# Acknowledgements

IMG wishes to acknowledge the contributions, assistance and support of the people who have helped us directly or indirectly develop and prepare this product for release. Their insights into what features Agenda users want have contributed to designing Beyond 2.0, and in many cases, their technical critiques of pre-release versions have helped us improve and refine it. We also wish to acknowledge their patience.

Katherine Fritz

Bruce and Catherine Frumerman

James L. Goldman

Clara L. Graves

Margot Jacqz

Robin Latham

Roseann Lilly

Paul Maloney

Members of the LotusB CompuServe Forum

Ern Reynolds, Esq.

Bob Singer

Paul D. Steel

Alex Todd

Carol Woodbury, Esq.

# Chapter 4
## Exporting and Importing Information in DBF Format

# Chapter 5
## Exporting People Notes to Lotus Organizer

# Chapter 6
## Exporting Items to Calendar Creator 5.0

# Chapter 7
## Using the IMG People Move to Build Agenda Files

## Chapter 8
### Using The IMG Special Edition of Books
### Cards and Labels PrintBase

## Appendix

## Index

# Introduction

Thank you for purchasing Beyond 2.0, IMG's enhancement product for Lotus Agenda 2.0. Beyond 2.0 increases Agenda's ability to connect with other software products, and improves Agenda's ability to be used as a contact manager. Long time users of Agenda 2.0 are already familiar with Agenda's power as an information manager, whether the information is "personal", i.e. appointments, to-do items, and the like, or "organizational", i.e. business planning, problem solving, customer service, or for research. Agenda users have sought a way of making their Agenda-based information more useful by being able to communicate it to other database products, and as a platform for hard copy communication. Agenda users have asked for features that would permit Agenda-based information to be used with word processors to create mail merges, for label making, envelope printing, and the creation of various types of hard copy calendars.

**Agenda is No Longer an Information Cul de Sac**

Beyond 2.0 overcomes Agenda's limitations that have caused it to be characterized as an "information cul del sac". It has always been easy to get information into Agenda. Getting Agenda-based information back out, i.e. communication with other database software, spreadsheet software, and printing Agenda-based information in ways that faciliate personal, work group and customer communication has heretofore been much more difficult.

**What You Can Do with Beyond 2.0**

Now that you have Beyond 2.0, you can:

- use Agenda as a contact manager. Using the IMG Structured People Note, and the Beyond 2.0 Contact Manager you can link people with their companies, professional or industry type, geographic location or many other categories. You can create views based on information in category notes for people.

- export items from an Agenda 2.0 database to print daily, weekly and monthly calendars in numerous formats using the IMG Special Edition of Books Cards and Labels PrintBase that comes with Beyond 2.0;

- export address information about people from Agenda 2.0 to print mailing labels, envelopes, Rolodex card and books using the IMG Special Edition of Books Cards and Labels Printbase;

- export items from an Agenda 2.0 database to print a variety of calendar styles using Calendar Creator Plus 5.0;

- export information about people from an Agenda 2.0 database to traditional tablular databases, spreadsheets and word processors that support the DBF file format. You can export Agenda-based information about peoople to such popular products as dBase, FoxPro, Paradox, Access, Quattro, Excel, Ami Pro and Microsoft Word to name just a few;

- export address information for people from an Agenda 2.0 database to the Address Section of Lotus Organizer;

- develop new Agenda databases, or clone parts of existing Category Managers into other Agenda databases with ease using the IMG People Mover.

# The Structured People Note Standard

Item Management Group has developed a means by which Agenda 2.0 can store and communicate information about people using the **IMG Structured People Note**.

Until now, Agenda users have typed information about people in category notes with little or no consistent structure. While the free-form nature of Agenda's data entry is ideal for many functions, it is not ideal for communicating with other software products that require structured data. By structuring information in category notes for people, and using Beyond 2.0's file translation techniques, Agenda users can now export structured information to BCL and other programs that support the DBF file format, the tab delimited file format used in Calendar Creator Plus 5.0 and the CSV file format used in Lotus Organizer.

In the installation process for Beyond 2.0 you attach a series of macros including one entitled "Create a Structured People Note". You can run this macro when you highlight a person's name. When you run this macro, you launch a data entry program designed to accept information about people. Once you type information in the data entry screen, and return to Agenda, a Structured People Note is written for the person.

A separate macro, "Change IMG Category Maker Settings" allows you enable fields in the data entry screen to be made into categories automatically when a person's Structured People Note is written to your Agenda file. Moreover, the IMG Category Maker writes an assignment action from the person's name to each of the enabled categories created by the IMG Category Maker. The steps for creating a Structued People Note are explained in Chapter 1.

## The Sample File

Beyond 2.0 includes a sample Agenda database file, SAMPLE.AG. The sample file is located in the directory where you installed Beyond 2.0. If you accept the default directory settings during the installation process, it will be in the \BEYOND20 directory. This file includes entries for people using the Structured People Note and the Category Maker, and a few sample items. The sample file is used as the base for many of the examples in this manual.

**To use the sample file, you will need to attach the Beyond 2.0 macros using the procedures detailed in Chapter 1.** Once the macros are installed, we strongly suggest you browse around this file, paying particular attention to the category notes for the sample people, and how the Category Manager looks. As you begin to use Beyond 2.0 and start using the Structured People Note and Category Maker to capture information about people, and convert your old, unstructured people notes to Structured People Notes, your Category Manager will begin to look more and more like the sample file.

All the people names, firm names, addresses and other information contained in the sample file are fictitious and any resemblence to real people or firms is entirely coincidental.

# The IMG Special Edition of Books Cards and Labels PrintBase

Beyond 2.0 includes the IMG Special Edition of Useful Software's PrintBase version of Books Cards and Labels, (BCL). This program is designed specifically to work with Lotus Agenda 2.0. For the first time, Agenda 2.0 users can print a wide variety of calendars, Rolodex cards, pocket organizers, phone books, and mailing labels from their Agenda 2.0 files.

BCL is menu-driven and is designed to make your database portable on paper. BCL lets you print valuable business and personal data in a wide range of popular formats:

> Monthly bock-style calendars;
>
> Day Timers (all sizes), Day Runners, Running Mate;
>
> 5 1/2 x 8 1/2", 3-ring or 7-ring binders;
>
> Filo Fax or any 6-ring binder;
>
> Rolodex Cards; Mailing Labels; and
>
> Envelopes.

BCL prints your information in a wide variety of popular formats. BCL can sort and cross reference your data 12 different ways. You can print your data in a book format as it should be printed, on the front and back of pages (with or without page breaks to allow you to insert A-Z dividers) as well as on the front and back of Rolodex cards.

BCL can print on over 400 printers including laser printers. It also takes advantage of available printer features (bold and underline) to optimize the quality of your books, cards and labels. Laser printer support includes all HP cartridges as well as Soft Fonts and includes 44 free Bitstream Soft Fonts. These formats are scaled horizontally and vertically to make the format you select match the form you wish to print. The program adds or subtracts hours to make the final product look like it was designed to fit whatever form you have selected.

## How Beyond 2.0 Works with Agenda 2.0 and BCL

BCL is a powerful printing program that processes structured information and prints a wide array of formats. Beyond 2.0 integrates Agenda 2.0 with BCL in order to take advantage of BCL's strengths as a series of printing routines. Agenda's printing capabilities have heretofore been limited to list style printing of standard and datebook views. Using Beyond 2.0 with the IMG Special Edition of Books Cards and Labels PrintBase, enhances Agenda's value as a personal and work group management tool. Agenda now communicates better along traditional media lines, i.e. printed output.

Transferring information from Agenda 2.0 to BCL involves executing a macro in your Agenda file. Each macro processes first in the Agenda environment, then launches an external program that further processes Agenda's .STF files to prepare them for BCL.

When you execute a macro that calls BCL, BCL is loaded, and you execute your choices for printing from within the BCL environment. You should take some time to become familiar with the BCL menues, and review the forms options described in Chapter 8.

When you leave BCL you are returned to the exact place in your Agenda file from which you launched BCL.

# Chapter 1
# Installation and Initial Processing

**System Requirements**

Beyond 2.0 requires at least 400K of available RAM memory, and 4.2 megabytes of hard disk storage space. Your CONFIG.SYS file should have the values of the variables FILES and BUFFERS set to at least 30 and 8, respectively. Beyond 2.0 and BCL will work with DOS 2.X, 3.X,DOS 4.01, and DOS 5.

**Conventions**

In this manual, when two keys are required for an operation, i.e. **Ctrl X**, you must hold down the **Ctrl** Key and then press the **X** at the same time. Steps that require keyboard entry are shown in bold type, such as **ENTER** which indicates that you should press the Enter or Return key. Program file names appear in all capital letters, e.g. NOTE2DBF.EXE. User-defined file names are shown in italics, such as, *lawyer.dbf*, etc.

The steps for installing the Beyond 2.0 including the IMG Special Edition of Books Cards and Labels PrintBase are: installing Beyond 2.0 and BCL on your hard drive using the installation program; installing the Beyond 2.0 macros in your Agenda database and initializing BCL by running it one time.

**Installing Beyond 2.0 On Your Hard Disk**

**The installation must be done from the distribution diskettes.** The following sections guide you through this process step by step.

1. Place the Beyond 2.0 diskette labeled Disk 1 in either the A or B floppy drive, and log on to the appropriate drive by typing **A:** and pressing **ENTER,** or **B:** and pressing **ENTER.** The DOS prompt will now display: A:> or B:>.

2. Type **INSTALL** and press **ENTER** to begin the installation process.

> **NOTE: In some cases, the installation procedure will conflict with some TSR's that you may have loaded. If you encounter problems, temporarily remove the TSR's from your AUTOEXEC.BAT file, reboot your computer and run the installation routine again. After the installation you can restore your AUTOEXEC.BAT**



```
BEYOND 2.0 (C) 1992-1993 Item Management Group          Version 1.00

BEYOND 2.0




                                                    portions (C) 1992
                                                    by Useful Software

                                         tm         Item Management Group, Inc.
                                                    611 Dartmouth Avenue
                                                    Silver Spring, MD 20910

        Includes Books Cards & Labels Printbase by Useful Software
        Works with Lotus (R) Agenda 2.0 (R)

Loading and Initializing...Press Any Key to Continue
```
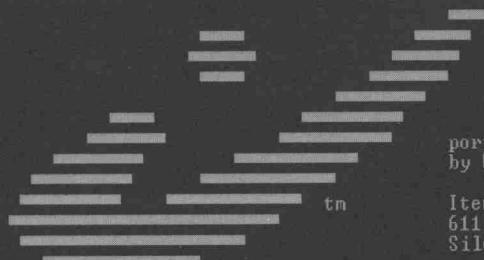
3. The installation program asks you to confirm that you wish to proceed with the installation by pressing **ENTER** to accept the default choice "I" to install, or by typing **E** and then pressing **ENTER** to discontinue the installation.

4. The program then asks you to enter the drive where you wish to install Beyond 2.0 or to confirm the default choice. The suggested drive is C:, however, you can change it to any valid drive by typing the drive letter in the highlighted space. Once you accept the default, or specify another valid drive letter, press **ENTER.**

```
BEYOND 2.0 (C) 1992-1993 Item Management Group              Version 1.00


                    System File Drive Information


    It is now necessary to specify the disk drive letter which will be
    used to store the BEYOND 2.0 application files.














            Files will be Installed on Drive Letter -->C
```
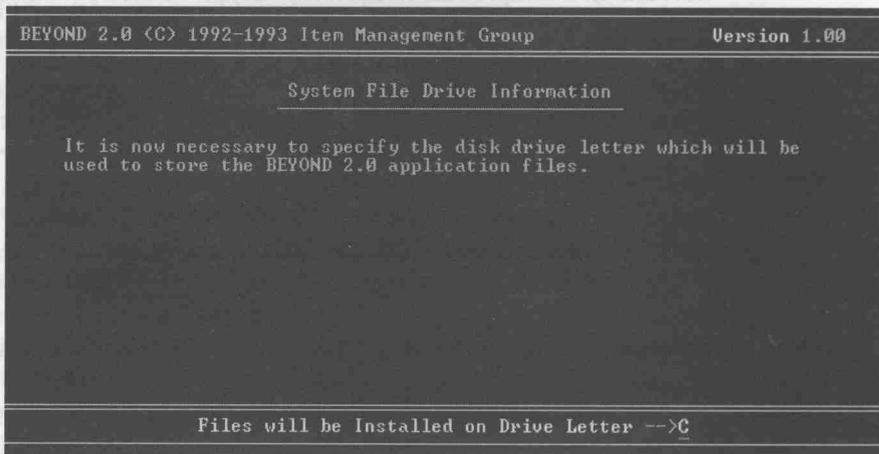
5. Next, the installation program suggests installing the Beyond 2.0 files in a directory named \BEYOND20. You can accept this setting or you can change the name of the directory where the program files will be installed.

> NOTE: Although you can specify a different directory for the program files, they must be placed in a directory that is off the root of the chosen drive, not in a subdirectory. For example, if you wanted to install the program files on the P: drive (assuming you have an active P: drive), in a directory named \XXX, the drive setting would be P: and the directory would be \XXX. A setting for the directory \AAA\XXX would not work, because the \XXX directory in this example is a subdirectory of \AAA.

Once you have selected the name of the directory where Beyond 2.0 and BCL will be installed, the installation program creates the directories and prompts you to **press any key to continue**. When you press any key, the program files are copied to your hard disk and decompressed.

**Overwriting
Previous
Versions of
Beyond 2.0**

If you are installing Beyond 2.0 on a computer that already contains a previous version of BCL in a directory named \BEYOND20, the installation program will detect its presence and prompt you as shown on the screen illustrated on the next page.

If you answer yes to the prompt shown below, all system files will be overwritten. If you answer no, the system files will not be copied to your hard drive. If you press Esc the installation will stop.

**Overwriting
Previous
Versions of
Beyond 2.0
continued**

```
BEYOND 2.0 (C) 1992-1993 Item Management Group          Version 1.00

              <<< SYSTEM FILE DIRECTORY ALREADY EXISTS >>>

                          C:\BEYOND20

    o If you respond yes (Y) to the following prompt, all new System files
      will be written to the hard disk.

    o If you respond no (N) to the following prompt, no System files will
      be copied and this step will be skipped.

    o If you press Esc, this installation process will be stopped.




         Do you want to overwrite existing System files (Y/N)? -->Y
```

6. The installation program will ask you for confirmation that you are ready to proceed with the installation. When you press **ENTER** to accept Y for Yes the installation program will begin copying files to your hard drive.

7. The installation program will prompt you to insert the diskette labeled Disk 2 at the appropriate time, so that the remaining files can be transferred to your hard drive. When the screen shown at the top of the next page appears, press **Y** when ready or **N** to end the installation.

```
BEYOND 2.0 (C) 1992-1993 Item Management Group          Version 1.00



              Continuation of Install Procedure for BEYOND 2.0

                  Please insert next disk into Drive B:
                          BEYOND 2.0 Disk 2






            Press Y when ready or N to end installation -->Y
```

8. The installation program will continue copying files to you hard drive. When this process is complete the screen will notify you that the files have been successfully transferred and to **press any key to continue**. When you press any key to continue, the first part of the installation will be complete.

# Attaching the Beyond 2.0 Macros Automatically

**Attaching and Running the IMGINST.MAC Macro to Your Agenda File**

The second stage of the installation process requires that you attach the nine Beyond 2.0 macros to your Agenda file. **There is one macro, IMGINST.MAC, that when attached to your Agenda file and run once, will install all the other macros.** Alternatively, you can install each of the macros individually. Follow the steps below to install and run the IMGINST.MAC.

To attach the macro file:

1. Start Agenda and open an .AG file.
2. Type **ALT F3** to start Agenda's Macro Manager.
3. If you have an existing list of macros in your file, you can position the cursor where you would like to insert the IMGINST macro, and press **INSERT**. If you have no existing macros in your Agenda file, Agenda prompts you to name the macro without the necessity of pressing INSERT.
4. Agenda prompts you to name the macro. Type in anything, such as the letter **A,** and press **ENTER**.
5. Press **F6** to display the Macro Properties dialog box.
6. Position the highlight on the setting for Macro file.
7. You can type the full path and file name for the macro and press **ENTER** or Press **F3** and browse upward through the directory tree by highlighting [..] and pressing **ENTER** until you locate a list that includes IMGINST.MAC.
8. Highlight IMGINST.MAC and press **ENTER**.
9. Press **ENTER** again to return to the Macro Manager. The macro is now attached. You should see the macro title "Install IMG Macros" in your Macro Manager accompanied by a double note symbol indicating that it has been attached as an external macro file.

```
Highlight the macro you want to run or change.  Press ENTER to
run the macro, INS to create one, F2 to edit an existing one.
Initial Section

                          Macro Manager                    UNC

                    ♫ Install IMG Macros

                 Press ENTER to run, ESC to cancel




 F1      F2      F3      F4      F5      F6      F7      F8      F9      F10
 Help  EditMac         Delete          Props   Learn
```

To run the macro, press **ENTER**. It will install the other macros and delete itself from the Macro Manager. When it has completed processing, your Macro Manager will look like the illustration on the next page.

**Attaching**
**and**
**Running**
**the**
**IMGINST.MAC**
**Macro to**
**Your**
**Agenda**
**File**
**cont.**

```
Highlight the macro you want to run or change.  Press ENTER to
run the macro, INS to create one, F2 to edit an existing one.
Initial Section
┌─────────────────────── Macro Manager ──────────────── UNC ──┐
│                                                              │
│        ♫ Create a Structured People Note                     │
│        ♫ Change Category Maker Settings                      │
│        ♫ Export Items to BCL Calendar                        │
│        ♫ Export People Notes to BCL                          │
│        ♫ Export People Notes to DBF                          │
│        ♫ Export People Notes to Organizer                    │
│        ♫ Export Items to Calendar Creator                    │
│        ♫ IMG People Mover                                    │
│        ♫ The Beyond 2.0 Contact Manager                      │
│                                                              │
│             Press ENTER to run, ESC to cancel                │
└──────────────────────────────────────────────────────────────┘

 F1      F2       F3      F4     F5      F6       F7      F8      F9      F10
 Help   EditMac          Delete         Props    Learn
```

NOTE:  The Beyond 2.0 macros are designed to show on the list of macros in the Macro
Manager no matter what part of Agenda you are in even though some macros will only run
from one part of Agenda.  Error trapping has been included in the macro code to stop
processing if you are not in the appropriate part of Agenda when launching the macro
rather than setting the macro properties to run in specific parts of Agenda only.  IMG's
choice to display all the macros as a unit is intended to give the user a consistent set of
choices when opening the Macro Manager, rather than having some macros show and
others not show depending on which parts of Agenda you are in at the time.  If you want to
further delimit in which parts of Agenda certain macros will show on the list in the Macro
Manager, you can change the macro properties manually.

# Attaching the Beyond 2.0 Macros Individually

You can attach each of the macros individually by following the steps outlined below.  The
procedure is the same for each of the macro files.  Just substitute the name of the macro file you
wish to install in the appropriate place.  A list of macro file names and their functions is included
in Appendix E.

1. Start Agenda and open the .AG file to which you want to attach the macro.

2. Type **ALT F3** to start Agenda's Macro Manager.

3. If you have an existing list of macros in your file, you can position the cursor where you would
   like to insert the macro, and press **INSERT**.  If you have no existing macros in you Agenda
   file, Agenda prompts you to name the macro without the necessity of pressing INSERT.

