Starfish Software

# Sidekick® 95

## User's Guide




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Sidekick 95

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# Introduction

Welcome to Sidekick 95, the personal organizer that provides power and simplicity to help you organize your life. Sidekick 95 has an easy and familiar design, based on the model of a desk top. Using simple clicking and dragging procedures, you can organize your schedule, write letters and other formatted documents, manage your contacts, and much more.

## *What's new in Sidekick 95*

For users of earlier versions of Sidekick for Windows, this section contains a rundown on the new features of Sidekick 95.

The new features include the following:

- **New Expense view** There is a new Expense view for calculating and printing expense reports. Click the Expense icon on the right side of the Deskpad to open the Expense view.
- **New EarthTime view** EarthTime provides a world clock that tells you the local time wherever in the world you have contacts and connections. Click the EarthTime icon to see the display.
- **New Reminder view** What was the cover page in earlier versions now displays your appointments and other events for the current day or whatever period you choose.
- **New Phone Dialer** The feature formerly known as Speed Dial has been replaced by the Phone Dialer, which lets you take advantage of the Windows 95 phone support.

## *New in the Write view*

The view formerly known as Notes is now the Write view. A variety of word processing features have been added to this view

- Full rich text formatting (RTF) capability provides control of fonts and type sizes in your documents. Use new Toolbar buttons to

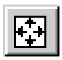
  Specify typeface and size for selected text

  Add (or remove) boldface, Italic, underline and color to selected text.

  Change paragraph alignment (flush-left, centered, flush-right)

  Create bulleted paragraphs.

- A ruler lets you set margins and tabs.
- E-mail connection via your Microsoft exchange address book, so you can create a document and e-mail it directly from the Write view.
- Instant fax capability in the Write view lets you send a document to one person or a group in your cardfile.
- New Quick Letter button makes it almost effortless to create a letter to anyone in your cardfiles.

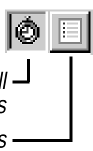


- Full-screen Edit view lets you see the whole document as you work. Or switch to the existing Indexed view for convenience in locating your documents. To switch between full-screen Edit view and index-tab view, click the View button on the right side of the Toolbar.
- Spelling checker helps you find spelling and typing mistakes.
- Cardfile selection button in the Viewport (formerly View-in-View). Click the Cardfiles button at the bottom of the Viewport to choose a cardfile.
- Import and export of rich text format (.RTF) and plain text (.TXT) files.

## New in the Calendar view

These new features have been added to the Calendar:

- Selectable cardfile in the Viewport (formerly View-in-View). Click the Cardfiles button at the bottom of the Viewport to choose a cardfile.



*Time view shows all times*

*List view shows busy times only*

- New List view shows only booked time, without empty time slots. Click the appropriate button in the upper right of the Appointments list.
- New view area above the daily calendar for holidays, special days, and multi-day events.
- The information almanac shows sunrise and sunset, phases of the moon, and other information.
- Shortcut menu (right-click menu) lets you check off completed appointments.
- New consolidated Reminder view shows appointments, ToDos and calls.

- Automatic sorting of ToDos and calls moves checked-off items to the bottom of the list.
- New .WAV alarm sounds.

### New in the Cardfile

These new features have been added to the Cardfile:

- Access to your Microsoft Exchange address book for e-mailing a document**. O**r import your Exchange address book as a cardfile.
- Redesigned label and envelope printing dialogs. New step-by-step dialog boxes clarify the process of designing labels or envelopes. Wizard-style help panels have been added for creating the content. Try them!

## In this manual...

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

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

Multilevel menu selections are separated with a vertical bar ( | ). So, where you see File|Save, you first open the File menu, and then select the Save command in that menu.

When you need to type in some information, it's indicated in a different typeface: like this.

## Where to go for help

Your first source of help and information should be this manual and the online Help system.

### Online help

The online Help system contains detailed information about Sidekick. Help appears in a separate window with its own controls. 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, press *F1* with the command highlighted.
- Click the Help button in a dialog box. For help about dialog box controls, click the Help button in the dialog box (or press *F1*).
- Choose a command from the Help menu.

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, Sidekick displays the name of the object. This feature, called ToolTips, makes it easy for you to identify what you see and find what you need.

## Technical Support

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2710 Walsh Avenue
SantaClara, CA 95051-0963
USA
Phone (408) 988-3832
FAX (408) 970-9727
Hours 6am to 5pm PST
Monday through Friday

McAfee BBS: (408) 988-4004
200 bps to 28,800 bps
8 bits, no parity, 1 stop bit
24 hours a day, 365 days/year

CompuServe: GO MCAFEE

Internet: support@mcafee.com

America On-line: MCAFEE

MSN: MCAFEE

WWW: http://www.mcafee.com

# 1

# Installing and starting Sidekick 95

Before you begin installing your new Sidekick 95, there are a few things you should check:

- Examine the contents of your Sidekick package (see the next section).
- Make sure you have the necessary hardware and software to run Sidekick 95.

Once you have done these two things, you'll be ready to start the installation program.

## The Sidekick 95 package

Your Sidekick 95 package includes the following:

- This *User's Guide*.
- The Sidekick 95 software (3.5 inch diskette format).
- Your registration card. Be sure to fill in the card and mail it back to Starfish.

## Necessary equipment

To use Sidekick 95, you need

- A computer running Windows 95
- A minimum of 5 Mb hard disk space for installation (including 1 Mb on the same drive as your Windows directory).

The following equipment is optional but recommended to fully use all Sidekick 95 features:

- A mouse compatible with Microsoft Windows 95; the instructions in this book assume you have a mouse.
- A modem, to take advantage of the Sidekick Phone Dialer.

- A printer supported by Windows 95.

## Windows 95 features you need

Some of Sidekick's features require that you install specific Windows 95 components.

To use the Phone Dialer you must install the TAPI communications feature. If you want to use the Microsoft Exchange address book for e-mail, you must have Exchange installed (MAPI). To fax documents, you must have Microsoft Fax installed.

**To add required software in Windows 95**

1. Click Start on the Taskbar. Choose Settings, and then Control Panel.
2. Double-click Add/Remove Programs.
3. Click the Windows Setup tab.
4. Follow the procedures in the dialog box to install the required software.

## Installing Sidekick 95

Before you install, please 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.

**To install from Drive A**

1. Insert the Sidekick 95 disk into Drive A.
2. In Windows 95, click the Start button, and choose Run.
3. Type A:INSTALL (type B:INSTALL if you inserted the disk into drive B) and press *Enter*.
4. Follow the instructions as they appear on screen.

Or you can install using Add/Remove Programs in the Windows 95 Control Panel.

If you already installed an earlier version of Sidekick, it will be retained in its original directory. Sidekick 95 will be installed in a new directory called Sidekick 95. After installing, you can open your old files in Sidekick 95, and use Save As to save them in your Sidekick95\Userdata directory. It is not recommended to install over earlier versions of Sidekick for Windows.

## The README file

Any last-minute changes or additions to Sidekick 95 are documented in a file with the name README. When the installation program has finished installing Sidekick on your hard disk, you will see the README file. To view it later, click the README icon in the Sidekick 95 folder (in the Windows 95 Start|Programs menu).

## Starting Sidekick 95

To begin working with Sidekick after you've installed it, open the Start|Programs|Sidekick 95 menu, and click the Sidekick 95 icon.

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, refer to your Windows 95 manual, or take a few minutes to run the Windows 95 Tour from the Start menu.

## Uninstalling Sidekick 95

If you decide to remove Sidekick 95 from your computer, use the Uninstall program.

**To remove Sidekick 95 permanently from your system**

1. Exit Sidekick 95.
2. From the Windows 95 Taskbar, click the Start button.
3. Choose Programs, and then choose the Sidekick 95 program group.
4. Click Uninstall.

Uninstall removes all Sidekick 95 program files, and removes Sidekick from the Windows 95 Registry. It also gives you the option of removing user data files. If you have personal files in the SIdekick 95 folder, Uninstall will not remove them. You have to remove these manually, and then manually delete the folders.

# 2

# Overview

This chapter gives you an overview of the many features of Sidekick that can help you simplify your life.

## Key features of Sidekick 95

Sidekick consists of a number of *views,* each with a broad range of capabilities. These views and other key features are listed below:

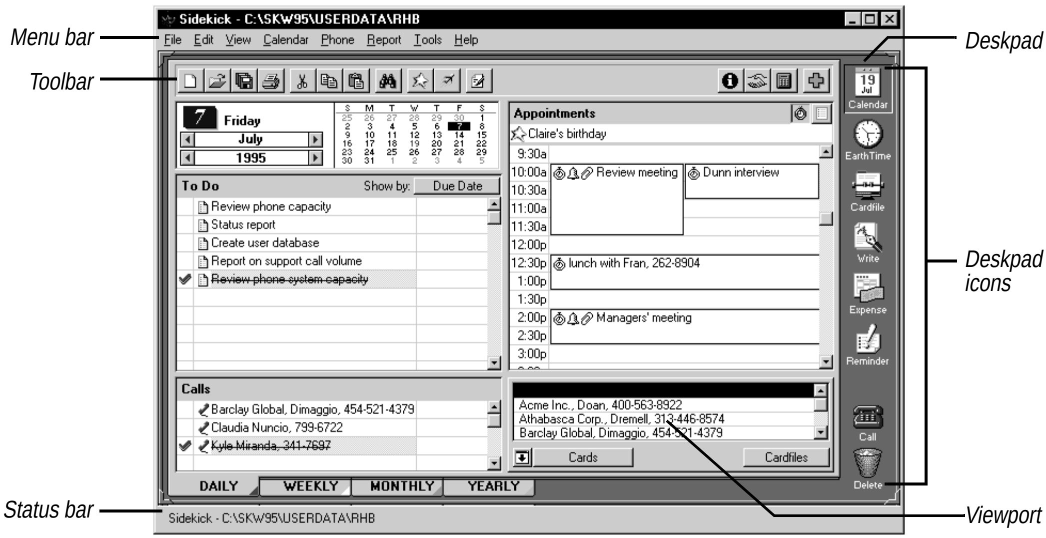
- The *Cardfile view* helps you keep track of anything from your address book to inventories to reference materials. You can have as many customizable cardfiles as you like.
- The *Calendar view* contains a calendar for scheduling appointments and managing short and long-term tasks.
- The *Write view* lets you create all kinds of documents, which are filed in folders. You can apply formatting to your documents, and create personalized documents by merging information from the Cardfile.
- *Electronic mail* using Microsoft Exchange is quick and easy from the Write view, where you can instantly send your document, or from the Cardfile.
- The *Expense view* lets you enter expense information directly from your pile of receipts. It generates a finished expense report with the information sorted and totaled, in an organized format you can print out.
- *EarthTime* presents information about the local time for cities around the globe.
- The *Phone Dialer* dials your calls and lets you make entries in your Contact Log.
- The *Reminder view* summarizes your appointments and ToDos for today, or for another time period you choose. You can even

preview your list of things to do and Calendar events for tomorrow.

- *Quick Letter* takes the name and address information from the current cardfile card, and creates an instant letter to that person, complete with their address and today's date. You can immediately start typing to create the text of the letter.
- Sidekick 95 also contains a powerful report view, which can correlate and display information from your cardfiles and calendar. Reports can include a wide range of ready-made and customizable formats for cards, labels, address books, calendars, envelopes, and documents.

## The Sidekick 95 screen

The major components of Sidekick 95 are shown in the following illustration, which shows the Calendar view and identifies the features common to all views.



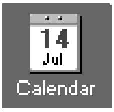

The **Toolbar** buttons let you do certain tasks quickly, without using the menus. The Toolbar and menu bar change with each view of Sidekick.

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

The working area of the Sidekick screen is called the ***deskpad***, and looks very much like the blotter you might have on your own desk. To make changes to the default deskpad colors and other display options, choose Tools|Preferences. See “Setting preferences” for more information.

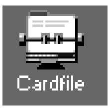
## *Deskpad icons*

Icons move you between each of the views in Sidekick. The views—and how to use them—are described in detail in later chapters of this book. You can save your work in all views at once by choosing File|Save All.



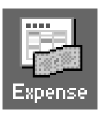

In the **Calendar**, you can schedule appointments, organize your daily tasks in a ToDo list, and keep track of calls. You can print your calendar in a variety formats, including page sizes suited to the most popular day planners, such as DayRunner, Day-Timers, and Franklin Planner. You can view your calendar in Daily, Weekly, Monthly, and Yearly views. See Chapter 3 for more information on the Calendar.


**EarthTime** tells you the current time in eight locations around the globe, and provides other information such as time difference and facts about each city. See Chapter 7 for more information.

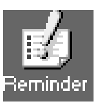



The **Cardfile** can be used as an address book in which you store names, addresses, and a variety of phone numbers. Or, you can keep records of any other type of information that can be broken down into common pieces. You can use the Cardfile with the Phone Dialer to dial your calls, or merge card information into a letter using Quick Letter. See Chapter 4 for more information on the Cardfile.


The **Write** view provides you with a place to create and format documents. You can use Write for most kinds of letters and documents. It lets you change fonts and format your documents, and you can create form documents for merging cards from the Cardfile. See Chapter 5 for more information on Write.




The **Expense** view lets you enter information from your expense receipts, and presents it in a finished expense report, ready for signing. For details, see Chapter 6.




The **Reminder** pulls together all the information you need to be reminded about: your calls, ToDos, appointments for today, this week, or other period you select. The Reminder is discussed later in this chapter.

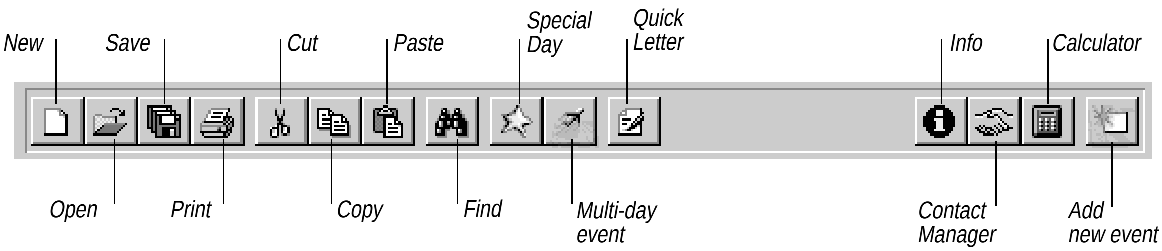

The **Phone Dialer** lets you quickly dial a number stored in your cardfile. Simply drag a card from the Cards list to the Call icon on the deskpad. Or you can just click the Call icon. (For this option to work you need to have a modem installed in your system.) See Chapter 8 for more information.


The **Delete** icon works just like you'd expect it to. To delete a card, document, or calendar activity in Sidekick, simply drag it to the Delete icon on the deskpad.

## The Toolbar

Each view in Sidekick 95 has its own Toolbar, which makes it quick and easy to perform standard actions in that view.

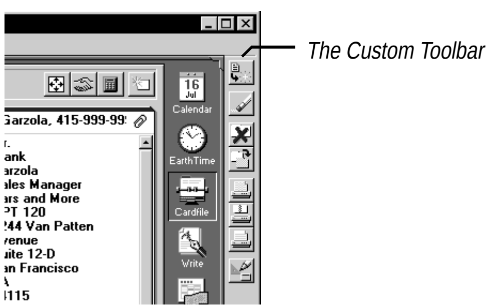
Tools that are standard to all views appear toward the left on the Toolbar. Tools that are specific to the current view are toward the right. The Calendar Toolbar appears below.




## 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 turn on display of 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, and you can create a different Custom Toolbar for each of Sidekick's views. If you want, you can leave your Custom Toolbar displayed, and turn off the standard Toolbar.



### To move thc Custom Toolbar

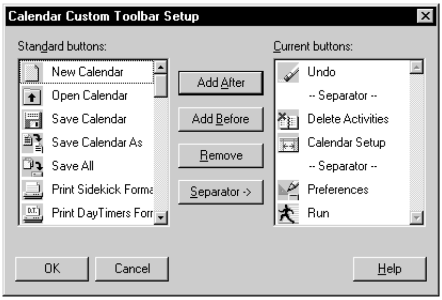
Click it and drag it to any side of the screen. You also can make it a floating Toolbar that you can position wherever you want on the deskpad.

### To change the buttons on the Custom Toolbar

Choose Tools|CustomToolbar Setup. The following dialog box appears:

*To add a button,*

1. *Click it in the Standard Buttons list.*
2. *Click the Current Button you want to add it before or after.*
3. *Click Add Before or Add After.*




*To remove a button,*

1. *Click it in the Current Buttons list.*
2. *Click the Remove button.*

*To add a separator,*

1. *Click the button in the Current list you want the separator before.*
2. *Click the Separator button.*

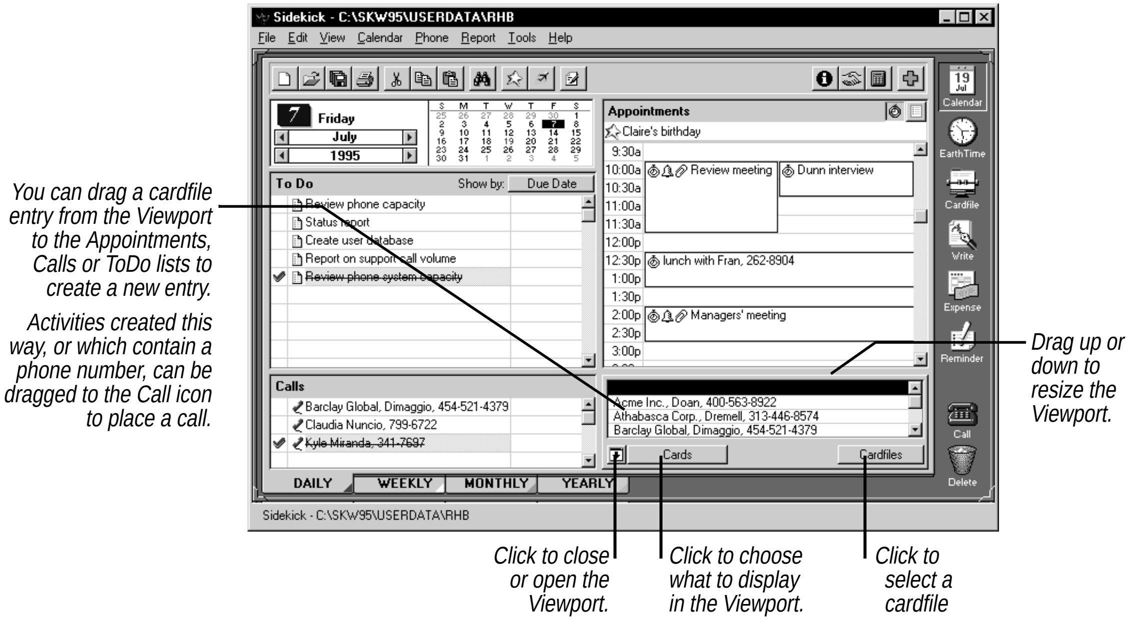
## *The Viewport*

In the lower right corner of the Cardfile, Calendar, and Write views, you'll find the Viewport window. The Viewport lets you work with a part of 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 ToDo 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 a time slot in the Calendar.
- Like appointments, you can create a Calls list (or ToDo list) entry by dragging a cardfile name from the Viewport to the Calls list. You can then place a call by simply dragging it from the Calls list to the Call icon on the deskpad (assuming you have modem dialing enabled on your system).

In the following figure, a Cardfile appears in the Viewport.



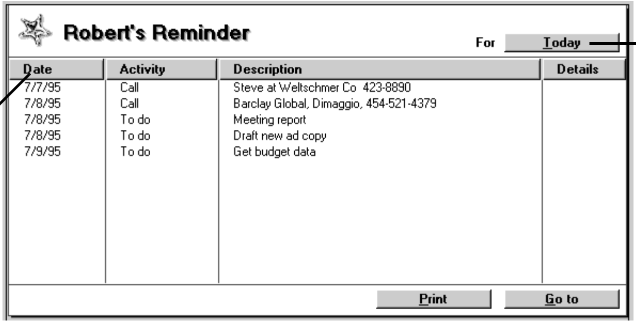

The information you can display in the Viewport changes depending on which view of Sidekick you're working in.

