials the first phone number it finds on the card or the field you specify.

To specify a default phone field to dial

Choose Phone | Cardfile SpeedDial Field from most Internet Sidekick views.



Click the field you want used as the default phone dialing field and click OK.

Telephone number format

Internet Sidekick uses Windows 95's TAPI (Telephony Application Programming Interface) to streamline communications. TAPI is capable of correctly dialing telephone numbers in different cities and countries based on your current location, inserting or omitting area code and country code as needed. It also has additional features such as special phone service access number prefixes and calling card information, discussed in Windows 95 Help.

Using TAPI, you can take your computer on the road. When you change to a different area code, TAPI will dial your home numbers correctly with the area code, and dial numbers in your current location without the area code. Similarly, if you travel internationally, TAPI will add the country code when needed, and omit it for the country you are in.

For this feature to work, you must enter phone numbers in the Cardfile in a format that TAPI understands.

NOTE The full TAPI format is only required for a portable computer or if you send your cardfile to someone in another time zone. The country code information for your home country is only required if the computer (or cardfile) travels internationally. If you have a desktop computer that stays on your desktop, you can generally omit your local area code and country code.

TAPI expects phone numbers to look like the following:

+ *country code (area code) number*

The key parts of this format are

- | | |
|----------------------------|---|
| + | The plus sign signals that what follows is a country code |
| <i>country code</i> | The country code is a number assigned to each country for international dialing |
| () | Parentheses must be used around the area code |
| <i>number</i> | The phone number can include dashes if desired. |

So the telephone field entry for the number 555-1234 in Boston (area code 617) in the U.S. (country code 1) is +1 (617) 555-1234.


 **TIP**


There is more information on telephone numbers in the Internet Sidekick Tips Write file automatically installed in your Userdata directory. Look for the Phone Dialer topics in the Cool Tips folder.

For a phone number (such as 1234567) in Bombay, India, where the country code is 91 and the city code is 22, the entry would be +91 (22) 1234567.

If you enter all phone numbers in this format, you can travel worldwide, and TAPI will dial correctly provided you notify Windows 95 of your current location. To do this, choose Phone | Setup to open the Phone Dialer Setup dialog box and switch to a different location in the Dialing Properties panel. (Click the Setup button in the Dialing Properties panel to create new locations.) See the following figure.

Setting up the Phone Dialer

To enter or change the set up information for the Phone Dialer Click the Setup button  in the Phone Dialer or choose Phone | Setup. The Phone Dialer Setup dialog box appears.



The screenshot shows the 'Phone Dialer Setup' dialog box with several sections and buttons. Annotations with arrows point to specific elements:

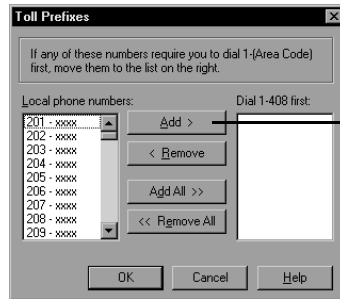
- Dialing Properties:** A dropdown menu for 'I am dialing from:' is set to 'Default Location'. A 'Setup ...' button is to its right. Annotation: 'Click to set up the phone number, area code, and line information for your current location or other locations.'
- Using Calling Card:** Set to 'None (Direct Dial)'. A 'Toll Prefixes:' button is to its right. Annotation: 'Click to specify local numbers to be dialed with Area Code.'
- Ignore "My Locations" settings:** A checkbox that is currently unchecked. Annotation: 'Check to have Internet Sidekick dial numbers without using the TAPI "My Location" settings.'
- Modem Properties:** A dropdown menu for 'Current Modem:' is set to 'Sportster 28800 External'. A 'Setup ...' button is to its right. Annotation: 'Click to set up your modem and communications information.'
- Phone Dialer Properties:** A checkbox for 'Dial using the handset instead of the modem' is unchecked. A checkbox for 'Automatically enter Call information into Contact Log at the end of call' is checked. Annotation: 'Check the properties you want.'
- Phone Dialer Options:** A radio button for 'Monitor current modem for incoming calls:' is set to 'Yes'. A checkbox for 'Enable Caller Look Up in the Current Cardfile' is checked. Annotation: 'Check options you want. The Monitor Current Modem setting must be set to Yes if you want to use the Caller ID feature (see page 158). If you have modem conflicts with other software, set it to No.'
- Buttons:** 'Close' and 'Help' buttons are at the bottom. Annotation: 'If you need assistance, click the Help button or refer to your Windows 95 documentation.'

Dialing local calls with Area Code

In some locations, you dial your own area code to reach certain local exchanges. Or you may want to dial the area code to use a low rate from your Long Distance carrier, instead of using your local service carrier.

Normally, Internet Sidekick (and TAPI) knows that it should omit the area code if it matches the area code you are calling from. When this is not the case, however, you can specify that the local area code should be included for specific exchanges. (The term *exchange* refers to the first three digits of a local phone number in the U.S., such as 555 in the number 555-1234.)

In the Phone Dialer Setup dialog box (see previous figure), click the Toll Prefixes button. The following dialog box appears.



Click a local exchange in the left column, and then click Add if it must be dialed with 1+Area Code.

Using the Dialer without a modem

If you do not have a modem, the Phone Dialer can still be useful to you for logging call information.

To use the Phone Dialer to log call information

- 1** Click on the Cardfile card for the person you are talking with, and then choose Phone | Dialer.
- 2** Type information or notes about the call in the Call Note window. Click the button to start the timer, if desired.
- 3** When done, click the Save to Current Contact Log button to have the call notes added to the Contact Log for the card.

Printing

Internet Sidekick lets you print from the Cardfile, Calendar, Write or Expense views to a variety of formats, using preprinted forms or your own custom ones. You can print your generated reports, and you can preview your output before you print it. You can also print expense reports.

You can print the data in your cardfile as cards, described in the following section, or as labels, address books, or envelopes using special formats.

You can easily print index cards to preprinted index card forms using the Print Labels command. See “[Printing labels, address books, and envelopes.](#)”

This chapter discusses

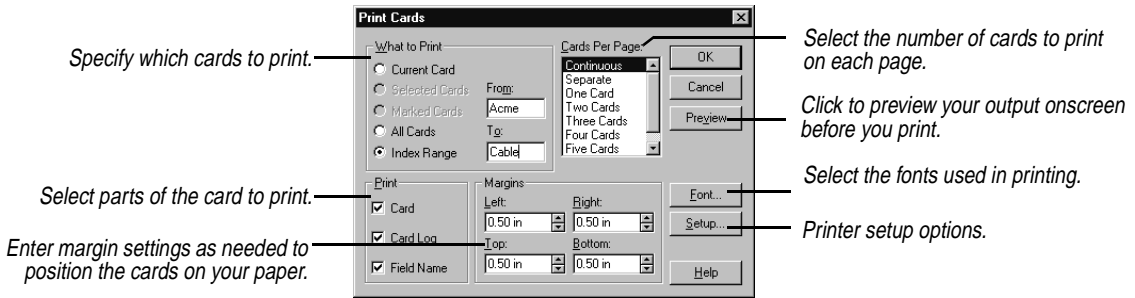
- ◆ Printing cards
- ◆ Printing labels, address books, and envelopes
- ◆ Printing calendars
- ◆ Printing Write documents
- ◆ Printing expense reports
- ◆ Printing Activities

NOTE If you have multiple printers, you can select the printer you want using the File | Print Setup or File | Page Setup command.