4. Agenda prompts you to name the macro. Type in anything, such as the letter **A,** and press **ENTER**.

5. Press **F6** to display the Macro Properties dialog box.

6. Position the highlight on the setting for Macro file.

7. Press **F3** and browse upward through the directory tree by highlighting [..] and pressing
   **ENTER** until you locate a list that includes the name of the macro file you wish to attach.  If
   you installed Beyond 2.0 using the defaults, this file will be in your C:\BEYOND20 directory.

8. Highlight the macro file name and press **ENTER**.

9. Press **ENTER** again to return to the Macro Manager.  The macro is now attached.  You should
   see the macro title in your Macro Manager  accompanied by a double note symbol indicating
   that it has been attached as an external macro file.

# Running BCL On Your Hard Disk the First Time

**Launching from Agenda**

The first time that you run a macro that exports information to BCL, it is desirable to initialize database and printer settings that BCL uses. Although it is not absolutely necessary to do this as part of the initial installation process, it is highly recommended, so that BCL will be ready when you want to print Agenda information. The steps for executing this process are:

1. Open the Agenda file where the macro files have been installed (as described above) and press **Alt F3** to open the Macro Manager.

2. Highlight one of the macros that exports information to BCL, for example "Export to BCL Calendar" and press **ENTER**.

3. The macro will prompt you for which items in the current view you wish to export. Accept the default by pressing **ENTER**. The macro will process and automatically open BCL. The screen shown below will appear.
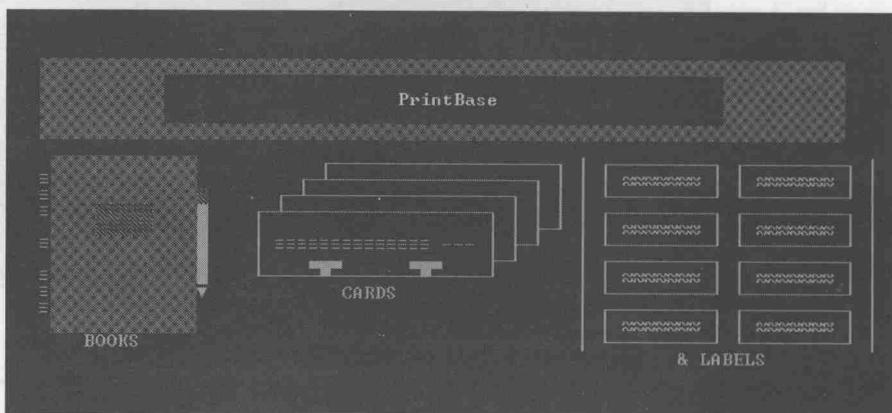


**Choosing Agenda from the Applications Menu**

4. Next the Applications Menu will appear as shown below. Since this edition of Books Cards and Labels PrintBase has been modified to work specifically with Agenda, the only application listed on the Applications Menu is Agenda. Press **ENTER** to continue.
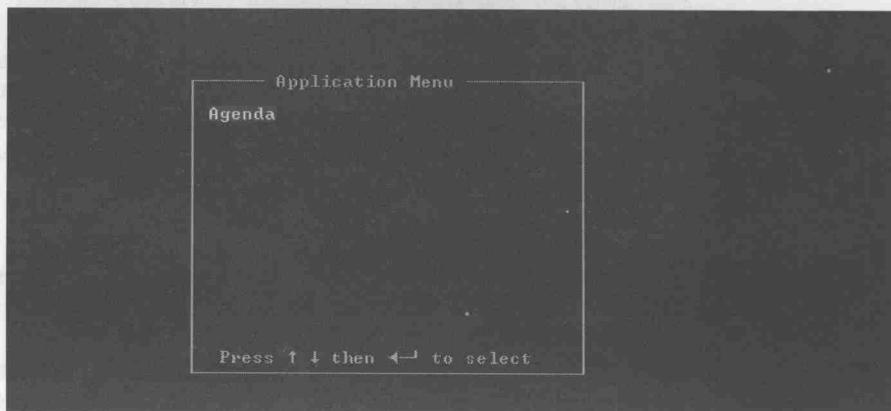
**Selecting an Initial Database File**

5. The next screen will display a highlighted choice for PEOPLE.DBF. Press **ENTER** to select it. **Do not make any changes, or type anything different.**

```
┌──────────── Application Menu ────────────┐
│             <people.dbf>                  │
│  Age │ PEOPLE.DBF                         │
│                                           │
│                                           │
│                                           │
│                                           │
│                                           │
│  Pr  │ Change File or Path                │
└───────────────────────────────────────────┘
```
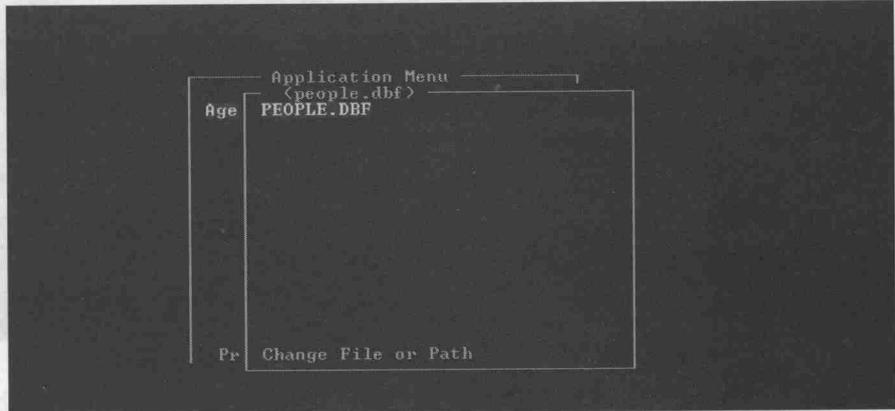
BCL processes information contained in one or another of two database files created by Beyond 2.0. In the case of calendar information exported from Agenda to BCL, the database file is named CALENDAR.DBF. The database file created by Beyond 2.0 that contains information about people to BCL is named PEOPLE.DBF. **BCL looks for PEOPLE.DBF by default. However, if you export items to the BCL calendar, BCL will automaticaly change the database selection setting to CALENDAR.DBF. You do not have to do anything.** The reason for the step you executed above is simply to initialize the default database setting.

**Entering Printing Header Information for the First Time**

6. The next screen will prompt you to fill in the information that will print on the first page of all reports and on the 'File Switch" menu. Move the highlight to the lines for name, address and phone number, and make the appropriate entries. When you have completed these steps, press **F10**. You will be asked if the information is correct. If it is, press **Y** and if not, press **N**, at which point you will have the opportunity to make changes. Once you accept the entries that you have made, you are notified that the initialization of BCL is complete.

```
┌──────────────────────────────────────────────────────────────┐
│         PrintBase Software                                     │
│ ┌──────────────────────────────────────────────────────────┐ │
│ │ What you enter below will print on the first page of all  │ │
│ │ reports and on the 'File' Switch Menu. If you are         │ │
│ │ entering data for a Phone Book, you could enter a          │ │
│ │ 'Company Name' (assuming the data is for a business) or    │ │
│ │ just enter your name for your Personal Phone Book.         │ │
│ │                                                            │ │
│ │ Menu Title              Agenda people.dbf                  │ │
│ │                                                            │ │
│ │ Your Name                                                  │ │
│ │ Address Line 1                                             │ │
│ │ Address Line 2                                             │ │
│ │ City, State Zip                                            │ │
│ │ Phone #                                                    │ │
│ │                                                            │ │
│ └─Press <F10> when finished────────────────────────────────┘ │
└──────────────────────────────────────────────────────────────┘
```

**The Installa-
tion and
Initialization
Process is
Complete**

```
    I N S T A L L A T I O N   C O M P L E T E

    You will not be required to run the install procedure
    again. Type 'PRB' at the DOS prompt whenever you want
    to start the program. If you decide to change any
    initialization parameters, select 'Edit Headings'
    found on the System Menu.

                                              Continue
```
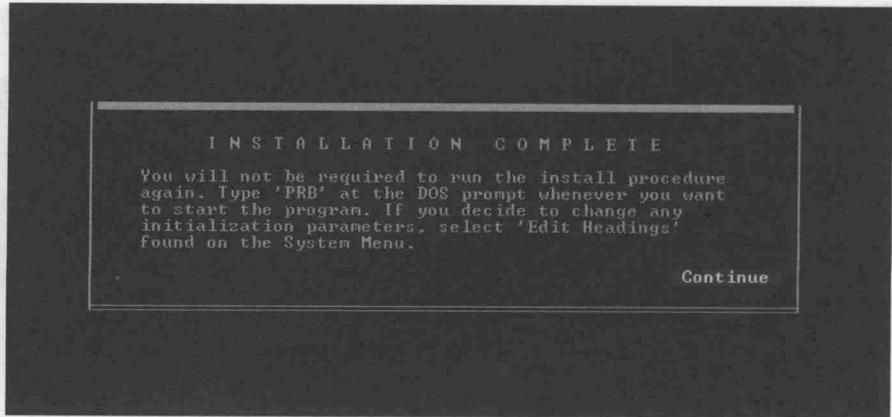
**BUT!**

**We Recom-
mend One
More Step**

7. The BCL Main Menu Screen will appear. If you do not want to print the information that was exported from the Agenda file as part of the preceeding set-up process you should press **ESCAPE** to exit BCL. BCL will ask you for confirmation, and answering **YES** will return you to your Agenda file.

We recommend that you define your printer now. That way, you will be able to print the information that was exported as part of the preceeding set-up process, and you will not have to define it the next time you access BCL. To define your printer, follow these steps.

**Printer
Set-Up**

The screen you see is headed by the BCL Main Menu. A full explanation of the menu choices is contained in Chapter 8.

1. Using the right arrow key, highlight the menu choice System, and press **ENTER**. The screen below will appear.

```
File   Forms   Labels   Sort   Select   Options   Print   System   Calendar

                                                     Edit Headings
  Paper                                              Printer Definition
  8-1/2" x 11"                                       Change Color
                                     Sort Order      Re-Index
  ~ ~~~~~~~~~~~ ~                    Cross Reference Letter
  ~ ~~~~~~~~~~~ ~                    Page Breaks     A4
  ~ ~~~~~~~~~~~ ~                    Calendar        Holidays
  ~ ~~~~~~~~~~~ ~                    <Select a Calen Print Duplex
  ~ ~~~~~~~~~~~ ~
  ~ ~~~~~~~~~~~ ~
  ~ ~~~~~~~~~~~ ~

                        Select ALL Records

                                Sort Order      : Organization
  ▆▆▆
  ▆▆▆        15/16" x 3-1/2", Standard Mailing Labels (one across)
  ▆▆▆

  Agenda people.dbf(1)
```

8

2. Highlight the choice for Printer Definition and press **ENTER**. BCL will ask you to confirm that you want to define your printer. Select YES by pressing **ENTER**.

3. Next the printer selection screen will appear as shown below.

```
                        Printer Selection

     1 Alps                      19 Juki
     2 Anandex                   20 Mannesman Tally
     3 Apple/AT&T                21 NEC
     4 Brother                   22 Okidata
     5 C.ITOH                    23 Olivetti/Olympia
     6 Canon                     24 Panasonic
     7 Centronix                 25 Printek
     8 Citizen                   26 Radio Shack
     9 Comrex                    27 Roland
    10 Dataproducts              28 Royal
    11 Diablo                    29 Seikosha
    12 Digital                   30 Silver Reed
    13 Epson                     31 Smith-Corona
    14 Fujitsu                   32 Star
    15 Genicom                   33 Unused
    16 Hewlett Packard           34 Texas
    17 IBM                       35 Toshiba
    18 JDL                       36 Unused
    19 Juki                      37 Other 1

 Select printer number 1-37 (38 to install later) followed by a ◄┘    0
```

4. From the printer selection list, find the number that corresponds to the brand of printer you intend to use by typing it in the highlighted box and press **ENTER**.

   For example, the value for Epson is **13**, while all Hewlett Packard Printers including the HP LaserJet Series +,II, III will be found under number **16**.

   When you encounter 'HP LaserJet' in this manual, we will be referring to the printer you installed as an *HP Laser Jet Series +,II, III*. If you have a Desk Jet or Desk Jet + with the ram card or cartridges, install as the HP Laser Jet Series.

   If you don't find a number for your printer, there is a 99.9% chance that your printer emulates one that's on the list. Check your printer manual, or call the manufacturer to see if you can find a suitable value on this menu.

   **If you do not have a printer connected at this time, select 38. You can always define a printer later from the System Menu.** It would be very unusual if you could not find a printer selection that would work with your printer; however, if you are forced to define the printer using the printer's own escape sequences, send a self-addressed stamped envelope to Useful Software requesting 'Printer Definition' instructions.

5. The next step is to identify the printer model in response to the program's prompt. What you see depends on what printer number you specified. Enter the number that corresponds with the model that best describes your printer. Type the appropriate number for the model you intend to use in the highlighted box and press **ENTER**.

6. The next step is to identify your printer ports by typing a number or a letter corresponding to the

```
                              Hewlett Packard
   1 DeskJet, resident
   2 DeskJet+, resident
   3 2602A daisy wheel
   4 2932A
   5 PaintJet
   6 Quietjet, alternate
   7 Quietjet, HP mode
   8 RuggedWriter 480
   9 ThinkJet, alternate
  10 ThinkJet, HP
  11 Original LaserJet
  12 LaserJet II, IIP, III etc




   Select Model followed by a ◄──┘   0
```

appropriate port in the highlighted box. The default choice is 1 for LPT1. To activate your
selection type the number or letter that represents your choice. Once the program has accepted
the information you provided about printer ports, it displays a reminder that your printer should
be On-line, Ready, and Loaded with paper. Press **ENTER** after you have verified all of these
conditions, and the program will start sending various test patterns depending on the printer to
confirm that the printer's alignment works with the program's requirements.

> **NOTE:  Some printers do not require the alignment process (HP Laser Jet Series
> II). If that is the case, your printer definition is complete.  If the printer you
> specified requires an alignment process or the specification of other information,
> follow the steps that follow.**

The printer selections you made previously determine which, if any, of the following set-up
steps will follow.  If you are not asked some of the following questions, or do not see  screens
described below, it is because the printer you selected does not require one or more of the tests
necessary to complete the printer set-up process.  If you see a screen with the following options,
your response to the prompts depends on what printer you have:

| | |
|---|---|
| **Continuous** | You have a pin or tractor-feed mechanism installed on your dot-matrix or daisy-wheel printer, so you can print on continuous form paper. |
| **Sheet** | You can only print one sheet at a time on your dot-matrix or daisy-wheel printer. |
| **Tray** | You have a sheet feeder connected to your printer, or laser jet, or desk jet type printer. |

If you enter Tray, the program may ask you if your printer emulates a daisey-wheel printer.
Consult your printer manual if you are not sure.  A number of popular laser printers emulate
dot-matrix printers including the Epson FX-80 and the IBM ProPrinter (Answer "N").  The
Canon laser printer emulates the Diablo 630 daisy-wheel printer (Answer "Y").  If you have a
printer with a cut sheet feeder, you may have to experiment with the settings for sheet or tray in
order to print the proper number of lines per page.

## Alignment Test

Depending on the printer that you specified you may be asked to test the alignment by comparing the last test pattern that the program printed to the pattern that appears on your screen.

```
C--------X-
         Q
```

If there is nothing on your screen that looks like this, or if extra characters appear on the printout, press **N**. The key to using the test pattern is the location of the "Q" relative to that of the "X". In response to the prompt, enter one of the following:

**Right**    This tells the program that the "Q" is under, but slightly to the right of the "X".

**Left**    This tells the program that the "Q" is under, but slightly to the left of the "X".

**No**    This tells the program that the "Q" is not at all aligned with the "X", or that extra characters appeared on the printout.

**Yes**    This tells the program that most of the "Q" is under the "X".

When you answer Yes, you see a new screen of questions about your printer. The questions that appear depend on the type of printer you have selected. Answering these questions is the last step of the printer setup process.

# Chapter 2
# Using The IMG Structured People Note and Category Maker

Beyond 2.0 contains features that enable you to use Agenda 2.0 as a contact manager to communicate information to the rest of the software world, using the IMG Structured People Note. Until now, Agenda users have typed information about people in category notes with little or no consistent structure. While the free-form nature of Agenda's data entry is ideal for many functions, it is not ideal for storing information about people or communicating with other programs that require structured information. By structuring information in category notes for people, and using IMG's file translation techniques, Agenda users can now export structured information to BCL, programs that support the DBF file format, and the Address Section of Lotus Organizer.

Working in tandem with the IMG Structured People Note feature is IMG's Category Maker. This feature enables you to create categories and assignment actions about people automatically while creating Structured People Notes. Creating action assignments from one category to another is a powerful feature of Agenda 2.0 that has confused many users when they have sought to employ it. Beyond 2.0 has made the process of creating numerous commonly used categories and assignments actions from people to these categories simple. Using the Structured People Note feature, together with the Category Maker not only allows Agenda to communicate with other database software such as BCL, but substantially improves Agenda's utility as a contact manager. Using the Beyond 2.0 Contact Manager is explained in the next chapter. This chapter focuses on the procedures for creating Structured People Notes, categories and assignment actions.

In the installation process you attached the macro entitled "Create a Structured People Note". When you run this macro, you launch the program that creates Structured People Notes, categories related to the person and action assignments from that person to categories that you specify.

**A Simple Prerequisite**

In order to use the feature for creating Structured People Notes, your Agenda file must have a category named "People", and the people listed in your Agenda file must be in the category family "People". When you run the macro that installs the Beyond 2.0 macros the category "People" is created if it did not previously exist. If you use the Activities Planner you probably have this category. If you have edited the category name "People" to some other name, you must re-edit it to say People before running the program to create Structured People Notes, and delete the category "People" created by the installation macro.

**Understanding the Category Maker**

The Category Maker is the tool you use to specify which categories and actions you want Beyond 2.0 to create automatically for you. To access the Category Maker, follow the steps below.