- From the Calendar, the Viewport displays the Cardfile, the Contact Log of the current card, or the Goals list.
- From the Cardfile, the Viewport displays your appointments, calls, ToDo items, goals, or the selected card's Contact Log.
- From the Write view, the Viewport displays the Cardfile, any list from the Calendar, or the Goals list.

# The Reminder view

The Reminder view summarizes your appointments and activities for today or some other period.

*Click the column head to sort on that column*




*Click here to change the date range.*

After you schedule activities, the Reminder view lists the first activities scheduled for the current day in the Calendar.

# The Calculator

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.

*To save the result of a calculation, highlight it and drag it to any card, document, or calendar item in Sidekick.*

*To resize the calculator, drag any edge.*


*You can customize up to three function keys for special operations.*

*To set up a function for the calculator,*

1. *Click one of the function keys: F1, F2, or F3.*
2. *Type a value.*
3. *Click an operator (*, /, –, or +).*

*To use a function key, click its button or press Ctrl and the corresponding function key on your keyboard.*

*To reset a function key, press Shift and click its button or press Shift and the corresponding function key at the same time.*

# Shortcuts

Sidekick has other features that simplify the work you can do with your computer:

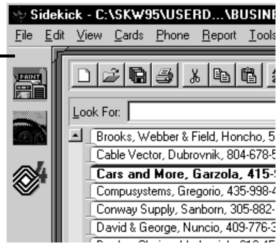
- **Launch Bar**. Launch any application from within Sidekick.

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

## *The LaunchBar*

The LaunchBar lets you start any Windows application right from Sidekick.

*The Launch Bar*




**To set up your own LaunchBar**

1. Choose Tools|LaunchBar Setup.
2. Search the File List for applications you want to add to the LaunchBar.
3. Select the file you want and click Add to add it to the LaunchBar.
4. To remove an application from the LaunchBar, select it and click Delete.
5. When the LaunchBar contains the applications you want, choose OK.

The LaunchBar appears at the left side of your screen. You can drag it to another position if you want to. You can show or hide it at any time by choosing View|LaunchBar.

## *Shortcut menus*

From several locations in Sidekick, if you right-click an object such as a card or activity entry, a context-sensitive Shortcut menu appears. These menus offer basic commands such as Cut, Copy, Paste, or other commands specific to that object or view.

For example, you can highlight some text in a document or an activity from the Calendar, right-click the mouse to open the Shortcut menu, choose Cut, move the insertion point to a new location, right-click and choose Paste.

**NOTE** When 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 appointment are lost if the appointment is moved to the ToDo list; similarly, ToDo attributes cannot be moved with an item to the Appointments list. (Exception: you can move entries between the ToDo list and the Goals list 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 deskpad are drag and drop “targets.” For example, you can drag a card, call, appointment or ToDo 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 a document**
Point to it, hold down the left mouse button, drag the pointer to the place you want to drop the object, and 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

In the Cardfile you can

- Drag cards to the Delete icon to delete them.
- Drag a card to the Phone to quickly dial a phone number on card.
- Drag a card to a calendar list in the Viewport to insert information from the card’s index.
- Drag cards to cardfile tabs to move them from one open cardfile to another. Hold down the Ctrl key as you drag to copy the card instead of moving it.

### In the Calendar

In the Calendar you can

- Drag an activity to the Delete icon to delete the item.

- Drag an activity to the Phone to quickly dial a number in its description text.
- Drag an activity to another list in the Calendar.
- Drag a card from the Viewport to a calendar list to insert information from the card's index.

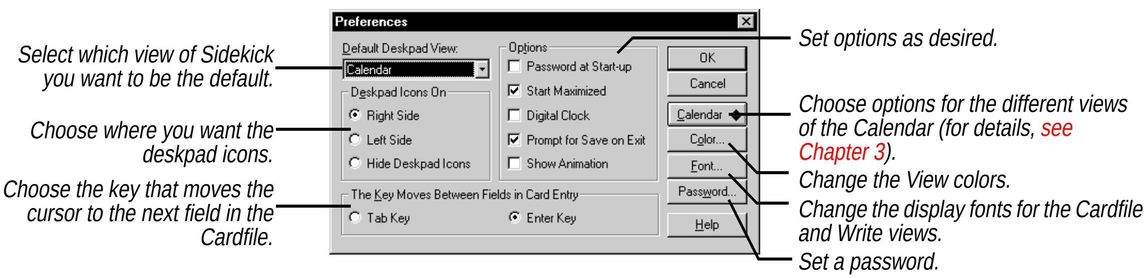
### *In Write*

In the Write view you can

- Drag documents to the Delete icon to delete them.
- Drag documents to folder tabs to move them to a different folder. Hold down the Ctrl key as you drag to copy instead of moving.
- 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 document to create a mail merge or form letter.

## *Setting preferences*

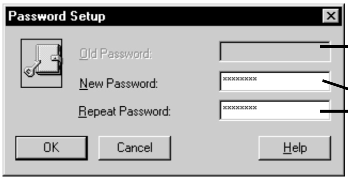
You can customize Sidekick by setting its preferences. Choose Tools| Preferences. The Preferences dialog box appears.




When you're in the Calendar, you can also set its preferences by choosing Calendar and the Setup command for the view you are in (Daily, Weekly, Monthly, or Yearly).

## *Using password protection*

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




*Type in your old password (not needed if this is the first time you are creating a password).*

*Type in your new password in these two boxes.*

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

# 3

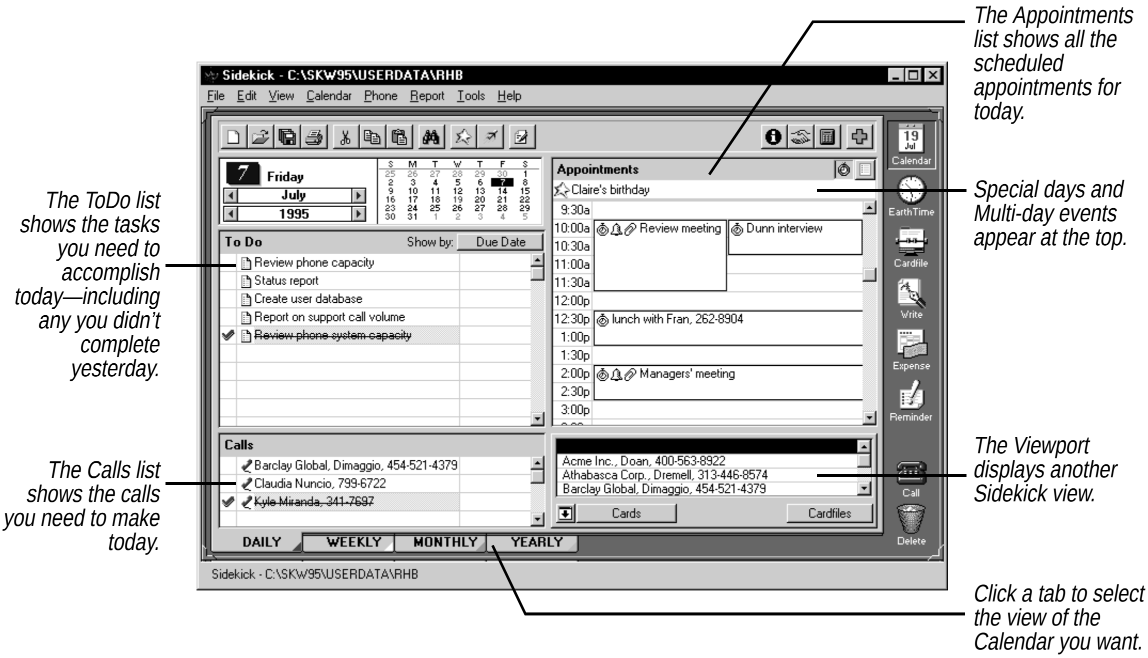
# The Calendar

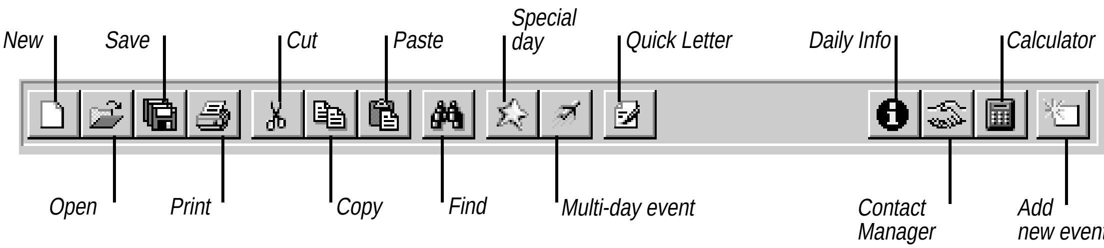
The Sidekick Calendar is a powerful tool for helping you organize your appointments and activities. You can use the Calendar to schedule appointments and reminders, keep a ToDo list, and keep a list of calls to make. You can merge information from a Cardfile to insert a name and phone number in your Calendar item, and you can even have Sidekick automatically dial the number for you.


To switch to the Calendar, click the Calendar icon on the Deskpad, or choose View|Calendar.

This chapter explains how to

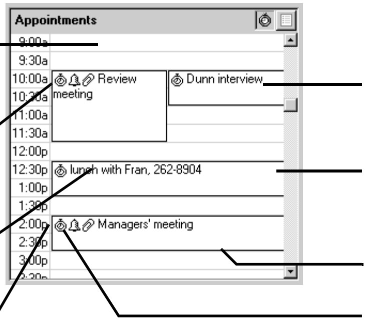
- Enter appointments, ToDos, and calls
- Use the different Calendar views
- Schedule special days
- Set up multi-day events
- Reconcile appointments between two Calendar files




## Appointments

Enter your appointments and scheduled events on the Appointments list. You can have any number of appointments scheduled throughout the day (up to a maximum of 288 per day!), and up to three overlapping appointments starting at the same time. Like ToDos, appointments can be checked off when completed, by right-clicking and choosing “Check as Completed” from the shortcut menu.




### To create an appointment

Click in the Appointments window on the time you want to start your appointment. This creates a blank appointment, in which you can immediately type a description. When you’re done typing, press *Enter.*

Or you can drag a card from the Viewport to the Appointments list (displayed in Time view, not List view). The three card fields shown in the Viewport will appear in the appointment. If the card includes a telephone number, you can drag the appointment to the Call icon to dial the number (assuming you are using modem dialing).

### To edit an existing appointment’s description or time

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

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

Sidekick automatically places an appointment icon to the left of the appointment text. You can use drag and drop to move the appointment; simply drag the icon to the new time.

### To check off a completed appointment

Right-click the appointment’s icon and choose Check as Complete from the Shortcut (right-click) Menu. Completed appointments are marked with strikethrough.

**To go to today**

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

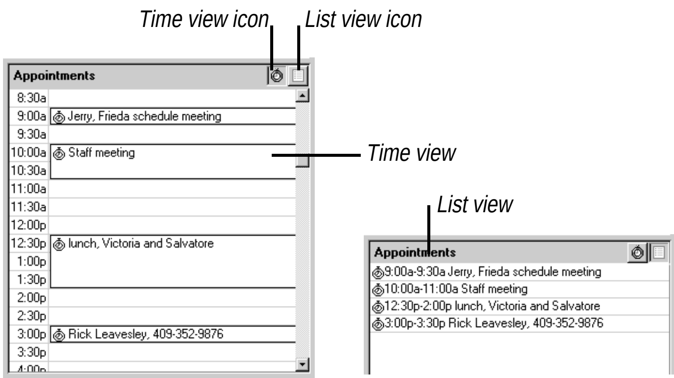
## *List view and Time view*

You can switch between two views of your calendar:

> **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**

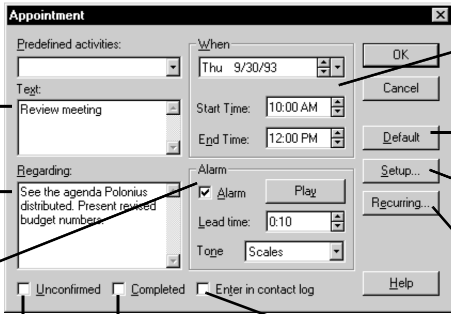
Click the icon for the view.




## *Changing the appointment details*

**To set or change the details for an appointment**

Double-click an appointment's icon, or click in the text area and choose Calendar|Appointment|Daily. The Appointment dialog box appears. If no appointment is selected when you open this dialog box, you can use it to create a new appointment.




The following choices are available for each appointment:

- **Alarm**. You can set a visual reminder to pop up when it's time for your appointment. You can also choose to play an alarm sound, and specify when each alarm goes off. An appointment with an alarm displays a bell icon to the left of the text. You can specify a .WAV sound to play when the alarm goes off (.WAV files are stored in your Windows 95 Media folder.)

  Sidekick notifies you when an alarm goes off, even if you're in another program.

  The alarm dialog box includes these options:

  **GoTo** takes you to the appointment's entry in Daily view.

  **Snooze** sets the alarm to repeat in 5 minutes, or when you specify.

  **Close** turns off the alarm sound and closes the message box.

- **Regarding notes.** You can save additional details about an appointment, up to 640 characters. An appointment with Regarding notes displays a paper clip icon.
- **Unconfirmed**. An unconfirmed appointment displays a question mark icon.
- **Exact starting and ending times**. You can specify these times to the minute. You can also choose to display these times in the

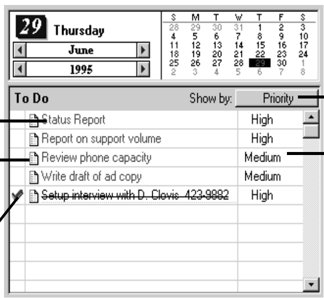
Appointments view by checking the option in the Daily Setup dialog box.

- **Enter in Contact Log.** Setting this option copies the date, time, and description text from the appointment into the Contact Log of the current card. See “Using the Contact Log” on page 64 for more information on the Contact Log.
- **Recurring.** You can make any appointment recurring, so that it automatically appears on your Appointments list at specified intervals. An icon appears for recurring appointments. See page 32 for more information.

You can use predefined activities to create an appointment using information from a cardfile. For example, you can create an appointment that automatically includes someone’s name and phone number. For details, see “Personal Lists” on page 38.

## ToDos

You can enter tasks into Sidekick’s ToDo list, and check them off when completed. Sidekick forwards any uncompleted tasks to the next day. You can also give a ToDo attributes like a priority, category, due date, and person assigned to handle it.




### To create a new ToDo

You can click any blank line in the ToDo list and begin typing. When you begin to type a new ToDo, Sidekick places a ToDo icon in front of the text.

Or drag a card from the Viewport to the ToDo list. The three card fields shown in the Viewport will appear in the appointment. If the card includes a telephone number, you can drag the ToDo to the Call icon to dial the number (assuming you are using modem dialing). See “Sorting the cardfile by index” on page 53 for more information on the Cardfile index.

You can also create a new ToDo by choosing Calendar|ToDo|Daily, which opens the ToDo dialog box. See the next section for more information.

#### To edit the text of an existing ToDo

Click in the text and edit as needed.

#### To drag and drop a ToDo

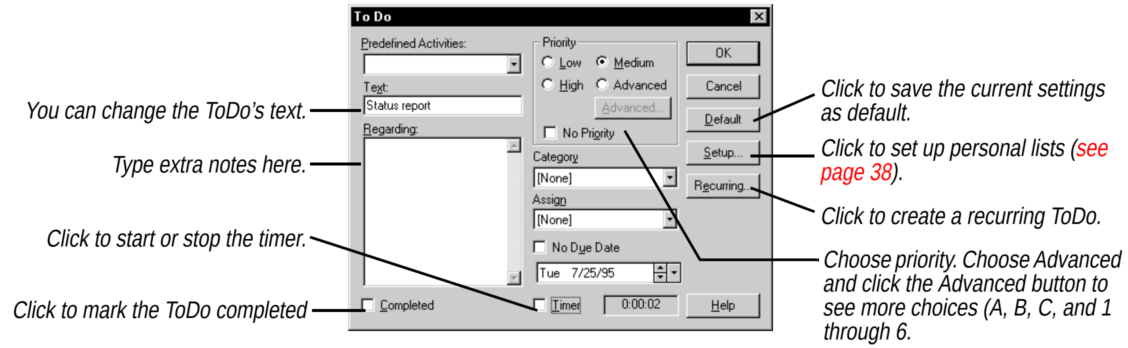
Grab its icon and drag it to the new location.

## *Setting ToDo attributes*

You can set optional attributes for each ToDo.

#### To set attributes for a ToDo

Double-click a ToDo's right column, or click in its text and choose Calendar|ToDo|Daily. The ToDo dialog box appears.




The attributes for ToDos are as follows:

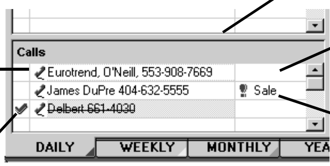
- **Priority.** Priorities are set by choosing Low, Medium, or High. Click the Advanced button if you would like to set priority using two levels: A, B, and C, and 1 through 6.
- **Category.** Sidekick comes with three predefined categories: Business, Personal, and Other. You can edit or create your own categories, as described in "Personal Lists" on page 38.
- **Assign.** You can assign a task to someone else. You can customize the list of assignable people; see "Personal Lists" on page 38.
- **Enter date.** If you use the ToDo dialog box, Sidekick automatically remembers the date you enter a task. You can choose to display the enter date in the ToDo list.
- **Due date**. If you assign a due date to a task, the ToDo 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 ToDo is checked as completed. The total elapsed time is recorded and saved with the task.
- **Regarding notes.** You can save detailed information about a task, up to 640 characters. If a ToDo has Regarding notes, a paper clip icon appears in its right column.
- **Recurring**. You can make any ToDo recurring, so it automatically appears on your ToDo list at specified intervals. See “Recurring activities” on page 32.

**NOTE** You can use predefined activities to create a ToDo using information from a cardfile. For example, you can create a ToDo that automatically includes someone’s name and phone number. Then it’s an easy matter to drag the item to the Call icon 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 “Personal Lists” on page 38.

## Calls

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




### To enter a call

Click any blank line in the Calls list and begin typing. When you begin to type a new call, Sidekick places a call icon in front of the text.

Or you can drag a card from the Viewport to the Calls list. The three card fields shown in the Viewport will appear in the call. If the card includes a telephone number, you can drag the call to the Call icon to dial the number (assuming you are using modem dialing). See

"Sorting the cardfile by index" on page 53 for more information on the Cardfile index.

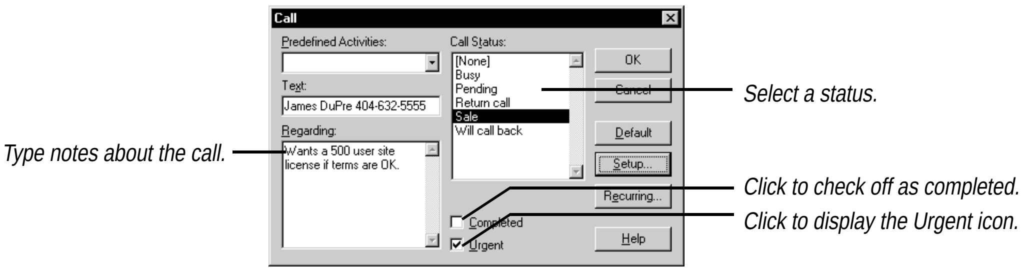
Or choose Calendar|Call|Daily, which opens the Call dialog box, described in the next section.

You can also edit the text of existing entries in the Calls list by just clicking on the text and typing.