Printing cards

To print the cards and their associated Contact Logs

In the Cardfile, choose File | Print | Cards. The Print Cards dialog box appears.



The Cards Per Page setting

As you specify more cards per page, the cards themselves become smaller. If a card becomes too small to contain all its fields, Internet Sidekick drops the extra fields from the bottom of the card. If you specify one card per page, Internet Sidekick will drop fields as needed to make the card fit. If you choose Separate, each card will begin on a new page, but will not be restricted to fit on one page.

Select Continuous to print the cards one after another, without page breaks between cards.

Printing labels, address books, and envelopes

Internet Sidekick can print to almost any size label, address book page, or envelope. The dialog boxes for printing these forms include numbered steps to help you organize and print the information the way you need it. In addition, you can view special Hints screens that provide details on arranging the contents.

Templates let you print in a variety of popular label, index card, and address book formats. You can modify these or create your own templates.

To print cardfile information to labels, address books, or envelopes

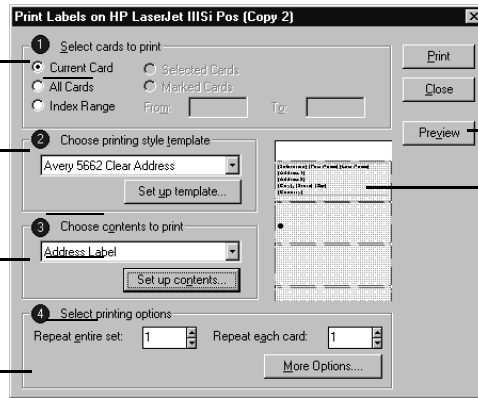
Choose File | Print, and select Labels, Address Book, or Envelopes. The corresponding dialog box appears; the Print Labels dialog box is shown in the example below.

Follow the numbered steps in the dialog box. Step 1 prompts you to specify the cards to print.

In Step 2, you determine placement of labels on the page. Click Set up to create or modify a template.

In Step 3, you specify what text, fields, or pictures to print. Choose previously created contents, or click Set up to define/modify contents.

In Step 4, you specify the number of copies and other options. See text for details.



Click to preview the results of your choices. You can see the overall layout here as you work.

The numbered steps are designed to help you specify what to print and arrange it within the print area available. The procedures for using all three dialog boxes are the same, but involve different templates and content arrangements. These numbered steps are discussed in more detail below.

Once you have specified the information in the four steps, click Preview to see the result. Click Print when you're ready to print.

Step One: Select cards to print

This panel is where you specify the range of cards to print. If you mark or select cards before you begin printing, you can check Selected Cards or Marked cards for printing. Check Current Card to print only the currently displayed card.

Step Two: Choose printing style template

The template is the format of your printed output, whether that's a label of a specific size and arrangement on a sheet, an address book page format, or a specific envelope.

NOTE If you choose a template from the template list, you may need to adjust the margin settings to fit your printer's printing area. See your printer's manual for specific dimensions.

In most cases, you can simply click the down-arrow in the text window and choose a template from the list.

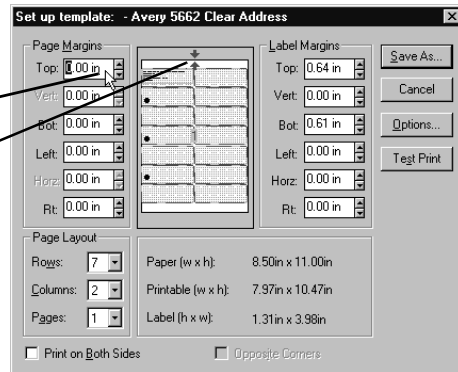
In addition, you can easily create a new template or modify an existing one.

To create or modify a template

- 1 In Step 2 of the Print dialog box (see [page 166](#)), click the Set up template button to open the dialog box shown below.

Label Template Setup Dialog Box

As you pass the cursor over the dimensions... arrows show you where they apply.



- 2 Set the number of rows, columns, and pages to print per sheet of paper in the Page Layout group.
 - ◆ **Rows.** The number of rows of labels on the sheet to which you are printing. Up to 60 rows are possible, depending on the size and margins specified.
 - ◆ **Columns.** The number of columns of labels on the sheet to which you are printing. Up to four columns are possible, depending on the size and margins specified.
 - ◆ **Pages.** The number of address book pages on each sheet of paper. Up to four pages are possible, depending on the size of the address book used. Each page has its own Index Tab, Page Number, and several address book entries. This setting does not apply to labels.
- 3 Change the page margins if necessary.

NOTE Page margins are needed only for address books, which can print to multiple pages on the same sheet.

- 4 Change the label margins settings if necessary.

Some margins might need to be set to the second decimal value for accuracy in printing to a specific label. The dimensions for the label size immediately reflect the change as you adjust the label margin settings.

- 5 When the Print On Both Sides option is checked, the Options button becomes available. Clicking Options displays the Template Setup Options dialog box, where you can set several reverse-side printing options and specify the position of binder holes.
- 6 The Opposite Corners setting allows alignment of the binder holes to be adjusted by changing top and bottom margins.
- 7 When done, click Save As. To modify the existing template, save your changes under the original name. To create a new template, type a new name and click OK.
- 1 Click Test Print to see a printed example of the effect of your changes.

 **TIP**

If you extract a card from a cardfile, you create a new cardfile that includes the templates of the first cardfile.

Step Three: Choose contents to print

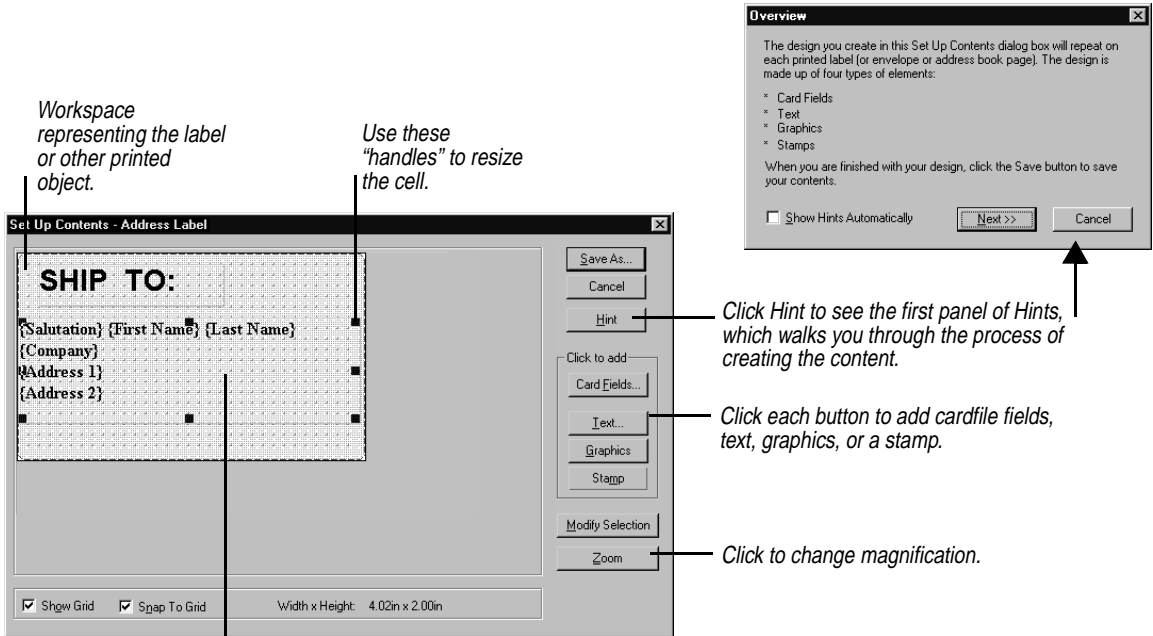
Since template definitions are saved with each cardfile, the changes you make only apply to the current cardfile's templates.