1. Open an Agenda file that contains the Beyond 2.0 macros. (See Chapter 1 for installing the Beyond 2.0 macros).

**Under-
standing
the
Category
Maker
continued**

2. Press Alt F3 to open the Agenda Macro Manager.
3. Highlight the macro entitled, "Change Category Maker Settings" and press ENTER. The macro will begin to process and you will see the screen below.

```
Category Maker              IMG Structured People Note <tm>
                            Copyright <C> 1992-93 Item Management Group, Inc.


      Change Category Maker Settings? <Y/N>:  N

      Choose "Y" <Yes> to select fields that you wish to export to the
      Category Manager with an assignment action from this Category



      Because the BEYOND 2.0 Contact Manager creates views based on
      the Company, Type, Work City, Work State, and Work Zip fields
      of the Structured People Note, these fields are selected for
      export to the Category Manager by default.



              Press the Escape Key <Esc> to Exit.
```

4. The default choice is N for no change to the export status. The first time you create a Structured People Note, you will want to press **Y** for Yes so that you can review the default settings and make any changes you desire. The screen shown below will appear.

```
Category Maker Settings     IMG Structured People Note <tm>
                            Copyright <C> 1992-93 Item Management Group, Inc.
         Work Phone:                   Fax #:
            Company: Y
              Title: N                 Type: Y

         First Name:           MI:   Last Name:
 Mr.,Mrs.,Ms.,etc.: N                 Nickname : N

  Business Address: N
                   N
               City: Y
            Country: N                 State: Y  Zip: Y

 Residence Address: N
                   N
               City: N
            Country: N                 State: N  Zip: N

         Home Phone:                   4th Phone:

            USER1   : N
            USER2   : N
            USER3   : N
              Press the Escape Key <Esc> when finished.
```
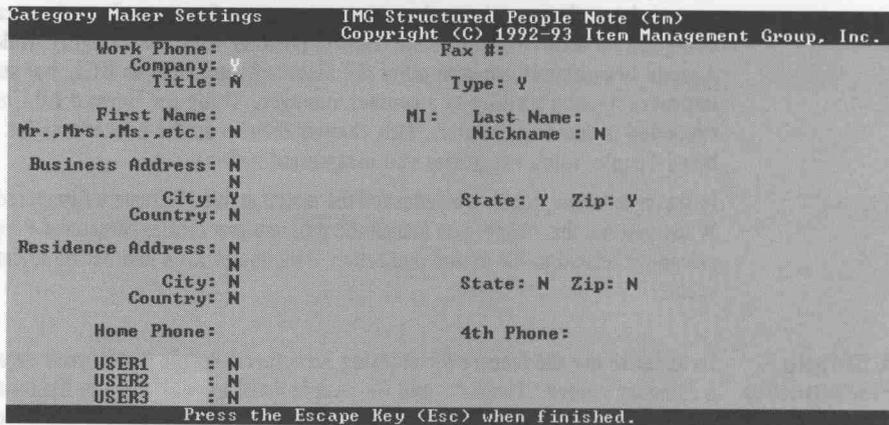
This screen shows the fields that are included in the Structured people Note data entry screen and includes Y (yes) or N (No) settings for each field. These settings control whether or not categories are created for the data entered in these fields when you create a Structured People Note. By default, the fields that capture a person's company, company type, work city, work state and work zip code are enabled. When you enter information in these fields, the content of the fields will be created as new categories in your Agenda file and assignment actions will be established between the person and these categories.

5. Press **ENTER** or the **down arrow** to move the highlight to the Y/N settings for each field. To reverse the direction of the cursor, press **SHIFT** and **TAB** at the same time, or the up arrow. When the highlight is positioned on a field setting for which you would like to automatically create a category and assignment action, change the setting from N to Y by pressing **Y**.

**Creating a User Defined Field**

The Cartegory Maker contains three user-definable fields. These fields will create standard categories in you Category Manager. Follow the steps below to create a user defined field.

6. Position the highlight on one of ther user defined field labels near the bottom on the screen by pressing **ENTER** or the down arrow key until the highlight is positioned on the user defined field lable you wish to modify.

7. Type the name of the category you wish to include. For example, if you want to capture a person's CompuServe address, you would position the highlight on one of the user defined field labels and type an identifier such as **C_ServeAdr** and press **ENTER**. The new field name will appear in place of the field label.

8. With the highlight on the Yes/No setting, press **Y** for Yes to activate the field as one that the Category will make when Structured People Notes are created. An action assignment will also be made from the person's name to the entry in that field. All future Structured People Notes will contain that field label until you change the field definition.

9. When you have finished making the changes to the field settings you wish to establish as categories, press **ESCAPE**. You will be returned to your Agenda file. The settings you established will remain as the default settings for this file until you change them. In the Structured People Note data entry screen, the enabled fields are identified with an asterisk next to the field name as a reminder that entries in these fields will be created as categories and assignment actions written between the person and these categories when the Structured people Note is written to your Agenda file.

**Using the IMG Structued People Note**

The steps for creating a Structued People Note are explained below.

1. Open the Agenda file that contains the attached macro STPNOTE.MAC, (the macro that launches the process for creating the Structured People Note).

2. Place the highlight on the name of a person shown in any view column containing the family "People", or on any child of "People" in the Category Manager. For example, if you have a view containing a category column containing People and an item is assigned to John Smith, you would place the highlight on John Smith's name in the category column.

3. Press **Alt F3** to open the Agenda Macro Manager.

4. Highlight the macro entitled "Create a Structured People Note" and press **ENTER**.

5. The macro will begin to execute and the first thing you will see is the screen shown below.

```
Input Screen                    IMG Structured People Note (tm)
Category: Asberry, Ellen        Copyright (C) 1992-93 Item Management Group, Inc.
        Work Phone: <    >    -           Fax #: <    >    -
          Company:*  _
            Title:*                         Type:*

        First Name:              MI:  Last Name:
Mr.,Mrs.,Ms.,etc.:                        Nickname :

 Business Address:

             City:*                      State:*  Zip:*
          Country:

 Residence Address:

             City:                       State:   Zip:
          Country:

        Home Phone: <   >    -          4th Phone: <   >    -

            USER1   :
            USER2   :
            USER3   :
        A "*" signifies that an entry will also be made into a Category.
```

**Using the
IMG
Structued
People
Note
continued**

6. The data entry screen contains numerous fields that you can fill in about a person. To fill in information, you simply type the information in the field. To move down through the form you can press **ENTER** to progress through the fields. The move back up through the fields, simply press **SHIFT** and **TAB** at the same time and the highlight will move upwards through the fields.

> **NOTE: The size of the fields shown on the Structured People Note data entry screen correspond to the maximum field lengths supported by BCL. The maximum length of an entry in any given field that is supported by BCL is shown on the information prompt at the bottom of the screen. If the data you wish to enter exceeds the maximum field length supported by BCL, the entry field will begin to scroll to the right as you type additional information. IMG has provided maximum field sizes significantly greater than those supported by BCL. Data entered in any field that is within IMG's limits will be written to the Structured People Note, and can be exported to a DBF file. If you enter data in excess of the maximum field length for BCL, only those characters that fall within BCL's limits will print.**

7. When you have filled in all the fields called for in the form, or all those for which you have data, press the **ESCAPE** key. (You do not have to enter data in all of the fields included on the data entry screen in order to create the Structured People Note.) Make sure you press ENTER after typing the last data entry in order to place it in the data entry screen before your press ESCAPE. **If you forget to press ENTER to place the last data entry on the screen, the ESCAPE key will cancel the data entry and return you to Agenda without that particular field entry.**

When you press ESCAPE the program will:

- write a Structured People Note containing the information you entered in the data entry screen for the person you highlighted at the beginning of the process;

- create categories for those fields you specified in the Category Maker; and

- create assignment actions from the person category to these new categories.

For example, if you create a Structured People Note for someone named John Quigley, and have specified that the field named "Company" should be exported by choosing Y as its setting in the Category Maker, when you return to Agenda from the program that creates the Structured People Note, the name of Quigley's company, Quigley Enterprises, will have been created as a category in the family Company, and an assignment action from John Quigley to Quigley Enterprises will have been written in the Category Manager to automatically assign items assigned to John Quigley to Quigley Enterprises. Similarly, other categories created using the Category Maker, such as work state, work zip code, and type of company will also have been created and assignment actions written from John Quigley to them. The Category Manager entry would look like the sample below.

```
♪ John Quigley      A= Silver Spring,MD,20910,Quigley Enterprises,Marketing
```

**Using the
IMG
Structued
People
Note
continued**

8. To view the Structued People Note, press **F5**. You will see the field labels and the data that you entered in the category note for the person. The text of a sample Structured People Note is shown below.

```
Note for:    Quigley                             Line    1 INS EDIT
                              Font: Times Roman 8.0pt    Attr: Normal
W. Phone #: (301) 555-2020
Company   : Quigley Enterprises
Type      : Marketing
Fax #     : (301) 555-2021
Title     : President
First Name: John
MI        : P
Last Name : Quigley
Mr,Mrs,Ms : Mr.
Nickname  : Jack
W. Addr   : 123 Fenton Street
W. Addr2  : Suite 104
W. City   : Silver Spring
W. State  : MD
W. Zip    : 20910
W. Country: USA
H. Addr   : 3428 South Pine Street
H. Addr2  :
H. City   : Rockville
H. State  : MD
H. Zip    : 20853
  F1        F2       F3      F4      F5      F6      F7      F8      F9      F10
 Help     Paste    Copy    Cut   Return  Marker   Mark                     Menu
```

> **NOTE: If you had existing data in the note for the person for whom you created the Structured People Note, the existing data has been pushed to the bottom of the structured list. It is not lost!**

You can add or edit information in the Structued People Note, just as you would in any other category note. You can format category columns for specific rows in the Structured People Note to display note information, just as you may have done with the more primative techniques for displaying telephone numbers for people in Agenda by placing them on the first line of the category note and then formatting category columns for the first line of the note text.

You can even insert additional information between rows in the Structured People Note for a person without diminishing the ability to export structured information to BCL or other programs that support the DBF file format. To add information, simply press **ENTER** to create space, and type your desired information anywhere in the list of structured note information.

> **NOTE: Be aware, however, that if you add rows to the Structured People Note, you will lose the ability to accurately reference information in category columns by formatting for specific rows in the category notes below the place of the insertion.**
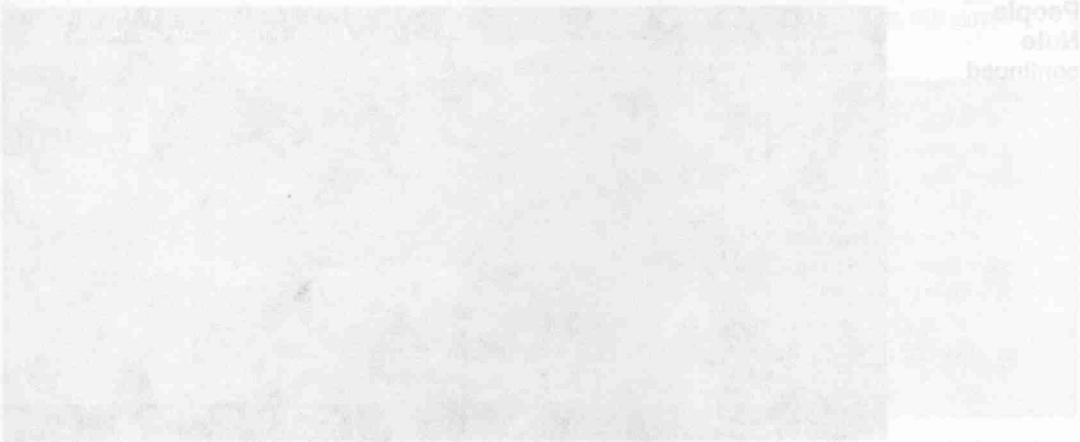
# Chapter 3
# Using the Beyond 2.0 Contact Manager

IMG has developed the Beyond 2.0 Contact Manager to replace the contact manager that Lotus included with the Activities Planner so that it is easier to use, and takes advantage of information contained in Structured People Notes. Once information about people is stored in the Structued People Notes, and you create the basic "Contact List of People" you can create a wide range of views arranged or filtered by any category for which an assignment action has been created. These tools enable you to produce views that are lists of people by company, work city, work state or work zip code, or any other category enabled in the Category Maker. From the views created using the Beyond 2.0 Contact Manager, you can export information to BCL for specialized printing, or export information as a DBF file so that it can be imported into any software product that supports the DBF file format. The latter feature enables links to a wide variety of database and word processing programs.

The Contact List of People is the basic list created by the Beyond 2.0 Contact Manager. From this list you can create the four pre-programmed views or make custom views that can be further enhanced modifying the view properties.

**Converting a Contact List Created with Lotus' Contact Manager**

If you have a Contact List that was created using Lotus' Contact List macro (included with the Activities Planner application), you must delete the dummy items in the Contact list before creating the Contact List of People using the Beyond 2.0 Contact Manager. To do this, simply load the Contact List view, highlight the section heading and press **Alt F7** to unmark any marked items in your file, and then press **F7** to mark all the items in the Contact List view. Then press **Alt F4** to discard all the marked items.

**Creating the Contact List of People**

To create the Contact List of People, follow the steps below.

1. Make sure that the Beyond 2.0 macros are installed in your Agenda file. If they are not, refer to Chapter 1 for Installation and Initial Processing.
2. From any view, press **Alt F3** to open the Agenda Macro Manager.
3. Highlight the macro entitled "The Beyond 2.0 Contact Manager" and press **ENTER**. The screen below will appear.

```
Highlight your choice and press ENTER.
─Con───People───────────W. Phone──────Company─────────────────C. Type────

                       The Beyond 2.0 Contact Manager
                  Create a Contact List of People
                  Create a View Showing Companies and People
                  Create a View by Work City
                  Create a View by Work State
                  Create a View of People by Work Zip Code
                  Create a Custom View of People by Category
                  Quit




   F1      F2      F3      F4      F5      F6      F7      F8      F9      F10
   Help
```
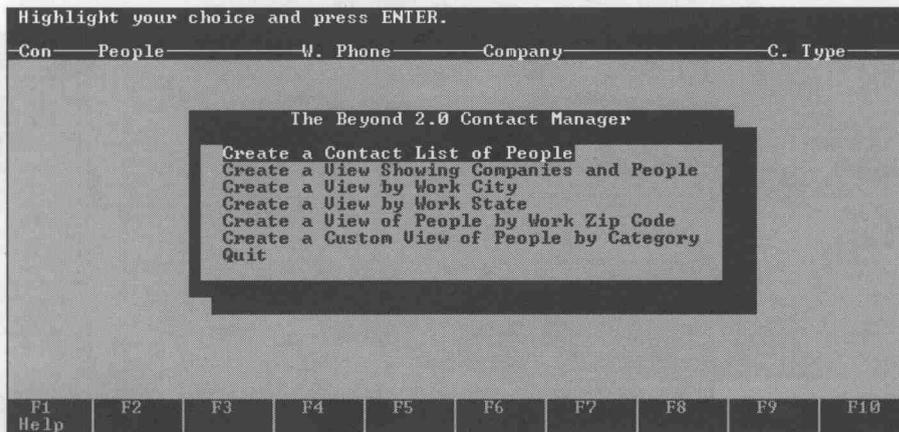
4. Position the highlight on the selection "Create a Contact List of People" press **ENTER** to begin processing. You will see a series of screens indicating that the process is under way. The Contact List of People view is created first and then the individual contact records are written and imported into your Agenda file. When Beyond 2.0 completes the creation of the Contact List of People, you will see the list and the message on the screen as shown below.

```
File: C:\BEYOND20\SAMPLE                                    03/01/93   ↓  ♪
View: Contact List of People [Contact List]
JAsberry, Ellen───────────W. Phone #────Company──────────────Type
   •                       ·<407> 555-0987 ·Forster & Lowe      ·Accountants
JDawson, Fredrich─────────────────────────────────────────────
   •                                                            ce Suppl
JDobson
   •       When you add Structured People Notes in other views, run this   tant
JEdison   macro periodically to add those names to this view.
   •                                                                       er
JFelter   Use the ALT-F5 key to search the Contact List.                   le
JHenry,
   •                       Press any key to continue
                           ·<301> 555──664 ·Festive Florists    ·Florist
JJasper, Martin───────────
   •                       ·<212> 555-6321 ·Jasper & Grimes      ·Lawyer
JJohnson, Wilma───────────
   •                       ·<215> 555-3076 ·Devlon, Smith and Towne ·Accountant
JLattimer, Gloria─────────
   •                       ·<202> 555-2046 ·Silver, Krickstein & Co ·Public Relat
JLowry, Auston────────────
   •                       ·<215> 555-6647 ·Lowry Brothers, Inc.  ·Printer
JMartin, Angela───────────
   F1        F2      F3      F4      F5      F6      F7      F8      F9      F10
```

The Contact List of People view contains the names of people as section headings in the left most column. Below each section heading is a dummy item, (an item with no text). The next category column to the right is headed by the work telephone number. This column is formatted for the first line of the parent category "People" using the same convention as Lotus established for the first line of a person's note. The next category column to the right is headed by the Company. This column is formatted for the second line of the category note for the parent category "People". The next column to the right displays the what you entered in the "Type" field when creating the Structured people Note. The Contact List of People displays line 3 of the category note under Type.

Finding people on the Contact List of People is easy. The section headings, which are the people's names are sorted in ascending alphabetic order. To quickly find a person's name, you can press the **Alt F5** (Go To) key. A list of the people included on the Contact List will appear. You can scroll down through the list, or use the Pg Down key, or use Agenda's automatic matching capabilities to locate the person's name by just typing the first few letters of the name, and Agenda will find it on the list. Once the desired name is highlighted, press ENTER, and the highlight will be located on the section heading that is the person's name.

```
Highlight the section that's your destination and press ENTER.
JAsberry, Ellen───────────W. Phone #────Company──────────────Type
   •                       ·<407> 555-0987 ·Forster & Lowe      ·Accountants
JDawson, Fredrich─────────
   •                       ·<201> 555-4050 ·Associate              Suppl
JDobson, Sarah────────────                         Go To
   •                       ·<202> 555-5265 ·Dobson &                       ant
JEdison, Kyle─────────────                          Asberry, Ellen
   •                       ·<305> 555-3427 ·Edison, W             Dawson, Fredrich
JFelter, Stuart───────────                          Dobson, Sarah
   •                       ·<301> 555-9903 ·Global Ui             Edison, Kyle
JHenry, Patricia──────────                          Felter, Stuart
   •                       ·<301> 555──664 ·Festive F             Henry, Patricia
JJasper, Martin───────────                          Jasper, Martin
   •                       ·<212> 555-6321 ·Jasper &              Johnson, Wilma
JJohnson, Wilma───────────                          Lattimer, Gloria
   •                       ·<215> 555-3076 ·Devlon, S             Lowry, Auston
JLattimer, Gloria─────────                          Martin, Angela         ant
   •                       ·<202> 555-2046 ·Silver, K             Simpson, Terry
JLowry, Auston────────────                          Smith, David           lat
   •                       ·<215> 555-6647 ·Lowry Bro            ↓ Spencer, Tyrone
JMartin, Angela───────────
   F1        F2      F3      F4      F5      F6      F7      F8      F9      F10
   Help
```

**Using the Beyond 2.0 Contact Manager as a Call Log**

Items in the Contact List of People, and the other pre-programmed views that are created by the Beyond 2.0 Contact Manager are not assigned to the category Tasks. This way, items related to tasks will not clutter your contact list. Since items in the Contact List of People are not assigned to Tasks, you can use the Contact List of People or the other views created by the Beyond 2.0 Contact Manager as a place to log calls made to people or companies shown on the list(s). If you have a conversation with a person on the list and you want to jot down the subject of your conversation, you simply find the person on the Contact List, and enter a new item as you would in any other view. For example, if you had a conversation with Ellen Asbury (a person shown in the sample file) you might enter an item such as:

> We discussed the Harris situation and she felt it could be solved by talking to Wilson.

The item would automatically be assigned an Entry date, and further notations you make in the Contact List of People or other views created by the Beyond 2.0 Contact Manager will sort on the Entry date so that you can have a chronological listing of items generated in your calls. If your item contains a When date, such as:

> We discussed the Harris situation and she felt it could be solved by talking to Wilson by Friday.

Agenda will keep track of the When date, and the item will appear in datebook views or other views that do not include the category Tasks. For example, the item would appear in a "This Week" view, or in a standard view where neither the section(s) or filter(s) include the Tasks category. In this example, the person's name was not included in the item text but is associated with the person in whose section the item was created. Since this item was created under the Ellen Asbury section (presumably a based on a conversation with her), her name will appear in a category column headed by People in other views that would include this item.