## *Setting call attributes*

**To set call attributes**

Double-click in a call's right column, or click in the call text and choose Calendar|Call|Daily. The Call dialog box appears.




You can set the following attributes for each call:

- **Call status.** If you assign a status to a call, 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, as described in "Personal Lists" on page 38.

- **Urgent**. If you label a call as Urgent, an exclamation point appears in the right column of that call in the Calls list.

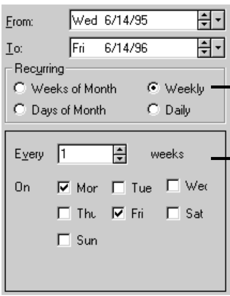
- **Regarding notes.** You can save additional information about a call, up to 640 characters in length. If a call has Regarding notes, a paper clip icon appears in its right column.

- **Recurring.** You can make any call recurring, so it automatically appears on your Calls list at specified intervals. See the following section for more information.

## *Recurring activities*

You don't have to type regularly repeated ToDos, appointments, and calls (all known also as activities) individually. You can specify the intervals and let Sidekick add these activities automatically. You can change a one-time ToDo, appointment, or call into a recurring one, or create recurring activities from scratch. Either way, the process is the same. Refer to the steps following this illustration.

Each Recurring dialog box is similar to the Daily dialog box for that same activity but with the addition of the recurring section. All recurring activities have the same panel to control the recurring interval, shown in the following illustration.




*Click your choice in this panel...*

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

### To add recurring activities to the Calendar

1. Choose the type of activity you want from the Calendar menu in the Daily view: Appointment, Call, or ToDo, and then choose Recurring.

   Or, to change an existing activity into a recurring one, click the Recurring button in the activity's attributes dialog box.

2. Enter the description, Regarding notes, and other options the same way you do for individual activities.
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**

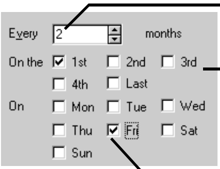
**You can right-click an existing one-time activity, and choose Recurring from the shortcut menu.**

# 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.

### *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 every two months.



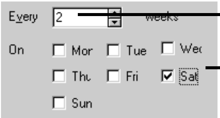

*Set the number of months between occurrences. The default is 1 (every month); the limit is 12.*

*Choose the week of the month for the activity. You can choose more than one week. 1st inserts the activity on the first occurrence of the day, whether it's in the first full week or first partial week. Last inserts the activity on the last occurrence of the day, whether it's in a full or partial week.*

*Choose the day of the week for the activity. You can choose more than one day of the week, but at least one day must be selected.*

### *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.

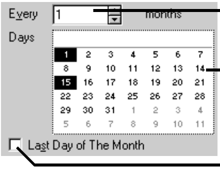



*Set the number of weeks between occurrences. The default is 1; the limit is 52.*

*Choose the day or days of the week for the activity. At least one day must be selected.*

### *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.

## *Rescheduling activities*

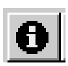
You can reschedule a ToDo, call, or appointment to another date.

### To reschedule an activity

1. Place the pointer over the event and right-click to see the Shortcut menu.
2. Choose Reschedule Activity. The Reschedule Activity dialog box appears.
3. Select the new date (and time, for appointments) for the activity, and click OK. The activity is moved to the new date and time in the Calendar.

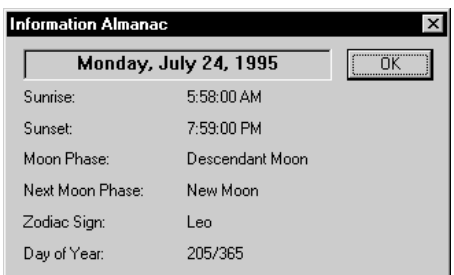
## *The Almanac*

Sidekick gives you solar and celestial information about the current day in its Almanac.



### To see the Almanac for the current day

Click the Almanac Information button in the Toolbar.




## *Other Daily view activities*

There's more to the Daily view than scheduling appointments or listing ToDos. The following sections describe

- How to select dates in the Daily view

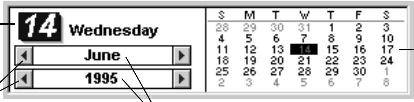
- How to customize the Daily view
- What appears in the Viewport
- How to sort ToDos and the Goals list
- How to set up and use personal lists
- How to create Special Days and Multi-day Events

## Selecting dates in Daily view

In the Daily view, the selected date is highlighted in the mini-calendar.

*The current date appears here in the Daily view. Click here to see the Info Almanac.*

*Change to the previous or next month or year by clicking the left and right arrows.*



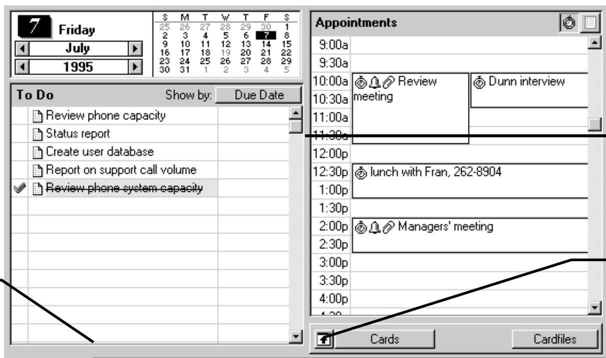

*Click a date in the mini-calendar to go directly to that day.*

*Click the mouse on the month or year to see a drop-down selection list.*

## Customizing the Daily view

You can customize your Calendar in many ways. You can resize the Appointments, Calls, and ToDo lists by dragging their edges. You can even size the Calls list down to the point where it no longer appears. You can close the Viewport window the same way. The size and position of each list is retained the next time you start Sidekick.

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




*Drag the border to change the width of the windows.*

*Click to open and close the Viewport.*

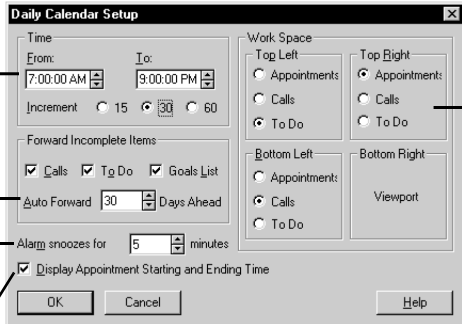
You also make additional changes by choosing Tools|Preferences and clicking the Calendar button. The Daily Setup dialog box appears.

*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 Sidekick should look back to check for incomplete ToDos.*

*Set the time Sidekick waits before repeating an alarm.*

*Check if you want Start and End time displayed with appointments.*

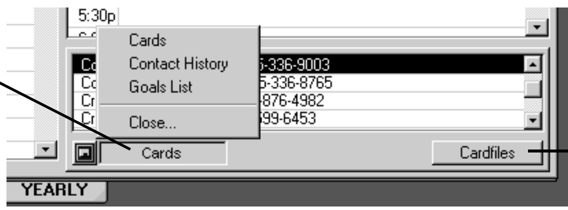



*Set up the arrangement you want for your work space.*

## The Viewport

In the Calendar, the Viewport can display the Card list, the Goals list, or the Contact Log of a specific card. (The Viewport was called View In View in earlier versions of Sidekick.) Select what you want to appear in the window from the list in the lower left corner of the Viewport.

*Click here and choose what to display in the Viewport.*




*If you display Cards, click here to change Cardfiles.*

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 ToDo list, Appointments list, or Calls list to create a new ToDo, appointment, or call containing the text from the card's index line. If the index line includes a telephone number, you can then drag from the ToDo list, for example, to the Call icon to dial the number.

**TIP**

**Select a card in the Viewport. Then create a calendar event. Select a predefined activity in the appointment, ToDo, or call dialog box to merge information automatically from the card.** **See "Personal Lists" on page 38.**

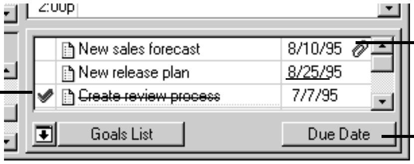
If you display a Contact Log, you see the log for the currently selected card in the Cardfile. You can edit the log. (See "The Contact Manager" on page 58.)

### The Goals list

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

You enter and edit goals the same way as ToDos: type directly onto the list to edit or create them, and double-click the right column to set attributes. You can also choose Calendar|Goals List.

Check off goals as completed.




*To edit a goal's attributes, double-click the right column.*

*Click to choose which attribute to display in the right column: Assign, Category, Enter Date, Due Date, Priority, or Timer.*

Goals have all the same attributes as ToDos, except Recurring. For detailed information on entering tasks and setting their attributes, see "ToDos" on page 28.

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

## Sorting ToDos and Goals

You can sort the ToDo 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.

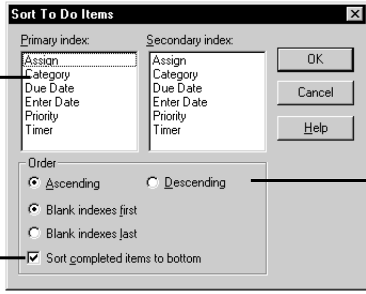
**NOTE** Completed ToDos are automatically moved to the bottom of the list when you click in another part of the Calendar view. Similarly, completed Goals are sorted to the end of the list. If you do not want this automatic sorting to occur, uncheck the box at the bottom of the Sort dialog.

### To sort ToDos or goals

Choose Calendar|Sort, then either Sort ToDo Items or Sort Goals List.

*Select the primary and secondary indexes, meaning the attributes you want to sort on.*

*Moves completed items to the end of the list.*




*Set options you want (see text).*

Choose form 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.

## *Personal Lists*

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

- Predefined activities can save you steps when creating an appointment, call, or ToDo. For example, you might create a predefined activity that says "Call {Firstname} {Lastname} at {Phone}." Then, to create a Call entry to phone someone, you make that person's card active in the Viewport, and use the ToDo dialog box to create a ToDo using this Personal List item.
- Call Status codes are selected in the Call attributes dialog box. They appear in abbreviated form in the right column of the Calls window. You can create or modify the Call Status codes by checking Call Status in the Personal List Setup dialog box.
- The Category and Assign lists are available in the ToDo dialog box. You can create or modify the Category and Assign lists by checking Category or Assign in the Personal List Setup dialog box.

**TIP**

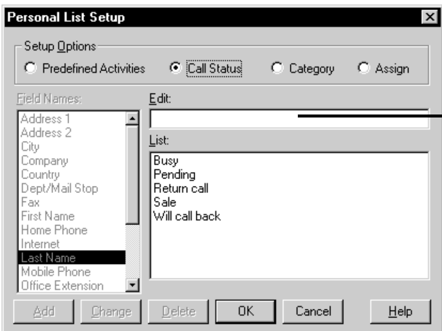
**If the predefined activity includes a phone field, you can place the call by simply dragging the ToDo or Call item to the Call icon.**

### 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.*

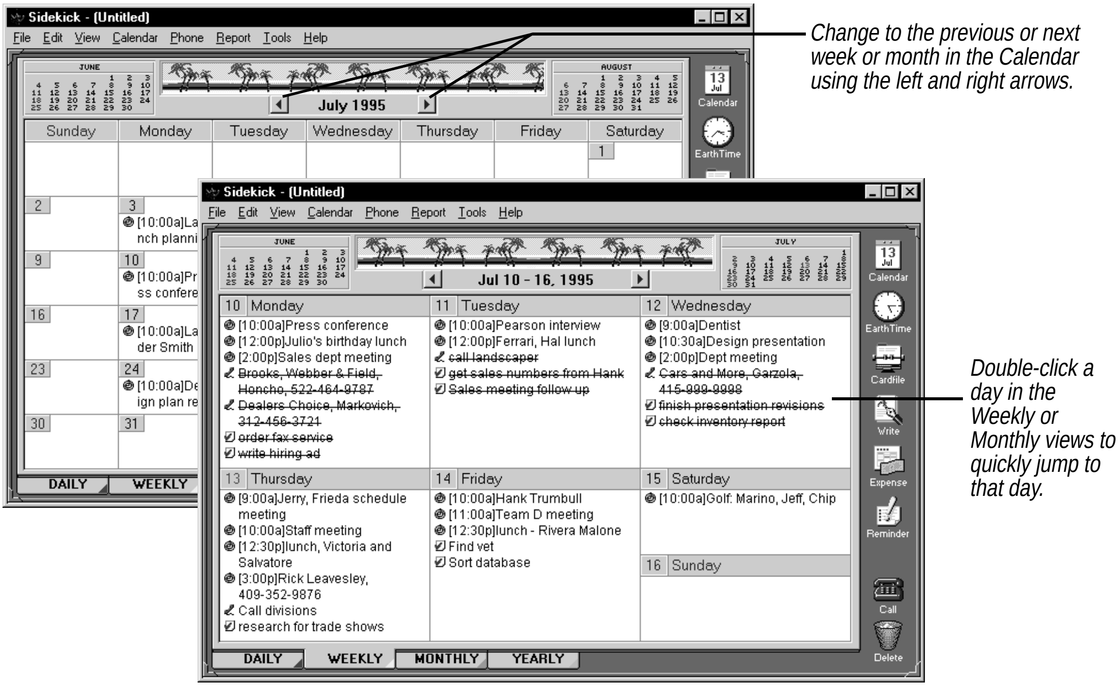



*For call status codes, categories, or assign names, type a description (up to 48 characters) in the Edit box, and choose Add to place it on the list.*

*Up to 127 entries can be added to each list.*

## *The Weekly and Monthly views*

The Weekly and Monthly views display appointments, calls, ToDo 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.




## *Setting up the Weekly and Monthly views*

**To customize the information displayed and printed in the Calendar views**

*1* Choose Tools|Preferences. The Preferences dialog box appears.

*2* Click the Calendar button and choose from Weekly View Setup or Monthly View Setup. The Weekly Calendar Setup or the Monthly Calendar Setup dialog box appears. Both dialog boxes contain almost the same options, listed in the next step.

*3* Select the display options for that view.

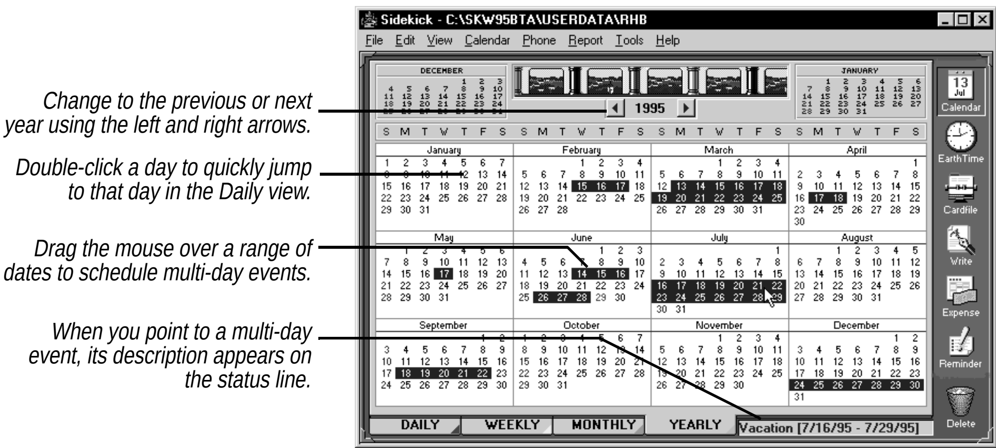
- **View** offers a list of what you can choose to display: multi-day events, special days, appointments, calls, and ToDos.
- **Summary** displays the daily totals for each type of activity, such as the number of calls and ToDos.
- **Detail** displays the following details (if they are selected) for activities.
- **Regarding** displays any comments attached to an activity.

- **Appointments With Duration** shows the ending time for an appointment. (Appointments always show their starting times.)
- **Leading Icon** displays the ToDo, Appointment, or Call icon in front of the description text for each activity.
- **Completed Items** displays activities checked-off as completed (incomplete activities always appear).
- **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.
- **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 (only available in Monthly view).

4 When done, click OK.

## The Yearly view

The Yearly view of the Calendar 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.




Choose Calendar|Yearly Setup from the Yearly view to set the default display of the Yearly calendar. You can choose from a vertical, horizontal, or planner format display.

## Entering activities from glance views

Sidekick's Weekly, Monthly, and Yearly views are referred to as *glance views*.

### To schedule daily activities from the glance views

1. Choose Calendar|Daily Entry. The Add New Daily Activity dialog box appears.
2. Choose the type of activity to add: Appointment, ToDo, or Call. When you click OK, the corresponding dialog box appears.

## 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 appointments area 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.

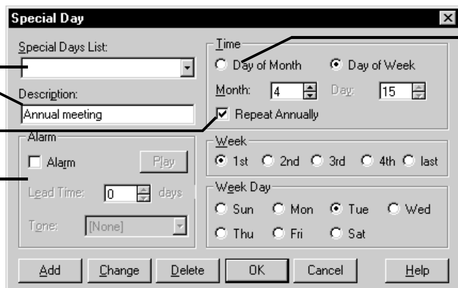
### To add a special day

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 Sidekick is first opened that day.

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 list and click Delete.

## *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 Appointments list. 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.

### To create a multi-day event

1 Choose Calendar|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 an 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.

## Searching the Calendar

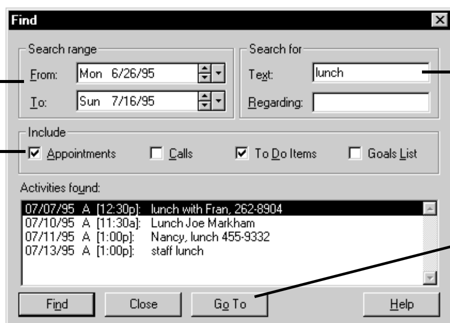
It's easy to find specific entries in your Calendar by searching for text in the descriptions or Regarding notes.

### To search the calendar

Choose Edit|Find from the Daily view. 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.*




*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 59.)*

*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.*

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

You can keep multiple Calendar files in Sidekick to keep different kinds of calendar information, although only one 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. Note, however, that a Calendar file is composed of as many as eight separate files. Sidekick uses part of the filename to differentiate the different files.

Use the commands listed in the following table to work with Calendar files.

| 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. |
| 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. |

## Deleting activities

You can free up space in your Calendar files for new entries or clear away 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 appointments, calls, ToDos, 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.

## *Reconciling appointments*

You can combine the appointments of two Calendar files, bringing the appointments of one into the other. Note that this is different from the Backup and Restore feature, which overwrites one file with another. (See Chapter 11, “Back Up and Restore” for more information.)

**To bring another Calendar file’s appointments into your current Calendar file**

1 Choose Tools|Reconcile Appointments. The Reconcile Appointments dialog box appears.

2 Choose the Calendar file whose appointments you want to bring into the open Calendar file, and click OK. The Reconcile Date Range dialog box appears.

3 Select the desired date range and click OK.

Sidekick brings in all the second file’s appointments within the date range into the open Calendar file.

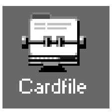
If the second file has any appointments that are identical (same start and end times, description text, and exact attribute settings) to appointments in the open file, the identical appointments are not added. However, if they are at all different, they are added as separate appointments.

**NOTE** Calendars can have up to three appointments starting at the same time. Sidekick will add appointments for any block of time until this limit is reached.

4

# The Cardfile

The Cardfile lets you store, manage, and retrieve all your personal information visually and intuitively in the form of a collection of index cards. Each card can contain full address information and numerous other details about your contacts. Or 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.