Template settings may be different for different printers. Experiment with your printer to find the best results.

Here is where you specify just what appears in the printed result, including text, Cardfile fields, and graphics. If you have predefined contents, you can click the down-arrow and choose from the list.

To set up the contents

- 1 Click the Set Up Contents button in the Print dialog box.
- 2 The panel that appears contains a green shaded workspace representing one label (or envelope, or address book page) for creating the contents. For an element to print in a label, you must position it within this shaded area (not within the background rectangle). Any elements you add to this contents design repeat on each label you print.



3 Each element, such as a group of fields or a graphic image, is contained in a “cell” that can be sized and moved within the workspace. In the figure above, the cell containing address information occupies the entire label area.

When you click a cell black squares, called “handles,” appear in each corner that you can drag to resize it. To move the cell, drag it to the location you want.

To change font, alignment, and colors, or to edit the contents of the cell, right-click it. Font, alignment and color attributes are unique to each cell, allowing you to have several different styles in different cells on the same label.

4 When done, click Save As to save your changes. Type a new name if you want to create a new contents design.

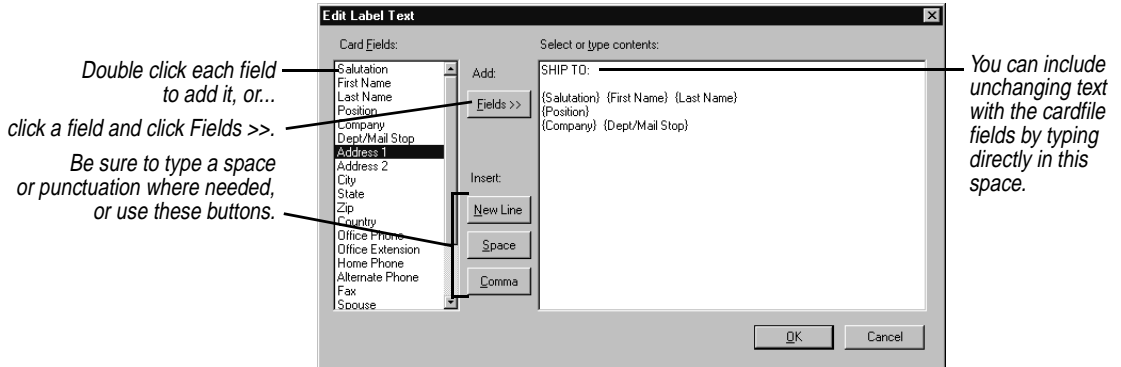
Since contents design definitions are saved with each cardfile, the changes you make only apply to this cardfile’s contents designs.

The content can consist of the following types of text:

- ◆ Card field text (like a person’s name or address, that prints a different card’s information on each new label)
- ◆ Unchanging text (like the word “Greetings!” or “Ship To:” that prints on each label, or your return address for an envelope)

Card fields

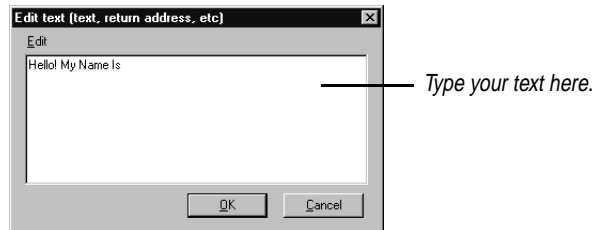
The Card Fields button lets you insert fields from the cardfile into the cell. The fields will be filled in with data from the card or cards you select.



This dialog box makes it convenient to insert fields in label, although you can type the field names yourself, either here or in the Text dialog box discussed next.

Text elements

Use the Text button when you have a lot of unchanging text that prints on every item, such as your return address on an envelope.



**TIP**

You can add multiple text elements with unique fonts, colors, and alignment.

Type whatever text you want the text cell to contain. Any text you type is repeated on each label.

When you're finished, click OK. A new cell appears. By right-clicking the cell you can change the font, color, and alignment, change the text and delete the element.

Stamp elements

A number of ready-made phrases such as "1st Class," "Urgent," and "Confidential" are available as *stamps*. Click the Stamp button, select the phrase you want, and a new text cell containing that text appears. By right-clicking a Stamp cell you can change its message and font, rotate it, or delete it.

Graphic elements

Clicking the Graphic button displays four choices:

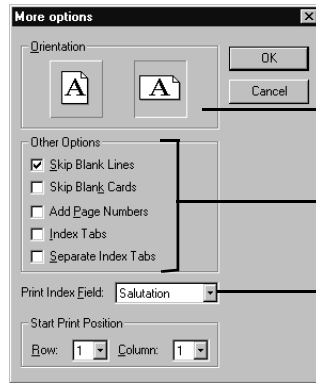
- ◆ **Bitmap** lets you choose a .BMP file to import.
- ◆ **Frame** creates a rectangle.
- ◆ **Round Frame** creates a rectangle with rounded corners.
- ◆ **Line** gives you the choice of creating a horizontal or vertical line.

Right click the graphic cell to see a menu of its properties you can change.

Step Four: Select printing options

The options let you specify quantity to print and other settings. Two repeat options are available: Repeat Entire Set prints the entire set once and then starts over, for the number of times you specify. Repeat Each Card prints each card for the number of times specified before going on to print the next card.

The additional choices available with the More Options button are shown in the following figure.



Choose Portrait (vertical) or Landscape (horizontal) page orientation.

Check boxes for printing options you want.

Select the field used to determine the printing order. For example, to print cards in Last Name order, choose the Last Name field here.

For envelope printing, the More Options button lets you select the feed and orientation of envelopes in your printer, plus options for skipping blanks and setting margins.

Calendar printing

You can print events, calls, and tasks from your calendar in a variety of formats. Internet Sidekick can print the daily, weekly, monthly, and yearly calendars in its own format using preprinted or standard paper.

