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General

Basic Topics

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What's New

May, 06, 1998; Some of the new features in version 3.0a of all Organizers are:
- New File Maintenance function. HTML Report Wizard provides flexible features that give you control on the process of naming and upgrading HTML and graphic files.
- Improved functionality of the HTML Report Wizard. You can display several data fields in the same line or column. There are new User-Defined Fields.

January, 30, 1998; Some of the new features in version 3.0 of all Organizers are:
- New HTML Report Wizard. Organizers are "Internet Ready". Without any additional HTML editor, with a click on the button, you can create a set of linked web pages that can be put immediately on your web server or you can just view your data with your favorite browser. Images are automatically converted to gif or jpeg formats.
- New functionality of the Picture Controls. Support for the direct entries from TWAIN compliant devices (scanners, digital cameras, and other image capturing devices). Support for GIF, JPEG, PNG, PCX   formats.
- New Data Table Viewer.
- Improved compatibility with international date and number formats.
- Improved functionality of the Label Wizard and Report Wizard.
- Log file with information about major processes done on your data files. Improved maintenance of your data files.
- Improved functionality of some data controls (email control integrated with your default email program, web address integrated with your default browser).
- Internal changes that better protect your data files against computer crashes and speed up the browsing of records.
- Improved support on our Web Page (examples, hints and tips,...): http://www.primasoft.com

November 05, 1997; New features in version 2.2 (only INTERNET ORGANIZER) are:
- Support for new browsers: Internet Explorer 4.0, Netscape Navigator 4.0;
- Specialized E-Mail edit box;
- Quick Access Sites function;
- Installs itself on the Icon Tray (quick access to some commands).

September 05, 1997; Some of the new features in version 2.1 of all Organizers are:
- New Search/Replace function;
- Improved Label printing (specify number of copies for one record);
- Improved Summary display;
- Integration with web browsers (Software, Hardware Organizers);

May 10, 1997; Some of the new features in version 2.0 of all Organizers are:
- Resizable main window with self-adjusting data fields;
- Selectable Fonts for various elements of the main window;
- Selectable individual field widths in printed reports;
- Improved Label printing (color support, more options, preview rulers, support for European Avery labels);
- Templates for adding new records;
- Template for field names;
- Easier access to many options from Popup menus;
- Support for Year-Only date format;
- Auto-Fill combo boxes (automatically picks up list elements based on the first typed-in characters);

- New dialing function;
- Improved help system;
- Manual in the electronic file form;
- Some bug fixes and more

Getting Started

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

Application Main Window
Options (Preferences)
Controls used in the Details Page
Adding New Records

Application Main Window

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

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

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

Customization: The program provides a wide range of customization functions. Before you start entering new records it is a good practice to play with some options of the program.
- It will allow you to set program options that are close to your individual preferences (colors, fonts, size, position, data field names..).
- Experience will speed up the future data entry process (record templates, copy/paste record, filter, sort, backup).

Controls used in the Details Page and in some dialog boxes

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

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

The following control types are used in our software:

Edit Boxes : Edit Boxes are the most basic controls that accept text. Characters typed in can be alphanumeric (letters of alphabet and numbers);   they also accept 'special characters' like: quotes, exclamation marks, percent signs, asterisks, etc. The edit controls have the following **Popup Menu** functions:
- *Undo* : undoes the last changes;
- *Cut* : deletes the selected text and copies it to the Clipboard;
- *Copy* : copies the selected text to the Clipboard;
- *Paste* : pastes text from the Clipboard;
- *Delete* : deletes the selected text;
- *Select All* : selects entire text;
- *Font* : allows you to select the font for all single-line edit controls;
- *Color* : allows you to select the text and background color for all single-line edit controls except numeric fields;

Combo Boxes : A Combo Box is a control that combines an edit box with a list, much like that of a list box. Users can either type text in the edit box or select an item from the list. The lists in the Combo Boxes can be edited in *Maintenance/Edit Lists* function or from the Popup Menu. The combo box controls have the following **Popup Menu** functions:
- *Undo* : undoes the last changes;
- *Cut* : deletes the selected text and copies it to the Clipboard;
- *Copy* : copies the selected text to the Clipboard;
- *Paste* : pastes text from the Clipboard;
- *Delete* : deletes the selected text;
- *Select All* : selects entire text;
- *Load* : loads the list from a text file;
- *Save* : saves the list in a text file;
- *Font* : allows you to select the font for all single-line edit controls;
- *Color* : allows you to select the text and background color for all single-line edit controls except numeric fields;
- *Edit List* : allows changing, deleting, and adding new list elements;
- *Auto-Fill* : if checked, can speed up data entry by automatically picking up list elements based on the first typed-in characters;

Graphic Fields : These data fields store graphical images. There are 2 types of Graphic Fields: Large and Small. The Large Graphic Field allows storing any size images. It also has a Speed Bar with the function buttons at the bottom. The Small Graphic Field does not have the Speed Bar. Both types of Graphic Field have a **Popup Menu** with the following functions:
- *Clear* : clears the image;
- *Load* : displays an Open File dialog box. Go to the directory where the image file is stored. Select the image file and click on the OK push button. The selected image will be displayed in the picture control.
- *Save* : saves the contents of the picture control to a file. You can save

the image as a new file or just overwrite the existing one.
- *Copy* : copies the image to the Windows Clipboard;
- *Paste* : pastes the image from the Windows Clipboard into the field.
- *Screen Capture* : allows you to capture any screen element. Click on the upper left corner of the image you would like to capture, hold the mouse button, and release in the lower right corner of the image. The selected part of the screen will be loaded automatically into the picture control.
- *Print*: prints the contents of the picture control.
- ***Scan*: loads the image from a selected scanner.**
- *Select Scanner*: displays a dialog box with available scanners. Select the scanner here.
- *Full Screen*: allows viewing the image on the whole screen.
- *Auto Stretch*: stretches the image in the picture control (just for better viewing). It will not resize the image.
- *Hide Tool Bar*: hides tool bar.