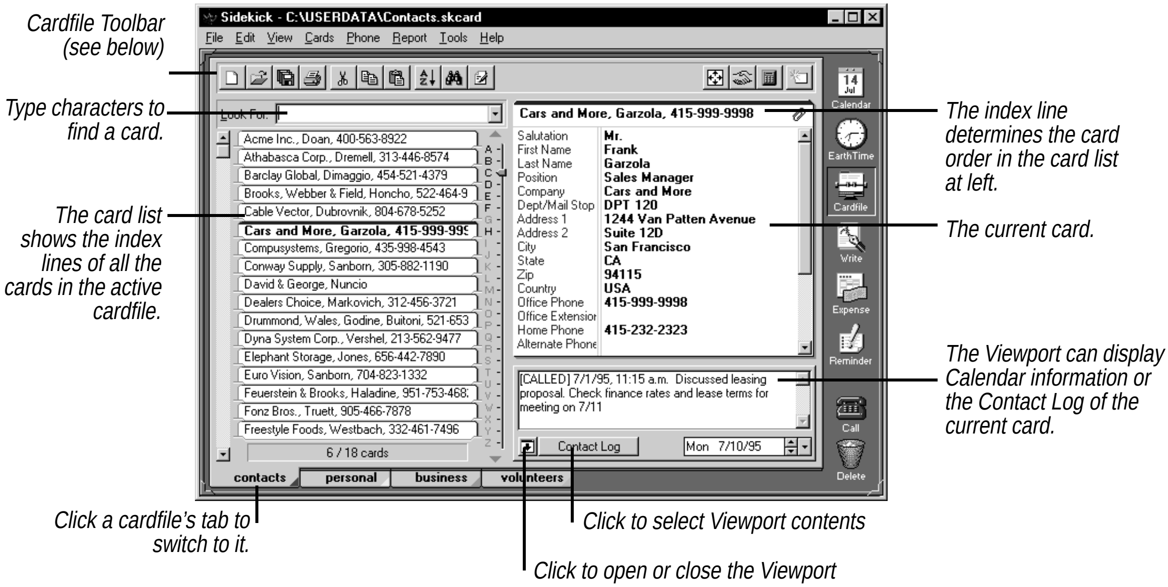

To switch to the Cardfile view, click its Deskpad icon or choose View|Cardfile.

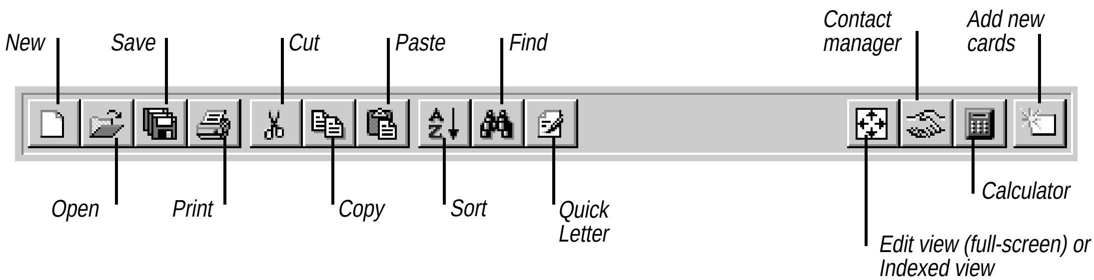
This chapter explains how to

- Create a cardfile and define fields
- Add new information to a cardfile
- Work with cards and cardfiles
- Send e-mail, and import the Microsoft Exchange address book
- Search for and extract information from a cardfile
- Create a Sidekick cardfile from your Microsoft Exchange address book.

## Cardfile basics

On the left side of the view is the card list, your visual index to the cards in the *active cardfile*. To the right is the *current card* in the cardfile. You can review and edit the information in the current card directly.




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 20,000 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 (or reverse alphabetically) by their indexes. You can determine 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, Sidekick displays scroll buttons.

**To go directly to any cardfile**
Choose Edit|Go To Cardfile, or click its tab.

**To reorder the cardfile tabs**
Choose Cards|Reorder Cardfile Tabs.

**To save a cardfile**
Choose File|Save Cardfile. Or choose File|Save Cardfile As to save the file under a different name, or to save as a Sidekick 2.0 file.

**NOTE** Sidekick 95 cardfiles must have the extension .SKCard

**To close the current cardfile**
Choose File|Close Current Cardfile. Or you can close several cardfiles at once, by choosing File|Close Cardfiles and choosing the files you want to close from the list that appears.

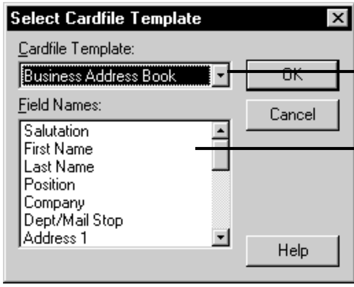
## Creating a cardfile

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. You can even mix these two approaches by customizing a template, keeping some of its fields and replacing the rest with your own. (If you're creating a cardfile based on an imported file with its own fields, see "Importing" on page 68.)

### To create a new cardfile

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

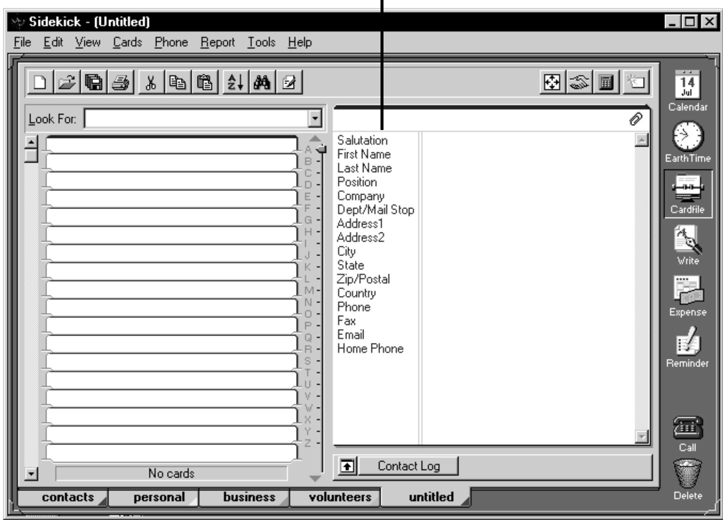
*NOTE If no cardfiles are open, use Cards|Define Cardfile Fields to open this dialog box.*




*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.*




You can use any of the cardfile templates provided with Sidekick or created by you. (See “Creating and editing cardfile templates” on page 56.) 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 change any of the fields after creating the cardfile, see the next section, “Creating and changing cardfile fields.” If you’re ready to begin entering data into your new cardfile, refer to “Adding cards” on page 52.

If your template choice was None, the Define Cardfile Fields dialog box appears. Create the fields you want as described in the next section. When you’re satisfied with your cardfile, begin adding cards, as described on page 52.

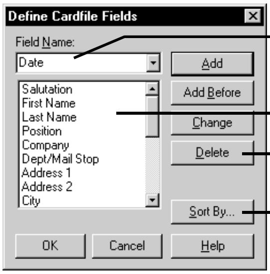
## *Creating and changing cardfile fields*

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.

**CAUTION** Be careful when deleting a field; you'll delete the field itself and any data contained in that field on every card in the cardfile. There is no Undo when you delete a field.

### To create or modify cardfile fields

Choose Cards|Define Cardfile Fields. The Define 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.* *See "Sorting the cardfile by index" on page 53.*

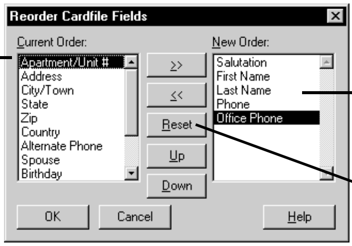
When you're done defining fields, click OK to save the changes you made and update the cards in the cardfile.

## *Reordering fields*

### To change the order of the fields in a cardfile

Choose Cards|Reorder Cardfile Fields.

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




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

*Click Reset to return to the original order.*

## *Repeating field data*

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

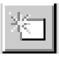
**NOTE** If you already have cards in the cardfile, specifying this default text won't add it to them. It only adds the text to any cards you create after specifying the text.

### To specify default data for a field

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

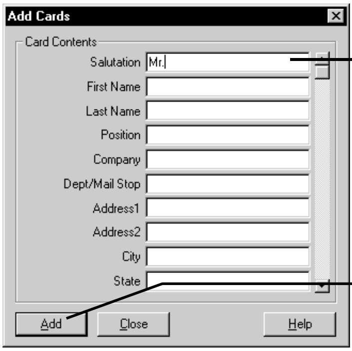

*Select the field and type a colon ( : ) followed by the default information you want. In this example, "USA" will appear in the Country field of new records (you can change it for non-US addresses by typing over it).*

## *Adding cards*



### To add a card to the cardfile

Choose Cards|Add Cards, or click the Add Cards button on the Card Toolbar. The Add Cards dialog box appears with a listing 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).*

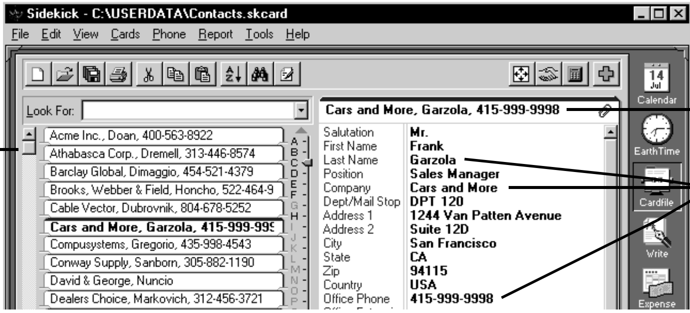
*Each field can hold up to 98 characters. If more than 10 fields exist for the current cardfile, a scroll bar appears at the right of the dialog box.*

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

## Sorting the cardfile by index

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

*Card indexes appear here.*




*This index...*

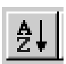
*...is composed of the information from these three fields.*

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.

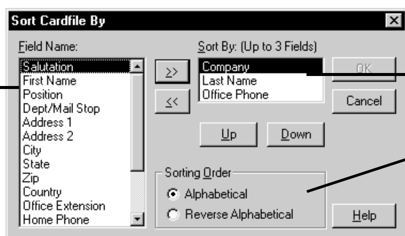
In addition to determining the sort order, the index determines what appears in the left side of the screen, and in the Viewport of other views. If you want to be able to see a telephone number for each card in the left side of the window, be sure to include the telephone field in the index.

> **TIP**
>
> **You can dial a call by dragging a card from the card list to the Call icon.**

### To define the index



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




*1 Select up to three fields one-by-one and click >> to move them to the Sort By list.*

*2 You can change their order by clicking one and using the Up and Down buttons to move it.*

*3 Choose the sorting order (alphabetically or reverse alphabetically) for the card list.*

## 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 by Sidekick. For instance, if you enter the numbers from one to twenty into fields, 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 95/10/14 or 68-06-19.

## *Editing and viewing cards*

Once a card has been added to the cardfile, you can change or add information by typing directly on the card (for information on editing a cardfile created by importing the Miscrosoft Exchange address book, see page 55).

**To edit a card**

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

## *Navigating through the cardfile*

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

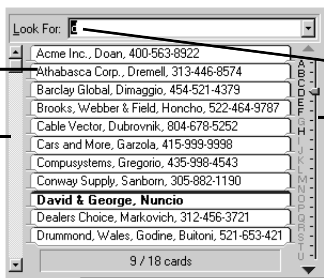
**To move quickly to the first card beginning with a specific letter**

Type the letter in the Look For box. The cursor jumps to the first card whose index starts with that letter. See "Quick search to find a card" on page 60.

The navigation aids are shown in the following figure.

*Click the index line to make select a card.*

*Scroll bar. Click the arrows, or drag the slider up or down to move through the cardfile.*

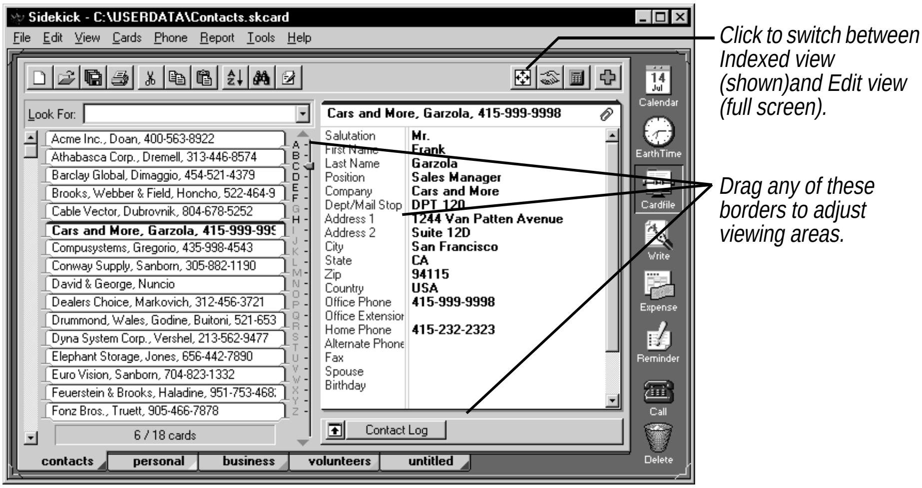



*Type the first letter to jump to the first card whose index starts with that letter.*

*Or you can click the letter you want, or drag the marker up or down.*

## *Changing the view*

There are several options for changing the way your data appears in the Cardfile view.




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

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

## *Sending card data by e-mail*

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

**To send a card by e-mail**

Right click the card you want to send, and choose Send E-mail from the shortcut menu.

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

## *Importing the Microsoft Exchange address book*

You can open your Microsoft Exchange address book as a cardfile in Sidekick 95. When you do, you can select cards from the imported Exchange address book for sending e-mail.

**To open your Exchange address book as a cardfile**

Choose File|MS Exchange Cardfile. Choose the address book you want in the dialog box that appears.

The Exchange address book appears as a tab in your current cardfile.

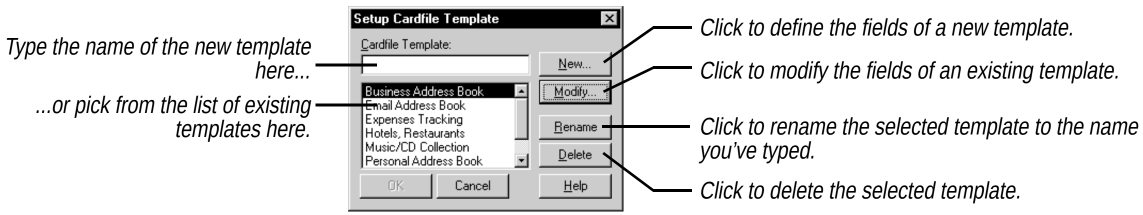
**To edit a card in the imported Exchange address book**
Double-click any field in the card. The Properties dialog box for that card opens, and you can make editing changes there.

**NOTE** You can edit imported Microsoft Exchange address data only for a personal address list. The primary post office address list can be modified only by the administrator.

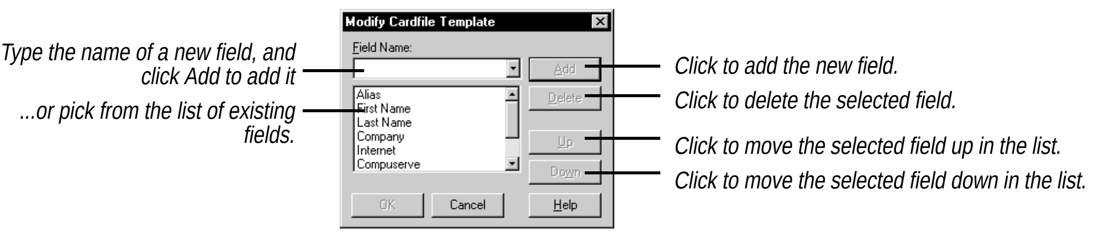
## *Creating and editing cardfile templates*

Cardfile templates help you create a new cardfile quickly and easily (see “Creating a cardfile” on page 49). Not only can you use the templates that Sidekick provides, but you can also create your own, or edit the existing ones.

**To create or modify a template**
Choose File|Setup Cardfile Template. The following dialog box appears.




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




## *The Cardfile in the Viewport*

Your Sidekick cardfiles are available in other views by means of the Viewport. This feature lets you use the information in your cardfile in a number of different ways:

- In the Calendar, you can drag a card from the Viewport to an appointment time, the ToDo list, or the Calls list to create an entry using that card's data. See "The Viewport" on page 36.

- 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 form the Viewport to the template to instantly create a letter or document that is "personalized" to the person on the card. See "Merging cards" on page 85.

- In any view, or in the cardfile itself, you can drag a card to the Call icon to dial the first phone number on the card. See Chapter 8.

## *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 9)
- Copying or moving cards from one cardfile to another (see "Moving cards between cardfiles" on page 65)
- Merging cards with Write documents (see "Merging cards" on page 85)
- Creating reports (see Chapter 10)
- Extracting (see "Extracting cards" on page 63)

## *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, since 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 and choose Mark Card in the menu.

**To unmark a card**

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

**To unmark all marked cards in a cardfile**

Choose Cards|Unmark All Cards.

## *Deleting cards*

**To delete cards**

Select their indexes from the card list and drag the selected cards to the Delete icon. Or choose Cards|Delete Cards, 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.

## *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 Card. Select the number of copies to make and choose OK.

## *The Contact Manager*

Use the Contact Manager to search your appointments, calls, ToDos, 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 a person 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 that person appear in the Contact Manager dialog box.

## *Searching for activities*

### To search for a contacts

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


All activities found appear in the list, including appointments, calls, ToDos, and Contact Log entries.

The broader your search is, the longer it takes to complete it. 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.

## *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 ToDo.
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 appointment, call, or ToDo as described earlier in this chapter.

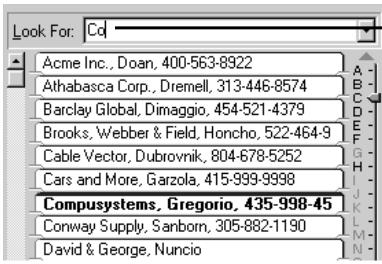
# Searching

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. Sidekick displays the first card matching the search criteria as the current card.

## Quick search to find a card

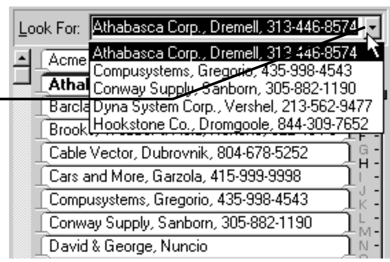
You can search the Card list for text contained in the index lines of each card. As you type text into the Look For box, Sidekick displays the first card whose index begins with the text you're typing.

In the following example, typing "c" takes you to the first record whose index begins with a 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, Sidekick moves immediately to the first record whose index begins with "co".*

*If you press Enter after typing "Co", 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).*



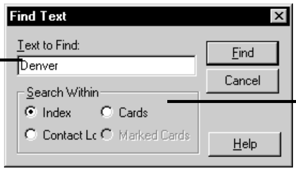

## Searching for text within a card

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 type Ctrl+F. The Find Text dialog box appears.

*Type the text you want to find. You can search for complete and partial text matches, dates, or combinations of numbers.*




*Select the part of the cardfile to search for the text.*

Click Find to begin the search. 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 back in your search.

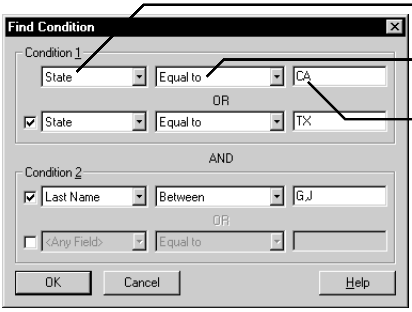
## *Finding conditions*

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 determine which customers are behind in their payments by finding cards that have a balance greater than zero.

### To perform a conditional search

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




*1 Select the first field to search in Condition 1.*

*2 Select the operator you want from the operator list.*

*3 Type the value you want to find in the selected field.*

*For additional conditions, check the appropriate condition's check box and repeat Steps 1 through 3.* *See "Specifying operators"* *for an explanation of operators.*

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 back in your search.

## *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 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 as well as with 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. |
| 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. |

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 1956 to 1994, type 1956,1994. To

indicate the range of words from smi to tru, type smi,tru. Searches are not case sensitive.