**Creating a View Showing Companies and People**

Once you store information about people using the Structured People Note and the Category Maker, and have created the Contact List of People, you can create a view of companies and the people who are linked to them by following the steps below.

1. From any view, press **Alt F3** to open the Agenda Macro Manager.

2. Highlight the macro entitled "The Beyond 2.0 Contact Manager" and press **ENTER**.

3. Position the highlight on the menu choice "Create a View Showing Companies and People" and press **ENTER**. The macro will process and when complete you will see a screen like the one shown below.

```
File: C:\BEYOND20\SAMPLE                          03/01/93    5:10pm
View: Contact List by Company [-Tasks]                 ↓    ↲
-Associated Parts, Inc.──────────────────People──────W. Phone #─────
                     •                    ·Smith, David    <301> 555-6611
-Associated Suppliers, Inc.──────────────People──────W. Phone #─────
                     •                    ·Dawson, Fredrich <201> 555-4050
-Davidson & Wilson───────────────────────People──────W. Phone #─────
                     •                    ·Wallace, Murry   <215> 555-5682
-Devlon, Smith and Towne─────────────────People──────W. Phone #─────
                     •                    ·Johnson, Wilma   <215> 555-3076
-Dobson & Jacobs─────────────────────────People──────W. Phone #─────
                     •                    ·Dobson, Sarah    <202> 555-5265
-Edison, Wilkins & Sons──────────────────People──────W. Phone #─────
                     •                    ·Edison, Kyle     <305> 555-3427
-Festive Florists────────────────────────People──────W. Phone #─────
                     •                    ·Henry, Patricia  <301> 555--664
-Forster & Lowe──────────────────────────People──────W. Phone #─────
                     •                    ·Asberry, Ellen   <407> 555-0987
-Frasier & Gillman───────────────────────People──────W. Phone #─────
                     •                    ·Tollister, Susan <212> 555-2224
-Global Village Travel───────────────────People──────W. Phone #─────
                     •                    ·Felter, Stuart   <301> 555-9903
-Jasper & Grimes─────────────────────────People──────W. Phone #─────
 F1      F2      F3      F4     F5     F6      F7     F8     F9      F10
Help    Edit  Choices  Done   Note   Props   Mark  Uw Mgr Cat Mgr  Menu
```

## Creating a View Showing Cities and People

Once you have created the basic Contact List of People, you can create a view showing the work cities included in your Category Manager and the people for whom assignment actions have been created to link those people to the cities. To create this view, follow the steps below.

1. From any view, press **Alt F3** to open the Agenda Macro Manager.
2. Highlight the macro entitled "The Beyond 2.0 Contact Manager" and press **ENTER**.
3. Position the highlight on the menu choice "Create a View by Work City"and press **ENTER**.
4. The macro will begin processing and when completed you will see a screen similar to the one below.

```
File: C:\BEYOND20\SAMPLE                                 03/01/93    5:16pm
View: Contact List by Work City [-Tasks]                      ↓      ♪
─Boca Raton─────────────────────────────People─────────W. Phone #─────────
   ∙                                     ∙Asberry, Ellen      ∙(407) 555-0987
─Ithaca────────────────────────────────People─────────W. Phone #─────────
   ∙                                     ∙Victor, Alvin       ∙(617) 555-8808
─Madison───────────────────────────────People─────────W. Phone #─────────
   ∙                                     ∙Dawson, Fredrich    ∙(201) 555-4050
─Miami─────────────────────────────────People─────────W. Phone #─────────
   ∙                                     ∙Edison, Kyle        ∙(305) 555-3427
─New York──────────────────────────────People─────────W. Phone #─────────
   ∙                                     ∙Tollister, Susan    ∙(212) 555-2224
   ∙                                     ∙Spencer, Tyrone     ∙(212) 555-3399
   ∙                                     ∙Jasper, Martin      ∙(212) 555-6321
─Northport─────────────────────────────People─────────W. Phone #─────────
   ∙                                     ∙Yost, Wilbur        ∙(516) 555-6678
─Philadelphia──────────────────────────People─────────W. Phone #─────────
   ∙                                     ∙Wallace, Murry      ∙(215) 555-5682
   ∙                                     ∙Lowry, Auston       ∙(215) 555-6647
   ∙                                     ∙Johnson, Wilma      ∙(215) 555-3076
─Rockville─────────────────────────────People─────────W. Phone #─────────
   ∙                                     ∙Smith, David        ∙(301) 555-6611
─Silver Spring─────────────────────────People─────────W. Phone #─────────
  F1      F2      F3      F4      F5      F6      F7      F8      F9     F10
 Help    Edit  Choices   Done    Note   Props   Mark   Uw Mgr Cat Mgr Menu
```

## Creating a View Showing States and People

In this view, the names of the cities are in the left most column as section headings, with the dummy items below them. The column to the right lists the people who have been assignment actions to those cities, and the work telephone number of the people listed in the "People" column.

Once you have created the basic Contact List of People, you can create a view showing the work states included in your Category Manager and the people for whom assignment actions have been created to link those people to those states. To create this view, follow the steps below.

1. From any view, press **Alt F3** to open the Agenda Macro Manager.
2. Highlight the macro entitled "The Beyond 2.0 Contact Manager" and press **ENTER**.
3. Position the highlight on the menu choice "Create a View by Work State" and press **ENTER**.
4. The macro will begin processing and when completed you will see a screen similar to the one below.

```
File: C:\BEYOND20\SAMPLE                                 03/01/93    5:17pm
View: Contact List by Work State [-Tasks]                     ↓      ♪
─DC────────────────────────────────────People─────────W. Phone #─────────
   ∙                                     ∙Martin, Angela      ∙(202) 555-3300
   ∙                                     ∙Lattimer, Gloria    ∙(202) 555-2046
   ∙                                     ∙Dobson, Sarah       ∙(202) 555-5265
─FL────────────────────────────────────People─────────W. Phone #─────────
   ∙                                     ∙Edison, Kyle        ∙(305) 555-3427
   ∙                                     ∙Asberry, Ellen      ∙(407) 555-0987
─MD────────────────────────────────────People─────────W. Phone #─────────
   ∙                                     ∙Smith, David        ∙(301) 555-6611
   ∙                                     ∙Simpson, Terry      ∙(301) 555-2207
   ∙                                     ∙Henry, Patricia     ∙(301) 555--664
   ∙                                     ∙Felter, Stuart      ∙(301) 555-9903
─NJ────────────────────────────────────People─────────W. Phone #─────────
   ∙                                     ∙Dawson, Fredrich    ∙(201) 555-4050
─NY────────────────────────────────────People─────────W. Phone #─────────
   ∙                                     ∙Yost, Wilbur        ∙(516) 555-6678
   ∙                                     ∙Victor, Alvin       ∙(617) 555-8808
   ∙                                     ∙Tollister, Susan    ∙(212) 555-2224
   ∙                                     ∙Stevens, Roberta    ∙(607) 555-1109
   ∙                                     ∙Spencer, Tyrone     ∙(212) 555-3399
   ∙                                     ∙Jasper, Martin      ∙(212) 555-6321
  F1      F2      F3      F4      F5      F6      F7      F8      F9     F10
 Help    Edit  Choices   Done    Note   Props   Mark   Uw Mgr Cat Mgr Menu
```

## Creating a View Showing Zip Codes and People

Once you have created the basic Contact List of People, you can create a view showing the work zip codes included in your Category Manager and the people for whom assignment actions have been created to link those people to those zip codes. To create this view, follow the steps below.

1. From any view, press **Alt F3** to open the Agenda Macro Manager.
2. Highlight the macro entitled "The Beyond 2.0 Contact Manager" and press **ENTER**.
3. Position the highlight on the menu choice "Create a View by Work Zip Code" and press **ENTER**.
4. The macro will begin processing and when completed you will see a screen similar to the one shown on the next page.

```
File: C:\AGENDA\APPS\SAMPLE                               01/06/93    9:49am
View: Contact List by Work Zip [-tasks]                       ↓      ♪
-07940─────────────────────────────────People─────────────W. Phone───────
    •                                    ·Dawson, Fredrich      ·(201) 555-4050
-10002─────────────────────────────────People─────────────W. ·Phone──────
    •                                    ·Spencer, Tyrone       ·(212) 555-3399
-10020─────────────────────────────────People─────────────W. Phone───────
    •                                    ·Tollister, Susan      ·(212) 555-2224
-10036─────────────────────────────────People─────────────W. Phone───────
    •                                    ·Jasper, Martin        ·(212) 555-6321
-10235─────────────────────────────────People─────────────W. Phone───────
    •                                    ·Yost, Wilbur          ·(516) 555-6678
-13560─────────────────────────────────People─────────────W. Phone───────
    •                                    ·Stevens, Roberta      ·(607) 555-1109
-14850─────────────────────────────────People─────────────W. Phone───────
    •                                    ·Victor, Alvin         ·(617) 555-8808
-19102─────────────────────────────────People─────────────W. Phone───────
    •                                    ·Wallace, Murry        ·(215) 555-5682
-19104─────────────────────────────────People─────────────W. Phone───────
    •                                    ·Lowry, Auston         ·(215) 555-6647
-20006─────────────────────────────────People─────────────W. Phone───────
    •                                    ·Lattimer, Gloria      ·(202) 555-2046
-20014─────────────────────────────────People─────────────W. Phone───────
 F1       F2       F3       F4       F5       F6       F7       F8       F9      F10
 Help     Edit    Choices   Done     Note    Props    Mark    Vw Mgr  Cat Mgr   Menu
```

## Creating Custom Views of People

The Beyond 2.0 Contact Manager enables you to create custom views for people based on any category in your Category Manager. You can even create a new category on the fly and a view will be built around it showing task items, Contact List items, and the people with whom these items match.

To create a custom view of people, follow the steps below.

1. From any view, press **Alt F3** to open the Agenda Macro Manager.
2. Highlight the macro entitled "The Beyond 2.0 Contact Manager" and press **ENTER**.
3. Position the highlight on "Create a Custom View of People by Category and press **ENTER**.
4. The macro will begin processing and will ask you for the name of the category around which the custom view will be built. You can type the name of the category at the prompt and press **ENTER**, or you can press **F3** to examine your choices and mark your selection by pressing **ENTER** to confirm your selection. When you have typed in the category name, for example *C. Type,* the category for type of company associated with people press **ENTER**, and the macro will continue processing. When completed you will see a screen similar to the one one the next page.

```
File: C:\BEYOND20\SAMPLE                              03/01/93    5:42pm
View: Custom View by C. Type                                  ↓   ♪
┌Accountant─────────────────────────┌People──────────────┐┌W. Phone #─────
  •                                   ·Asberry, Ellen       ·(407) 555-0987
  • Meet with Ellen Asberry 10:00     ·Asberry, Ellen       ·(407) 555-0987
    AM about the problem with the
    Harris project.
  •                                   ·Johnson, Wilma       ·(215) 555-3076
                                      ·Wallace, Murry       ·(215) 555-5682
┌Consultant─────────────────────────┌People──────────────┐┌W. Phone #─────
  •                                   ·Dobson, Sarah        ·(202) 555-5265
                                      ·Victor, Alvin        ·(617) 555-8808
┌Delivery───────────────────────────┌People──────────────┐┌W. Phone #─────
  •                                   ·Stevens, Roberta     ·(607) 555-1109
┌Florist────────────────────────────┌People──────────────┐┌W. Phone #─────
  •                                   ·Henry, Patricia      ·(301) 555—664
┌Hardware───────────────────────────┌People──────────────┐┌W. Phone #─────
  •                                   ·Smith, David         ·(301) 555-6611
┌Lawyer─────────────────────────────┌People──────────────┐┌W. Phone #─────
  •                                   ·Edison, Kyle         ·(305) 555-3427
  • Call Kyle Edison to review        ·Edison, Kyle         ·(305) 555-3427
    budget vs actual for his
    project Tuesday 9:00 AM.
┌─────┬──────┬───────┬──────┬──────┬──────┬──────┬──────┬──────┬──────
 F1    F2     F3      F4     F5     F6     F7     F8     F9     F10
 Help  Edit   Choices Done   Note   Props  Mark   Vw Mgr Cat Mgr Menu
```

**Further
Refinement
of Custom
Views**

In the example above, the view was built around the category *C. Type*, and produced a list of people broken down in sections according to the types of companies for which assignment actions had been created.  If you wish to further  refine this veiw to only show one type of company, you can change the properties of the view by deleting some of the unwanted sections, or by adding negative filters to screen out unwanted information.  Another approach would be to create a view built solely around one of the child categories included in the family under C.Type.

Custom views created using the Beyond 2.0 Contact Manager are not protected, and can be further enhanced by adding view columns, additional sections, filters or other properties in the conventional  manner.

# Chapter 4
# Exporting and Importing Information in DBF Format

Getting information into Agenda 2.0 has always been relatively easy, but getting information out of Agenda has been much more difficult. Beyond 2.0 helps you make more use of your Agenda-based information by helping you get it back out of Agenda and connected to other software. Beyond 2.0 enables you to export information from Agenda 2.0 in the DBF file format, and thereby easily communicate Agenda-based information to the rest of the software world. Using this feature you can export information contained in Structued People Notes to many popular database products, word processors and spreadsheets that support the DBF file format. For example, if you use Agenda to collect information about people, whether they are business leads, customers, clients, survey respondents, or others, and your corporate database is built in a product such as dBase, FoxPro, Paradox, Access or others, you can now communicate that information from Agenda to the corporate knowl-edge base. Using the Beyond 2.0 Contact Manager and the Beyond 2.0 DBF export capabilities you can create focused views for people by a variety of categories, and then export information in their Structured People Notes to a DBF data file. The DBF export file can be imported to traditional tabular databases or it can be used in conjunction with your word processor for a mail merge. This chapter focuses on the procedures for exporting information in DBF file format, and presents a examples of how to export information and import it into Microsoft Access and Ami Pro 3.0 and Microsoft Word.

**Before You Export**

You can export information about people from any view that contains items related to people in Agenda 2.0. For best results, however, you should make sure that the view from which you export is focused on the criteria that are most important to you. One way to do this is to use the Beyond 2.0 Contact Manager to create a Contact List of People first, so that you have an array of people with their assignment actions as a starting point from which you can then develop a view that is focused on the characteristics that are important to you.

> **REMEMBER!** Only information contained in Structured People Notes will be exported when you activate the export to DBF program. If you have information in category notes about people that has not been converted to Structured People Notes, the program will pass by that person, and information about that person will not be included in the DBF file that is exported.

**Exporting Information**

To export information follow the steps below.

1. Develop the view from which you wish to export items and information from Structured People Notes. As in the sample below, we suggest that you create the Contact List of People using the Beyond 2.0 Contact Manager and then define a view that is focused on your desired category, or categories. For example, if we want to export information about people who are assigned to the "Lawyer" category from our sample file, we would execute the macro to Create a Custom View of People by Category and enter *Lawyer* as the category around which the view should be built, (See Chapter 3). Once completed, this view would look like the illustration on the following page.

```
File: C:\AGENDA\APPS\SAMPLE                            01/07/93  11:15am
View: Custom Contact List [-Tasks]                              ♪
─Lawyer─────────────────────────────┬People───────────W. Phone───────
   •                                  ·Edison, Kyle     ·(305) 555-3427
   •                                  ·Jasper, Martin   ·(212) 555-6321
   •                                  ·Martin, Angela   ·(202) 555-3300
   •                                  ·Spencer, Tyrone  ·(212) 555-3399
   •                                  ·Tollister, Susan ·(212) 555-2224




┌────┬─────┬───────┬────┬─────┬──────┬────┬───────┬───────┬─────┐
│ F1 │ F2  │  F3   │ F4 │ F5  │  F6  │ F7 │  F8   │  F9   │ F10 │
│Help│Edit │Choices│Done│Note │Props │Mark│Vw Mgr │Cat Mgr│Menu │
└────┴─────┴───────┴────┴─────┴──────┴────┴───────┴───────┴─────┘
```

This view contains the names of the people in the sample file that were assigned to the
"Lawyer" category using the Category Maker and the Structured People Note. Assuming that
this is the cadre of people whose information we wish to export as a DBF file, we can now
proceed with the actual exporting process.

> **NOTE: You are not limited to using the views created by the Beyond 2.0 Contact
> Manager as the starting point for exports to a DBF file. You can use any view that
> contains items assigned to the people whose Structured People Note information you
> wish to export.**

1. Press **Alt F3** to open the Agenda Macro Manager.
2. Highlight the macro entitled "Export People Notes to DBF" and ress **ENTER**. The macro
   will begin to process and you will see the screen shown below.

```
Highlight Your Choice and Press ENTER
─Lawyer─────────────────────────────┬People───────────W. Phone───────
   •                                  ·Edison, Kyle     ·(305) 555-3427
   •                                  ·Jasper, Martin   ·(212) 555-6321
   •                                  ·Martin, Angela   ·(202) 555-3300
   •                                  ·Spencer, Tyrone  ·(212) 555-3399
   •                                  ·Tollister, Susan ·(212) 555-2224
      Please Select the "People" You Wish to Export to CONTACT.DBF
     ┌───────────────────────────────────────────────────────────────┐
     │ All     -- Export All "People" in This View to a DBF file       │
     │ Section -- Export "People" in This Section to a DBF file        │
     │ Marked  -- Export Marked "People" to a DBF file                 │
     │ Quit                                                            │
     │                                                                 │
     └───────────────────────────────────────────────────────────────┘



┌────┬─────┬─────┬────┬─────┬──────┬────┬───────┬───────┬─────┐
│ F1 │ F2  │ F3  │ F4 │ F5  │  F6  │ F7 │  F8   │  F9   │ F10 │
│Help│     │     │    │     │      │    │       │       │     │
└────┴─────┴─────┴────┴─────┴──────┴────┴───────┴───────┴─────┘
```

3.  This menu allows you to export information about all the people shown in the view, people in a particular section, or only those people that have been previously marked. If you wish to export information about people in a particular section, you do not have to position the highlight on the section heading before running the macro. You do, however, need to place it on an item within the desired section. If you want to export information only about specific people, you should mark them with F7 prior to executing the macro.

    In this example we focused the view on the people who are assigned to the"Lawyer" category when we created it, and therefore there is only one section in the view, and it contains all the people we wish to export. Therefore we would accept the default, "All -- Export All People in this View", and press **ENTER**.

The macro will resume processing and it will launch the program that converts information from the Structured People Notes for the selected people into a DBF file.

The screen that appears suggests a default file name, CONTACT.DBF. You have the option of changing the file name by typing **N** for NO in the space provided, in which case you are prompted to enter a different file name. If you accept the default, any prior data file named CONTACT.DBF fill be overwritten with the new information you are exporting.

4.  For this example, if you wanted to name the export file *lawyer.dbf* you would press **N** for No, and type the desired name *lawyer.dbf* where prompted, and then confirm your entry by pressing **Y** for Yes.

5.  Once you confirm the export file name, the program will read your Category Manager and write a record for each person with information in a Structured People Note to the export file. You will see a counter on the screen indicating the number of records that have been written. If you are exporting information about a small number of people, this function may happen so quickly that hardly notice the counter.

When the records have all been written you will see a screen confirming that the export process is complete. The screen displays the path and file name of the export file. The export file you just created will be located in the directory where Beyond 2.0 was installed. If you accepted the default configuration in the installation process, the directory will be \BEYOND20. If you chose to name the directory another name, the export file will be located in that directory.