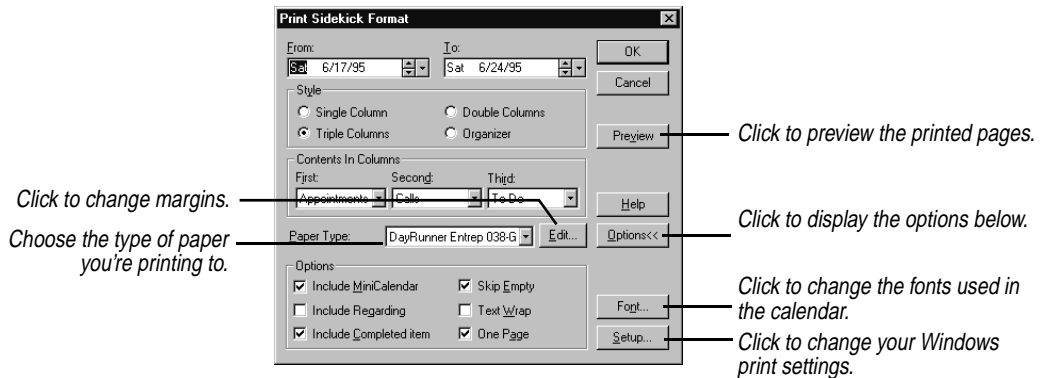
In addition, Internet Sidekick can print to the paper forms of several popular organizers:

- ◆ At-A-Glance daily, weekly, and monthly forms
- ◆ Day-Timer daily organizer forms
- ◆ Franklin Planner daily organizer forms
- ◆ Day Runner dated or undated daily, weekly, and monthly forms
- ◆ Filofax weekly and monthly formats

Printing in the Sidekick daily format

Using the Sidekick format, you can print on any size paper or personal organizer. You can use special preprinted paper or you can create your own organizer using standard blank paper.

- 1 Choose File | Print | Sidekick Daily Format from the Daily view of the Calendar. The Print Sidekick Format dialog box appears.



- 1 Change the dates in the From and To boxes if you want to print a series of days. The default date is whatever day you had selected in the Calendar.
- 2 In the Style group, choose the number of columns per page that you want to print.
- 3 Choose the type of activity you want to appear in each column from the drop-down lists in the Contents In Columns group. If you pick the same activity for more than one column, text flows continuously from the bottom of one column to the top of the next.
- 4 Select the paper type that corresponds to the paper you're printing to. Internet Sidekick can print to a number of popular laser forms by Day Runner, Day-Timer, and Franklin. If you need to change any of the settings, click the Edit button. The Paper Setup dialog box appears.

Edit, add, or delete paper types in this dialog box. You can print the Sidekick format to almost any size of blank organizer paper by adjusting the margins accordingly. When you're done, click Change, and then click Close to return to the Print Sidekick Format dialog box.

- 5 Click the Options button to expand the dialog box and choose from the following options for your printout.
 - ◆ **Include Mini-Calendar.** Prints current month calendar at the top of the page. The previous and next month calendar grids are also printed, when space allows.
 - ◆ **Include Regarding.** Prints any Regarding notes attached to activities.

- ◆ **Include Completed Items.** Prints all entries from the selected lists, including those checked-off as completed.
- ◆ **Skip Empty.** Prints only those lines from the Appointments, Calls, To Do, or Goals list containing data; all blank lines between entries are omitted.
- ◆ **Text Wrap.** Prints the entire description of an activity (up to 500 characters). If necessary, the text wraps to additional lines.
- ◆ **One Page.** Truncates the schedule and prints only what can fit on a single page. Changing the start and end times or time increments for the Appointments list on the daily schedule or choosing Skip Empty can help shorten the printed material.

NOTE Be prepared to experiment with the settings to achieve the results you need for your paper type and printer.

- 6 If you want, you can change the print fonts for the calendar by clicking the Font button, available when the Options button is clicked. You can choose a different font for each part of the calendar.
- 7 Choose OK to print the calendar.

The activities print just as they appear in the Daily view of the calendar. Their descriptions, time increments, durations of appointments, alarms, and other displayed information are all printed.

Printing in the glance formats

In addition to the Daily view formats, Internet Sidekick can print in several different glance calendar formats, including one-, two-, and six-week, monthly and yearly calendars.

When printing in weekly, monthly, and yearly formats, the information printed is determined by the display setup for that view. Choose Tools | Preferences | Calendar, and then choose the Weekly, Monthly, or Yearly Setup tabs to customize the printed information.

- 1 Switch to the glance view (Weekly, Monthly, or Yearly) that you want to print.
- 2 Choose File | Print and select the format you want.
- 3 Choose the date range you want to print. The default is the date range currently displayed in that view.
- 4 Set any other options you want to print, including a title, footnote, mini-calendar, today's date, or graphic images. (If you want to add

graphic images, they must be black-and-white .PCX files; store them in the Internet Sidekick Data folder).

- 5 Change the fonts for the calendar by clicking the Fonts button. You can choose a different font for each part of the calendar.
- 6 Choose Setup to change the orientation or the page size for the printer. Adjust the margin settings as necessary.
- 7 Choose OK to print the calendar.

Printing to At-A-Glance forms

Internet Sidekick can print directly to pages in At-A-Glance organizer format (in Portrait orientation only). The pages from the notebook must be fed through the printer.

- 1 Choose the Calendar view: Daily, Weekly, or Monthly.
- 2 Choose File | Print and then At-A-Glance format from the menu.
- 3 Select one of the At-A-Glance formats from the Format list in the Print dialog box.
- 4 Experiment with the Origin settings if the printed text doesn't match the lines on the page. (You can print a test draft on a blank sheet of paper and compare the output to the At-A-Glance sheet to make sure that the text and lines match.)
- 5 For Daily view, check the Start On button to specify Left page or Right page. For Weekly or Monthly views, specify the paper you are printing on—dated or non-dated.
- 6 If you want, you can change the font by clicking the Font button. A point size of 8 or 9 works best with the available space.
- 7 Choose the range of dates to print, and choose OK.

Printing to Day-Timer and Franklin forms

Internet Sidekick can print directly to pages from the Day-Timer and Franklin Planner personal organizer notebooks. The pages from the notebook must be fed through the printer.

- 1 From the Daily view of the Calendar, choose File | Print and then Day-Timer Daily Format or Franklin Daily Format from the cascading menu.
- 2 Select a Day-Timer or Franklin format from those listed in the Print dialog box.
- 3 Experiment with the margin settings if the printed text doesn't match the lines on the page. (You can print a test draft on a blank

sheet of paper and compare the output to the Day-Timer or Franklin sheet to make sure that the text and lines match.)

- 4 If you want, you can change the font by clicking the Font button. A point size of 8 or 9 works best with the available space.
- 5 Choose the range of days to print, and choose OK.

Internet Sidekick prints on the forms as though they are being centered into the printer. If your printer does not feed smaller (less than 8.5 x 11) sizes of paper centered, adjust the margin settings to accommodate your printer. You can use negative numbers in the margin settings, if necessary.