- Cardfile fields are text fields, not numeric fields. (See "Using numbers in fields" on page 53.) Make sure to enter numbers with leading zeroes (01, 02, 03, and so forth) if you want to be able to sort them correctly.
- 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 used above—finding text in an index line, Contact Log, or cards, or searching for cards according to specific conditions—can be the basis for extracting cards into a new file.

### Extract on index range

**To copy an alphabetical 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.

### Extract 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 text string specified.

## Extract on condition

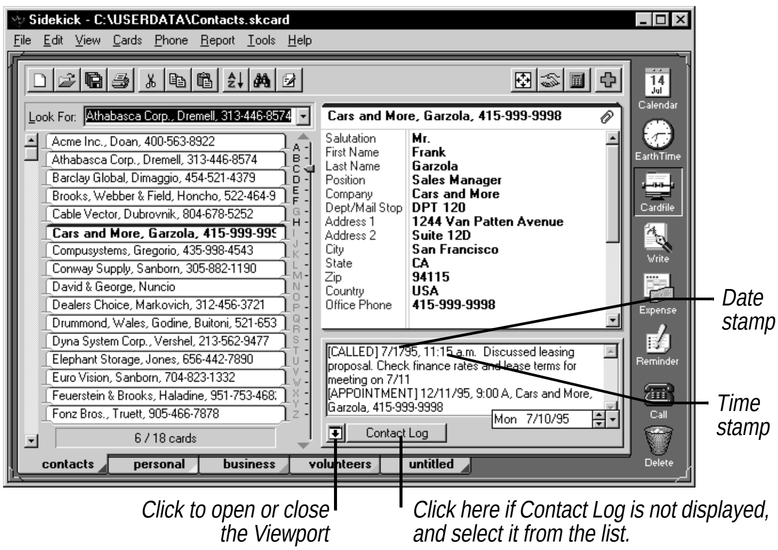
Extracting cards on condition is just like searching a cardfile for specific conditions. The only difference is that instead of merely jumping to the first card matching your condition, the Extract Cards On Condition function creates a new cardfile containing *all* the cards matching your conditions.

**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 61. When the search is complete, a new cardfile appears containing copies of only those cards from the original cardfile that meet the conditions specified.

## Using the Contact Log

You can display the Contact Log in the Viewport. The history of the current card is shown.




The Contact Log can store a great deal of additional information about a card (up to 14k 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 100.)
- Completed appointments that were saved to the log. See page 28.
- Mail merges that have been performed with Write documents. (See “Merging cards” on page 85 for more information on mail merges.)

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 mailmerge, Sidekick stamps [DOCUMENT] to the Contact Log along with merge information.

## *Moving cards between cardfiles*

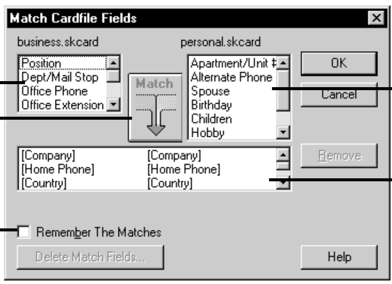
You can move a group of selected cards between cardfiles by dragging them. (To learn how to drag cards, see “Drag and drop” on page 19.) Dragging a group of cards onto another cardfile’s tab moves those cards into the other cardfile. If you want to copy cards instead of moving them, press and hold *Ctrl* while dragging and dropping.

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 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, 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 (see the following options). Click OK when done.
    - **Replace Cards** replaces the cards in the open cardfile with the cards from the second cardfile.
    - **Retain Cards** retains the cards in the 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. Specify any matches you want between fields by highlighting a field from each cardfile and clicking the Match button. Click OK when done. For more information on the Match Cardfile Field dialog box, see "Moving cards between cardfiles."

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 20,000 total cards. If the number of cards resulting from a merge would be greater than 20,000, you will see a message, and the merge will not occur.

## *Importing and exporting cardfile data*

You can import cardfile data from and export cardfile data to other applications. Sidekick supports the following file formats when importing to or exporting from a cardfile.

| File Format | Description |
|---|---|
| dBASE III (.DBF) | File format editable by most applications that can read dBASE. |
| dBASE IV (.DBF) | File format editable by most applications that can read dBASE. |
| Paradox (.DB) | Paradox 3.5 .DB format created or edited in Paradox. Also for files created by Sidekick 2.0 for DOS (import only). |
| Spreadsheet Data Interchange Format (.DIF) | File format editable by many spreadsheet and word processor applications. This format should not be confused with Navy Data Interchange (DIF), which is not currently supported. |
| Tab-delimited Text (.TXT) | ASCII text file format in which each tab represents the end of a field. Tabs within quotation marks are treated as normal characters and not delimiters. There should be an even number of quotation marks in each line. A hard return represents the end of a record. The first line of the text file is used for cardfile field names. |
| Comma-delimited Text (.CSV) | Text file format in which each comma represents the end of a field. Commas within quotation marks are treated as normal characters and not field delimiters. There should be an even number of quotation marks in each line. A hard return represents the end of a record. The first line of text is used for cardfile field names. |
| Microsoft cardfile (.CRD) | File format created and edited by the Microsoft Windows 3.1 Cardfile application. See "Importing text from the Microsoft cardfile" on page 69 for more information. |

Since the 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.

**NOTE** When importing data from dBASE III, dBASE IV, and Paradox files, the contents of memo fields, embedded graphics, and other binary objects are not included in the resulting Sidekick cardfile.

These are the maximum values for importing and exporting cardfile data:

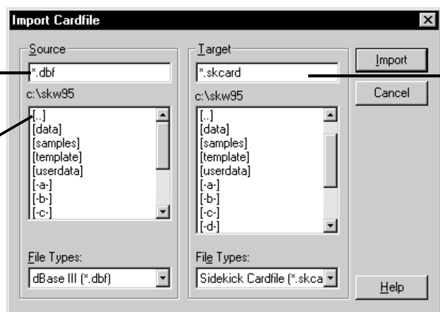
- Maximum number of characters in a field: 98.
- Maximum number of characters per record or card: 5,000.
- Maximum number of records: 20,000.
- Maximum number of fields to a record or card: 100.

## Importing

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

### To import text data into a cardfile

Choose Tools|Import Cardfile. The Import dialog box appears.

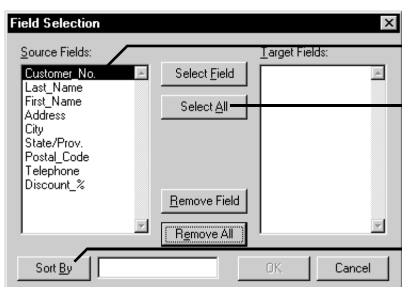



*Select the source file to import.*

*Two dots [..] means move up to higher folder.*

*Type the name of the target file you are creating. It must have the extension SKCard.*

Select the source and target files, and then click the Import button. The Field Selection dialog box appears, showing the fields available from the Source file.




*Select fields you want, and click the Select Field button.*

*Or click Select All button to move all fields to the Target Fields list.*

*Select a field in the Target list and click Sort By to specify the index field for sorting the cardfile.*

Select the fields for the target file. You must select at least one field. You must also select a field in the 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 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.

### *Importing text from the Microsoft cardfile*

You can import text from the Windows 3.1 Cardfile application. Choose Microsoft Cardfile (.CRD) as the file type for the source. A Field Selection dialog box appears, displaying the data from the first record in the cardfile and automatically entering one field name for each line in the Enter Field Names box.

The Field Names are listed as Field 1, Field 2, and so on. Edit each field name as necessary to label the data on each line of the Windows card.

Each line of the Microsoft cardfile card is treated as a separate field in the Sidekick cardfile. You can use the First, Last, Next, and Previous buttons to scroll through the available cards in the Microsoft cardfile and make changes to align data with the field names.

The original index line of the Microsoft cardfile is automatically imported to a field called Index in your new Sidekick cardfile.

**NOTE** Sidekick can only import text from the Microsoft cardfile format. Any graphics or OLE objects must be removed from the Microsoft cardfile before it can be converted to the Sidekick format.

## *Exporting*

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

**To export a cardfile**

1. Choose Tools|Export Cardfile. The Export dialog box appears.
2. Select the Sidekick cardfile (*.SKCard) you want to export from the files list, switching directories as needed to find the file.

3. In the Target group, select the file format to export the cardfile to in the File Types list, and the target directory to which the exported file should be saved. Give the new file a name.
4. Click Export. The Field Selection dialog box appears, showing the fields available for export from the cardfile.
5. Double-click the fields to export in the Source Fields list to place them in the Target Fields list. Click Select All to export all the fields in the same order as the Source Fields. At least one field must be selected.
6. Click OK to begin exporting the cardfile.

5

# The Write view

The Write view gives you the key features of a word processor for creating and formatting documents. Use the Write view to create letters and reports, complete with font control and other formatting options.

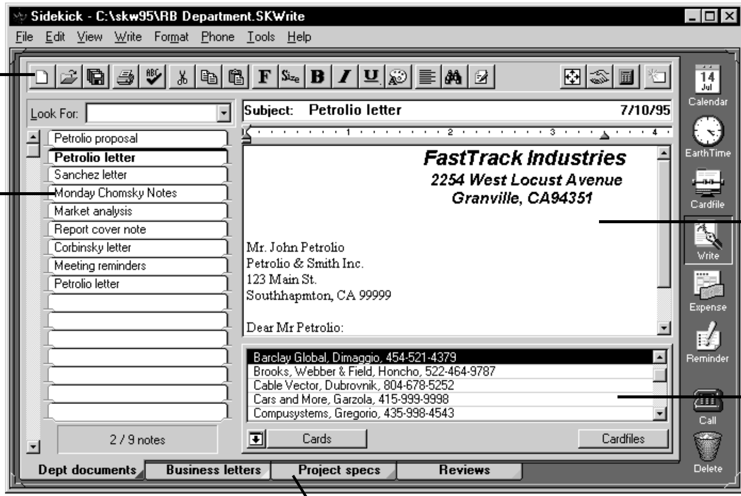
You can view your Write documents in full-screen edit view to make writing and editing easy. Or switch to an indexed format, so you see the titles of documents on the left and the text of the current one on the right. Sidekick also makes it easy to create a form letter and print a copy whenever you need it, personalized for someone in your cardfile.

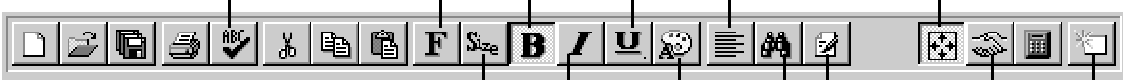

**To switch to the Write view**

Click the Write Deskpad icon, or choose View|Write.

This chapter explains how to

- Create and edit Write files, folders, and documents
- Search Write documents
- Use Write templates provided with Sidekick 95
- Use drag-and-drop with your Write documents
- Send electronic mail using Microsoft Exchange
- Fax a document directly from Sidekick
- Use Quick Letter and merge cardfile data into Write documents
- Import and export from Write




## Documents, folders, and files

Folders help you organize your documents by topic. A Write file can contain many folders. Each folder contains one or more documents. Here's how the organization looks:

- File (only one can be open at time)
  - Folder
    - Document
    - Document
  - Folder
    - Document
    - Document
    - Document
  - Folder

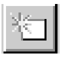
Each folder in a Write file is identified by a tab at the bottom of the Write screen. Using folders, you can organize documents according to projects, tasks, people, subject, or any other grouping. You can set up as many as 256 folders for documents, and add, rename, or delete them at any time.

## Creating documents

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

**To create a document**

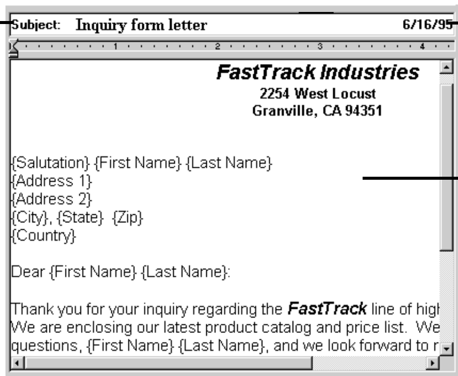
1 Click the tab of the folder where you want the document.



2 Click the Add Document button or choose Write|Add Document. A new, blank document appears, with the insertion point in the subject line.

3 Type a subject, and then press *Tab* or *Enter* to move into the body of the document. Type whatever text you like.

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

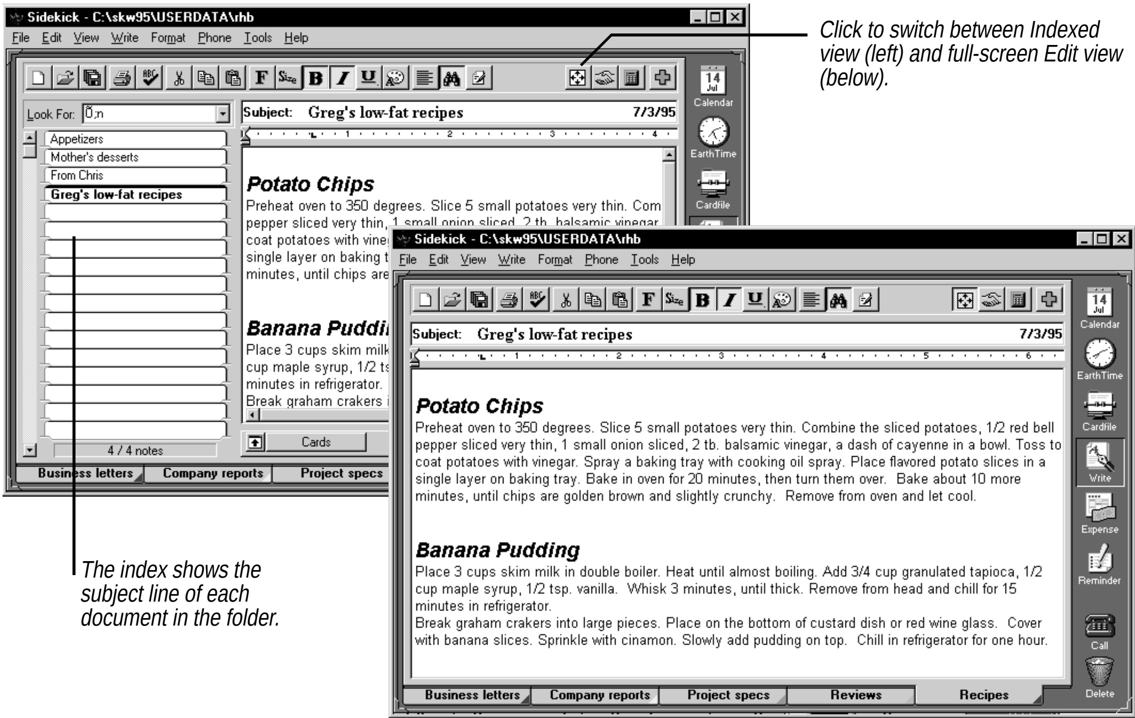



*The date the document was created appears here.*

*Type directly in the document.*

## Using full-screen editing

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

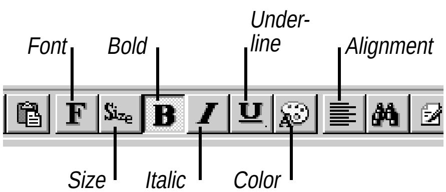



## Fonts and formatting

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 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.

## *Sending electronic mail*

Once you have created a Write document, you can send it by electronic mail with the click of your mouse.

**NOTE** This feature requires that you use Microsoft Exchange for your e-mail.

**To send a document as electronic mail using the Microsoft Exchange address book**
Right click on the document, and choose Send E-mail from the shortcut menu.

Microsoft Exchange opens. Click the To: button, and complete the addressing information. Then click the Send button. Your document text is sent to the recipients you specified.

## *Using the imported Exchange address book*

You can send e-mail to people in your imported copy of the Microsoft Exchange address book. First you must import the address book as a Sidekick cardfile (see "Importing the Microsoft Exchange address book" on page 55).

**To send e-mail to your Exchange address book cardfile**

1. In the Write page, set the Viewport to display Cards, and 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. If you don't make a specific selection, Sidekick uses the current card.
3. Right-click on the Write document you want to send, and choose Send E-mail from the shortcut menu.

The Microsoft Exchange window opens with the addresses you selected filled in, and the document in the text field.

## Faxing a document

You can fax a document directly from 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.

### To fax a Write document

1. Select one or more cards in the Viewport. (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, Sidekick uses the current card.
2. Right-click the document and choose Fax from the shortcut menu. The document is faxed to all cards you selected.

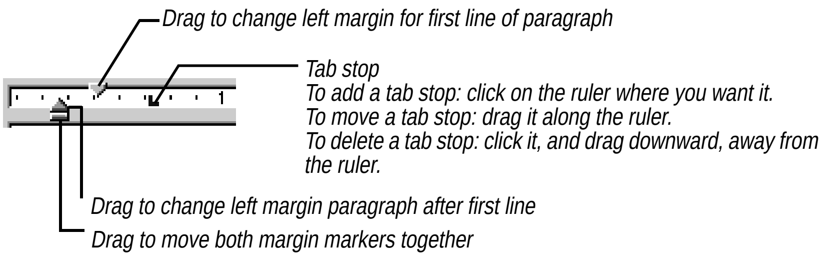
### To change the cover page sent out with your faxes

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.

## Changing margins and tabs

Use the ruler when you want to change margins or set a tab stop.

**To see the ruler, choose View|Ruler.**

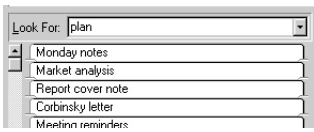



## *Finding text*

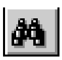
You can search through the text of a document, or all documents in a folder, at the click of a button.

**To find text in the current document using the Look For box**

Type the characters in the Look For text box, and press Enter. To go to the next instance of the characters in the current document, press *F3*.

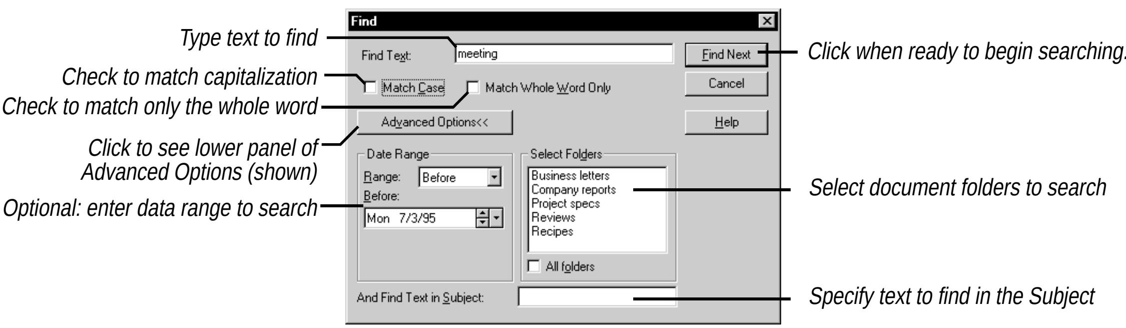



The Find dialog box gives you more flexibility in searching for text. It searches through all documents in the current folder, or in all folders you specify.



**To find text using the Find dialog box**

Click the Find icon to open the Find dialog box.




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

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

**Folders to search**. Specify all folders, or only certain folders.

## *Found text*

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

**TIP**

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

### To see all instances of your Find text

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


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

## *Replacing text*

### To find and replace text

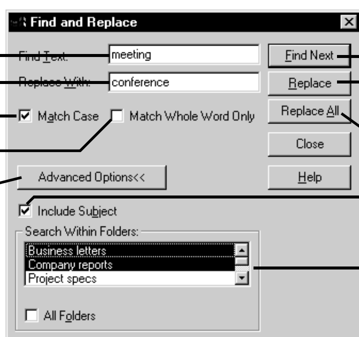
Choose Edit|Replace to open the dialog box shown here.