Date Fields : Date Field is a variation of an edit box that displays and accepts date values in different formats.   Enter a date using numeric keys on the keyboard. Clicking on the '...' button of the Date Field, displays a small calendar, from which you can select a date.   The date will be automatically entered as a text in the date field. Date formats can be set from the 'Options' function on the main menu or from the Popup Menu. The Date Fields have the following **Popup Menu** functions:
- *Undo* : undoes the last change;
- *Today* : enter the current system date;
- *Clear* : clears the field contents;
- *Font* : allows you to select the font for all single-line edit controls;
- *Color* : allows you to select the text and background color for all single-line edit controls except numeric fields;
- *Date Format* : allows you to choose one of the four date formats (MM/DD/YYYY, DD/MM/YYYY, YYYY/MM/DD, and YYYY).

Numeric Fields : Numeric Fields are variations of edit boxes, and accept numerical data only.   Use numerical keys on the keyboard to manually enter data into the numeric field.   Pressing on the '...' button of the numeric field displays a small keypad.   Use keypad buttons to enter value in the field.   Press the 'Checkmark' button to accept the entry,   the 'Cancel' button aborts the data entry and closes the keypad. The Numeric Fields have the following **Popup Menu** functions:
- *Undo* : undoes the last changes;
- *Cut* : deletes the selected text and copies it to the Clipboard;
- *Copy* : copies the selected text to the Clipboard;
- *Paste* : pastes text from the Clipboard;
- *Delete* : deletes the selected text;
- *Select All* : selects entire text;
- *Font* : allows you to select the font for all Numeric Fields;
- *Color* : allows you to select the text and background color for all Numeric Fields;

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

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

E-Mail Edit Boxes (used only in some organizers): These edit boxes are a special type of the Attachment Fields. They allow you to enter e-mail address and later start   an e-mail application (Eudora, Pegasus Mail, Microsoft Explorer,...) with the contents of this field sent as a parameter. It invokes the e-mail program defined in the Internet Properties/Mail and News Window.

List Boxes : List Boxes display a scrollable list of items that you can select but cannot directly modify. List Boxes are not used in the main window but are used in many dialog boxes.

Phone Edit Boxes (used only in some organizers)**:** These are a special type of an edit control. When you click on the '...' button the Dial dialog box will be displayed. If your computer is equipped with a modem you can dial the number that is contained in the Phone Edit Box (or any other number). In order for the Dial function to work your modem COM Port and modem parameters must be selected in
- *Options/Modem*. Phone Edit Boxes have the same Popup Menu as regular edit boxes.

Multi-line Edit Fields : These fields allow entering multiple lines of text up to about 64KB in size. The fields' **Popup Menu** has the following functions:
- *Undo* : undoes the last changes;
- *Cut* : deletes the selected text and copies it to the Clipboard;
- *Copy* : copies the selected text to the Clipboard;
- *Paste* : pastes text from the Clipboard;
- *Delete* : deletes the selected text;
- *Select All* : selects entire text;
- *Font* : allows you to select the font for all Multi-Line Edit Fields;
- *Color* : allows you to select the text and background color for all Multi-Line Edit Fields;

Internet Address Edit Boxes (used only in some organizers): These edit boxes allow you to enter World Wide Web Page Addresses. Pressing on the '...' button of the edit box sets your Web browser to activate the World Wide Web page address from the selected record. This function may be also invoked from the popup menu of the edit box. The WWW address can be captured automatically from your browser by selecting the *Get Address* command from popup menu of the edit box. Note: both *Send Address* and *Get Address* functions automatically start your browser.
Currently supported Web Browsers are:
- Netscape Navigator 4.0 and all older versions;
- Microsoft Internet Explorer 4.0 and all older versions;
- CompuServe Web browser;
- America Online Web Browser;
- NCSA Mosaic 2.0.

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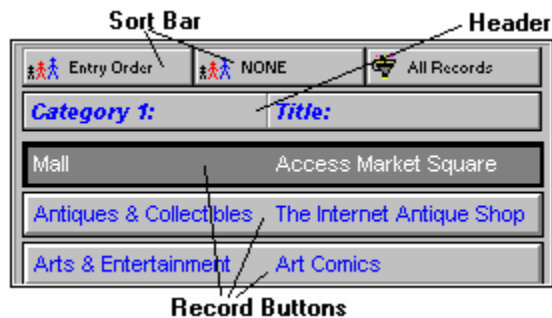
Record Buttons are displayed in the <u>Table Of Contents</u>. In essence, record buttons give you a quick view of a certain number of records at once. The number of record buttons depends on the main window size (12 is the default number). This number can be changed by adjusting the size and type of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

Record Buttons are controlled by the <u>Header</u> which determines which data fields are displayed, in which order, and how wide each field is. Multi-line edit fields and graphic fields cannot be displayed on record buttons.

Clicking on a Record Button results in the selection of the record. <u>Details Page</u> for the selected record is displayed.

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

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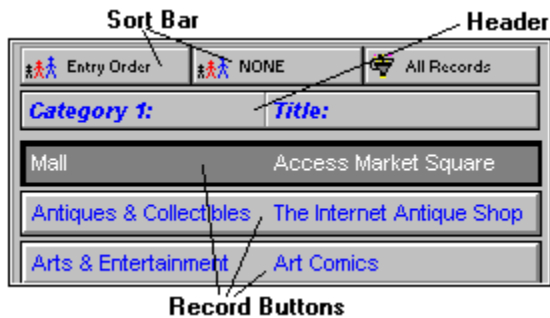
Header displays the Names of the data fields that are displayed underneath on Record Buttons. Header controls which fields are displayed and in what order as well as the width of each field. The user can change the order by dragging and dropping the field names on the Header (left mouse click). The widths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

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

Letter bar

What is it?

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

How to use it?

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

Hint : learn how to use Sort the database if you want to use the Letter Bar.

Adding New Records

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

Note: Some fields in the record may be 'required'.   This means that they can NOT be left blank - you must put some data there.
Note: When the new record is saved, it is positioned automatically in the data according to your sort order.
Hint : Advanced users may want to take advantage of the Record Templates when creating new records.