6.  To complete the process and return to Agenda, you are prompted to **press any key to continue.**

Now you can use the DBF file that you created as a data file for importing into other software.

**Importing Your File Into Microsoft Access**

Once you have created the export file using Beyond 2.0, you can import it into any software product that supports the DBF file format. Microsoft Access is one such product. This section describes how to import information exported from Agenda 2.0 using Beyond 2.0 into Microsoft Access as a means of showing how the information contained in Structured People Notes can be converted to traditional tablular databases.

To import the file *lawyer.dbf* into Microsoft Access, follow the steps below.

1. Load Windows, and then load Microsoft Access.

2. Open an existing or new database file. You will see a screen like the one shown below.
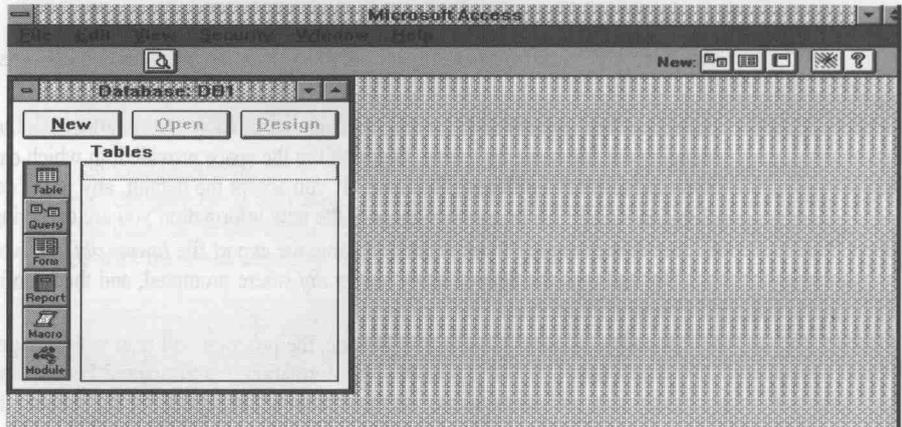


3. Click on **File** from the Main Menu, and then click on **Import**. The Data Source dialog box shown below will appear. Use the scroll bar to position the highlight on the **dBase III** selection. Double click on **dBase III** or click [ OK ] to select it.
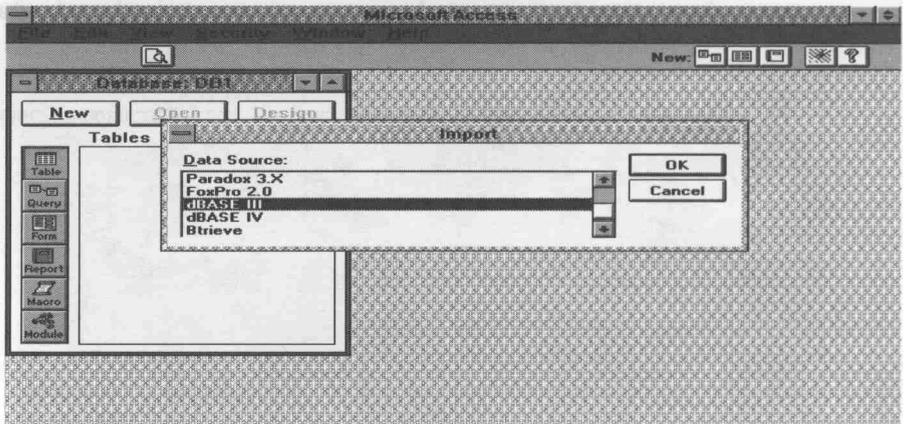
**Importing
Your File
Into
Microsoft
Access
continued**

4. The Select File dialog box will appear. You will have to have to locate the directory where your export file is located. In this example the export file is located in the *\BEYOND20* directory. To locate the *\BEYOND20* directory, click on **C:\** and then use the scroll bar to find *\BEYOND20*. Once *\BEYOND20* is highlighted, double click on it, and the .DBF files in that directory will appear in the file list portion of the dialog box.

5. Use the scroll bar to locate the desired file name on the file list. In this example, the desired file name is *lawyer.dbf*.
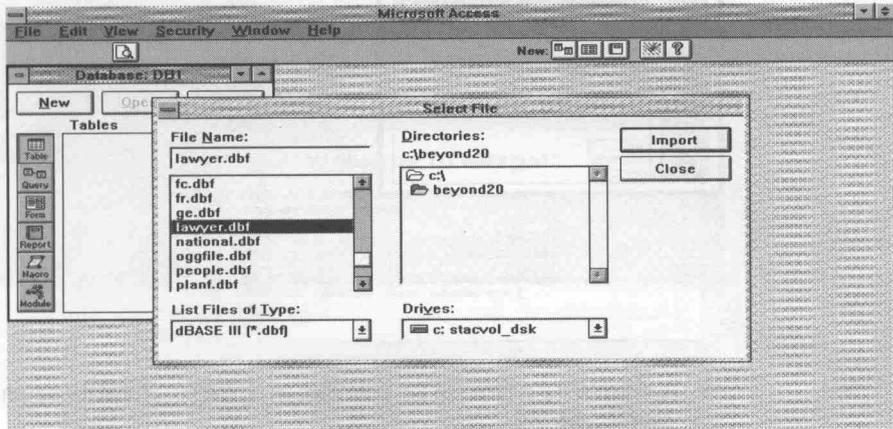


6. To activate the import process, double click on the highlighted file name, or click on [ Import ] . The import process will continue and you will see the screen below.
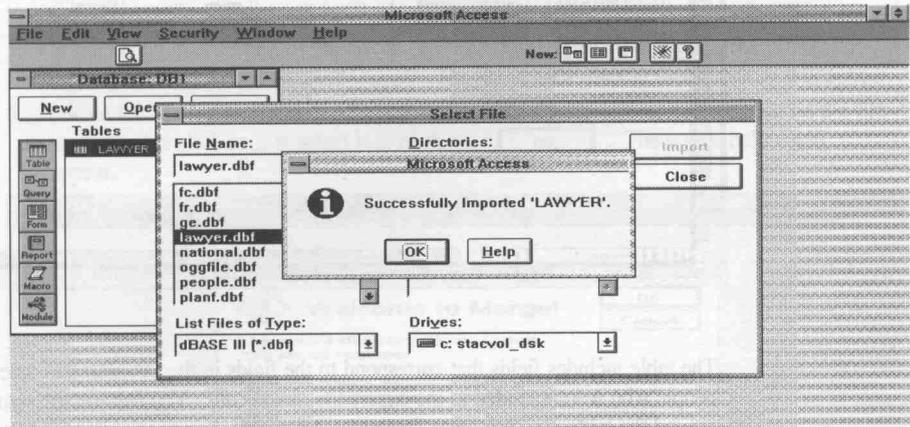
**Importing
Your File
Into
Microsoft
Access
continued**

7. Click on [ OK ] and then click on [ Close ] . You will see a new table entry for
   LAWYER listed as shown on the following screen.
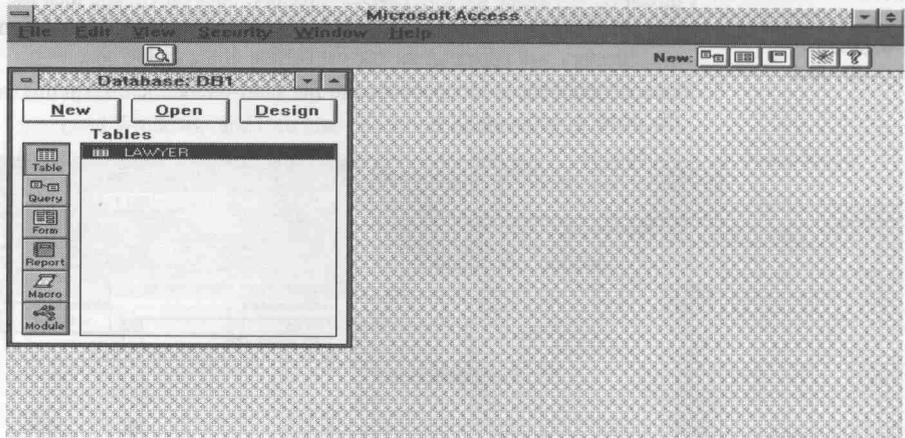


8. To examine the contents of the table click on [ **Open** ] and the screen below will appear,
   showing the table.
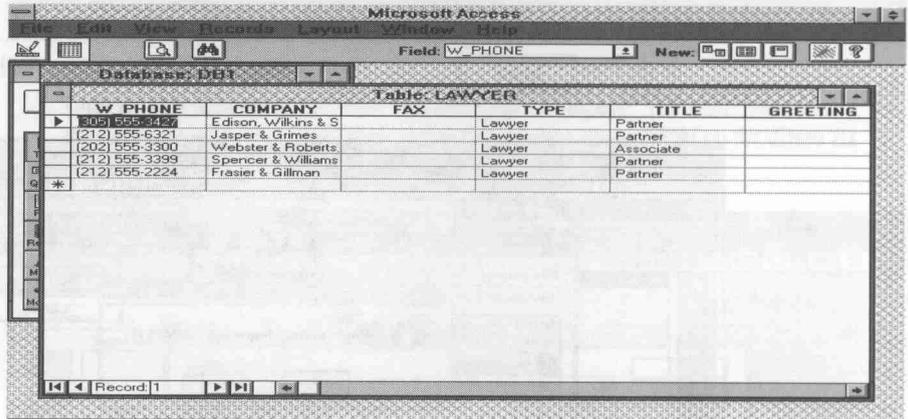


The table includes fields that correspond to the fields in the Structured People Note for the
people who were included in the export file, *lawyer.dbf*. You can use the scroll bar to move
around the table, and use other features of Microsoft Access to change the appearance of the
table.

**Importing Your File Into Ami Pro 3.0 to Print Labels**

Once you create the export file using Beyond 2.0, you can import it into any software product that supports the DBF file format, such as Ami Pro 3.0. This section describes how to import information into Ami Pro 3.0 to show how the information contained in Structured People notes can be used to create mailing labels. To import the file *lawyer.dbf*, created previously, into Ami Pro 3.0, for printing labels, follow the steps below.

1. Load Windows, and then load Ami Pro 3.0.
2. Click on **File** from the Main Menu, and click on **Merge**. The Welcome to Merge dialog box will appear.



3. Click on [ OK ] and the Select Merge File dialog box will appear.
4. In the Select Merge File dialog box click on ⬆ in the List Files of Type portion of the dialog box. The choices will be displayed. Click on **dBase** to display files in DBF format.
5. In the Directories section of the dialog box, click on **[..]** until you locate the *\BEYOND20* directory. Double click on *\BEYOND20*. The list of DBF files in that directory will appear.
6. Locate the file *lawyer.dbf* using the scroll bar. When you position the highlight on the file name, double click on it to select it or click on [ OK ]. The screen below will appear.

**Importing
Your File
Into Ami Pro
3.0 to Print
Labels
continued**

7. You are now ready to specify the merge document. Click on [ OK ]. The Merge Document dialog box shown below will appear.
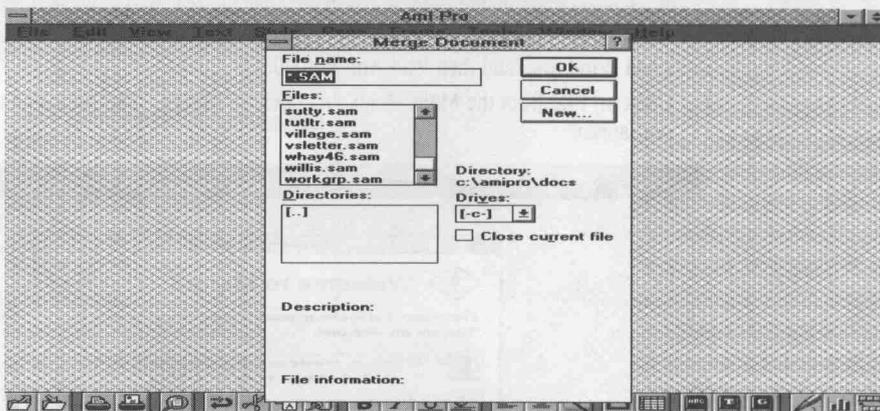


8. Click on [ New... ]. The list of Ami Pro style sheets will appear.
9. Select "Label - compatible with Avery[R] laser labels" by positioning the highlight on it and clicking on [ OK ] A list of label styles will appear as shown on the screen below.
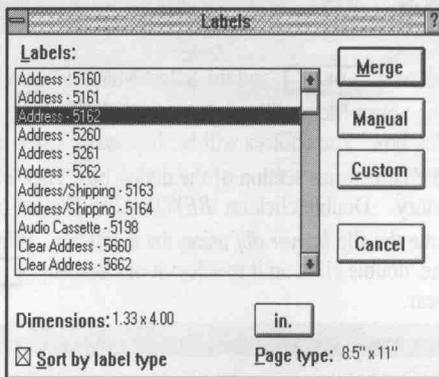


10. Select the style of label that you want to use by positioning the highlight on the name of the style and click on [ Merge ]. The Insert Merge Field dialog box will appear.

11. A list of fields included in the merge data file appears in the list box in the upper left portion of the screen. Use the scroll bar to locate the fields that you want to include on your label, and click on the field name to highlight it. Then click on [ Insert ] to place the field name on the label style sheet. Make sure that you include spaces and commas where appropriate. A sample of a completed label is shown on the following page. When you are satisfied with the layout of fields, click on [ Continue Merge ].

**Importing
Your File
Into Ami Pro
3.0 to Print
Labels
continued**

```
                                    Ami Pro - [Untitled]
   File   Edit   View   Text   Style   Page   Frame   Tools   Window   Help

                                          ┌──── Insert Merge Field ────┐ ?
                                          │ Field names:        ┌─────────────┐
                                          │ COMPANY        ▲    │   Insert    │
                                          │ FAX                 └─────────────┘
                                          │ FIRSTNAME           ┌─────────────┐
                                          │ GREETING            │Continue Merge│
                                          │ H_ADDR1        ▼    └─────────────┘
                                          │ Data file: lawyer.dbf┌─────────────┐
                                          │ You can leave this box up while you │ Data File...│
      <FIRSTNAME> <MINIT>. <LASTNAME>     │ insert your merge fields. Choose    └─────────────┘
      <COMPANY>                           │ Continue Merge when you have inserted ┌───────┐
      <W_ADDR1>                           │ all your fields.                     │ Close │
      <W_ADDR2>                           └──────────────────────────────└───────┘
      <W_CITY>, <W_STATE> <W_ZIP>



Heading          Arial          10   c:\amipro\docs              Ins
```

12. The merge dialog box shown below will appear. You are now ready to merge and print the addresses contained in you merge data file. Click on   [ OK ]   to activate the final step.

```
                                    Ami Pro - [Untitled]
   File   Edit   View   Text   Style   Page   Frame   Tools   Window   Help

                    ┌──────────── Welcome to Merge ─────────────┐ ?
                    │                                  ┌────────┐│
                    │  ⬆  Welcome to Merge!            │   OK   ││
                    │                                  ├────────┤│
                    │  You are now ready to merge and print.│ Cancel ││
                    │                                  └────────┘│
                    │   ┌─┐  ○ Select, create or edit a data file│
                    │   │1│     (List of names, addresses, etc.) │
                    │   └─┘                                      │
                    │   ┌─┐  ○ Create or edit a merge document   │
                    │   │2│     (Letter, form, labels, etc.)     │
                    │   └─┘                                      │
                    │   ┌─┐  ● Merge and print the data and the document│
                    │   │ │                                      │
                    │   └─┘                                      │
                    └────────────────────────────────────────────┘

Heading          Arial          10   c:\amipro\docs              Ins
```

**Caution!**

Ami Pro, like many other word processors, permits you to select fonts for your labels. You should consult the Ami Pro documentation for specific instructions on how to specify fonts. If you select a proportional font that requires more space than will fit on the label, you may encounter unexpected results, even though all the desired information appears to fit on the label style sheet when viewed on the screen. **Therefore, you should test your layout and font selection prior to running a large label printing job.**

Beyond 2.0 includes an Ami Pro style sheet and macro to facilitate printing labels from Beyond 2.0's default DBF export file, CONTACT.DBF. The style sheet file, *~beylbl.sty* and the macro file, *beylbl.smm* are installed in the same directory where you installed Beyond 2.0. It is recommended that you copy *~beylbl.sty* to the styles subdirectory in Ami Pro, \AMIPRO\STYLES; and that you copy *beylbl.smm* to the macros subdirectory, \AMIPRO\MACROS. The versions that remain in your \BEYOND20 directory can serve as back up copies should you need them.

The labels style sheet was developed using Ami Pro's generic label style sheet, and modified to fit on a page of Avery Laser Printer Labels Style 5162. The style sheet prints labels in two columns, seven labels to a column. It contains standard address fields that correspond to the enabled categories in the Category Maker and Structured People Note. The illustration below shows the fields that are included on each label.

```
<GREETING> <MINIT> <LASTNAME>
<TITLE>
<COMPANY>
<W_ADDR1>
<W_ADDR2>
<W_CITY>, <W_STATE>   <W_ZIP>
|
```

A sample of the output using this style sheet is shown below. You may need to adjust the font and/or point size of the text to match the fonts available for your printer, or to suit your taste.

> **Remember! If you modify the style sheet, you must check the "With contents" box in the dialog box when you save it. Otherwise the contents will be lost.**

```
Mr. John W. Smith
President
Smith, Jones, & Wilson
123 Main Street
Suite 300
Washington, DC  20006
|
```

To execute the macro, follow the steps below:

1. Create the data export file using the default file name, CONTACT.DBF.
2. Make sure your printer is turned on and that you loaded blank mailing label sheets.
3. Open Ami Pro and from the Main Menu click on **Tools**. From the drop down menu click on **Macros**, and from the next drop down menu click on **Playback**. The Play Macro dialog box will appear.
4. Highlight the macro file name *beylbl.smm* and double click on it. The macro will begin to process. It will load the style sheet *~beylbl.sty*, the IMG Mailing Label Format, and automatically merge CONTACT.DBF into the untitled document and print it. When the process is completed, you will have the opportunity to save the untitled document should you wish to do so.

**Importing Your File Into Ami Pro 3.0 to do a Mail Merge**

Using Beyond 2.0, you can export information about people contained in Structured People Notes to any word processor that supports the DBF file format. The following example illustrates how to use a .DBF file to merge with a letter in Ami Pro 3.0. The steps are described below.

1. Load Windows, and then load Ami Pro 3.0.

2. Click on **File** from the Main Menu, and click on **Merge**. The Welcome to Merge dialog box will appear.



3. Click on ☐ OK ☐ and the Select Merge File dialog box will appear.

4. In the Select Merge File dialog box click on ↓ in the List Files of Type portion of the dialog box. The choices will be displayed. Click on **dBase** to display files in DBF format.

5. In the Directories section of the dialog box, click on **[..]** until you locate the \*BEYOND20* dictory. Double click on \*BEYOND20*. The list of DBF files in that directory will appear.

6. Locate the file *lawyer.dbf* using the scroll bar. When you position the highlight on the file name, double click on it to select it or click on ☐ OK ☐ . The screen below will appear.