*Type the text you want to replace and the replacement text.*

*Check box to match capitalization*

*Check box to find whole words only*

*Click to see lower panel of Advanced Options (shown).*




*Click Find Next to go to the next instance.*

*Then click Replace to replace it, or Find Next to skip it and continue search.*

*Click Replace All to automatically replace all instances.*

*Check box to include subject in search.*

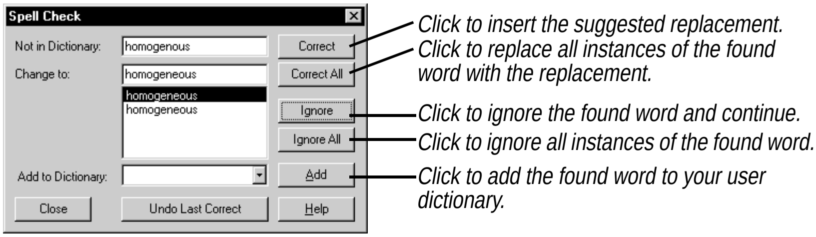
*Select folders to search, or check All Folders.*

# Checking your spelling

Sidekick's Spelling Checker can find your spelling and typing errors.

**To check the spelling in a document**

Choose Tools|Spelling Check. The spelling check begins at the start of your document. When an error is found, the Spelling Check dialog box opens.



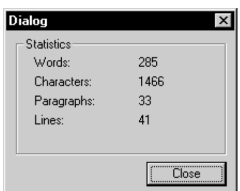

The Spelling Checker comes with a dictionary of 90,000 words. Using the Add button, you can create a personal dictionary of words and names that you want to be recognized as correctly spelled.

# Counting words

When you need a count of the words in a document, let 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.

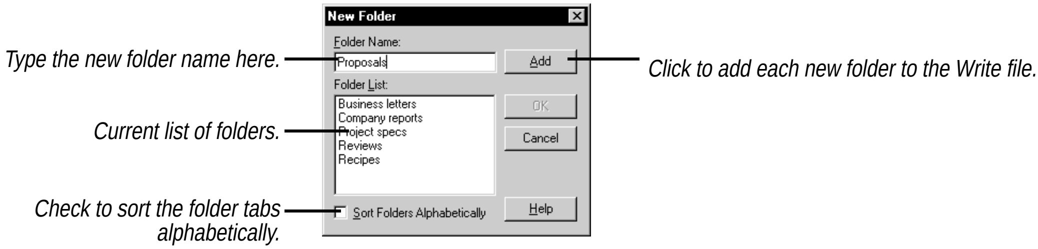



# Using folders and files

**To create a new folder**

1. Choose Write|Folder|New Folder. 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 Folder.

2 Select the folder from the list and choose Delete.

All documents contained in the folder will be deleted.

### To change a folder's name

1 Choose Write|Folder|Edit Folder Name, 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|Reorder Folder Tabs.

2 Select each folder name and choose Up or Down to move it in the list.

## *Creating, saving, and opening files*

A new Write file initially contains one unnamed folder, and no documents.

### To create a new Write file

Choose File|New Write File.

**To save a Write file**

Choose File|Save Write File, or click the Save All button in the Toolbar.

If you want to save a file under a new name, choose File|Save As and specify the name.

**To open an existing Write file**

Choose File|Open Write File, and select the file.

## 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, after you select them.

### Selecting documents

**To select multiple documents, do either of the following:**

- Click a document's subject line in the Documents 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 documents 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 87)
- Printing (see Chapter 9)
- Moving documents from one folder to another (see "Moving documents between folders" on page 83)

### 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, since 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|Mark Current Document, press *Ctrl+K*, or right-click the document in the documents list.

### To unmark a document

Choose Documents|Unmark Current Document, press *Ctrl+K*, or right-click it in the documents list.

### To unmark all marked documents

Choose Write|Unmark All Documents.

## *Deleting documents*

You can delete a single document, selected documents, or marked documents.

### To delete documents

Select them from the Documents list and drag them to the Delete icon (see “Drag and drop” on page 19). Or choose Write|Delete Documents, where you can choose to delete the current document, selected documents, or marked documents.

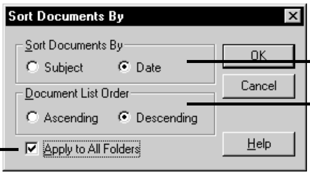
## *Sorting documents*

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)

Click the Sort button in the Toolbar, or choose Write|Sort Documents. 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.*



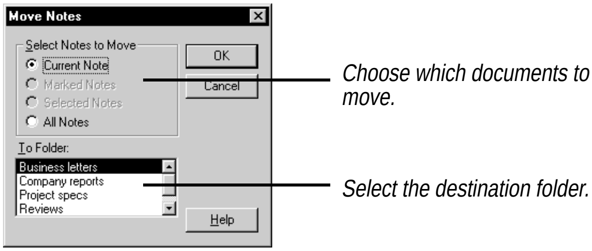

*Select either Subject or Date for the sorting.*

*Select either Ascending or Descending for the order of 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 choose Write|Move Documents, which displays the Move Documents dialog box.




# Quick Letter

Sidekick's Quick Letter feature instantly creates a letter from information in the current card, formatted and ready for you to just type the text. Although Quick Letter operates in the Write view, you can activate it from Cardfile and Calendar views as well.

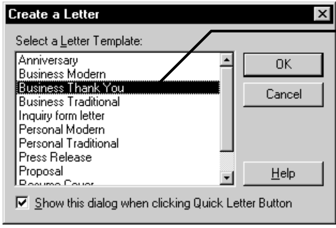
Quick Letter makes use of merge templates that specify where different pieces of information from the card should be placed in the document. Sidekick comes with pre-defined templates, based on the fields used in the Business and Personal cardfile templates. You can create or modify merge templates, and 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" on page 84).

## Creating a Quick Letter

**To create a Quick Letter**

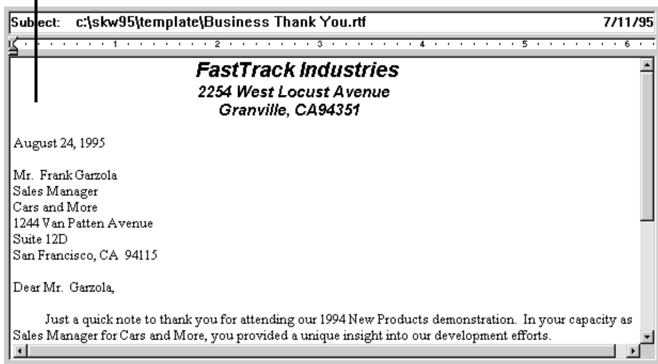
1. In the Cardfile, or with the Cardfile displayed in the Viewport, click on the index of the card you want to address your letter to.
2. Click the Quick Letter button, or choose Tools|Quick Letter.

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

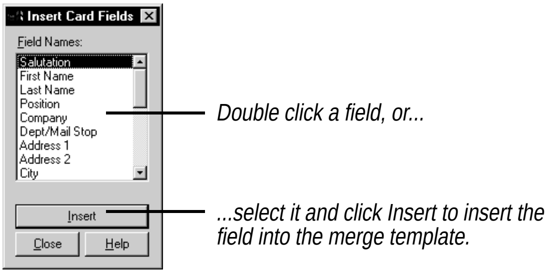
A merge template is composed of *constant text* and *fields*. Constant text, like “Dear,” or the text of a letter, remains the same on all the resultant merged documents. Fields, like `{First Name}`, insert different text into the merged documents depending on the information in the cardfile. By combining both of these kinds of text, you end up with, for example, `Dear Jennifer` on one document and `Dear Patrick` on another.

### To create a merge template

1 Write the constant text, such as the content of a letter, in a new document.

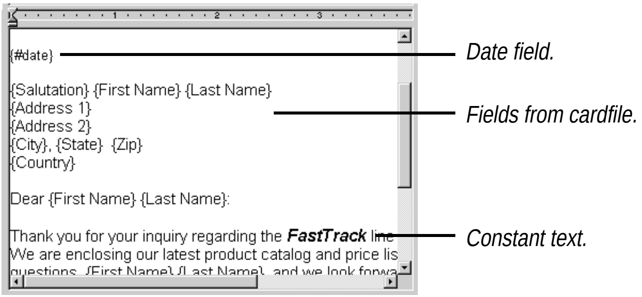
Be sure to include such unchanging information as your return address at the top. You can apply whatever fonts and formatting you need for an attractive letter.

**2** Insert fields from the active Cardfile where appropriate. To insert fields, choose Tools|Create Merge Template. The Insert Card Fields dialog box appears.




Inserted fields appear in the merge template between braces, like this: `{Last Name}`.

You can also insert the date or time a document was merged using two special fields. Type {#date} or {#time} in your document template to insert them. Just type the characters {#date} or {#time}, and the actual date or time will be filled in at the time of the merge.




## *Merging cards*

Sidekick makes it easy to create custom documents by merging any number of cards from your Cardfile to create personalized letters.

Sidekick's mail merge uses the same templates as Quick Letter. Using a template, you can select one or many cards and drag them from the Viewport to the template to create personalized letters.

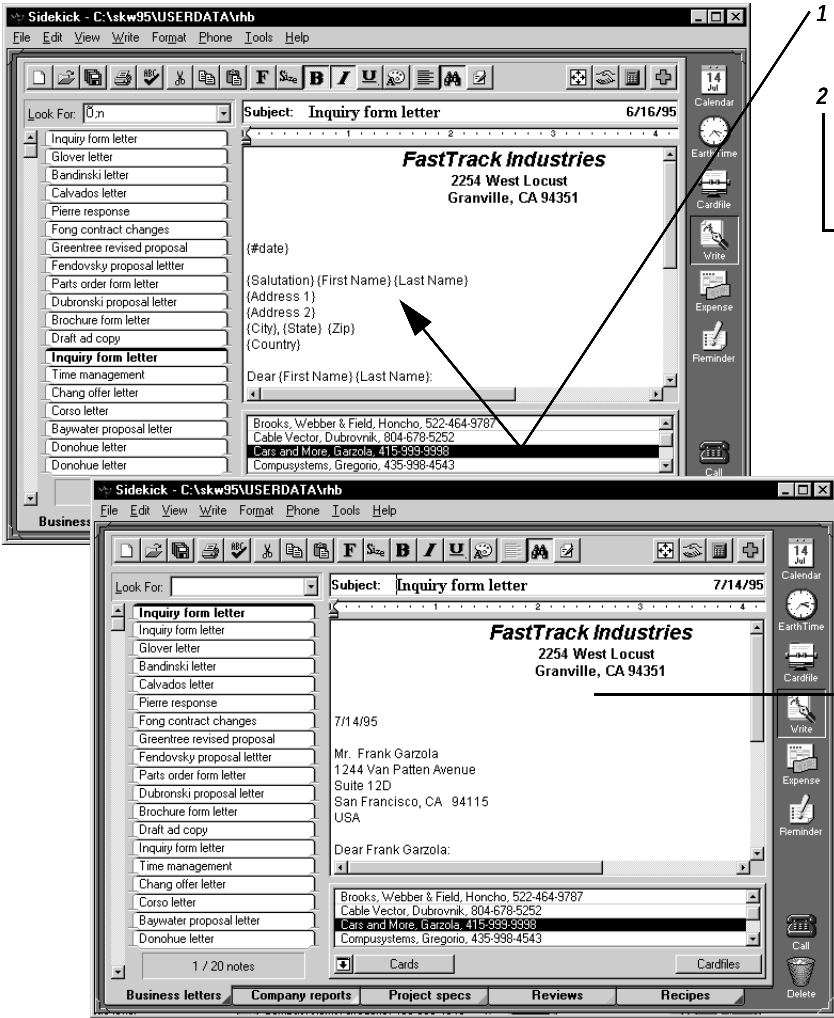
## Merging the cards

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.

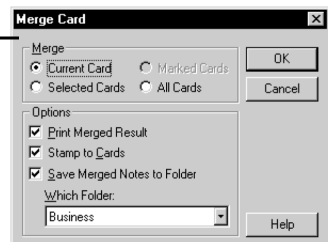
### To merge one or more cards

Drag the card or cards from the Viewport to the Write template. Or you can choose Tools|Mailmerge.




*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.*

Use the options in the Merge Cards dialog box if you want to stamp the subject lines of these new documents to the selected cards' Contact Logs.

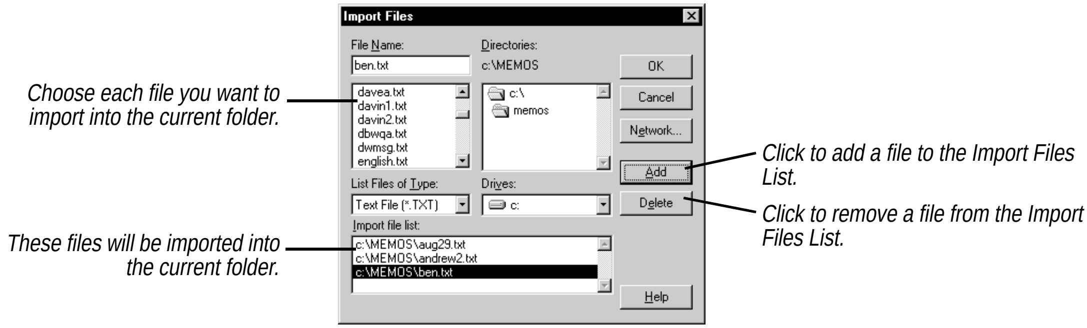
To merge multiple cards using drag and drop, select or mark them before you drag them from Viewport to the document window.

## *Importing text files*

You can import any text 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 Tools|Import Files. The Import Files dialog box appears.




## *Exporting documents*

You can export the current document, selected documents, marked documents, or all documents to an ASCII text file or rich text format (RTF) file.

### To export a document

Choose Tools|Export Documents. 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.

## *Combining documents*

**To add to the open file all the documents and folders from another file**

1. Choose Tools|Combine Write Files. The Merge With dialog box appears.
2. Select the document file you want to merge with the open file, and click Open.

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 Sidekick Expense view makes it easy to enter information from a pile of expense receipts, and create an expense report.

This chapter discusses

- Entering information from your receipts
- Using expense categories
- Creating the expense report

## The Expense view

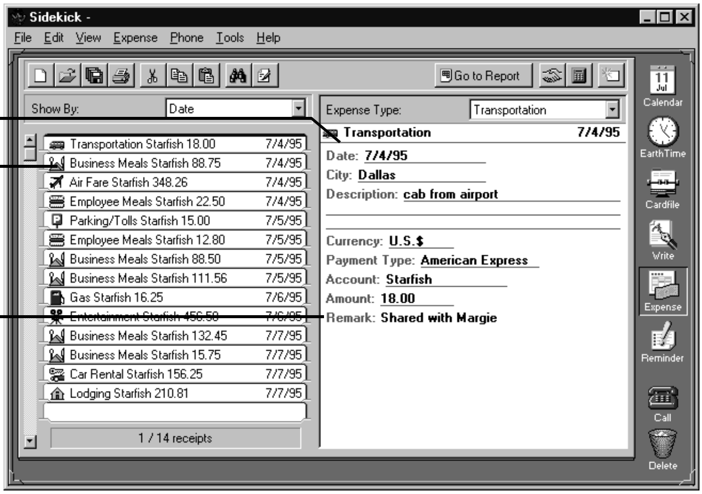
### To open the Expense view

Click the Expense icon on the Deskpad, or choose View|Expense report.

*Enter or edit current expense receipt information here.*

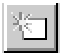
*Summary of receipts entered. Click a receipt to edit its contents.*

*You can enter more information about a receipt in the Remark section*



# Entering and editing receipts

Creating an expense report usually begins with a pile of receipts. Sidekick lets you start entering directly from the receipts, without the need to sort or categorize first.



### To enter information from a new receipt

Click the Add Receipt button.


*Click to add a new receipt.*

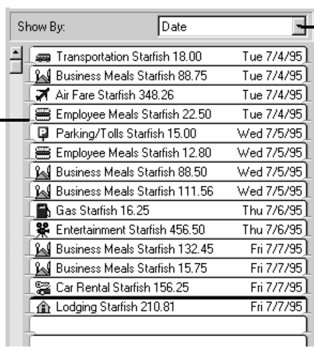
*Click to choose expense type.*

*Enter receipt information here. Most fields include a drop-down list you can select from to speed up you data entry.*

### 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 on the right side.

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.




*Click to choose the sort order of receipts.*

*Click the receipt you want to edit*

### To enter a cash advance

Follow the same procedure as for a receipt, but choose Cash Advance as the expense type.

# 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

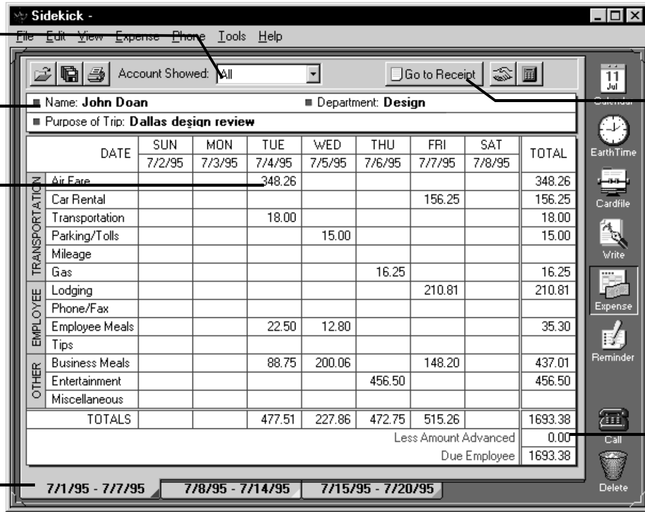
Click the Go To Report button, or choose View|Report view.

*Click to change account displayed.*

*Click to edit name and trip information.*

*Double click an expense entry to go to that receipt.*

*The tabs show weekly periods covered by receipts.*



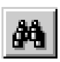

| DATE | SUN 7/2/95 | MON 7/3/95 | TUE 7/4/95 | WED 7/5/95 | THU 7/6/95 | FRI 7/7/95 | SAT 7/8/95 | TOTAL |
|---|---|---|---|---|---|---|---|---|
| Air Fare | | | 348.26 | | | | | 348.26 |
| Car Rental | | | | | | 156.25 | | 156.25 |
| Transportation | | | 18.00 | | | | | 18.00 |
| Parking/Tolls | | | | 15.00 | | | | 15.00 |
| Mileage | | | | | | | | |
| Gas | | | | | 16.25 | | | 16.25 |
| Lodging | | | | | | 210.81 | | 210.81 |
| Phone/Fax | | | | | | | | |
| Employee Meals | | | 22.50 | 12.80 | | | | 35.30 |
| Tips | | | | | | | | |
| Business Meals | | | 88.75 | 200.06 | | 148.20 | | 437.01 |
| Entertainment | | | | | 456.50 | | | 456.50 |
| Miscellaneous | | | | | | | | |
| TOTALS | | | 477.51 | 227.86 | 472.75 | 515.26 | | 1693.38 |
| Less Amount Advanced | | | | | | | | 0.00 |
| Due Employee | | | | | | | | 1693.38 |

*Click to go to Receipt view.*

*If you have entered a cash advance, it appears here.*

**NOTE** The expense report is not directly editable. To change information, return to Receipt view and make changes in the receipts.

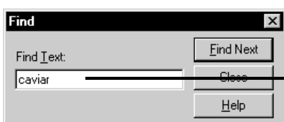
# Finding receipt information



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.



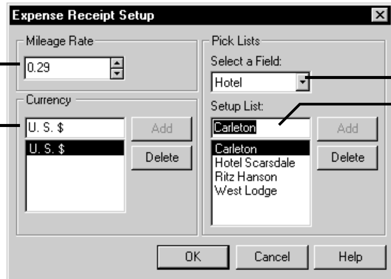

*Type the text you want to find, and click Find Next.*

# Expense receipt setup

Use the Expense view Setup dialog to change options, such as mileage rate and currency.

### To change the Expense view setup

Choose Expense|Receipt setup.