You can also create a new record by using Paste Record function. This may be useful when you are entering similar records which differ only in some data fields. In this case do the following :
- Enter manually the first record;
- Use *Copy Record* to save it in a Copy Buffer;
- Press the *New* button;
- Use *Paste Record* function;
- Modify the data fields that are different;

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

Copy Record and Paste Record
Deleting records
Using Record Templates

Copy Record and Paste Record

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

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

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

Adding New Records
Deleting records
Using Record Templates

Deleting records

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

How to delete a record:

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

Note: the deletion process can not be undone! Pressing 'Cancel' aborts the deletion process. If you do not want the confirmation dialog box to be displayed before the deletion you can change set the Immediate Delete Option (see Options).
Hint : You can delete a range of records   (see: Maintenance and Filters).

Adding New Records
Copy Record and Paste Record
Using Record Templates

Using Record Templates

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

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

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

1. Select templates from the Details Page popup menu:

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

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

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

Adding New Records
Copy Record and Paste Record
Deleting records

Searching the database

What is Search?

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

Where is the Search function?

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

How to use the Search function?

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

What is the Result of a Search?

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

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

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

Sorting the database

What is sort?

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

Two kinds of sort

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

One-level sort

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

Two-level sort

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

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

Where is the Sort function?

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

Note: Primary and secondary sort fields are also being displayed as buttons above the Table of Contents.   Pressing on these buttons also activates the 'Sort' function.
Hint: The Letter Tabs(Letter Bar) remain disabled until you select a text field as the Primary Sort Field.

Quick Access to Sort and Filter Functions - Sort Bar

Quick Access to Sort and Filter Functions - Sort Bar
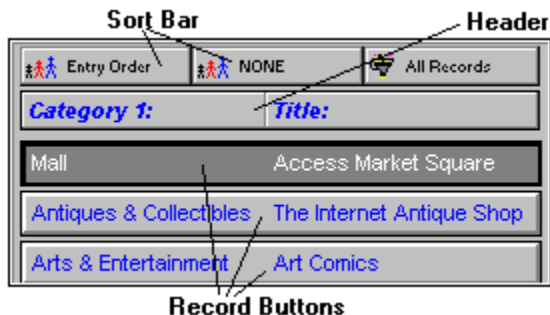
The Sort Bar consists of the following 3 buttons:
1. Primary Sort Field (first button): displays the name of the data field used as a Primary Sort Field; if a Text Field is selected as a Primary Sort Field the Letter Bar is enabled and the records are automatically separated according to the first letter of the Primary Sort Field;
2. Secondary Sort Field (second button): displays the name of the data field used as a Secondary Sort Field; if the Primary Sort Field is ENTRY ORDER the Secondary Sort Field is disabled; if both Primary and Secondary Sort Fields are text fields they both must have the same Sort Direction (Ascending or Descending).
3. Filter Button (third button): displays the current Filter Status (see Filters for more information) :
- *All Records*: filter is not active and all records are displayed;
- *Normal Filter*: filter is active and records that satisfy the filter are displayed;
- *Reversed Filter*: filter is active and records that do not satisfy the filter are displayed;

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

A faster way to change the sort options is to use Popup Menus of Sort Buttons.
- Click with right-mouse button on the Sort Button (Primary or Secondary sort button);
- Select Primary Sort Field;
- Select sort field;

Clicking on Filter Button displays the Filter dialog box where the user can create or modify a filter.
The Filter Button Popup Menu contains the following functions:
- *All Records*: deactivates the current filter (all records are displayed);
- *Normal Filter*: activates the Normal Filter option (see Filters);
- *Reversed Filter*: activates the Reversed Filter option (see Filters);
- *Load From Template*: allows the user to quickly load a previously Saved filter;
- *Save As Template*: allows the user to save the current filter in a template for future use;
- *Delete Template*: removes the selected template from the list of filter templates.

Selecting a subset of all records - Filters

What is filtering?

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

Kinds of filters.

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

How to access the 'Filter' function?

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

How to filter?
When in the **Set Filter window**:
1. Select fields to be used in the filter (the box on the right) from the fields list on the left.
2. A filter criteria for each field used in the filter can be specified using the *Edit* button below (see: Setting a filter criterion for a data field).
3. Use the 'Scope' selection to specify the filter kind:
   • All records: display all records (clear the filter results).
   • Normal filter: use the filter as is.
   • Reversed filter: reverse the action of the filter.
4. Press the *Apply* button to see the effects of your filter settings.
The result: Filtering results in a range of records that meet your criteria specified in the filter dialog box.

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

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

Note: you can't set filters for multi-line edit boxes in the filter dialog box. You can use the non stop search function for this purpose.
Hint: you can also use Filters for selecting subsets of records for Printing.

Setting a filter criterion for a data field

What does it mean?

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

How to get there?

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

How to use it?

When in the 'Filter for:' dialog box:
- Select your criteria from the 'Is' list (<,<=,=,>=,>, Between, One Of).
- Type in a value or values corresponding to your criterion selection.

Summary and Graphs

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

How to display a Summary:

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

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

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

Using Multiple Databases

The **Load Database** dialog box provides functions that are useful for:
- **Creating** new databases.
- **Deleting** databases that are no more in use.
- **Modifying** names and descriptions of existing databases.
- **Loading** different databases to the program.

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

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

 Database Functions:
- **_Load_** Database: This function loads a new database to be used by this application. Select a database name in the *Available Databases* list box. Click on the *Load* push button.
- **_Edit_** Database: This function will edit information about the currently selected database. You can modify database name and description.
- **_New_** Database: This function will create a new, empty database. Enter a name for the new database, and a short description. **Note**: the *disk file name* will be generated by the program and it refers to the data files stored on the disk in the C:/ORGANIZER/DATA directory (*filename*.dbf, *filename*.dbt, *filename*.mdx).
- **_Delete_** Database: This function will delete selected database. Select the database in the *Available Databases* list box. Click on the *Delete* push button.

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

Printing Functions

How to get there?

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

Printing Reports:

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

Printing Labels:

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

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

<u>Printing Reports</u>
<u>Printing Labels</u>

Printing Reports

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

How to create a Report?

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

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

Printing Functions
Printing Labels

Printing Labels

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

How to create a Report?

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

Hint : To change Pages in the Print Labels window use *Previous* and *Next* buttons or click on the *Tabs: Fields, Page, Labels, Body, Header/Footer, Logo.*
Hint : You can use Printing Labels function for creating more complex reports.