Printing to Day Runner and Filofax forms

Internet Sidekick can print directly to pages from the Day Runner and Filofax personal organizer notebooks. Both dated and undated versions of a variety of Day Runner forms can be used. The pages from the notebook must be fed through the printer

- 1 Switch to the view that you want to print, and choose File | Print. Choose Day Runner Format or Filofax Format. The Print Day Runner or Print Filofax dialog box appears.
- 2 Select a format from the Format list, and choose Dated or Non-dated for Day Runner, depending on the paper you're printing to.
- 3 Adjust the page origin settings if the printed text doesn't match the lines on the page. (You can print a test draft to a blank sheet of paper and compare the output to the Day Runner or Filofax sheet to make sure that the text and lines match.)
- 4 Change the fonts for the calendar by clicking the Fonts button. You can choose a different font for each part of the form.
- 5 Choose the date range you want to print. The default is the range currently displayed in that view.
- 6 When ready, choose OK to print the calendar.

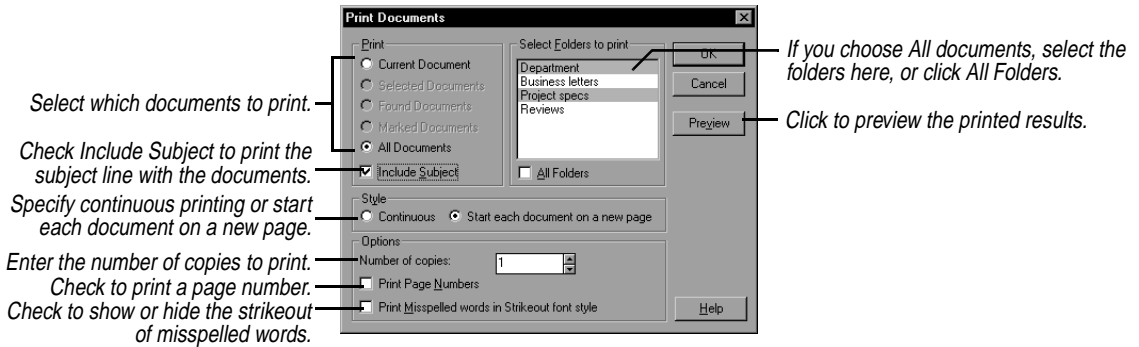
When printing to weekly and monthly forms, the information printed is determined by the display setup for that view. Choose Tools | Preferences and click the Calendar button to set up the Weekly or Monthly views.

Printing in the Write view

You can print a single document, all of the documents filed in specific folders, selected documents, marked documents, or found documents listed in the Found window.

To print your documents

Choose File | Print from the Write view, or click the Print button on the Write Toolbar. The Print Documents dialog box appears.



Printing expense reports

To print a completed expense report

Choose View | Report View. Then select File | Print Report.

Internet Sidekick prints your expense report, including details for the business meals, entertainment, and miscellaneous expense types.

To print expense receipts

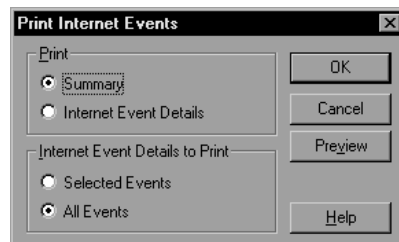
Choose View | Receipt view. Then choose File | Print Receipts and select either Current or All.

Printing activities

In the Activities view, you can print summary information or details of your Internet activities, and summaries of your calendar entries.

To print your activities

- 1 Click a tab for the kind of entry you want to print: the Calendar items (All, Appointments, To Do, or Calls) or Internet Events.
- 2 If you want to print only specific entries, select them. Click on an event to select it; use Ctrl+click to select multiple events.
- 3 Choose File | Print.



Reports

Reports present information from your Cardfile or Calendar, complete with titles and headers, in a form you can easily review or print. You can generate a report on cards or contacts, search for available free time in your appointments schedule, or summarize activities, phone calls, or time spent on tasks.

Topics discussed in this chapter include

- ◆ Creating Cardfile and Calendar reports
- ◆ Creating Free Time and To Do items reports
- ◆ Creating Contact Log reports
- ◆ Report formatting

About Reports

Reports collect the information you request and present it in a tabular form, such as the following Cardfile report:

| Sales Department | | | |
|------------------|-----------|-----------------------|------------|
| 1996 Contacts | | | |
| First Name | Last Name | Company | Office |
| Rob | Bakrow | West Services | +1 (406) 4 |
| Pierre | Balmoran | Four Quarters | +1 (518) 5 |
| Fernando | Bloom | Intergraphical | +1 (209) 5 |
| Favio | Buitoni | Drummond, Walkow, | +1 (408) 5 |
| June | Corsova | Greenwich Consulti | +1 (301) 5 |
| Rich | DiMaggio | Barclay Advisors | +1 (415) 5 |
| Don | Dremell | Athabasca Corp. | +1 (303) 5 |
| Saul | Estevan | Starfish Software | +1 (805) 5 |
| Fern | Franklin | Barometrics | +1 (408) 5 |
| Herman | Garzola | Cars & More | +1 (415) 5 |
| Fran | Grimswell | Freestyle Foods | +1 (408) 5 |
| Jeff | Halstein | Fonz Brothers | +1 (408) 5 |
| Janice | Hartbloom | Grenville, Notewor | +1 (213) 5 |
| Sue | Henderson | Brooks, Walker, S. E. | +1 (408) 5 |

Once you have viewed the report, click an icon on the Desktop to switch to another Internet Sidekick view.

The Report menu is the same whether you are in the Cardfile, Calendar, or Write views. Its first five commands create reports of the following types:

- ◆ Cardfile
- ◆ Calendar
- ◆ Free time
- ◆ To Do Items
- ◆ Contact log

Creating these reports is explained in the following sections. Once you create a report, you can view or print it, or change its formatting (see “**Formatting reports**” on page 184). Use File | Save if you want to save a report.

The Report menu contains two more commands: Open Report opens any previously saved report; Go To Current Report returns you to the current report if you’re in another view of Internet Sidekick. Other options appear on the Layout menu while you are viewing a report.

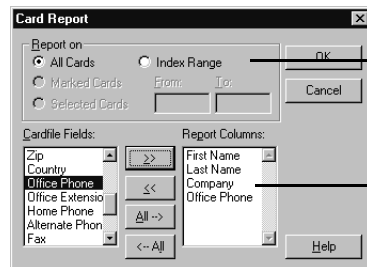
NOTE Be sure to save your latest changes before you create a report.

Cardfile reports

The Card report lets you summarize information from the open cardfile in a tabular format.

To create a cardfile report

Choose Reports | Cardfile.



1 Choose the cards to report on—all, marked, selected, or a specific range.

2 Select cardfile fields to include in the report using the >> or All buttons. The field names appear in the report as column headers in the order listed.

The cardfile report is generated with fields arranged in columns and cards arranged in rows.

See “**Formatting reports**” on page 184 for information on customizing your report.

Calendar reports

A Calendar report summarizes information from activities in the open calendar. You can choose to report on appointments, calls, To Do list and Goals list items, multi-day events, or special days, and set the level of detail for the report.

You can quickly generate

- ◆ A weekly To Do list, sorted by due date or priority
- ◆ A list of everything on your agenda, including appointments, calls, and goals
- ◆ A list of special days and multi-day events scheduled for the next few months
- ◆ A report on any important name or a keyword in the Calendar

To create a Calendar report

Choose Reports | Calendar. The Calendar Report dialog box appears.