*Specify rate for mileage reimbursement.*

*Specify currency.*

*Select a field from the drop-down list.*

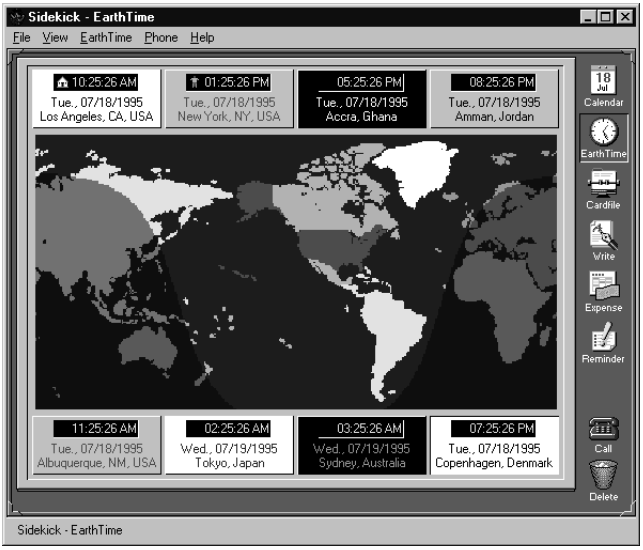
*Then type names, such as hotels, and click Add. Names you type while entering a receipt are also added to these lists.*

# EarthTime

EarthTime displays a map of the world, and lets you see times at 8 different locations around the world. 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 local time as you travel.

## The EarthTime globe

When you click the EarthTime button, you see a map of the globe. Light areas are in daylight, and the shading represents nighttime.




The shading that shows daylight and nighttime is updated automatically on the first second of every minute.

Above and below the map of the globe are the names and local date and time information for 8 cities, which you can choose.

## Selecting the cities

You can select the cities shown along the top and bottom of the EarthTime display. EarthTime has a database of about 300 cities you can choose from.

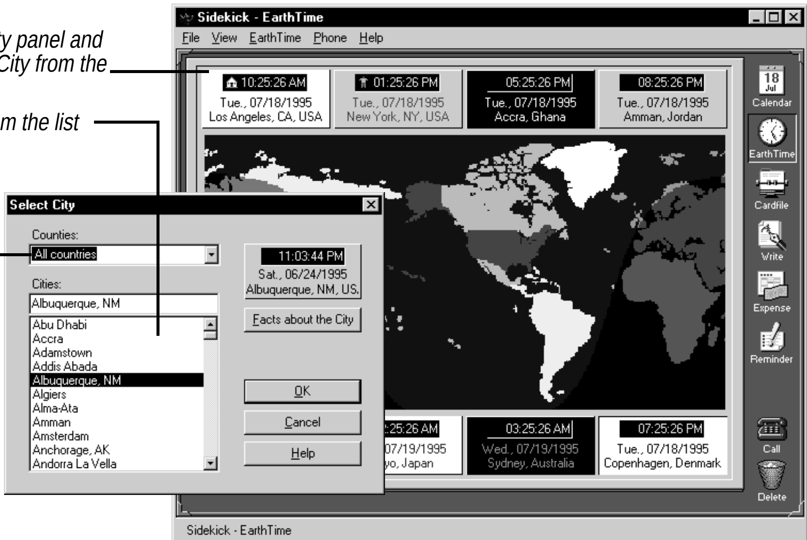
### To change one of the displayed cities

Right-click the panel containing the city you want to change, as shown below. Or you can click the city panel, and then choose Earth Time|Change City.

*1 Right-click the city panel and choose Change City from the shortcut menu.*

*2 Choose a city from the list*

*You can specify a country to choose cities from.*




## 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 take your computer and travel to another time zone, you can enter another time as the Local Clock. There are two reasons for doing this.

One is so that EarthTime can display the current local time for you. The other is to change your computer's system clock to match the local time. If you don't do this, your alarms and other time-related activities will be incorrect for the local time.

### Changing the Home Clock

Your Home Clock should be set correctly automatically when you first start 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, as discussed earlier.
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 City panel.


## Changing the Local Clock

When you travel to another time zone, update Sidekick and your computer's system clock to reflect the local time.


### To change the Local Clock

1. Set one of the eight city panels to display the local city, as discussed earlier.
2. Right click the panel containing the local city, and click Choose As Local Clock from the shortcut menu.

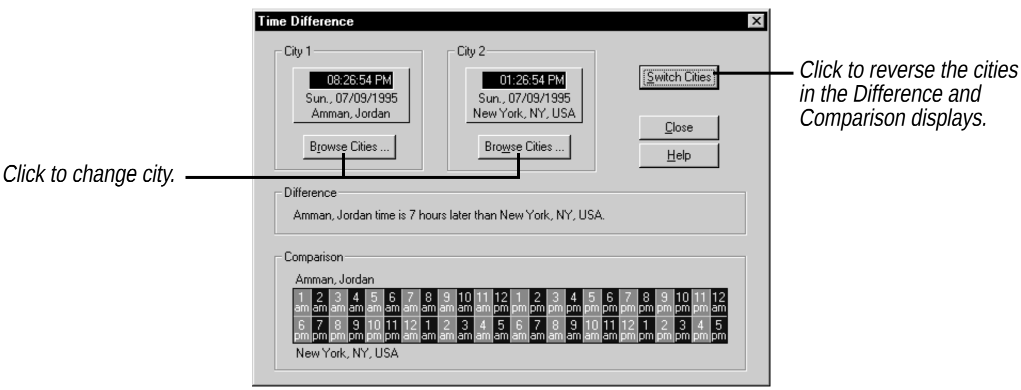
**NOTE** When you see the message asking you to confirm the change of local time, it is usually best to check the option to Adjust System Time. If you do not check this option, EarthTime will not display correct information, and your Sidekick alarms will not occur at the right time.

## Time difference

Time differences between any two locations can be displayed graphically in EarthTime.

### To see time differences

Right-click one of the city panels, and choose Time Difference from the shortcut menu.



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. It also includes a comparison that lets you look up the time of either city in relation to a specific time at the other.

## *Facts about the city*

EarthTime stores facts about the hundreds of cities in its database.

**To see facts about the current city**

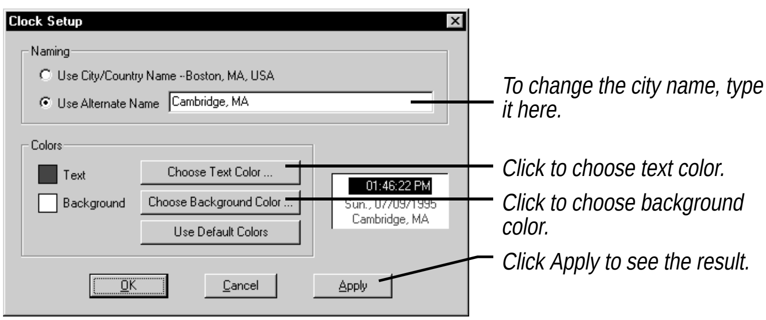
Right-click the city panel, and choose Facts About The City from the shortcut menu.


## *Configuration options*

You can configure EarthTime according to your preferences.

**To set configuration 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 reset the current city panel to its default color, click the Use Default Color button.

# 8

# The Phone Dialer

Sidekick's Phone Dialer dials your voice phone calls using phone numbers from your cardfiles or phone numbers you type in. The Phone Dialer uses your modem to dial phone calls, using sophisticated telephone technology known as TAPI (for Telephony Applications Programming Interface).

The Phone Dialer can enter call information, including notes you type, to the Contact Log for the person you called, so you can keep a complete record of your contacts. 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 discusses the following subjects:

- How to open the Phone Dialer
- Selecting the card to dial
- Setting up for your modem and phone information
- Specifying the default cardfile field for the dialer

## Requirements for using the Phone Dialer

There are several requirements that must be met before you can use the Phone Dialer to place your calls.

- You must have installed the TAPI option in Windows 95. See"Windows 95 features you need" on page 8.
- You need a modem if you want Sidekick to dial your calls (you can use the Phone Dialer for data entry without a modem; see"Using the Dialer without a modem" on page 102). You need to provide some information about your modem, your dialing preferences, and your location. However, you might have already entered this information in Windows 95; if so, Sidekick will find it, and you

don't have to enter it again. Otherwise, see "Setting up the Phone Dialer" on page 100.

- You also need to specify which field in a cardfile contains the telephone number, as discussed in "Specifying the dialing field" on page 100. If you create cardfiles using the Business or Personal templates provided, the appropriate phone field has already been selected.

## Opening the Phone Dialer

**To open the Phone Dialer, do any of the following**

- Click the red Call icon on the lower right of the deskpad.
- Drag a card containing a phone number from the Cardfile or Viewport to the Call icon.
- Drag a call or ToDo that contains a phone number to the Call icon.
- Choose Phone|Call from the menu.

If your computer is configured for dialing, the Phone Dialer opens with the current card's information displayed, ready to dial the call.

*Name and phone number information comes from the current card.*

*Or you can type a phone number in the Number field.*


*If the current card has more than one phone number, click the arrow and choose the one you want.*

**TIP**

**You can leave the Dialer open and click another card in the Viewport or Cardfile, and its information appears in the Dialer automatically.**

Sidekick takes the name and phone information from the current card in the Cardfile. Or you can type a phone number into the Number field and click the Dial button. You also can click the mouse pointer on the Phone Dialer keypad to enter a number.

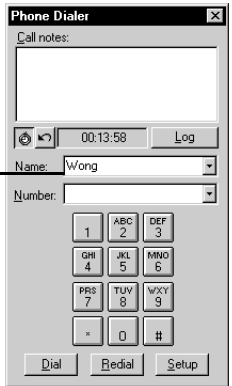
# Selecting the card to dial

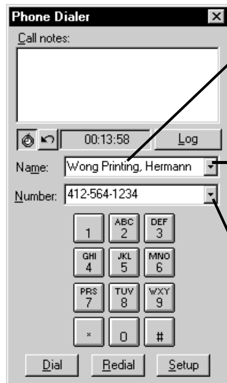
**To change to a different card**

Leave the Phone Dialer displayed and change to the Cardfile, if necessary. Then click another card or cardfile. The Phone Dialer window remains on top of other Sidekick views, so you can switch to the Cardfile, click different cardfile tabs, and click different cards to change the information in the Phone Dialer.

You also can use the Phone Dialer to find the card you want, as shown in the following illustration.

*To search for a card, type part of the name or index and press Enter.*




*Sidekick finds the first card that matches what you entered.*

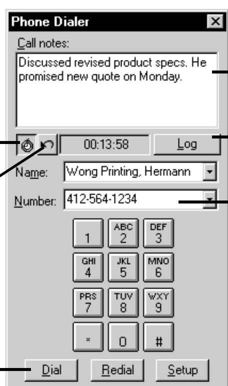
*If more than one card contains a match in its index, click the arrow and select the one you want.*

*If the phone number displayed is not the one you want to dial, click the arrow and select another number (if the card contains more than one).*

# Dialing the call

**To dial the phone call**

Click the Dial button in the Phone Dialer. When you see the Dialing dialog box, pick up your telephone handset and click OK. Sidekick disconnects the modem so you can use the telephone handset.




*While you talk, you can type notes to be added to the information in the Contact Log.*

*When done, click to record the call information, and notes if you've entered any, to the Contact Log.*

*Start timer*

*Reset timer*

*To select a different card, just click the card you want in the Cardfile. The Phone Dialer remains open and the card's information appears in the dialing fields.*

*Click to dial the number. When the dialog box appears, pick up the telephone handset and click Talk.*

## Completing the call

When you finish the call, hang up the telephone handset.

If the modem fails to disconnect, you can force it to hang up.

**To hang up the modem**
Choose Phone|Hang Up Modem, or click the Hang Up button (the Dial button changes to Hang Up once the call has been dialed). Or you can close the Phone Dialer to disconnect.

## Entering information in the Contact Log

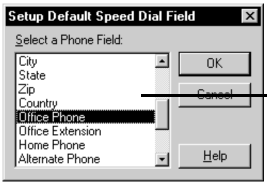
Sidekick enters the word CALLED and time and date information in the Contact Log of the card you called. This is followed by any additional information or notes you type in the Contact Log window.

**To enter the call in the Contact Log**
Click the Log Notes button when you have placed the call and finished writing notes. If you attempt to select another card or close the Phone Dialer without logging the call, you will see a message offering you a chance to log the call.

## Specifying the dialing field

When you drag a card to the Call icon, Sidekick dials the first phone number it finds on the card, or the field you specify.

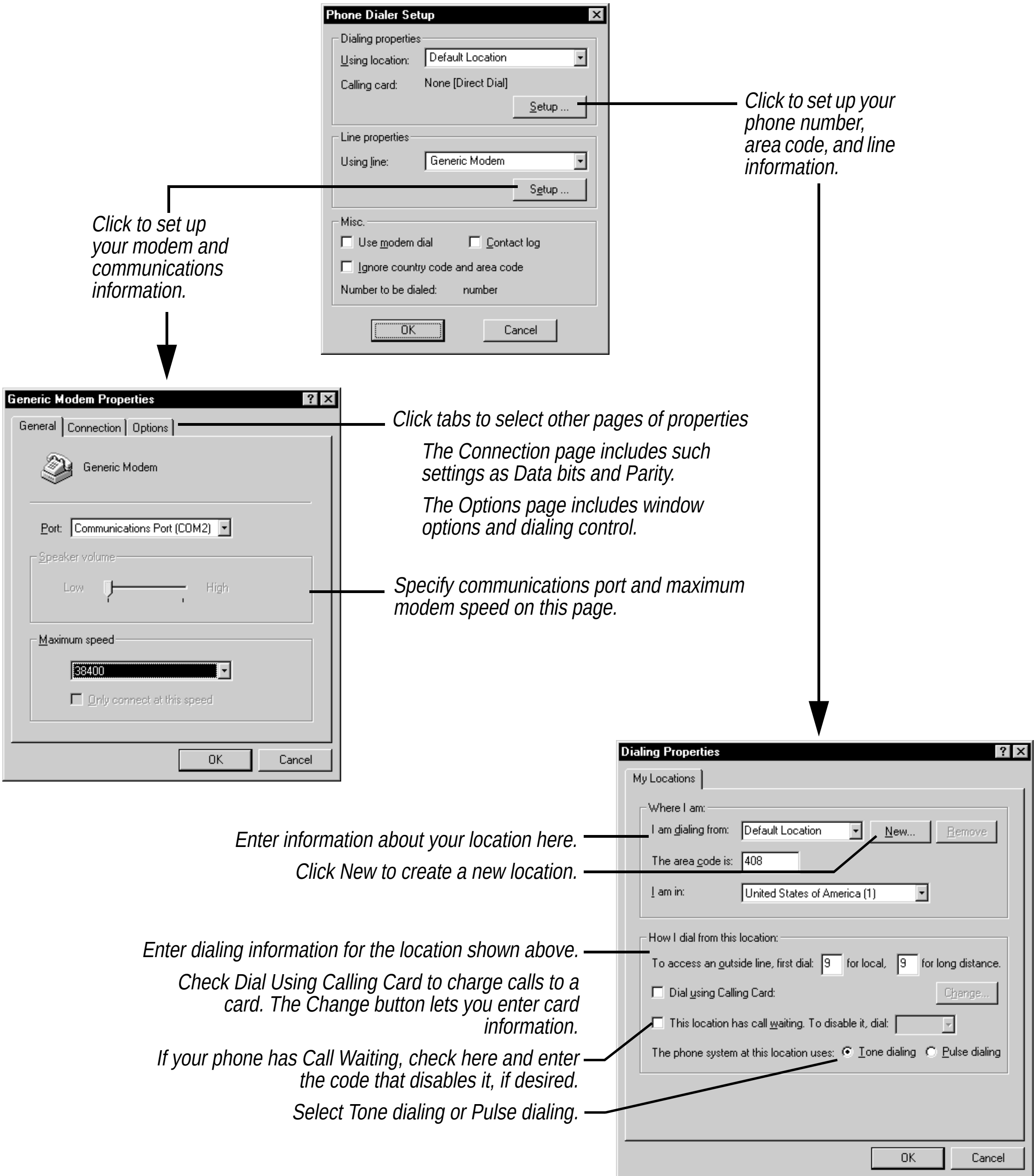
**To specify a default phone field to dial**
Choose Phone|Speed Dial Field from most Sidekick views.




*Click the field you want used as the default phone dialing field, and click OK.*

## 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.


Phone Dialer Setup
Dialing properties
Using location: Default Location
Calling card: None [Direct Dial]
Setup ...
Line properties
Using line: Generic Modem
Setup ...
Misc.
Use modem dial
Contact log
Ignore country code and area code
Number to be dialed: number
OK
Cancel
Click to set up your phone number, area code, and line information.
Click to set up your modem and communications information.
Generic Modem Properties
General
Connection
Options
Generic Modem
Port: Communications Port (COM2)
Speaker volume
Low
High
Maximum speed
38400
Only connect at this speed
OK
Cancel
Click tabs to select other pages of properties
The Connection page includes such settings as Data bits and Parity.
The Options page includes window options and dialing control.
Specify communications port and maximum modem speed on this page.
Dialing Properties
My Locations
Where I am:
I am dialing from: Default Location
New...
Remove
The area code is: 408
I am in: United States of America (1)
How I dial from this location:
To access an outside line, first dial: 9 for local, 9 for long distance.
Dial using Calling Card:
Change...
This location has call waiting. To disable it, dial:
The phone system at this location uses: Tone dialing Pulse dialing
OK
Cancel
Enter information about your location here.
Click New to create a new location.
Enter dialing information for the location shown above.
Check Dial Using Calling Card to charge calls to a card. The Change button lets you enter card information.
If your phone has Call Waiting, check here and enter the code that disables it, if desired.
Select Tone dialing or Pulse dialing.

## *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**

Click on the Cardfile card for the person you are talking with, and then choose Phone|Call.

Type information or notes about the call in the Call Notes window. Click the button to start the timer, if desired. When done, click the Log Notes button to have the call notes added to the Contact Log for the card.

# Printing

Sidekick lets you print from the Cardfile, Calendar, or Write view 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.

**NOTE** You can easily print index cards to preprinted index card forms using the Print Labels command. See “Printing labels, address books, and envelopes.”

## *Printing cards*

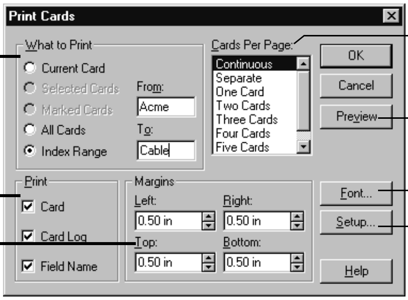
**To print the cards and their associated Contact Logs**

In the Cardfile, choose File|Print|Print Cards. The Print Cards dialog box appears.

*Specify which cards to print.*

*Select parts of the card to print.*

*Enter margin settings as needed to position the cards on your paper.*




*Select the number of cards to print on each page.*

*Click to preview your output onscreen before you print.*

*Select the fonts used in printing.*

*Printer setup*

## *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, Sidekick drops the extra fields from the bottom of the card. If you specify one card per page, Sidekick will drop fields if necessary to make the card fit. If you choose Separate, each card will begin on a new page, but 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*

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**

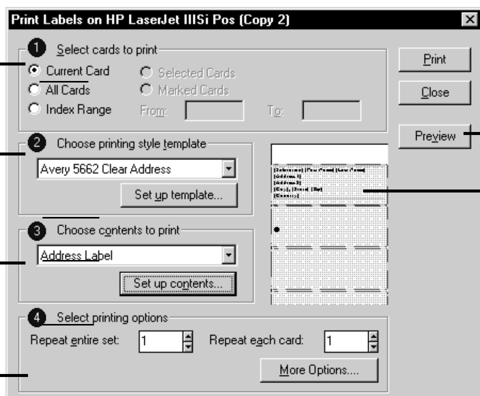
Choose File|Print, and select Print Labels, Print Address Book, or Print Envelope. The corresponding dialog box appears; the Print Labels dialog box is shown in the example below.