Printing Functions
Printing Reports

Options (preferences)

What does it do?

This application can be customized to suite your needs and preferences. For example:
- you can select fonts and colors for various elements of the user interface.
- you can show, hide some elements , or change their position.....

How to find preferences?

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

How to set preferences?

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

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

1. **User interface page** - general settings controlling some aspects of the user interface.
- Menus and Speed Bars (Read also: Menus, Speed Bars).
  - Show Both Menus and Speed   Bars.
  - Show Only   Menus.
  - Show Only   Speed   Bars.
- Letter Tabs (A..Z) (Read also: Letter Tabs).
  - Use Letter Tabs.
  - Don't Use Letter Tabs.
- Hint Messages (Hints are one line messages displayed close to the mouse pointer).
  - Show Hint Messages.
  - Hide Hint Messages.
- Record Delete Mode.
  - Ask User to Confirm.
  - Immediate Delete.
- Letter Tabs Location (Read also: Letter Tabs).

- Center.
- Right.
- Speed Bar Location (Read also: <u>Speed Bars</u>).
  - Top.
  - Bottom.
- Miscellaneous Options.
  - Display Tips On Startup.
  - Auto-Fill (set the auto-fill option for combo boxes) (Read also: <u>Combo Boxes</u>).
  - Don't display reminders (data backup reminders, data maintenance functions) (Read also: <u>Data Maintenance</u>).
  - Display Tray Icon (if set the program icon is displayed on the Tray Icon)

2. Modem page - modem settings used by <u>Phone Edit</u> Boxes to dial phone numbers (may not be used by some Organizers).
- Com Port (select your modem comport)
- Dial Type
- Modem (select modem type from the list, or select *Custom Type* if modem settings have to be entered manually).
- Modem Configuration List String (if the modem not listed then enter value from the modem manual).
- Modem Initialization String (if the modem not listed then enter value from the modem manual).
- Modem Hangup String (if the modem not listed then enter value from the modem manual).

3. Data page - initial (startup) data file selection (usually you want it as *Load Last Used File*). Here you can also modify the data field labels (or names). This lets you use some data fields for other purposes than designed.
- Initial Data File.
  - *Load Default File* (when you install the program and start the first time the **data.dbf** file is created: this is the default file).
  - *Load Last Used File* (you can have any number of data files; when this option is set the data file from the last session will be loaded at program startup).
- Modify Labels (Labels that are listed above all data entry fields are only our suggestion, you can change them here).
  - Select the label that you want to modify in the *Labels* box.
  - Enter new value in the *New Label* edit box.
  - Click on the *Change* push button.
  - *Save* push button: saves current label settings to a template.
  - *Load* push button: loads labels from previously created templates.

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

4. Date Formats page - on this page you can select Date Format for data edit boxes.
- *Date Fields* (select date field).
- *Date Format* (set the date format).

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

5. Colors page - here you can modify colors for most elements of the main window.
- *Applications Elements* box (select application element here).
- *Colors* box (click on the new color here).
- *Save* push button: saves current color settings to a template.
- *Load* push button: loads color settings from previously created templates.

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

6.   Fonts page - you can select Fonts for groups of controls, e.g. single-line edit boxes, multi-line edit boxes, etc.
- Component (select the control element here).
- Change Font push button (displays the Windows standard Font dialog box, select the font type and size here).

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

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

8.   Users page - if you select Multi-User System you can create, modify, and delete user accounts. See Multi-User System section for more information.

Password

Why set password?

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

Where to find password functions?

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

How to set/modify password?

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

The result: The new password is effective immediately after you have set or changed it. Use your new password next time you start this application.
Important: In order to activate the Password system select Password Required in Options/Security. In a multi-user system only the Supervisor can access Options/Security settings.

Export

You can export records (all or only those selected by a Filter) to:
Text File
DBF File
Netscape Bookmark File (only Internet Organizer)
Microsoft Internet Explorer Favorites (only Internet Organizer)

Note: The only Export function that preserves all information is Export To DBF File (when you export to other file types graphic and multi-line text fields are not exported).
Hint : You can export a subset of all records by setting a Filter first.

Export To A Text File

What is exporting data to a text file?

This operation will move all or selected records to a text file. The text file will list all exported records in the following way:
- Each record will be listed in one line.
- Data fields will be separated from each other by: tabs, commas or another user defined character.
- Data fields will be optionally delimited by: commas, quotes or another user defined character.

How to find Export?

The 'Export' function can be accessed in two ways:
- from the *Advanced* section on the speed bar: the *Export* button;
- from the *Advanced* section on the main menu: the *Export* option.

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

How to use Export?

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

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

Export To DBF File

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

How to find Export?

The Export function can be accessed in two ways:
- from the *Advanced* section on the speed bar: the *Export* button;
- from the *Advanced* section on the main menu: the *Export* option.

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

Note: All fields are exported for each record.
Note: Each database consists of three files: dataname.dbf, dataname.dbt, dataname.mdx. Those three files you can find in the EXPIMP subdirectory.

Export To Netscape Bookmark File

This function is available only in our **Internet Organizer**. You can export all or a subset of records from a current database to a Netscape Bookmark file. This is useful when you sometimes use Netscape Bookmarks. The data can be exported to a file in any directory. Fields exported are: Title, Address and optionally Description.

How to find Export?

The Export function can be accessed in two ways:
- from the *Advanced* section on the speed bar: the *Export* button;
- from the *Advanced* section on the main menu: the *Export* option.

Then select *Export To Netscape Bookmark File* radio button and click on *OK*. You will be asked if you want to include the contents of the Description field in a bookmark file. Then you will have to select name (and directory) for your bookmark file.

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

Export To Microsoft Internet Explorer Favorites

This function is available only in our **Internet Organizer.** You can export all or a subset of records from a current database to a Microsoft Internet Explorer Favorites. Fields exported are: Title, Address and optionally Category.

How to find Export?

The Export function can be accessed in two ways:
- from the *Advanced* section on the speed bar: the *Export* button;
- from the *Advanced* section on the main menu: the *Export* option.