**Importing
Your File
Into Ami Pro
3.0 to do a
Mail Merge
continued**

7. You are now ready to specify the merge document. Click on [ OK ] . The Merge Document dialog box shown below will appear.



8. In this example we will prepare a simple letter to the people contained in the sample file created previously, *lawyer.dbf*. To create the merge document, we will type the letter, and insert the field names from the merge data file as we go along. In the Select Merge Data File dialog box shown above, click on [ New... ] .

9. The list of style sheets will appear. Highlight "Default" and click on [ OK ] or double click on the name of the style sheet. A blank style sheet will load and the Insert Merge Field dialog box will appear in the upper right of the screen.

10. Click on the portion of the screen that contains the style sheet for the letter, and begin typing the text. When you reach a point where a field from the merge data file should go, locate the field name in the Insert Merge Field dialog box, using the scroll bar if necessary, highlight it, and click on [ Insert ] . When you have completed the letter it is recommended that you save the file, and then click on [ Continue Merge ] . An example of what your letter might look like is shown below.
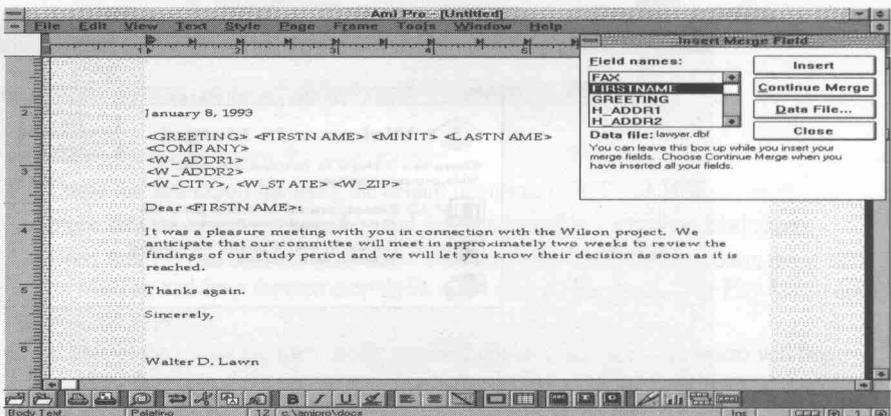
**Importing Your File Into Ami Pro 3.0 to do a Mail Merge continued**

11. The merge dialog box shown below will appear. You are now ready to merge and print the addresses contained in you merge data file. Click on [ OK ] to activate the final step.
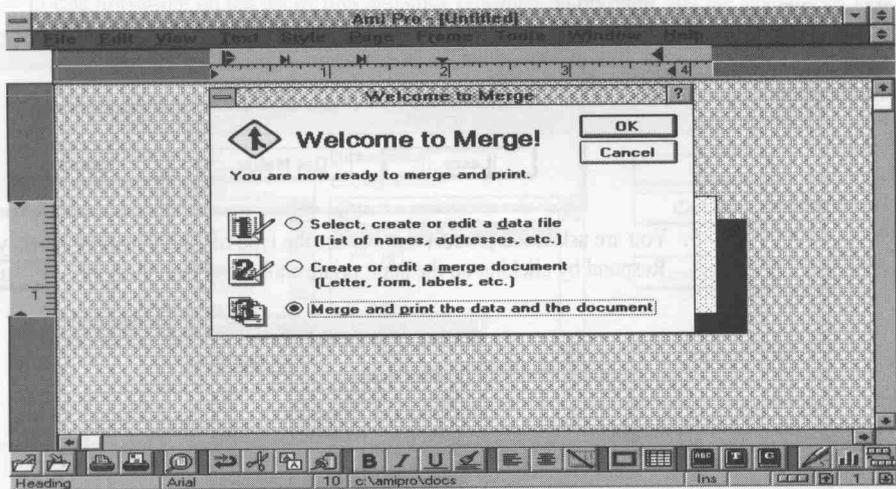


**Importing Your File Into Microsoft Word 2.0 to Print Mailing Labels**

Once you create the export file using Beyond 2.0, you can import it into any software product that supports the DBF file format, such as Microsoft Word 2.0. This section describes how to import information into Microsoft Word 2.0 to show how the information contained in Structured People Notes can be used to create mailing labels. To print labels in Microsoft Word 2.0 you can use the Print merge command to create labels, or you can use the mailing label macro as described below. To import the file *lawyer.dbf*, created previously, into Microsoft Word 2.0, to print mailing labels using the mailing label macro, follow the steps below.

1. Load Windows and then load Microsoft Word 2.0.

2. From the Main Menu, click on **File**. When the drop down menu appears, click on **New**. The Use Template dialog box shown below will appear.
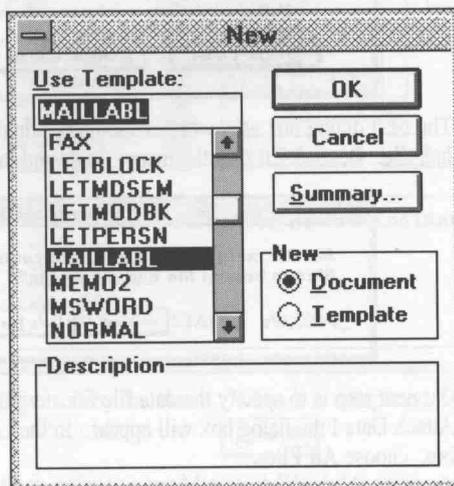
**Importing
Your File
Into
Microsoft
Word 2.0 to
Print Mailing
Labels
continued**

3.  Highlight MAILLABL and click on [ OK ]. Word opens a new document based on the mailing label template and the mailing label macro begins executing.

4.  You are asked to specify the type of printer you are using. Respond by clicking on the appropriate choice.

> **Mailing Labels**
>
> Choose the type of printer to use when merging Labels.
>
> [ Laser... ]  [ Dot Matrix... ]  [ Cancel ]
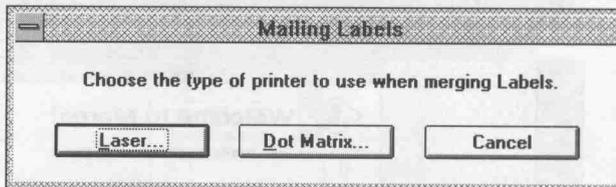
5.  You are asked the product number for the type of Avery mailing labels you wish to use. Respond by clicking on the appropriate choice and then click on [ OK ]

> **Laser Printer Label Sizes**
>
> Product Number:
> 5066 File Folder
> 5096 3-1/2" Diskette
> 5097 5-1/4" Diskette
> 5160 Address
> 5161 Address
> 5162 Address
> 5163 Address/Shipping
> 5164 Address/Shipping
> 5165 Full Sheet
> 5196 3-1/2" Diskette
> 5197 5-1/4" Diskette
> 5198 Audio Cassette
>
> [ OK ]
> [ Cancel ]
>
> Product Numbers for Avery Laser Printer Labels.
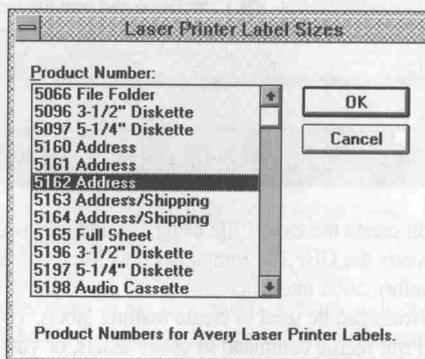
6.  Choose whether you want to print a single label or multiple labels. For this example, click on **Multiple Labels**.

> **Microsoft Word**
>
> Choose Single Label to print only one label. Choose
> Multiple Labels to print many labels using Print Merge.
>
> [ Single Label ]  [ Multiple Labels ]  [ Cancel ]
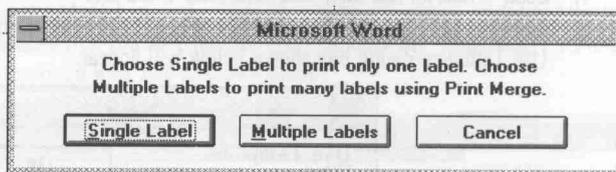
7.  The next dialog box asks whether the merge fields and the data are in separate files or in one file. Beyond 2.0 puts the merge fields and the data in one file. Click on No.

> **Microsoft Word**
>
> Are the merge names and data contained in two separate
> files, a header file and a data file?
>
> [ Yes ]  [ No ]
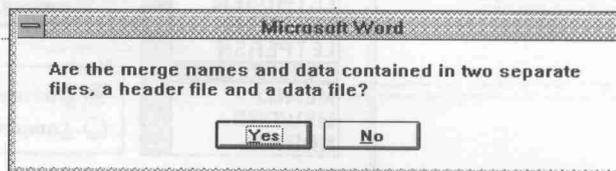
8.  The next step is to specify the data file for merging into the mailing label template. The Attach Data File dialog box will appear. In the List Files of Type portion of the dialog box, choose **All Files.**

    In the directories portion of the dialog box, browse upward through the directoryies until

you locate \BEYOND20. When you click on it, a list of files will appear in the File Name portion of the dialog box.

Based on our example, we want to import the data file created by Beyond 2.0 called *lawyer.dbf*. Locate *lawyer.dbf* on the list of files and click on it. The dialog box choices should look like the illustration below. If you were merging the data file with the default name, it would be CONTACT.DBF. When you have these choices selected, click on [ OK ]

**Attach Data File**

File **N**ame:
lawyer.dbf

gt2d.dat
gt2x.dat
help.dat
imginst.mac
item2cal.exe
item2ccp.exe
item2ccp.mac
label.dat
lawyer.dbf
mrec.ntx
mym.csd
national.dbf

**D**irectories:
c:\beyond20

c:\
beyond20
qr1
qr2
qr3
qr4
qr5

Dri**v**es:
c: stacvol_dsk

List Files of **T**ype:
All Files (*.*)

[ OK ]
[ Cancel ]
[ **F**ind File... ]
[ **C**reate Data File... ]
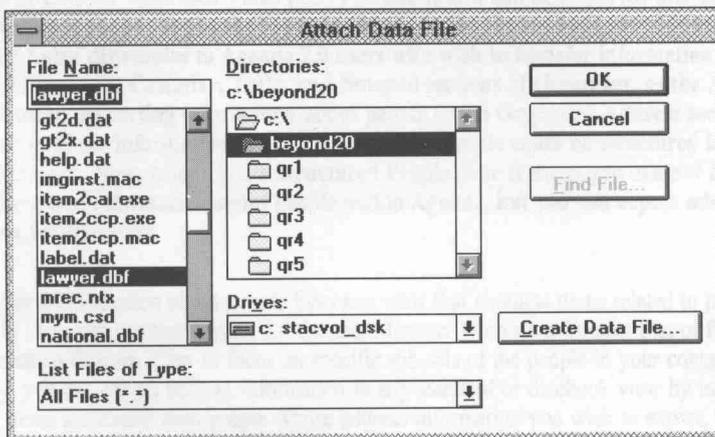
9. The Layout Mailing Labels dialog box appears. Highlight field names and click on Add to Label to build the entries you wish to include. Remember to add punctuation as appropriate in the text of the label. When you have entered the fields you wish to include, click on [ **D**one ]

**Layout Mailing Labels**

**Field Names:**

W_PHONE
COMPANY
FAX
TYPE
TITLE
GREETING
FIRSTNAME
MINIT
LASTNAME
NICKNAME
W_ADDR1

**Special Character:**

(space)
, (comma)
: (colon)
. (period)
~ (new line)
¶ (new paragraph)
" (quotation mark)

[ **D**one ]
[ Cancel ]

[ **A**dd To Label ]  [ **U**ndo Last Add ]

Sample Mailing Label
«GREETING» «FIRSTNAME» «MINIT» «LASTNAME»~
«TITLE»~
«COMPANY»~
«W_ADDR1»~
«W_ADDR2»~
«W_CITY», «W_STATE»  «W_ZIP»_
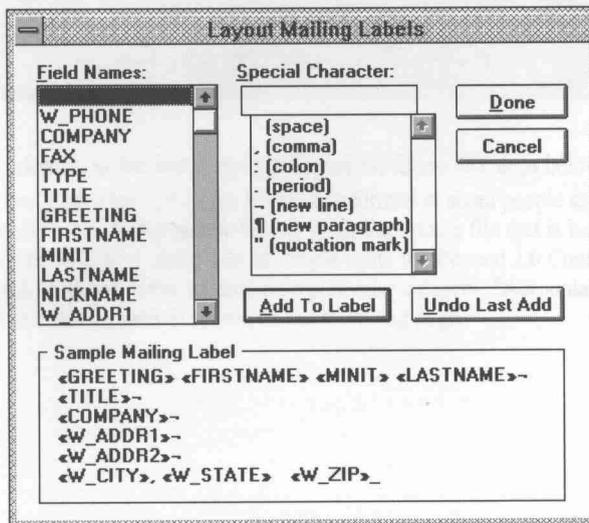
10. The label page will be built by the macro. When it is completed, click on the **Merge to Printer** button on the Print Merge Bar.

For more advanced options, refer to your Microsoft Word 2.0 documentation.

**Exporting and Importing Information in DBF Format**
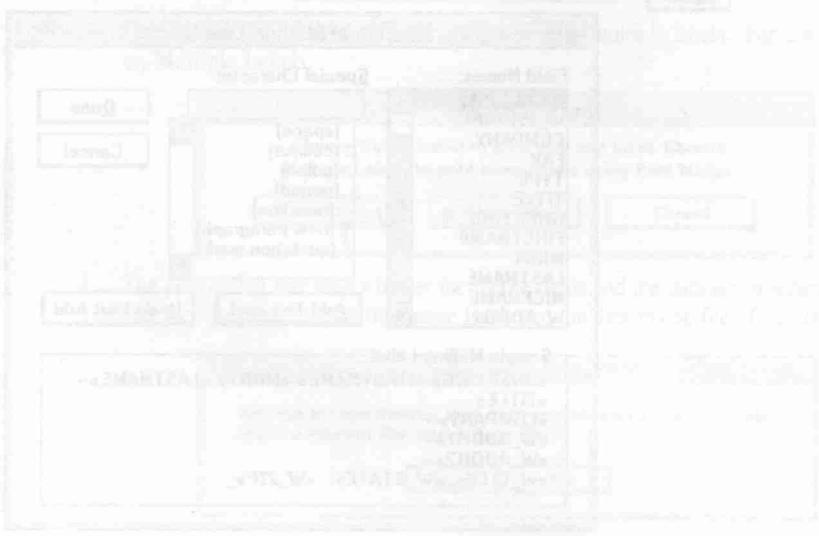
# Chapter 5
# Exporting People Notes to Lotus Organizer

Beyond 2.0 enables you to export address information contained in Structured People Notes in the type of Comma Seperated Value (CSV) format that it can be imported into the Address Section of Lotus Organizer(TM). Item Management Group authored ITEM2CSV(TM), the product Lotus distributes to Agenda 2.0 users who wish to transfer information from Agenda 2.0 files to the Calendar, ToDo, and Notepad sections of Organizer, as the Agenda Transfer Utility. Exporting information about people to the Organizer Address section was not possible until the information in category notes for people could be structured in a consistent format. Now, using IMG's Structured People Note feature, you can not only make better use of information about people within Agenda, but you can export address information to Organizer.

**Before You Export**

You can export information about people from any view that contains items related to people in Agenda 2.0. You can use the Beyond 2.0 Contact Manager to create a Contact List of People and then create a Custom View to focus on specific sub-sets of the people in your contact list. Alternately, you can export address information in any standard or datebook view by marking individual items associated with people whose address information you wish to export, whole sections, or the whole view.

REMEMBER ! Only information contained in Structured People Notes will be exported when you activate the export program. If you have information in category notes about people that has not been converted to Structured People Notes, the program will pass by that person, and information about that person will not be included in the CSV file that is exported.

To export address information for importing into Organizer, follow the steps below.

1. Develop the view from which you wish to export information about people as shown in their Structured People Notes. In the sample below, using the sample file that is included in Beyond 2.0, we created the Contact List of People using the Beyond 2.0 Contact Manager and then defined a Custom View focused on a particular category, "Accountant". (See Chapter 3). The resulting view is shown on the following page.

**Selecting the People Whose Notes Will Be Exported**

```
File: C:\AGENDA\APPS\SAMPLE                                    01/10/93    3:53pm
View: Custom Contact List [-Tasks]                                        F
Accountant                              People              W. Phone
         •                              Asberry, Ellen       (407) 555-0987
         •                              Johnson, Wilma       (215) 555-3076
         •                              Wallace, Murry       (215) 555-5682




ShfF1 │ ShfF2 │ ShfF3 │ ShfF4 │ ShfF5 │ ShfF6 │ ShfF7 │ ShfF8 │ ShfF9 │ ShfF10
```

This view contains the names of the people in the sample file that were assigned to the "Accountant" category using the Category Maker and the Structured People Note. Assuming that this is the cadre of people whose information we wish to export as a CSV file, we can now proceed with the actual exporting process.

**Activating the Export Macro**

1. Press **Alt F3** to open the Agenda Macro Manager.

2. Highlight the macro entitled "Export Addresses to Organizer" and press **ENTER**. The macro will begin to process and you will see the screen below.

```
Highlight Your Choice and Press ENTER
Accountant                              People              W. Phone
         •                              Asberry, Ellen       (407) 555-0987
         •                              Johnson, Wilma       (215) 555-3076
         •                              Wallace, Murry       (215) 555-5682

    Please Select the Information You Wish to Export to the Organizer

      All -- Export All Addresses in This View to the Organizer
      Section -- Export Addresses in This Section to the Organizer
      Marked -- Export Addresses for Marked Items to the Organizer
      Quit




F1   │ F2   │ F3   │ F4   │ F5   │ F6   │ F7   │ F8   │ F9   │ F10
Help
```

3. This menu allows you to export information about all the people shown in the view, people in a particular section, or only those people that have been previously marked. If you wish to export information about people in a particular section, you do not need to position the highlight on the section heading before running the macro. You do, however, need to place it on an item within the desired section. If you want to export information only about specific people, you should mark them with F7 prior to executing the macro. In this example we focused the view on the people who are assigned to the "Accountant" category when we created it, and therefore there is only one section in the view, and it contains all the people we wish to export. Therefore we would accept the default, "All -- Export All People in this View", and press **ENTER**.

**Choosing an Export File Name**

Information exported to the address section of Organizer will be contained in a file with the file extension .CSV. The default file name suggested by the screen is ADDRESS.CSV. You have the option of changing the file name by typing **N** for NO in the space provided, in which case you are prompted to enter a different file name. The export file is created in the directory where Beyond 2.0 was installed. If you accepted the default configuration in the installation process, the directory will be \BEYOND20. If you chose to name the directory another name, the export file will be located in that directory.

4. For this example, if you wanted to name the export file *account.csv* you would press **N** for No, and type the desired name where prompted, and then confirm your entry by pressing **Y** for Yes. As soon as you confirm your selection, Beyond 2.0 reads your Category Manager and creates the export file. When processing is completed you will see a screen confirming that the process has been completed and prompting you to **press any key to continue.** When you press any key to continue, you will be returned to your Agenda file.

**Importing People Notes into the Organizer Address Section**

Once you have created the export file using Beyond 2.0, you can import it into Lotus Organizer. To import the file *account.csv* into Organizer, follow the steps below.