*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 what the result will look like. 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.

In most cases you can simply click the down-arrow in the text window, and choose a template from the list.

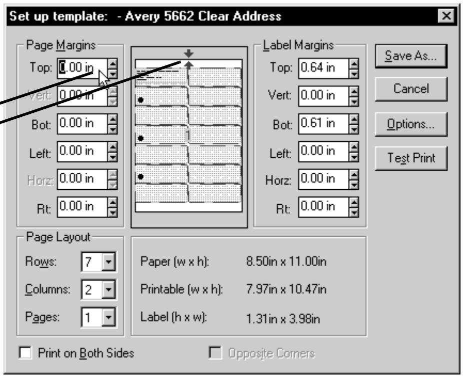
**NOTE** If you choose a template from the template list, you may need to adjust it to fit your printer's specific printing area.

**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 104), click the Set up template button to open the dialog box shown below.

*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 30 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. When setting up labels, you don't need to adjust page margins.

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 change as you change 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.

8 Click Test Print to see a printed example of the effect of your changes.

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.

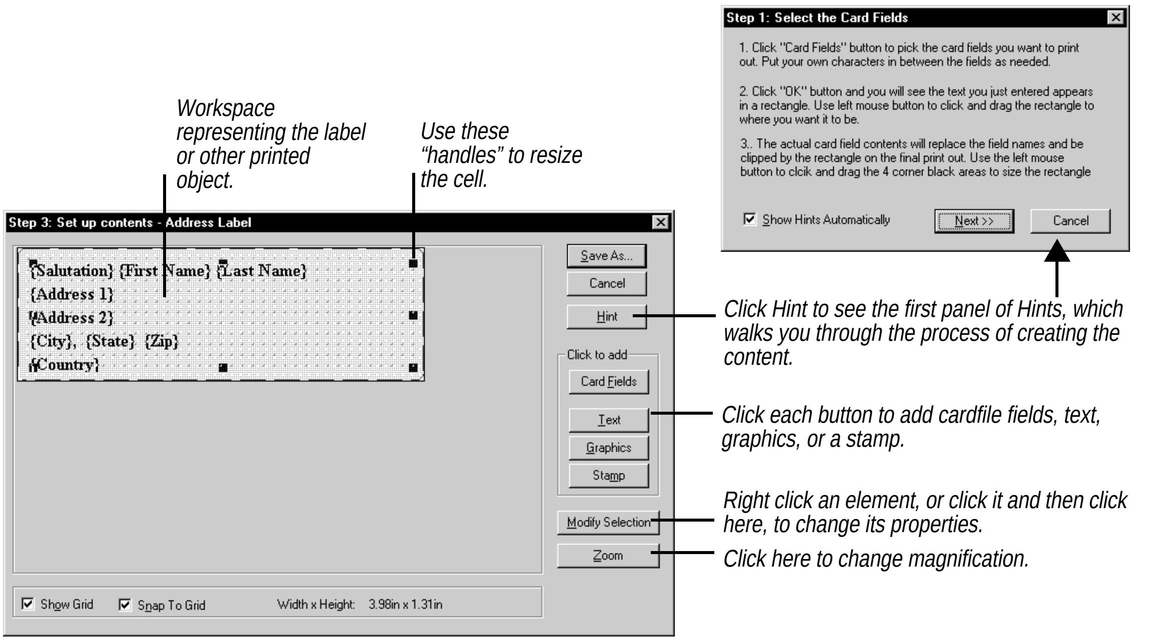
## Step Three: Choose contents to print

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 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 work space. In the figure above, the cell containing address information occupies the entire label area.

   When you click a cell, “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.

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!" that prints on each label, or your return address for an envelope)

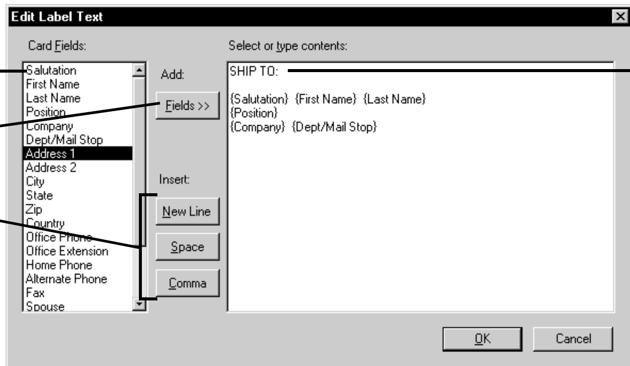
## *Card fields*

The Card Fields button lets you insert fields from the cardfile, to be filled in with data from the card or cards you select.

*Double click each field to add it, or...*

*Click a field and click Fields >>.*

*Be sure to type a space or punctuation where needed, or use these buttons.*

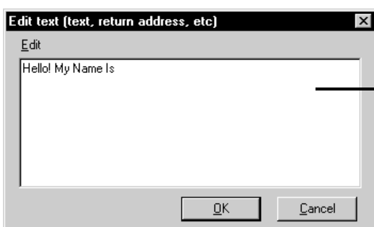



*You can include text with the fields.*

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.




*Type your text here.*

> **TIP**
>
> You can add multiple text elements with unique fonts, colors and alignment.

Type whatever text you want the text element to consist of. Any text you type is repeated on each label.

When you're finished, click OK. A new text element appears. By right-clicking the text element 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 element containing that text appears. By right-clicking a Stamp element you can change its message and font, rotate it, or delete it.

#### *Graphic elements*

Clicking the Graphic button displays four choices:

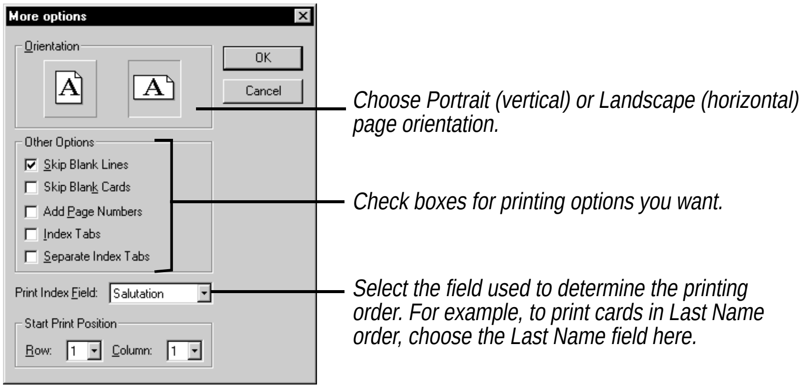
- **Bitmap** lets you choose a .BMP file to import.
- **Frame** creates a rectangle.
- **Round Frame** creates a rectangle with rounded corners.
- **Line** gives you the choice of creating a horizontal or vertical line.

Right click the graphic element 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 below.




## Calendar printing

You can print appointments, calls, and tasks from your calendar in a variety of formats. Sidekick can print the daily, weekly, monthly, and yearly calendars in its own format using preprinted or standard paper.

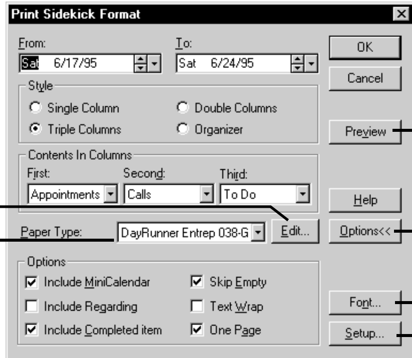
In addition, Sidekick can print to the paper forms of several popular organizers:

- Day-Timers 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 paper.

1. Choose File|Print|Print Sidekick Format from the Daily view of the Calendar. The Print Sidekick Format dialog box appears.




2. 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.

3. In the Style group, choose the number of columns per page that you want to print.

4. 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.

5. Select the paper type that corresponds to the paper you're printing to. Sidekick can print to a number of popular laser forms by Day Runner, Day-Timers, 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.

6. 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.

7. 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.
8. 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 Sidekick glance formats

In addition to the Daily view formats, 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 and click the Calendar button. Choose Weekly Setup, Monthly Setup, or Yearly Setup to customize the printed information.

1. Switch to the glance view 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 (black and white .PCX files).

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 Day-Timers and Franklin forms

Sidekick can print directly to pages from the Day-Timers 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 Print Day-Timers Format or Print Franklin Format from the cascading menu.

2 Select a Day-Timers 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-Timers 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.

Sidekick prints on the forms as though they are being center-fed 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

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 and then Print Day Runner Format or Print Filofax Format. The Print Day Runner or Print Filofax dialog box appears.

2 Select a format from the Format list, and choose either 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.


*Select which documents to print.*

*Check Include Subject to print the subject line with the documents.*

*Specify continuous printing or starting each document on a new page.*

*If you choose All documents, select the folders here, or click All Folders.*

*Click to preview the printed results.*

When all settings have been made, choose OK to print the documents.

## Printing expense reports

**To print a completed expense report**

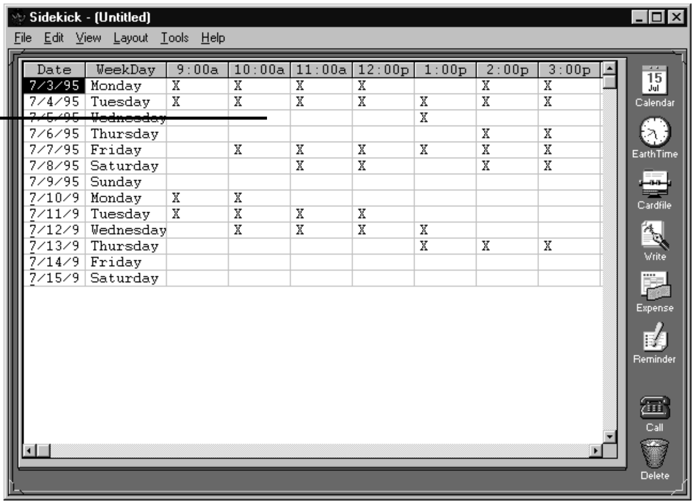
Choose File|Print in the Expense view.

Sidekick prints your expense report, including details for the business meals, entertainment, and miscellaneous expense types. The printed report even includes spaces for authorized signatures.

# 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.

*An X marks time that is busy.*




The free time report above displays times in one-half hour increments. Blank cells are unscheduled time slots. A cell with an X has an appointment scheduled for that time. Other reports are similar to the one above, with information organized in rows and columns.

The Report menu is the same whether you are in the Cardfile, Calendar, or Write. Its first five commands create reports of the following types:

- Cardfile report
- Calendar report

- Free appointment time report
- ToDo report
- Contact log report

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 121). 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 Sidekick. Other options appear on the Layout menu while you are viewing a report.

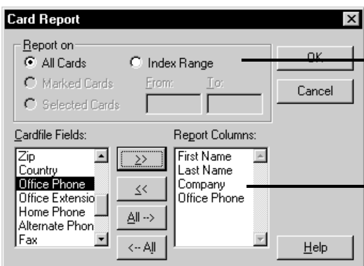
**NOTE** Be sure to save your latest changes before you create a report.

## *Cardfile report*

The card report lets you summarize information from the open cardfile in a tabular format.

**To create a cardfile report**

Choose Report|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 121 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 Sidekick. A Contact Log can contain records of conversations, correspondence, and other important details.

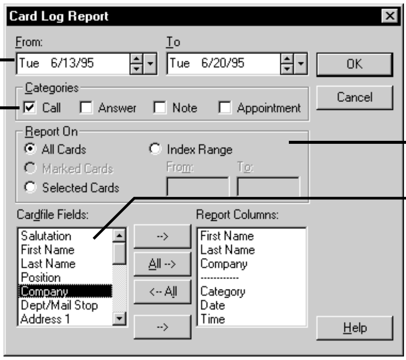
### To create a Contact Log report

Choose Report|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. To remove an attribute or field name from the Report Fields list, select it and press the Delete button.

See "Formatting reports" on page 121 for information on customizing your report.

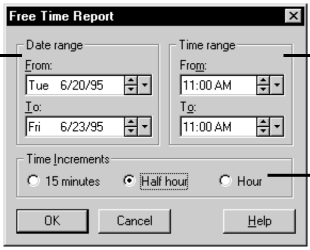
## Free time report

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

Choose Report|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. See "Formatting reports" on page 121 for information on customizing your report.

## ToDo List report

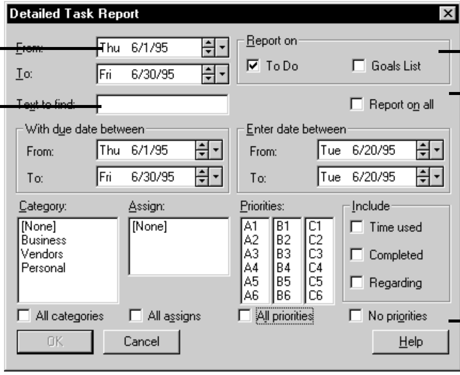
For a report on ToDos and Goals, you can create a ToDo List report.

### To create a ToDo List report

Choose Report|ToDo. The ToDo 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 key word.*




*Check the appropriate boxes to include only the ToDos, only the Goals list, or both.*

*Select the dates and properties to include.*

See “Formatting reports” on page 121 for information on customizing your report.

## Calendar report

A calendar report summarizes information from activities in the open calendar. You can choose to report on appointments, calls, ToDo 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 ToDo 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 key word in the Calendar

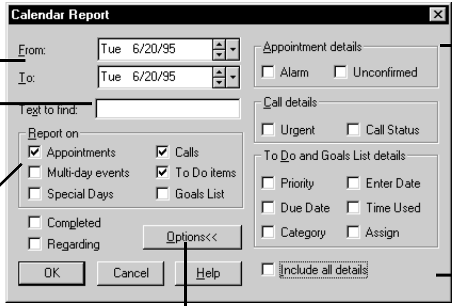
### To create a Calendar report

Choose Report|Calendar. The Calendar Report dialog box appears.

*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 key word.*

*Select the types of activities from the calendar to include in the report.*




*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.*

*Click to see the options on the right side of this dialog box.*

## *Formatting reports*

Once you create a report, 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 data*

If you update your calendar or cardfiles after you generate a report, you can also update your report.

### To update a report

Go to the report, if necessary, by choosing Report|Go To Current Report. Then choose Layouts|Update Current.

### *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.

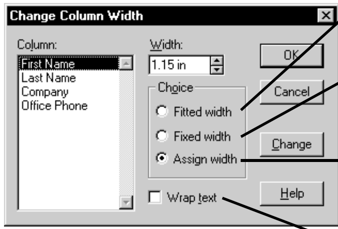
### To add a title to your report

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.

You can also 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 Highlighted 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 Layouts|Hide Column Title or Layouts|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. Choose
3. 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. 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.

# 11

# Back Up and Restore

When you want to take Sidekick on the road, or if you just need a backup copy of your data, Sidekick's Back Up and Restore lets you copy 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 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 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.

## 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 all 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 Sidekick to restore those files onto that machine. (You must have a copy of Sidekick, or at least the Back Up and Restore utility, installed on each computer.) Sidekick automatically puts all the files into a directory structure *identical to where they came from*.

Later, when you're ready to bring those files back to their original directories, Sidekick again puts them back in the proper locations. Also, after the first time you use Back Up and Restore, 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 Sidekick, or as a separate stand-alone application in your Sidekick program group.

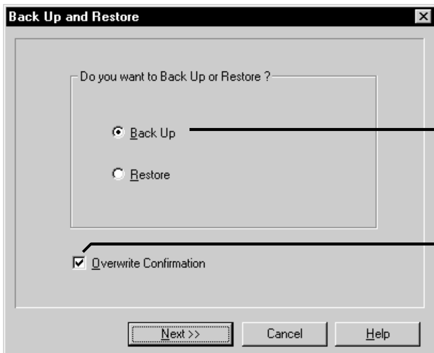
**NOTE** You can't restore data while Sidekick is running, since doing so might corrupt data files. Exit Sidekick before attempting to restore.

## *Backing up*

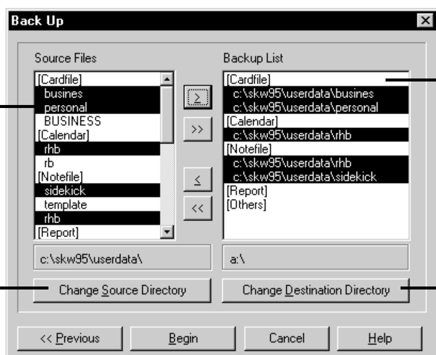
Although Back Up and Restore can back up open files, it will only back up the last-saved version of these files. Once you open the Back Up And Restore dialog box, you're prompted to save your open files before continuing.

### To back up files

1. Save your open files.
2. Choose Tools|Back Up And Restore Files. At the opening dialog box, choose Back Up and click Next.




3. Choose the files to back up in the Back Up dialog box.



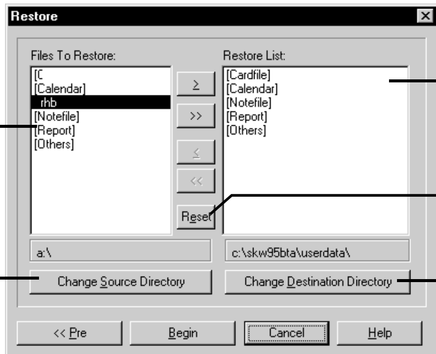
**4** After you've selected all the files you want to back up and specified the directory to back them up to, click Begin. Sidekick backs up the files you specified.

If you're backing up to a floppy disk, you might run out of disk space for all your files. If this happens, Sidekick copies your files across multiple disks, prompting you to insert as many as needed.

## Restoring

**To place backed-up files onto your second computer, or restore files to your primary one**

**1** Choose Tools|Back Up And Restore Files. 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 before you add files to the Restore list.

**2** When ready, click Begin. If you are restoring from multiple disks, Sidekick prompts you to insert them in the correct order. If some of the files that should be restored are missing, Sidekick notifies you.

## Sidekick's files

This manual refers to a "Write file" or "calendar file" as a single file, but each of these is actually composed of several files. When you create new calendar files or Write files, 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 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* stands for your name or initials. When saving, opening, backing up, or restoring calendar files, 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 | Appointments |
| XXXXCALL.SKW | Calls |
| XXXXTASK.SKW | ToDos |
| 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 |

## 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 [Others] They have the extension .SKExpense.

## 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.

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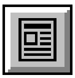
# Acrobat Reader Tips

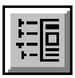
Use these buttons to view, search, or print the book. Choose Help | Acrobat Reader Help for more information.

Shows or hides subtopics when clicked (when bookmarks are showing).

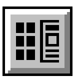
Jumps to a topic when double-clicked (when bookmarks are showing).



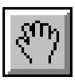
Closes the thumbnail/bookmark area and displays only the page view.



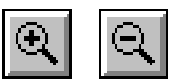
Displays bookmark area and page view.



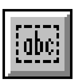
Displays thumbnails and page view.



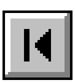
Drags the page in any direction.



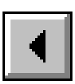
Magnifies or reduces the page view. Click the button, then click within the document, or drag out an area to enlarge.



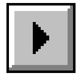

Selects text so you can copy it to the Clipboard.



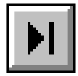
Displays the first page of the document.



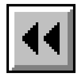
Displays the previous page.



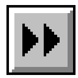
Displays the next page.



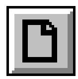
Displays the last page of the document.



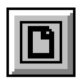
Displays the previous page viewed.



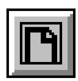
Steps forward from previous pages viewed.



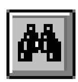
Sets the page view to 100%.



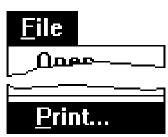
Displays the entire page within the window.



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.

## Sidekick® 95 User’s Guide Navigation

**Red text** designates hypertext links. All cross-references are hypertext linked. Clicking a hypertext link jumps you to the page referred to by the red text.