Then select *Export To Netscape Bookmark File* radio button and click on *OK*. You will be asked if you want to include the contents of the Description field in a bookmark file. Then you will have to select name (and directory) for your bookmark file.

Import

You can import records from:
    [Text File](#)
    [DBF File](#)
    [Netscape Bookmark File](#) (only Internet Organizer)
    [Microsoft Internet Explorer Favorites](#) (only Internet Organizer)

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

Import From Text File

What is importing data?

Importing data is another option of adding records to this application.   You can import data from text files that have the following characteristics:
- fields have to be separated from each other by: tabs, commas or another user defined character;
- fields can be delimited by: quotes or another user defined character;
- each line corresponds to one record in the database.

How to find Import?

The Import function can be accessed in two ways:
- from the *Advanced* section on the speed bar: the *Import* button;
- from the *Advanced* section on the main menu: the *Import* option.

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

How to use Import?

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

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

Import From DBF File

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

How to find Import?

The Import function can be accessed in two ways:
- from the *Advanced* section on the speed bar: the *Import* button;
- from the *Advanced* section on the main menu: the *Import* option.

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

Import From Netscape Bookmark File

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

How to find Import?

The 'Import' function can be accessed in two ways:
- from the *Advanced* section on the Speed Bar: the *Import* button;
- from the *Advanced* section on the main menu: the *Import* option.

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

Import From Microsoft Internet Explorer Favorites

This function lets you import data from a Microsoft Internet Explorer Favorites into the current database (only **Internet Organizer**). This is especially useful when you have many MS IE Favorites that you want to transfer to Internet Organizer. Fields imported are: Title, Address, and optionally Category.

How to find Import?

The Import function can be accessed in two ways:
- from the *Advanced* section on the Speed Bar: the *Import* button;
- from the *Advanced* section on the main menu: the *Import* option.

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

Maintenance

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

- **Reindex database**: this option repairs indexes on your database. It is mainly used when troubleshooting your application, in case your data files become corrupt. It is recommended that you use this function *once a month*.
- **Delete database indexes**: this function is useful when the MDX files become very large overtime.
- **Pack database** : When deleting records from your data files, they are not physically erased.   Use the *Pack database* function periodically to reclaim disk space after deleting records.
- **Delete all records** : this function removes all records from your database. Use it with extreme caution - *it cannot be undone*.
- **Delete selected records**: this function can be used to permanently remove a group of records from the database. You select the records to be deleted by setting a <u>Filter</u> first.
- **Repair data file** : This function will repair a damaged data file. Sometimes your memo or graphic fields (those containing images or binary data) get corrupted, which results in error messages. Use this function to correct this problem. Typically one record (sometimes several records) may be lost. This problem is usually caused by a system crash when Organizer is open or by not closing Organizer before shutting down the system.
- **Backup data** : it is very important that you back up your database. If the database becomes corrupted as a result of a system crash Restoring database from a previous backup may be your only chance to recover your data (*Repair data file* function not always works). For more information on Backup function see <u>the next section</u>.
- **Restore data** : you need to use this function only if something went wrong (e.g. your database became corrupted) and you have backed up your database. For more information on *Restore* function see <u>the next section</u>.
- **Edit lists** : this function can be used to edit lists accessible through <u>combo boxes</u> in the <u>Details Page</u>. It is easier to access this function from combo box **Popup Menus.**
- **Display Log**: this function opens the   <u>Maintenance Log Window</u>. All data maintenance processes done on all your data files are logged here.

How to use Backup and Restore functions?

It is important to back up your data!

It is recommended that you back up your data on a regular basis e.g. once a week or once a month. You should especially do a backup after entering new records. When you do a Backup the following data files are copied to DATA\BACKUP directory:
- DATA.DBF and DATA.DBT (this is assuming that you have Loaded DATA.DBF file) (those files contain all your records)
- as well as some LISTx.DBF, LISTx.MDX,   (those files contain elements from combo boxes)

DATA directory is located underneath your main program directory. Once you do a backup to your DATA\BACKUP directory you should compress the above files (e.g. using PKZip or WinZip program and copy the compressed file to some backup media e.g. a diskette or a backup tape). You can also use backup software to do it (for example, **Microsoft Backup** included in **Windows 95**. Open: Programs/Accessories/System Tools/ Backup).

If you have backed up your data, it can be Restored from the backup directory into your data directory. If you compressed your backup files and copied them to a diskette (or some other backup media) you have to decompress it into BACKUP subdirectory (see above) before you can use Restore function.

Shortcut keys

What does it do?

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

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

Frequently asked questions and useful hints.

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

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

1) **Internet**
To find our products on the Internet:
- Connect with our Home Page : **http://www.primasoft.com**

2) **CompuServe**
To find our products on CompuServe:
- Go WINPROD and do search by contributor id:74643,2635; or
- Go WINSHARE and do search by contributor id:74643,2635;

3) Contact us.

2. How can I learn about new versions of your software?
You should visit one of our home pages on a regular basis. Our home page is the first place where new releases of our software are announced.

3. How to use backup and restore functions?
See *How to use Backup and Restore functions* section for a detailed description (or Maintenance).

4. Why are my DBF, DBT and MDX files so big?
MDX files store your database indexes and can grow substantially overtime if you have used many different orderings and filters. You can trim the MDX file by using Delete Indexes function in Maintenance.

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

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

5. I switched to multi-user system and I can not return to single-user system. What should I do?
Enter "**Supervisor**" as User Id in the *Login screen* and leave the *Password* field blank (if you did not set a password for the Supervisor). Then, change the Options to Single-User system.

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

7. Learn how to use filters!
Filters can be very useful in selecting a subset of all records both for viewing and printing.
For example, if you are only interested in records with NAME data field beginning with letters
C-F just set the filter for the NAME field with filter expression 'BETWEEN C and F'.

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

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

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

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

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Advanced Topics

[Multi-user applications](#)
[Network Installation](#)

Multi-user applications

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

If you want to use this software in a multi-user environment set Multi-User Mode in Options (Users page).
Only user who has the '**Supervisor**' user id can modify user accounts (Options, Users page). Every user has his or her own private directory where his or her private databases are stored. Nobody else can access the user's private data. The Supervisor's private directory serves at the same time as a Public Directory. All users can access the Public Directory (unless the Supervisor revokes their access privilege).