1. Load Windows, and then load Organizer.

2. Open an existing or new Organizer file.

3. Click on **File** from the Main Menu, and then click on **Import**. The Import dialog box will appear.

4. In the Into Section portion of the dialog box, click on ⬇. Click on the **Address** section name. The Address section name will appear in the Into Section portion of the dialog box.

The default setting in the Import Format portion of the dialog box is .CSV. Therefore you need not change this setting.

5. In the Import File portion of the dialog box you will need to locate the directory where the import file is located and specify the name of the file. If you installed Beyond 2.0 in the default directory named \BEYOND20, the import file will be located there. If you installed Beyond 2.0 in a directory with another name, it will be located in that directory. Click on the **[..]** move upward through the directory structure until you locate the directory where your file is located. Then locate the file name, in this case, *account.csv*, and click on it to place its name in the Import File portion of the dialog box. Your screen should look like the one shown below.
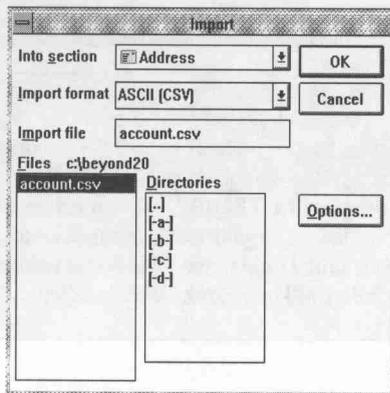
**Importing People Notes into the Organizer Address Section** *continued*

| Field Mapping |
| --- |

Import from ACCOUNT.CSV

| Source fields | map to | fields in section | |
| --- | --- | --- | --- |
| Field 1 - Ms. | | Title | Import |
| Field 2 - Ellen | | First Name | Cancel |
| Field 3 - Asberry | | Last Name | |
| Field 4 - Partner | | Position | Map all |
| Field 5 - Forster & Low | | Company Name | |
| Field 6 - 22 South Org | | Address | Clear |
| Field 7 - 33412 | | Zip | |
| Field 8 - Accountants | | Type | |
| Field 9 - (407) 555-098 | | Phone | |
| Field 10 - | | Extn | |
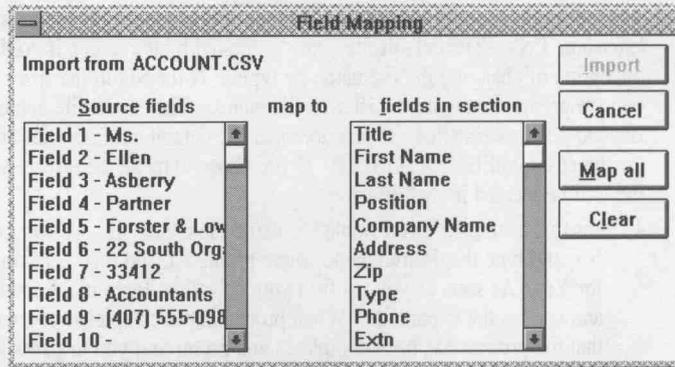
6. When the settings appear as they do above, click on [ OK ] to accept them and to proceed with the import process. The Field Mapping dialog box shown below will appear.

7. The next step is to map fields in the data export file to fields in Organizer's Address Section. For convenience, Beyond 2.0 has ordered the information in the data file so that you can map the data fields directly. To accept the default, click on [ Map all ].

8. The final step is to click on [ Import ]. You will see the results of the import process as shown on the following page.

| Lotus Organizer |
| --- |
| ⓘ  3 records imported. |
| OK |
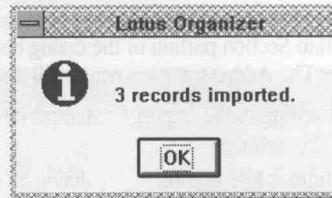
9. When you click on [ OK ] the import process is complete.

10. To see your entries, click on the tab for the Address Section of Organizer.

In this example, we did not include a FAX number. If an entry for a FAX number had existed in the Structured People Note for this person, it would appear in the appropriate place once imported into Organizer. Additional information, such as home address, additional telephone numbers and other fields contained in the Structured People Note for which there is no specific matching field in Organizer, is placed in the Note section of each address entry.

> **NOTE: Organizer 1.0 does not support the inclusion of a person'a middle initial in the Address Section. The Beyond 2.0 Structured People Note does include a field for a person's middle initial. If you export from Agenda using the Beyond 2.0's DBF export program NOTE2DBF, you can create a DBF file, CONTACT.DBF, and import it file into Organizer. You can then manually map the data fields and assign the middle initial field to the First Name field along with the First Name. The middle initial will append the middle initial to the person's first name.**

# Chapter 6
# Exporting Items to Calendar Creator Plus 5.0

Calendar Creator Plus 5.0 is a popular program for printing scheduled events in numerous styles and sizes. Calendar Creator Plus 5.0 will allow you to import information from ASCII files in three popular formats: Comma Delimited, Space Delimited and Tab Delimited. Beyond 2.0 includes a feature that allows you to export schedule information to Calendar Creator Plus 5.0 using Tab Delimited ASCII files, (TDL).

**Selecting Items for Export**

This section explains how to export Agenda items to a file that can be imported into Calendar Creator Plus 5.0, and how to import that file into your copy of Calendar Creator Plus 5.0. Follow the steps below to create the export file.

1. Develop the view from which you wish to export information. For example, if you want to export information about your to-do and scheduled items for this week so that you can print a calendar for this week, load your "This Week" view. If you do not have a "This Week" view in the database you are using, it is easy to construct. Consult your Agenda documentation on how to do this. For the purposes of this illustration, we will consider the following three items as sample items on this week's schedule.

   - Meet with Ellen Asberry 10:00 AM about the problem with the Harris project.
   - Call Kyle Edison to review budget vs actual for his project Tuesday 9:30 AM.
   - Call Gloria Lattimer to arrange the symposium Wednesday 2:00 PM.

Depending on the layout of the view columns and other properties of your view, the items would appear in a view similar to the illustration below.

```
File: C:\AGENDA\APPS\SAMPLE                              01/17/93   2:54pm
View: This Week                   Datebook For: When                *
When             Sun 01/17/93
─────────────────────────────────────────────────────────────────────────
                 Mon 01/18/93
·10:00am  •  Meet with Ellen Asberry 10:00 AM about the problem with the Harris
             project.
─────────────────────────────────────────────────────────────────────────
                 Tue 01/19/93
·9:00am   •  Call Kyle Edison to review budget vs actual for his project
             Tuesday 9:00 AM.
─────────────────────────────────────────────────────────────────────────
                 Wed 01/20/93
·2:00pm   •  Call Gloria Lattimer to arrange the symposium Wednesday 2:00 PM.
─────────────────────────────────────────────────────────────────────────
                 Thu 01/21/93
─────────────────────────────────────────────────────────────────────────
                 Fri 01/22/93
─────────────────────────────────────────────────────────────────────────
                 Sat 01/23/93
─────────────────────────────────────────────────────────────────────────
 F1     F2      F3      ·F4     F5     F6     F7     F8     F9     F10
Help   Edit  Choices   Done   Note   Props  Mark  Vw Mgr Cat Mgr Menu
```

**Launching the ITEM2CCP Macro**

1. Press **Alt F3** to open the Agenda Macro Manager.

2. Highlight the macro entitled "Export Schedule to Calendar Creator" and press **ENTER**.

```
Highlight the macro you want to run or change.  Press ENTER to
run the macro, INS to create one, F2 to edit an existing one.          ◆
─Lawyer──────────────────────────────People──────────────W. Phone────
    •                           ┌─────Macro Manager──────────UNC──┐   427
    •                           │                                 │   321
    •                           │  ♫ Create a Structured People Note│ 390
    •                           │  ♫ Export Items to BCL Calendar   │ 392
    »»                          │  ♫ Export People Notes to BCL     │   224
                                │  ♫ Export People Notes to DBF     │
                                │  ♫ Export People Notes to Organizer│
                                │  ♫ Export Items to Calendar Creator│
                                │  ♫ IMG People Mover               │
                                │  ♫ The Beyond 2.0 Contact Manager │
                                │                                 │
                                │    Press ENTER to run, ESC to cancel│
                                └─────────────────────────────────┘




 F1    │  F2   │ F3 │  F4   │ F5 │  F6   │  F7   │ F8 │ F9 │ F10
 Help  │EditMac│    │Delete │    │ Props │ Learn │    │    │
```

The macro will begin to process and you will see the following screen.

```
Highlight Your Choice and Press ENTER

When                MAIN                                    People
·01/18/93 10:00am • Meet with Ellen Asberry 10:00 AM about  ·Asberry, Ellen
                     the problem with the Harris project.
·01/19/93 9:30am  • Call Kyle Edison to review budget vs    ·Edison, Kyle
                     actual for his project Tuesday 9:30 AM.
·01/20/93 2:00pm  • Call Gloria Lattimer to arrange the     ·Lattimer, Gloria
        ┌─Select the Information You Wish to Export to Calendar Creator Plus─┐
        │                                                                    │
        │  All     ── Export All Items in This View to Calendar Creator Plus │
        │  Section ── Export Items in This Section to Calendar Creator Plus  │
        │  Marked  ── Export Marked Items to Calendar Creator Plus           │
        │  Quit                                                              │
        │                                                                    │
        └────────────────────────────────────────────────────────────────┘




 F1    │ F2 │ F3 │ F4 │ F5 │ F6 │ F7 │ F8 │ F9 │ F10
 Help  │    │    │    │    │    │    │    │    │
```

3.  This menu allows you to export all the information in the view, information in a particular section, or only those items that have been previously marked. If you wish to export items information in a particular section, you do not need to position the highlight on the section heading before running the macro, but it should be positioned in the section from which you wish to export items. If you want to export a specific item or items, you should mark them with F7 prior to executing the macro. In this example we focused the view on the entire week and will export All the items (accepting the default choice) and press **ENTER** to continue processing.

4.  The macro will launch Beyond 2.0's ITEM2CCP program to capture the designated items and create a tab delimited ASCII file that can be imported into Calendar Creator Plus 5.0. While Beyond 2.0 is processing, you will see a counter that enumerates how may recrods have been processed.

5.  When the processing is complete, you will see a screen that indicates that the tab delimited file, CALENDAR.TDL, has been created. CALENDAR.TDL is located in the directory where you installed Beyond 2.0. If you accepted the default choices during the installation, the file will be in the \BEYOND20 directory. As prompted on the screen, when you **press any key to continue**, you will be returned to your Agenda file.

**Importing Items into Calendar Creator Plus 5.0**

Once you have created the export data file CALENDAR.TDL, you can import it into your copy of Calendar Creator Plus 5.0. Follow the steps below to import the data file.

1. Load Calendar Creator Plus 5.0.

2. From the Main Menu, select **File,** by pressing **Alt-F** or clicking on **File.**    The File menu will appear.

3. If you want to open an existing event list, select **Open** from the File menu and press **ENTER,** or click on **Open.** You can also open an existing event list by pressing **F3.** A list of existing Event Lists will appear.  You can highlight the existing event list and press **ENTER** or click on its name to load it.

4. If you want to open a new file, highlight Open from the File menu and press **ENTER,** or click on **Open.** Highlight **New** and press **ENTER** or  click on **New.** you will be prompted to give the new event list a name.  Type the name in the dialog box and press **ENTER.** You will be asked to confirm your choice and if the name is satisfactory, press **ENTER** to accept **OK,** or click on **OK** to accept it.

5. Once the desired event list is loaded select File from the Main Menu by lighlighting **File** and pressing **ENTER,** or clicking on **File.**  The File Menu will appear.

6. From the File Menu, highlight Import ASCII and press **ENTER,** or  click on **Import ASCII,** as shown on the screen below.

```
Tuesday   1/19/93          Calendar Creator Plus 5.0              11:17 am
File   Edit   Event   Style                                           Help
                                     test
 New...              F2      ┌──────────Event──────────┐    ┌──Style──┐
 Open...             F3      │                         │    │         ▲
 Close                       │                         │    │         │
 Event List Utilities ▶      │                         │    │
 ──────────────────────      │                         │    │
 Import ASCII...             │            ·            │    │
 ──────────────────────      │                         │    │
 Print...            F9      │                         │    │
 Print Preview...            │                         │    │
 Page Setup...               │                         │    │
 Printer Setup...            │                         │    │
 Print PCX Catalog           │                         │    │
 ──────────────────────      │                         │    │
 Set Paths...                │                         │    │
 Set Defaults...             │                         │    │
 ──────────────────────      │                         │    │
 Exit                        │                         │    │         ▼

 F1 Help F2 New F3 Open F4 Date F5 Add F6 Edit F7 Cut F8 Paste F9 Print F10 Menu
 Converts an ASCII text file to use as an event list
```
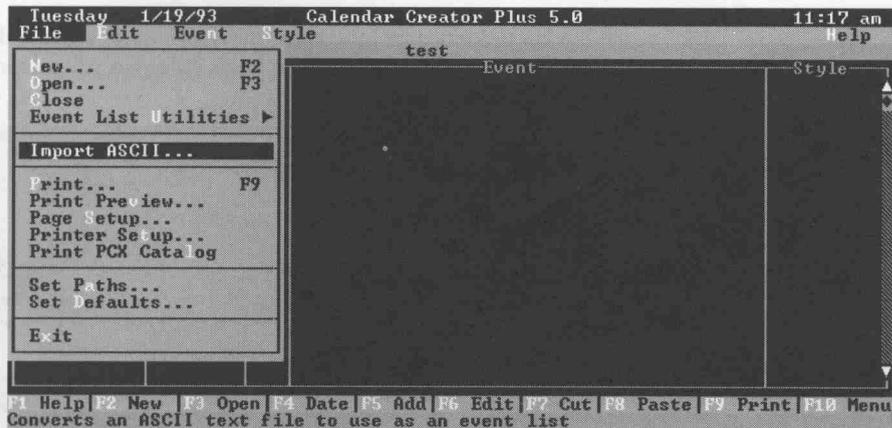
7. The Select import ASCII File dialog box will appear.  Use the **Tab** key to position the highlight on place to specify the Import Path.  If you installed Beyond 2.0 in the default directory, \BEYOND20, you should type **\BEYOND20** as the import path.  If you installed Beyond 2.0 in a directory with a different name, you should type that name as the import path.

8. Use the **Tab** key to highlight the portion of the dialog box where you specify the file type. If the setting is not currently set for Tab Delimited, use the **down arrow key** to position the highlight on Tab Delimited.  Alternately, you can click on **Tab Delimited** to select it with your mouse.

9. Use the **Tab** key to position the highlight on the portion of the dialog box where you select the data file for importing into Calendar Creator Plus 5.0, and use the **down arrow key** to locate and highlight the file CALENDAR.TDL.  The file will be near the bottom of the file

**Importing
Items into
Calendar
Creator
Plus 5.0
continued**

list.  Alternately, you can click anywhere on the list of files, to position the highlight in the file list portion of the dialog box and use the scroll bar to move down through the file list until you locate CALENDAR.TDL.  When you have completed these steps your screen should look like the one below.

```
 Tuesday   1/19/93        Calendar Creator Plus 5.0          11:44 am
 File   Edit   Event   Style                                    Help
      - 1993 +                      test
    -Date-      -Time-   -*@P-              -Event-              -Style-
              ┌─────────────── Select Import ASCII File ───────────────┐
              │ Import Path: [C:\BEYOND20\                            ] │
              │ ┌File─────────────┐                                    │
              │ │NOTE2ORG.EXE   ▲ │                                    │
              │ │CALENDAR.BAT   █ │  ┌File Type────────────┐           │
              │ │STPNOTE.MAC    █ │  │ ( ) Comma Delimited  │           │
              │ │IMGINST.MAC    █ │  │ ( ) Space Delimited  │           │
              │ │EXP2CAL.MAC    █ │  │ (•) Tab Delimited    │           │
              │ │NOTE2BCL.MAC   █ │  └──────────────────────┘           │
              │ │NOTE2DBF.MAC   █ │                                     │
              │ │ITEM2CCP.EXE   █ │                                     │
              │ │NOTE2ORG.MAC   ◆ │                                     │
              │ │CALENDAR.TDL   █ │                                     │
              │ │ITEM2CCP.MAC   ▼ │  █Assign Fields█ █Cancel█ █Help...█ │
              │ └─────────────────┘                                    │
              └────────────────────────────────────────────────────────┘
```

10. Use the Tab key to position the highlight on the Assign Fields button and press **ENTER**, or click on **Assign Fields**.  The Assign Import Fields dialog box will appear as shown below.

```
 Tuesday   1/19/93        Calendar Creator Plus 5.0          12:23 pm
 File                 ┌─── Assign Import Fields ───┐              Help
      -D  From File - C:\BEYOND20\CALENDAR.TDL                    tyle-
          ┌Calendar Fields┐ ┌Import Fields─────────────┐
          │ -Unassigned- = │Meet with Ellen Asberry│  Record #1
          │ -Unassigned- = │01/18/93               │
          │ -Unassigned- = │10:00                  │  Previous
          │ -Unassigned- = │                       │
          │ -Unassigned- = │                       │  Next
          │ -Unassigned- = │                       │
          │ -Unassigned- = │
          │ -Unassigned- = │
          │ -Unassigned- = │
          │ -Unassigned- = │
          │ -Unassigned- = │
          │ -Unassigned- = │
          │ -Unassigned- = │
          │ -Unassigned- = │                          Import
          │ -Unassigned- = │
          │ -Unassigned- = │                          Cancel
          └────────────────┘
          Path - C:\CC5\
          Event List Name:[Sample                ]    Help...
```

11. In this dialog box you will specify which fields are the Entry Name, the Date and the Start Date.  The column on the left side of the dialog box contains the Calendar Field names, and the list to the right contains the field entries for the first record in CALENDAR.TDL.  With the highlight positioned on the top Calendar Field name (at the start it is set for "Unassigned"), **double click** on it.  A list of Calendar Field name options will appear as shown on the next page.

```
ay   1/19/93          Calendar Creator P
                                          Fi
From File - C:\B    -Unassigned-          L
  Calendar Fields   Event Name
  -Unassigned-    ◄ Date - mm/dd/yy        n
  -Unassigned-      Date - dd/mm/yy
  -Unassigned-      Date - yy/mm/dd
  -Unassigned-      Start Time
  -Unassigned-      End Time
  -Unassigned-      Priority
  -Unassigned-      Event Style
  -Unassigned-      Effect
  -Unassigned-      Graphic Name
  -Unassigned-      Graphic Size
  -Unassigned-      Color
  -Unassigned-
```

12. Use the **down arrow key** to highlight Event Name and press **ENTER**, or double click on **Event Name** to establish the first Calendar Field as the Event Name.

13. Use the **down arrow key** to position the highlight on the next Unassigned Calendar Field and press **ENTER**, or double click on the next **Unassigned** Calendar Field. The assignment options will again appear.

14. Use the **down arrow key** to highlight Date mm/dd/yy and press **ENTER**, or double click on **Date mm/dd/yy** to establish it as the assignment for the second Calendar Field.

15. Use the **down arrow key** to position the highlight on the next Unassigned Calendar Field and press ENTER, or double click on the next **Unassigned** Calendar Field. The assignment options will again appear.