The screenshot shows the 'Calendar Report' dialog box. It has a title bar with a close button. The 'From' field is set to 'Mon 6/3/96' and the 'To' field is set to 'Fri 6/28/96'. There is a 'Text to find' field. Under 'Report on', there are checkboxes for 'Appointments' (checked), 'Multi-day events', 'Special Days', 'Completed', and 'Regarding'. There are also checkboxes for 'Calls' (checked), 'To Do items', and 'Goals List'. An 'Options <<' button is located below these checkboxes. On the right side, there are three sections: 'Appointment details' with 'Alarm' and 'Unconfirmed' checkboxes; 'Call details' with 'Urgent' and 'Call Status' checkboxes; and 'To Do and Goals List details' with 'Priority', 'Enter Date', 'Due Date', 'Time Used', 'Category', and 'Assign' checkboxes. At the bottom right, there is an 'Include all details' checkbox. At the bottom left, there are 'OK', 'Cancel', and 'Help' buttons. Annotations with arrows point to various parts of the dialog box: 'Set the calendar date range to include in the report. One day is the minimum range.' points to the 'From' and 'To' fields; 'Type a string of characters in the Text To Find box to limit your report to items related to a specific person or keyword.' points to the 'Text to find' field; 'Select the types of calendar activities to include in the report.' points to the 'Report on' checkboxes; 'Click to show or hide the options on the right side of this dialog box.' points to the 'Options <<' button; and 'Select from additional options for each part of the calendar to adjust the level of detail for your report. Options become available as you make selections in the Report On group.' points to the right-hand sections of the dialog box.

Set the calendar date range to include in the report. One day is the minimum range.

Type a string of characters in the Text To Find box to limit your report to items related to a specific person or keyword.

Select the types of calendar activities to include in the report.

Click to show or hide the options on the right side of this dialog box.

Select from additional options for each part of the calendar to adjust the level of detail for your report. Options become available as you make selections in the Report On group.

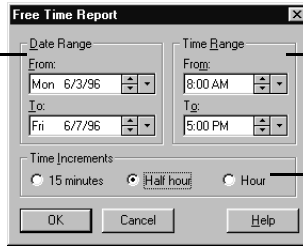
Free time report

A free time report searches the appointments schedule in the open calendar for unscheduled time slots. If you have a busy schedule for the weeks ahead, this is a quick way to determine when you have time available for last minute appointments.

To generate a free time report

In Calendar view, choose Reports | Free Time. The Free Time Report dialog box appears.

1 Set the date range to search on the Appointments list. One day is the minimum.

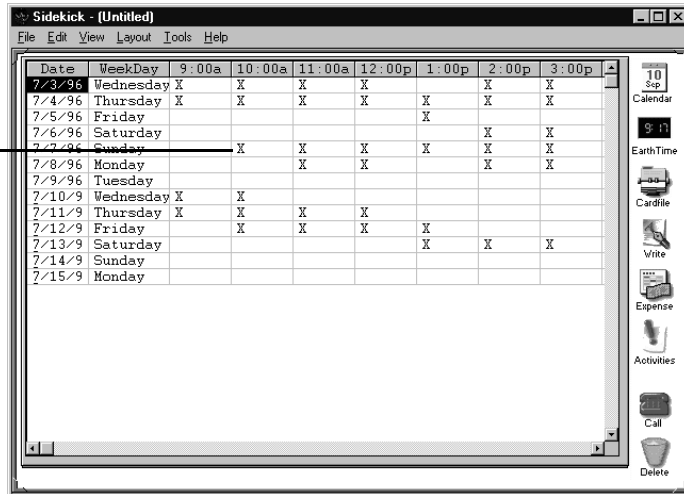


2 Set the time range for the number of hours each day to be searched, for example, From: 8:00 AM To: 5:00 PM.

3 Select the time increments to display the report results, either 15 minute, half hour, or hour intervals.

The scheduled times are marked with an X, while unscheduled times are left blank.

An X marks time that is busy.



See “[Formatting reports](#)” on page 184 for information on customizing your report

To Do item reports

For a report on To Do items and Goals, you can create a To Do Items report.

To create a To Do Items report

Choose Reports | To Do Items. The To Do List Report dialog box appears.

Set the date range in the Calendar to include in the report. One day is the minimum range.

Type a string of characters in the Text To Find box to limit your report to items related to a specific person or keyword.

Check the appropriate boxes to include only the To Do items, only the Goals list, or both.

Select the dates and properties to include.

See “**Formatting reports**” on page 184 for information on customizing your report.

Contact Log report

The Contact Log report is a history of all the contacts you made with specific people during a specified time period.

This is particularly useful if the Contact Log for each card contains information that has been recorded there using the Stamp To Card feature found throughout Internet Sidekick. A Contact Log can contain records of conversations, correspondence, and other important details.

To create a Contact Log report

Choose Reports | Contact Log.

1 Set the date range to report on.

2 Check the categories of logged entries to include in the report.

As you select one or more of the categories, names for their attributes appear in the Report Columns list.

3 Select the cards to report on from the Cardfile.

4 Select the field names from the cardfile that you want to include as additional columns in the report, and click -->. To remove an attribute or field name from the Report Fields list, select it and press the <-- button.

See the following section for information on customizing your report.

Formatting reports

Once you create a report, Internet Sidekick displays it for viewing or formatting. There are several options available for you to customize the report format. When viewing a report, you can save it, print it, or open a new one.

Updating report fields or data

If you update your calendar or cardfiles after you generate a report, you can also update your report. Also use Update if you want to add or remove fields from the report, or change the range cards covered by the report.

To update a report

Go to the report, if necessary, by choosing Report | Go To Current Report. Then choose Layout | Update Report.

Adding a title

Before printing the report, you might want to add a title and subtitles that identify the report contents. The report title is centered at the top of the page, and the subtitles are left-aligned just above the column headers.

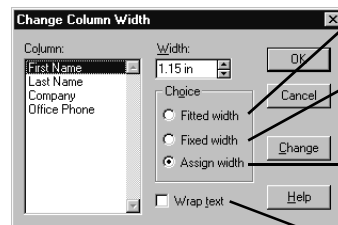
To add a title to your report

- 1 Choose Layout | Header.
- 2 Enter a title of up to 90 characters for the report.
- 3 You can also add three lines of subtitles (up to 296 characters total) to the report.
- 4 When done, choose OK to insert the title and subtitles in the report above the column headers.

Adjusting column widths

To adjust the column widths in a report

Choose Layout | Change Column Width.



Choose *Fixed Width* to change the width of all columns to the setting in the width box.

Choose *Fitted Width* to change the width of each column to the length of its longest entry. This adjustment might extend the width of the report across several pages.

To specify an exact column width for the selected field, choose *Assign Width*, adjust the size in the Width box, and choose *Change*.

Check the *Wrap Text* option to have information in cells wrap to multiple lines.

When done, choose OK to apply the changes for column widths to the report.

To resize the columns individually using the mouse

Position the pointer over the border between the headers. When the pointer changes to a double-headed arrow, press and hold the mouse button and drag the line to the right or left.