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

Network Installation

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

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

1.Application Installation (installation of the Organizer)

On your network server run Setup.exe from disk #1, CD ROM, or your hard disk (if you downloaded and unzipped the software) and follow the installation instructions. As a result all components will be installed on the server and icons will be created.
Note: If your network server is not running Windows NT or Windows 95 you should install Organizer software on a workstation (running Windows 95 or NT) first. Then copy, from the workstation to the server, the following:
- entire Organizer directory (including subdirectories) e.g. c:\ 32io11;
- entire Borland Database Engine directory (by default C:\Program Files\Borland\Common Files\Bde - you can put it in C:\Bde on the server); you will have to reflect the BDE location in 2) below;

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

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

3.Manual Setup of Borland Database Engine

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

For example, you may have to change:
[HKEY_LOCAL_MACHINE\SOFTWARE\Borland\Database Engine]
"DLLPATH"="C:\\Program Files\\Borland\\Common Files\\BDE"
"RESOURCE"="0009"
"CONFIGFILE01"="C:\\Program Files\\Borland\\Common Files\\BDE\\IDAPI32.CFG"
"UseCount"="1"

"SaveConfig"="WIN32"

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

to:

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

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

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

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

4.Create Organizer Icons on workstations

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

Details Page - Functions

Details Page has the **following functions** (all listed in the Details Page **Popup Menu** section, some listed in the Details Page **Speed Bar** section):

- *Replace Record With Template*: Displays all previously saved <u>record templates</u>. Select a template, the record data fields will be initialized from the record template. This form is convenient for entering series of different records. **Warning**: If the current record is not empty it will overwrite the contents.
- *Save Record To Template* : save the currently displayed   record in the Details Page to a Record Template;
- *View Copy Buffer* : Copy Buffer is temporary storage to which a record is being copied when using the Copy Record function; later you can Paste the record from the copy buffer;
- *Paste Record* : paste a record from the Copy Buffer;
- *Copy Record* : copy a record to the Copy Buffer;
- *Undo Changes* : this feature lets you undo the most recent changes to a record.
- *Delete Record* : delete the currently displayed record (cannot be undone);
- *Print Record* : print only this record;
- *Synchronize* : synchronize the Table of Contents with the current record in the Details Page.
- *Go To Web Page* : load the Web site from the record into the Web browser (available only in Internet Organizer); (only Internet Organizer)
- *Capture Web Page* : capture the Web site from the Web browser into the record (available only in Internet Organizer); (only Internet Organizer)

Record Template Button

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

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

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

Using Record Templates

Templates

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

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

Data Root Directory

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

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

DATA, DATA0001, DATA0002, etc.

Multi-user system

Go to PrimaSoft Web page

Click with LEFT mouse button on the PrimaSoft LOGO -
Sets your Web browser to activate the PrimaSoft World Wide Web Home Page -
http://www.primasoft.com
Stay tuned for future releases of our products (free minor upgrades). Any new versions will be announced on our Web Home Page. On this site you can also find links to other places that are relevant to this program (image resources, data resources, ...)

Organizer currently supports the following Web Browsers:
- Netscape Navigator;
- Microsoft Internet Explorer;
- NCSA Mosaic 2.0;
- Spry Mosaic - Compuserve Edition;
- America Online Web Browser.

Quick Access Sites (Only Internet Organizer)

Edit User Account

This information applies only to .

Only the Supervisor can add, delete and modify user accounts. Every user has:
- Name - used only for reference;
- User ID - used during the Login process; cannot be changed by the user;
- Password - used during the Login process; can be changed by the user.

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

User Accounts

This information applies only to <u>Multi-user Systems</u>.
Only the Supervisor can add, delete and modify <u>user accounts</u>.

Edit lists

What does it mean?

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

By using this function, you can modify contents of these lists:
- select a list
- add/edit/delete items in the list

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

Attachment/Start Application

What is 'attachment' ?

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

What is 'start application' ?

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

How to attach a file ?

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

How to select the application for the attached file ?

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

Preview this report

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

Print Functions
Print Reports
Print Labels

Repair data file

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

[Maintenance](#)
[Backup/Restore](#)

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  Fax: **604-951-7797**
  Internet: **support@primasoft.com**
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- If you would like to speed up the registration process you can also send your order form as an e-mail with the **attached encrypted file** (order.enc). Do it in the following way:
  1. Credit Card payments only (MasterCard and Visa),
  2. Open the Order Form dialog box and fill the form.
  3. In order to encrypt the form click on the Save push button (the order.txt, order.enc files will be created)
  4. You may check the order.txt file with a Notepad or a Text editor (the same ecnrypted info is in order.enc file)
  5. Create and send an e-mail with the attached file (order.enc)
  Note: Files Attached to e-mail messages are not preserved when the source and the destination are not on the same on-line system. Send it to our e-mail address that corresponds to your online system.

Replacing the database

What is Replace?

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

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

Where is the Replace function?

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

How to use the Replace function?

Use filter function to select only desired records.

When in the 'Replace' dialog box:
- Select the *Field To Be Replaced.*
- Select the *Replace Mode*:
    - *Replace Entire Field Contents*: select this mode if you would like to replace the entire content of the selected field with the *Replace With* string.
    - *Replace Substring Only*: select this mode if you would like to replace the part of the selected field. It will search for the text specified in the *Substring To Replace* edit box. Each found text will be replaced with a new value
    - *Auto-Increment*: select this mode if you would like to number your records. Enter the initial value in the *Start From* edit box. The number that will replace the content of the selected field is incremented by one and starts from the value entered in the *Start From* edit box.
    - *Auto-Decrement*: select this mode if you would like to number your records. Enter the initial value in the *Start From* edit box. The number that will replace the content of the selected field is decremented by one and starts from the value entered in the *Start From* edit box.
- Enter *Substring To Replace*: this edit box is displayed when the *Replace Substring Only* mode is selected. Specify the text to search for that will be replaced with a new value.
- Select *Start Replacing From*: select scope for the search/replace function:
    - *Current Record*: search/replace process will start from the record displayed in the detail window.
    - *First Record*: search/replace process will start from the first record.
- Enter *Replace With* text: Specify the text that will replace the whole content or the substring according to the selected options.
- Press the *Replace* button to activate search/replace function.