Deleting columns or rows

To delete unwanted columns or rows from a report

1 Select an entire column or row by clicking its column header or row number.

2 Choose Edit | Delete Column/Row.

Only complete columns or rows can be deleted.

CAUTION There is no undo option available after deleting columns or rows. However, you can easily re-create or update the report to include the original information.

Moving columns

To change the order of columns

Select a column by clicking its title. Then drag the column to another location in the report and drop it.

Hiding column and row titles

To hide the column or row titles

Choose Layout | Hide Column Title or Layout | Hide Row Title.

If you decide to show them again, choose the same commands.

Changing fonts

The title, subtitles, column titles, and report contents can each be displayed and printed with different fonts.

To change the font

1 Right-click the report or choose Layout | Font to display the Font dialog box.

2 Select the font, style, and point size you want for each element of the report, and choose Apply.

3 Choose OK when done.

The font settings are saved with the report.

Saving and applying report styles

To save time setting up headers and fonts for each report, you can create a report with all the appropriate settings, then save its style to a file for later use. The font settings and headers saved can be used in any subsequent report that you create. You might want to save several different styles to use with the various reports you need to generate and print.

To create a report style

- 1** Create a new report, following the steps outlined earlier in this chapter, or open an existing report.
- 2** Save the style by choosing **Layout | Save Report Style**. The **Save Report Style** dialog box appears.
- 3** Type a name for the style. Internet Sidekick automatically adds **.TPT** as the extension for the style file. The report contents are not saved in the style file.
- 4** Choose **OK**.

After you save a style, it can be applied to any other report to change the font settings, title, and subtitles.

To apply a saved report style

- 1** Choose **Layout | Choose Report Style**.
- 2** Select the style file (**.TPT**) and choose **Open**.

The fonts and header from the saved style are applied to the report.

Back Up and Restore

When you want to take Internet Sidekick on the road, or if you just need a backup copy of your data, the Back Up and Restore utility copies the files you need from one location to another.

For example, if you're bringing your laptop computer with you to a conference, you'll probably want Internet Sidekick on that machine to access all the important schedule and other information from your desktop computer at your office. And after the conference, you can transfer the files you've worked on back to your office computer, so you have access to all the new contacts you've met and appointments you've scheduled.

In fact, you can use Back Up and Restore to copy any files, not just Internet Sidekick files, anywhere. Using Back Up and Restore, you can copy files to a laptop to take home for the night, or to a file server to hand off to a colleague, or to a floppy disk to have a backup version of your data.

This chapter discusses:

- ◆ Backing up files
- ◆ Restoring files
- ◆ Internet Sidekick file types

What it does

Back Up and Restore is a simple, yet powerful, feature. You choose what files you want to copy or back up, and choose the location to copy them to. To copy files onto a second computer simply back up the files on to a floppy disk, and use the second computer's copy of Internet Sidekick to restore those files onto that machine. (You must have a copy of Internet Sidekick, or at least the Back Up and Restore utility, installed on each computer.) Internet Sidekick automatically puts all the files into a directory structure identical to where they

came from, or you can change directory for each file or for a group of files.

Later, when you're ready to bring those files back to their original directories, Internet Sidekick again puts them back in the proper locations. Also, after the first time you use Back Up and Restore, Internet Sidekick remembers which files you backed up or restored most recently, and displays them as the default files for backing up or restoring.

You can run Back Up and Restore from within Internet Sidekick, or as a separate standalone application in your Internet Sidekick program group. However, You can't back up or restore data while Internet Sidekick is running, because doing so might lose the most recent changes. You will be prompted to close Internet Sidekick before you can complete the back up or restore process.

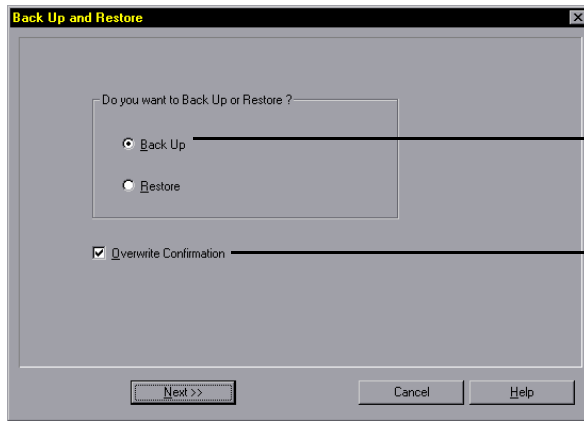
NOTE You can't use Internet Sidekick's Restore utility to restore files backed up with Sidekick 95's Back Up program. Similarly, you can't restore in Sidekick 95 files that were backed up in Internet Sidekick.

Backing up

Although Back Up and Restore can back up open files, it will only back up the last-saved version of these files.

To back up files

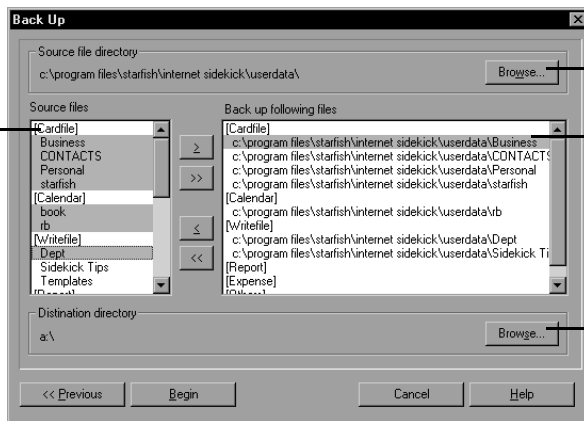
- 1 Choose File | Back Up And Restore, or, if Internet Sidekick is not running, select the Back Up and Restore option in the Internet Sidekick program group. At the opening dialog box, choose Back Up and click Next.



Click button to specify Back Up.

Check the box if you want to be prompted before Back Up and Restore overwrites an existing file.

2 Choose the files to back up in the Back Up dialog box.



Click to change the source directory.

The files you choose for backing up appear here.

Click to choose another destination directory.

Choose the files to back up here. Then click the Add arrow (>) to add them to the backup list.

3 After you've selected all the files you want to back up and specified the directory to back them up to, click Begin.

4 If Internet Sidekick is running you are prompted to close it. When you do, the Back Up and Restore program backs up the files you specified.

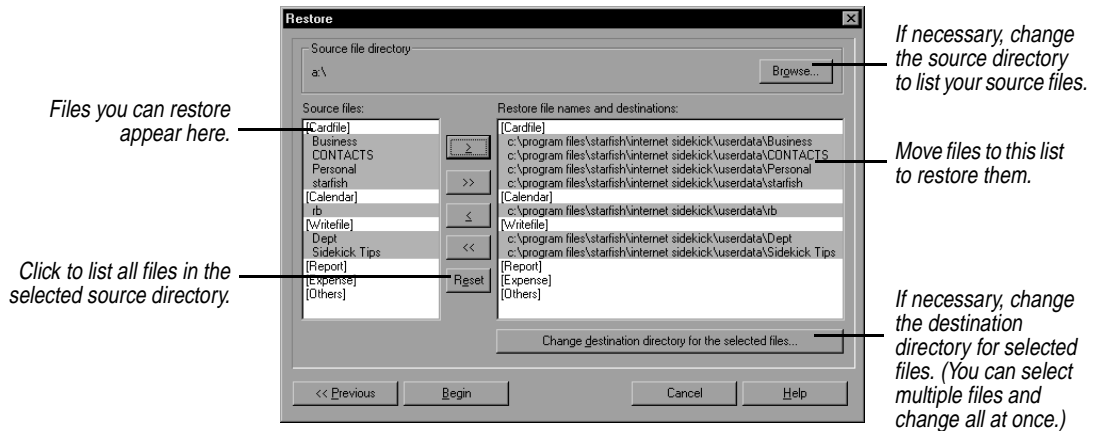
If you're backing up to a floppy disk, you might run out of disk space for all your files. If this happens, Internet Sidekick copies your files across multiple disks, prompting you to insert as many as needed. However, Internet Sidekick can't back up a file that is larger than the capacity of the disk—1.4Mb for a diskette.