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

HTML Report Wizard

What is it?

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

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

HTML Report Wizard Window (Help)

Examples/Tutorial
General Settings Page
Data Page
Report Elements Page
    Report Attributes
    Report Header
    Report Body
    Report Body (Groups)
    Report Footer
Hyperlinks Pages
Maintenance Page
Functions

HTML Report Wizard - General Settings

HTML Report Wizard:

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

Generate HTML Report in this directory

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

Images Format

If your database contains images they can be used in the HTML report. The HTML Report Wizard will have to save them as graphical files. Select the file format that you would like to use. All graphical files will be stored in the report directory. File names are created in the following way: letter (optional) + field number + underscore + record number, for example: a11_23.gif => a(letter selected by you) + 11(graphical field position in the record) + "_" + 23(record number).

HTML Report Wizard - Data Fields

HTML Report Wizard:

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

All Data Fields List Box

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

To Remove a Field

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

To Change the Order of Fields

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

To Group Records

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

To Group Records in Separate Files

Select a "group by field", go to the Report Elements Page and select Report Type: 2-Level, or 3-Level.
In this case the report main page (index.htm) contains the list of group names with hyperlinks to the corresponding group files.

Field Attributes

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

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

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

User-Defined Fields

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

URL Link for User Field

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

HTML Report Wizard - Report Elements

HTML Report Wizard:

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

Report Type

1-Level: generates one html page with report body
2-Level: report is split into separate html pages, main page contains index with hyperlinks to grouped pages
3-Level: report is split into separate html pages, main page and the second level pages contain indexes (groups), the third level pages contain report body.

Note

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

Four sections
Each report page is split into four sections. Depending on your requirements select sections that will be included in your report.
Page Attributes (define background, meta tags, menus, margins, ...)
Page Header (define header title, header text, header graphic,...)
Page Body (define report layout, ...)
Page Footer (define footer title, footer text, footer graphic,....)

Insert into this   HTML Page

You can insert each section of the report into any html document. Just include section tags in your html file. HTML Converter will replace each tag with the corresponding part of the report.
<!-- PRIMASOFT:A -->   - Page Attributes tag
<!-- PRIMASOFT:H -->   - Page Header tag
<!-- PRIMASOFT:B -->   - Page Body tag
<!-- PRIMASOFT:F -->   - Page Footer tag
Brackets are part of the section tag. Each tag should be listed in a separate line.

HTML Report Wizard - Report/Page Attributes

HTML Report Wizard:

Include HTML Prolog/Epilog tags

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

HTML Page Title

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

Background Graphic/Background Color

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

Meta Tags

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

Description

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

URL Link Colors

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

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

Use this option if you want to create margins or menus.
Page Left Margin: enter number here. It will represent left margin in pixels.
Page Top Margin: enter number here. It will represent top margin in pixels.
Left Margin Color: select this option if you want to define unique color of a margin.
Top Margin Color: select this option if you want to define unique color of a margin.
Page Menu: select which menus should be created.
Create Menu: click on this push button to define menus.

Read more:

HTML Report Wizard - Report/Page Header

HTML Report Wizard: Help Index

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

Source

Select the source of the page header here.
Defined Attributes: DB-HTML Converter will create header elements defined on this page.
HTML File: DB-HTML Converter will use the content of this file as a report header.

Header Title

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

Picture

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

Picture Alignment

This function allows you to set the position of the image.
Left: image will be displayed on the left side of the window.
Right: image will be displayed on the right side of the window.
Above Title: image will be displayed above the title.
Below Title: image will be displayed above the title.

Header Text

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

HTML Report Wizard - Report/Page Body

HTML Report Wizard:

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

Report (Body) Format

Click on Plain if you would like to have each field on a separate line. Click on Tabular if you want to display selected fields in the form of a table.

Table Options

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

Table Width

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

HTML Report Wizard - Report/Page Footer

HTML Report Wizard:

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

Source

Select the source of the page footer here.
Defined Attributes: DB-HTML Converter will create footer elements defined on this page.
HTML File: DB-HTML Converter will use the content of this file as a report footer.

Footer Title

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

Picture

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

Picture Alignment

This function allows you to set the position of the image.
Left: image will be displayed on the left side of the window
Right: image will be displayed on the right side of the window
Above Footer: image will be displayed above the footer title.
Below Footer: image will be displayed above the footer title.

Footer Text

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

HTML Report Wizard - Hyperlinks

HTML Report Wizard: <u>Help Index</u>

To Create Hyperlinks

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

To Remove Defined Hyperlinks

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

HTML Report Wizard - Functions

HTML Report Wizard: Help Index

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

Close
It will close the HTML Report Wizard Window.

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

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

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

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

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

Text Attributes Control Elements

HTML Report Wizard:

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

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

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

Font Type
This control selects the font type.

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

Templates

HTML Report Wizard: Help Index

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

To Create a Template

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

 Notes

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

Related Topics
Save Template
Load Template

Save Template

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

Template Name

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

Existing Templates

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

Load Template

HTML Report Wizard:

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

Template Name

It displays the name of the selected template.

Existing Templates

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

Menu Page

HTML Report Wizard: [Help Index](#)

Controls:

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

How to create menu item.

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

Examples, Tutorial

HTML Report Wizard:

Examples

PrimaSoft's Gallery (on the Internet: http://www.primasoft.com/links/gallery.htm)
Selection of the web's best resources by PrimaSoft. All pages created entirely by HTML
Wizard. Database organized with our product: PrimaSoft Internet Organizer . To see this
example you have to be connected with the Internet. Load the following page into your
browser: http://www.primasoft.com/links/gallery.htm
- about 300 pages;
- all pages and graphics generated in less than 10 seconds with HTML Report Wizard;
- graphics and layout prepared in less than 30 minutes;

Parts of our site are created with HTML Report Wizard. Each page that has the DB-HTML
Converter push button at the bottom part was created with this powerful tool.
To see this example you have to be connected with the Internet. Load the following page
into your browser: http://www.primasoft.com

Tutorial

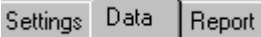**How to Create HTML document from a database in 3 easy steps.**

1) Start HTML Report Wizard

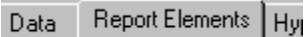I am assuming that your data file contains some records. Click on the **HTML** push button
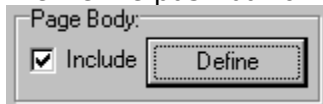.