NOTE Do not back up two files of the same name stored in different directories. Since Internet Sidekick does not preserve the directory name when backing up, the second file backed up will overwrite the first. This is not a problem if you back up only Internet Sidekick files, since there are no duplicate filenames.

Restoring

To place backed-up files onto your second computer, or restore files to your primary one

- 1 Choose File | Back Up And Restore, or, if Internet Sidekick is not running, choose Back Up and Restore in the Internet Sidekick program group. At the opening dialog box, choose Restore and click Next.



Notice that each file to be restored already indicates its own destination directory. You can change the destination directory by selecting the files and clicking the button labeled Change destination directory for the selected files....

- 2 When ready, click Begin. If Internet Sidekick is running you are prompted to close it. When you do, the restore process continues.

If you are restoring from multiple disks, Internet Sidekick prompts you to insert them in the correct order. If some of the files that should be restored are missing, Internet Sidekick notifies you.

Internet Sidekick files

It's easy to think of a Calendar file or Write binder as a single file, but each of these is actually composed of several files. When you create

new Calendar files or Write files, Internet Sidekick creates and maintains these extra files automatically.

Write files

A Write file is made up of *.SKWrite, *.SKContent, and *.SKNoteHeader. The asterisk represents the name you give the file when you save it from the Write view. A fourth file with the extension .SKTmpContent is a temporary file that exists only as long as that Write file is open. Back Up and Restore does not back it up. Write files are listed without an extension in Internet Sidekick, so they appear as one file.

Calendar files

Your calendar file is actually up to eight files in the XXXX?????.SKW format, where XXXX is the name you entered when you saved the calendar (it can be more than four characters). When saving, opening, backing up, or restoring calendar files, Internet Sidekick lists XXXX as the name of the calendar. The ????? part of the file name stands for the type of calendar file, as listed here:

| Calendar file | Contains |
|---------------|---|
| XXXXEVEN.SKW | Events (appointments) |
| XXXXCALL.SKW | Calls |
| XXXXTASK.SKW | To Do items |
| XXXXMAST.SKW | Goals |
| XXXXRECR.SKW | Recurring activities |
| XXXXINIT.SKW | Calendar settings (includes print settings) |
| XXXXCSCA.SKW | Personal list definitions |
| XXXXDATA.SKW | Special days and multi-day events |
| XXXXALAR.SKW | Alarm information |
| *.SKB | Back up copies of Sidekick 95 files you have opened in Internet Sidekick. |

Cardfiles

Unlike calendars and Write documents, cardfiles are single files. A cardfile is saved with the name you give it and the extension .SKCard. Cardfiles are listed without their extensions in Back Up and Restore.

Report files

Like cardfiles, report files are single files. A report is saved with the name you give it and the extension .RPT.

Expense files

Expense files are listed under [Expense]. They have the extension .SEE.

***Internet Sidekick
system files***

Data files, usually with an extension .DAT, which are stored in your DATA directory.

***Back Up and
Restore files***

When Back Up and Restore copies files, it creates and places a .LOG file alongside the copied files. This file allows Back Up and Restore to keep track of the files that have been backed up or restored. Back Up and Restore creates and accesses this file automatically, so you don't need to worry about copying or updating it.

Internet Scheduling Configurations

Use the tables in this appendix to help you determine the Internet Scheduling capabilities and limitations for different e-mail transport configurations.

Case 1 In Setup, you select Internet (POP3) as your e-mail type, using a name like “johndoe@domain.com”.

| Task | Internet (POP3) recipient | Exchange-only recipient | Exchange & Internet recipient (using the SMTP domain Internet address) |
|----------------------------|---------------------------|-------------------------|--|
| Schedule an event | YES | NO | YES |
| Reply to event invitations | YES | NO | YES |
| Reserve a resource | YES | NO | NO |
| Distribute a resource | YES | NO | NO |
| Transfer a resource | YES | NO | NO |

Case 2 In Setup, you select Microsoft Exchange, using a name such as “John Doe”, and you do NOT enter an Internet account (you have no direct Internet connection through an SMTP gateway). Resources you manage can be scheduled by other Exchange users only.

| Task | Internet (POP3) recipient | Exchange-only recipient | Exchange & Internet recipient (using the Exchange name) |
|----------------------------|---------------------------|-------------------------|---|
| Schedule an event | NO | YES | YES |
| Reply to event invitations | NO | YES | YES |
| Reserve a resource | NO | YES | YES |
| Distribute a resource | NO | YES | YES |
| Transfer a resource | NO | YES | YES |

Case 3 In Setup, you select Microsoft Exchange, and you DO have a direct connection to the Internet (via an SMTP gateway), so you enter a name such as “johndoe@domain.com. Resources you manage can be scheduled by other Exchange users only.

| Task | Internet (POP3) recipient | Exchange-only recipient | Exchange & Internet recipient |
|----------------------------|---------------------------|-------------------------|-------------------------------|
| Schedule an event | YES | YES | YES |
| Reply to event invitations | YES | YES | YES |
| Reserve a resource | NO | YES | YES |
| Distribute a resource | NO | YES | YES |
| Transfer a resource | NO | YES | YES |

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Acrobat Reader Tips

Use these buttons to view, search, or print the book. Choose Help | Acrobat Reader Help for more information.



Shows or hides subtopics when clicked (when bookmarks are showing).



Jumps to a topic when double-clicked (when bookmarks are showing).



Closes the thumbnail/bookmark area and displays only the page view.



Displays bookmark area and page view.



Displays thumbnails and page view.



Drags the page in any direction.



Magnifies or reduces the page view. Click the button, then click within the document, or drag out an area to enlarge.



Selects text so you can copy it to the Clipboard.



Displays the first page of the document.



Displays the previous page.



Displays the next page.



Displays the last page of the document.



Displays the previous page viewed.



Steps forward from previous pages viewed.



Sets the page view to 100%.



Displays the entire page within the window.



Displays the full width of the page within the window.



Searches for a word or partial word.



Prints a page or multiple pages from the online manual. Specify the page range in the dialog box that appears. The default, All, prints the entire manual.

Starfish Internet Sidekick® User's Guide Navigation

Red text designates hypertext links. All cross-references and index entries are hypertext linked. Clicking a hypertext link jumps you to the page referred to by the red text.