2) Select Fields and Select Format
The HTML Report Wizard Window is displayed. Don't worry about all options. Click on the

Data Tab . It will display **Data Page**. Click on **Include All Fields**
push button
. It will select all fields from the database. All will be included in the HTML report. Click
on the **Report Elements Tab**
. It will display Report Elements Page. In the Page Body part click on
the Define push button
, it will display Page(Report) Format window . In the Body Format
part click on the **Plain**
, click on the OK push button.

3) Generate HTML Report

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

Set the option **View in Browser** .   Click on the Go push button

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

Maintenance Log Window

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

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

Table Viewer

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

Toolbar Commands
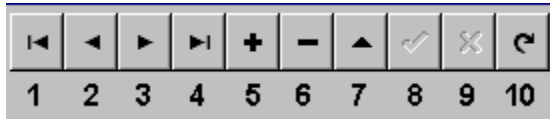
Move Commands:
1-Selects the first record of the table
2-Selects the previous record of the table
3-Selects the next record of the table
4-Selects the last record of the table
New/Edit/Delete Commands:
5-Insert Record
6-Delete Record
7-Edit Record
8-Post Edit
9-Cancel Edit
10-Refresh Data

You can move to different fields and records using the keyboard as follows:
Left arrow: Selects the field to the left of the selected field.
Right arrow: Selects the field to the right of the selected field.
Down arrow: Selects the same field in the record below the current one. If the last record is selected the table
Up arrow: Selects the same field in the record above the current one.
Home: Selects the first field in the current record.
End: Selects the last field in the current record.
Ctrl+Home: Selects the active field of the first record in the table.
Ctrl+End: Selects the active field of the last record in the table.
PgDn: Displays the next set of records.
PgUp: Displays the previous set of records.

How to edit data in fields

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

How to create a new record
Click on the Insert push button in the Toolbar. It creates empty new record.
Double click on each empty field. Enter your data in the Data Entry Windows.

Picture Control (Graphic Fields)

Picture Controls allows you to quickly enter and easily maintain image data. There are 2 types of Graphic Fields: Large and Small. The Large Graphic Field allows storing any size images. It also has a Speed Bar with the function buttons at the bottom. The Small Graphic Field does not have the Speed Bar. Both types of Graphic Field have a **Popup Menu** with the following functions:

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

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

Quick Access Sites

Click with LEFT mouse button on the PrimaSoft LOGO -
Sets your Web browser to activate the PrimaSoft World Wide Web Home Page -
http://www.primasoft.com

Click with RIGHT mouse button on the PrimaSoft LOGO -
Displays Quick Access Sites popup menu with the following functions:
- Add Current Site: adds selected record to the Quick Access Sites List.
- Edit Quick Access Sites : displays Quick Access Sites dialog box. There you will be able to add/delete/modify Quick Access Sites. This dialog box allows you to enter sites that are not listed in the program.
- Quick Access Sites List :   list of all Quick Access Sites. Selecting the site from the list sets your Web browser to activate the World Wide Web page address.

Note: This function is only available in the PrimaSoft Internet Organizer.

HTML Report Wizard - Group Page (BODY)

HTML Report Wizard:

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

HTML Report Wizard - Maintenance

Maintenance options are for advanced users. They can be used for two purposes:
- to allow more flexible naming of the generated HTML and graphic files.
- to allow more efficient HTML files maintenance - users can select which files will be generated.

When **HTML Files** radio button is selected you can set maintenance options for HTML Files. For 2-Level Reports (Report Elements) "HTML Files - 2nd Report Level" options can be set. For 3-Level Reports (Report Elements) both "HTML Files - 2nd Report Level" and "HTML Files - 3rd Report Level" options can be set.
Those options are the following:
Start File Names With: this option allows you to specify the prefix for all HTML   files that will be created automatically by the program;
Start Numbering From: this option also controls how the file names are created by the program; for example, if Start File Names With is "test" and Start Numbering From is "100" the program will create the following files: "test100.htm", "test101.htm", etc.
HTML File Name Field: this options allows the user to designate one text field in   the database that will be used for HTML file names. You can now keep the file   names unchanged even when new records are added to the database. File Naming Mode options are active only when the above HTML File Name Field is selected.
File Naming Mode options:
- Create All Files/Create All Names: this option causes the program to generate file names for all records (according to Start File Names With and Start Numbering From settings) and to store those file names in the selected database field (HTML File Name Field);   this option is useful for a new HTML Report;
- Create Only Files With Empty Names: this option means that the program will go through all records and when it finds no file name in the HTML File Name Field it will create the file name automatically, store it in the field, and create an HTML file; this option is useful when you add some new records and want to update the HTML Report (only files for new records will be created); it makes updates very easy;
- Create Files According to Update Rule: this option allows you to specify which HTML files should be created; this option allows you to update only HTML files for which the Update Rule is satisfied; the Update Rule is defined by selecting a database field (Update when Value of the Field), the operator and the operand (a text, date, or numeric value); for example, the Update Rule could be: Last_Name <= B   (create only pages for which Last_Name is A or B);
- Create All Files / Don't Update Names: this option allows you to recreate all HTML   files without changing the file names stored in the HTML File Name Field;

When **Graphic Files** radio button is selected you can set maintenance options for Graphic Files. Those options are the following:
Start File Names With: option allows you to specify the prefix for all graphic files that will be created automatically by the program;
Start Numbering From: option also controls how the file names are created by the program; for example, if Start File Names With is "test" and Start   Numbering From is "100" the program could create the following files: "test100_1.gif", "test100_2.gif", "test101_1.gif", "test101_2.gif", etc.
Graphic File Name Field: this options allows you to designate one text field in the database that will be used for graphic file names; using this field you can now keep the graphic file names unchanged even when new records are added to   the database; File Naming Mode options are active only when the above Graphic File Name Field is selected;

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