16. Use the **down arrow key** to highlight Start Time and press **ENTER**, or double click on **Start Time** to establish it as the assignment for the third Calednar Field. When you have completed these steps, your screen should appear similar to the screen shown below.

```
Tuesday   1/19/93       Calendar Creator Plus 5.0          12:21 pm
File                 Assign Import Fields                      Help
        From File - C:\BEYOND20\CALENDAR.TDL
    D    Calendar Fields  Import Fields                          tyle
         Event Name    =  Meet with Ellen Asberry    Record #1
         Date - mm/dd/yy = 01/18/93
         Start Time    =  10:00                       Previous
         -Unassigned-  =
         -Unassigned-  =                                 Next
         -Unassigned-  =
         -Unassigned-  =
         -Unassigned-  =
         -Unassigned-  =
         -Unassigned-  =
         -Unassigned-  =
         -Unassigned-  =
         -Unassigned-  =
         -Unassigned-  =                                 Import
         -Unassigned-  =
         -Unassigned-  =                                 Cancel
         Path - C:\CC5\
         Event List Name:[Sample             ]        Help...
```

17. Once the Calendar Fields are defined, use the **Tab** key to position the highlight on Import and press **ENTER**, or click on **Import** to bring the import data file into the event list. When the importing process is complete, you will see a screen like the one below indicating the number of records that have been imported. **The screen will report that one record was discarded. You can ignore that report.**

**Importing
Items into
Calendar
Creator
Plus 5.0
continued**

```
 Tuesday   1/19/93        Calendar Creator Plus 5.0              12:25 pm
 File    Edit    Event    Style                                    Help



                    ┌──────── Import Report ────────┐
                    │  Records successfully imported: 3  │
                    │         Discarded: 1               │
                    │                                    │
                    │                                    │
                    │             ┌────┐                 │
                    │             │ OK │      Help...     │
                    │             └────┘                 │
                    └────────────────────────────────┘



 F1 Help│F2 New │F3 Open│F4 Date│F5 Add│F6 Edit│F7 Cut│F8 Paste│F9 Print│F10 Menu
```
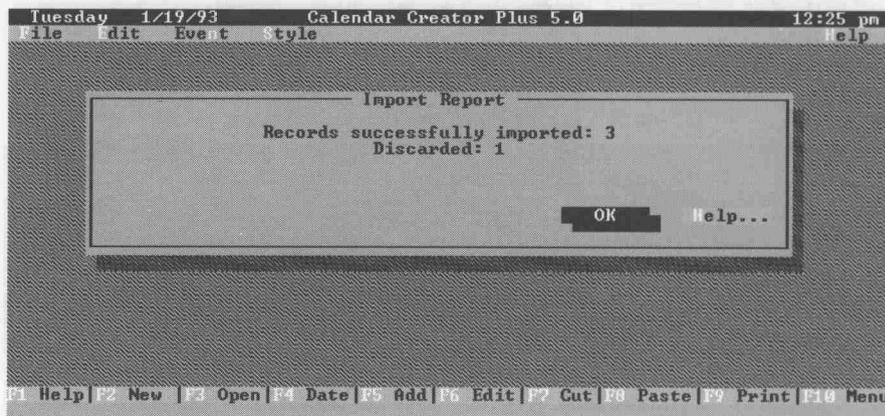
18. When you press **ENTER** to accept OK or click on **OK** you will see the items in your event
    list as shown in the sample below.

```
 Tuesday   1/19/93        Calendar Creator Plus 5.0              12:55 pm
 File    Edit    Event    Style                                    Help
     - 1993 +                        Sample
 ┌─Date───┬──Time──┬─*©P┬────────────Event────────────┬──Style─┐
 │Jan 18 Mon│10:00AM │   │Meet with Ellen Asberry 10:00 AM about the│Normal │▲
 │    19 Tue│ 9:30AM │   │Call Kyle Edison to review budget vs actua│Normal │
 │    20 Wed│ 2:00PM │   │Call Gloria Lattimer to arrange the sympos│Normal │
 │          │        │   │                                          │       │
 │          │        │   │                                          │       │
 │          │        │   │                                          │       │
 │          │        │   │                                          │       │
 │          │        │   │                                          │       │
 │          │        │   │                                          │       │
 │          │        │   │                                          │       │
 │          │        │   │                                          │       │
 │          │        │   │                                          │       │
 │          │        │   │                                          │       │
 │          │        │   │                                          │       │▼
 └──────────┴────────┴───┴──────────────────────────────────────────┴────────┘
 F1 Help│F2 New │F3 Open│F4 Date│F5 Add│F6 Edit│F7 Cut│F8 Paste│F9 Print│F10 Menu
```
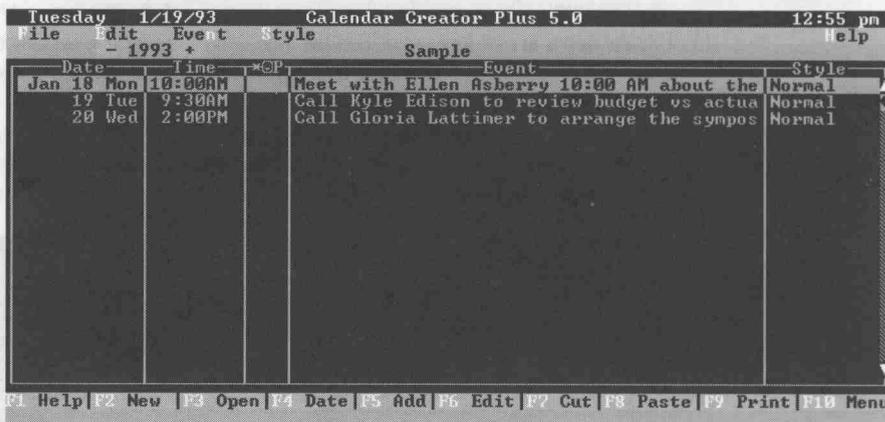
Calendar Creator Plus 5.0 limits the number of characters in items that are event names to 55
characters. To accomodate this limit, Beyond 2.0 truncates items at the last full word prior to
the 55 character limit. When you see items on the event list in Calendar Creator Plus 5.0 only
the first 42 characters appear in the Event column. If you highlight an event and press **ENTER**,
or double click on an event, you will see the Modify Event dialog box. The full 55 characters
in the event name can be seen there.

Repeating dates are created by Beyond 2.0's program for exporting to Calendar Creator Plus
5.0, ITEM2CCP.EXE. ITEM2CCP.EXE will create instances of any repeating date in Agenda
for a period of at least one year from the base date. For a discussion of the base date, see your
Agenda documentation.

# Chapter 7
# Using the IMG People Mover to Build Agenda Files

## Re-thinking the Single Application Syndrome

Agenda users have often labored to create new Agenda files from their basic "home base" Agenda database. Many "single-application" users have been frustrated in their desire to create subsets of their Agenda-based information in separate Agenda files rather than continuing to expand a single file. Their desire has been motivated by the business purposes of keeping more than one file, and by Agenda's limitations with larger and larger data sets. While on the one hand Agenda is wonderful accomodating the "just dump it in there" approach to data management, there comes time for users to rethink how they handle larger data sets or data sets that can be logically broken into relatively large sub-sets using multiple Agenda files.

An inhibiting factor for many users has been the way in which Agenda 2.0 is configured for exporting categories and category notes. In order to create a new file from a part of an existing Agenda file, users have had to create templates of their files, (duplicate files with the Category Manager and views in tact, but devoid of items), and then go through the process of deleting categories and views that have no bearing on the information that they will be putting in the new file. Other users have tried to explort items into .STF files and stumbled with the settings for category exporting. Frequenty, when users have imported the .STF files into another database their Category Managers have either contained too much or too little of the information from the source file. Because this process has proven cumbersome or confusing many users have retreated to using a single Agenda file rather than taking advantage of the ability to create multiple databases.

## Selective Exporting of Categories

The IMG People Mover is intended to address the need for an easy way to create new databases about people quickly and easily from parts of existing Agenda databases. Once Agenda has grouped items of information based on their category assignments, the IMG People Mover enables you to selectively export information from one database and build it into another. In a view, you can to easily export items, people categories and the categories for which action assignments have been made. **The IMG People Mover does not actually move items and their people assignments from one database to another, rather it allows you to clone additional databases by copying items, people category assignments and categories that are linked through assignment actions to other databases. Your original file remains in tact.**

For example, if one of many projects in your primary Agenda file becomes so big or so important that it justifies its own file, using the IMG People Mover, you can move the relevant items and people into an export file that can be easily imported into another database. When used in conjunction with the Category Maker and Structured People Note, The IMG People Mover will help you communicate information to other existing files and build new files much more easily than ever before. When used in conjunction with the Beyond 2.0 Contact Manager, you can quicly assemble databases about people, companies, locations, and many more categories.

**Building a New Agenda File With the IMG People Mover**

Building a new Agenda file using the IMG People Mover involves three steps.

1. Creating a view that contains items and people assignments for the people you wish to export to the new database.
2. Executing the macro that launches the IMG People Mover.
3. Importing the resultant STF file into the new database to incorporate the categories and items from the source database.

These steps are described below.

You can export information about people from any view that contains items related to people in Agenda 2.0. The view can be any standard or datebook view containing items, or it can be one of the views created by the Beyond 2.0 Contact Manager.

1. Create or select the view from which you want to export items, their people assignments and categories for which assignment actions have been established.

   For example, using the sample file included in Beyond 2.0, you might decide to create a separate database just for people who are lawyers, as distinguished from persons in other types of occupations. You could use the Beyond 2.0 Contact Manager to create a custom view of lawyers and then export the entire view. Or you could use the Beyond 2.0 Contact Manager to create a custom view by company type (C.Type), and then select only the section that includes the lawyers for export.

   In a standard or datebook view other than those created using the Beyond 2.0 Contact Manager, you might have a group of items that are associated with the lawyers whose names and category assignments you want to build into another database. In this case, you could mark items for which there are meaningful assignments to people (in this case lawyers) and export only those items and category assignments.

**Before You Launch the IMG People Mover**

REMEMBER ! For maximum benefit from the IMG People Mover you should use the Category Maker and create Structured People Notes in your Agenda file. Using these features will enable you to export all categories for which assignment actions have been created. If you have information in category notes about people that have not been converted to Structured People Notes, the program will transfer the people categories, and the category note text, but will not transfer other categories for such things as company name, city, state, zip code, and other data.

**Launching the IMG People Mover**

2. Press **Alt F3** to open the Agenda Macro Manager.
3. Highlight the macro entitled "The IMG People Mover" and press **ENTER**.
4. The macro will begin to execute and the first thing you will see is the screen shown on the next page. The menu allows you to export all the items and the associated people in the view, items and the associated people in a particular section, or items and associated people that have been previously marked. If you wish to export information in a particular section, you do not need to position the highlight on the section heading before running the macro, but should place the highlight within the section containing the information you wish to export. If you want to export selected items, you should mark them with F7 prior to executing the macro.

**Launching the IMG People Mover continued**

In this example we created a custom view of lawyers using the Beyond 2.0 Contact Manager. Therefore, this view contains only one section, "Lawyers" and we will select the default option, "All -- Export All Items and People in this View, by pressing **ENTER**.

```
Highlight Your Choice and Press ENTER

┌Lawyer─────────────────────────────People─────────────────H. Phone───────
 ·                                 ·Edison, Kyle           ·(305) 555-3427
 ·                                 ·Jasper, Martin         ·(212) 555-6321
 ·                                 ·Martin, Angela         ·(202) 555-3300
 ·                                 ·Spencer, Tyrone        ·(212) 555-3399
 ·                                 ·Tollister, Susan       ·(212) 555-2224
 Please Select Items and People You Wish to Export to Another Agenda Database

 All     -- Export All Items and People in This View to an STF file
 Section -- Export Items and People in This Section to an STF file
 Marked  -- Export Marked Items and People to an .STF file
 Quit
```

```
 ShfF1    ShfF2    ShfF3    ShfF4    ShfF5    ShfF6    ShfF7    ShfF8    ShfF9    ShfF10
```

**Processing Items and People to an STF File**

The macro will resume processing and the screen shown below will appear.

```
                   PMOVER (tm) exports your
              IMG Structured People Notes (tm)
                   and Items to PMOVER.STF
"PMOVER" (C) 1993              Item Management Group, Inc.
Version 1.0                    611 Dartmouth Avenue
                               Silver Spring, MD 20910


Your "People" Notes and Items will be exported to PMOVER.STF

Is this OK? (Y/N):  Y
```

Information exported using the IMG People Mover will be contained in a file with the file extension .STF. The default file name suggested by the screen is PMOVER.STF. You have the option of changing the file name by typing **N** for No in the space provided, in which case you are prompted to enter a different file name and confirm your entry by pressing **Y** for Yes.

5. For this example, if you wanted to export the file *lawyer.stf* you would press **N** for No and type the desired name where prompted, and then confirm your entry by pressing **Y** for Yes.

6. Once you confirm the export file name, the program will continue by reading your Category Manager and writing a record for each item and associated person to the export file. When this process is completed you will see the screen shown on the next page.

```
PMOVER will return you to Agenda 2.0 (R) now.



                                         "PMOVER" (C) 1993
                                         is copyrighted by
                                         Item Management Group, Inc.
                                         Unauthorized use and
                                tm       distribution are prohibited.
                                         All rights reserved.


Your Items and People have been exported to C:\BEYOND20\LAWYER.STF.


Agenda 2.0 is a trademark of Lotus Development Corp.
Press any key to continue..._
```

7. The screen will prompt you to **press any key to continue**, and when you do, you will be
   returned to your Agenda file.

**Importing
the STF File
Into Another
Agenda File**

1. To import the STF file you just created into another Agenda file, load the file into which
   you wish to import the STF file.

2. Press **F10** to bring up the Agenda menu.

3. Press **F** for File, then press **T** for Transfer, then press **I** for Import. The Import Structured
   File dialog box will appear.

4. On the top line of the dialog box you specify the file you wish to import, including its path.
   In this example the file name we chose was *lawyer.stf*. It was created in the directory on
   the C: drive named \BEYOND20. Therefore, you would type
   **C:\BEYOND20\LAWYER.STF** on this line. If you installed Beyond 2.0 in a directory
   with another name, you would substitute that name in place of \BEYOND20.

5. Using the down arrow key, position the highlight on the "Assign to category:" line. On this
   line type **People**, and press **ENTER**. If your file did not contain the parent category
   People, Agenda will create it for you when you type it as the entry on the "Assign to
   category" setting.

6. To complete the process, press **ENTER** again, and the file will be imported. You will see
   the items that were in the view that you selected for export from your source file, and the
   people with whom those items were associated. To see the newly imported people
   categories and the categories to which assignment actions had been created using the
   Category Maker, press **F9** to look at the Category Manager. You will see the people names
   under the parent category "People" and the other category families in your Category
   Manager.

# Chapter 8
# Using The IMG Special Edition of Books Cards and Labels PrintBase

The IMG Special Edition of Books Cards and Labels PrintBase that is included with Beyond 2.0 is a customized version of the popular Books Cards and Labels. This chapter describes the menu system and discusses the steps involved in printing various types of output using BCL.

**The BCL Screen**

The standard BCL screen us shown below. The screen contains three parts: the Main Menu on the top line; the large area below the Main Menu line tells you some of the details of the reports and labels you are planning to print. This is the **Reports Information Area**. The **Labels Information Area** is below, where formatting information for labels is displayed. If you select a different type of paper form for printing the middle section of the screen will change to display the characteristics of the form you have selected. The information at the bottom describing the style of mailing label will not change until you specify that you want to print mailing labels, and then information about the style you selected will appear in the bottom portion of the screen.

```
  File  Forms  Labels  Sort  Select  Options  Print  System  Calendar

  One Form per Page
  5-1/2" x 8-1/2"
                             Sort Order      : Organization
                             Cross Reference : Yes
                             Page Breaks     : No
                             Calendar        : Landscape
                             01/01/93 to 01/31/93


              Select ALL Records


                             Sort Order      : Organization
                             1" x 2-5/8",
                             Standard Mailing Labels (three across)
     Agenda people.dbf(1)
```

**The Main Menu**

The top line of the screen is the Main Menu. You will use the Main Menu to select formats for your calendars, reports and labels. Selecting one of the choices on the Main Menu generally causes a subsidiary menu to appear, where you can make further choices. When you first bring up BCL, the word **File** is highlighted. Use the right and left arrow keys to move back and forth across the Main Menu line.

To select an option from the Main Menu Line, highlight the option (using the right and left arrow keys) and then press **ENTER**, or simply type the first letter of your selection. BCL will go directly to your choice. You may exit from any menu line by pressing **ESCAPE**.

> NOTE: Because there are three options that begin with 'S' (SORT, SELECT AND SYSTEM) 'S' will always select 'SORT'. Use the arrow keys to select the SELECT option. As you go along, the simplicity of one-keystroke selections will become second nature.

**Overview of the Main Menu Selections**

The selections below are available from the Main Menu. When you select one of these items, a menu will appear below it. See the following sections for complete information on what appears in these menus.

**File** This sub-menu contains options that allow you to add a database to the roster of active databases, delete a database from the roster, select a database, update Printbase's copy of the database with up-to-date records, or compress PrintBase's copy to save room on the hard disk.

**Form** Use this menu to make formatting selections for your reports.

**Labels** Use this menu to make formatting selections for your Labels.

**Sort** The sort options allow you to select the order in which your labels or reports are to be printed. (i.e. by Name, by Organization, etc.)

**Select** Use this to select only a particular section of records for printing, or to select all of them.

**Options** Use this menu to further format your Reports and Labels. The options in this menu include: (for Reports) Cross Reference, Pitch and Font, 1 or 2 sided printing, (for Labels) Print Salutation, Return Address, and many others.

**Print** Select this menu when you are ready to print your labels or reports.

**Calendar** Use this menu to choose daily, weekly, or monthly calendar formats.

**System** This menu allows you to change the information you entered upon installation, change the colors of the screen, or reconstruct index files.

**Quit** Select QUIT to leave PrintBase.

**The File Menu**

Select 'File' from the Main Menu line to maintain a roster of active database files. Use this menu to ADD another database to BCL, SWITCH to another database, DELETE a database from the roster, UPDATE the database with current records, or COMPRESS the database to save space. The following options are available from the File Menu:

**Add** This option will add a copy of your database file to BCL so you may print data from that file. This file will also contain formatting choices you make with BCL. You may have up to five active databases at one time.

```
Add a New Database
  File   Forms   Labels   Sort   Select   Options   Print   System   Calendar
 ┌─────────┐
 │ Add     │
 │ Switch  │
 │ Delete  │11"                        Sort Order       : Organization
 │ Update  │                           Cross Reference: Yes
 │ Compress│                           Page Breaks    : No
 └─────────┘                           Calendar       : Disabled
         ≈ ~~~~~~~~ ≈                   Select a Date Range
         ≈ ~~~~~~~~ ≈
         ≈ ~~~~~~~~ ≈
         ≈ ~~~~~~~~ ≈
         ≈ ~~~~~~~~ ≈
         ≈ ~~~~~~~~ ≈
                          Select ALL Records


                                       Sort Order       : Organization
 ┌─┐ ▬▬▬  ▬▬▬  ▬▬▬ ┌─┐
 │ │ ▬▬▬  ▬▬▬  ▬▬▬ │ │   1" x 2-5/8".
 │ │ ▬▬▬  ▬▬▬  ▬▬▬ │ │   Standard Mailing Labels (three across)
 └─┘                └─┘
    └─ Agenda people.dbf(1) ─┘
```

**The File Menu continued**

**SWITCH** Use this option to switch from one active database to another. When you select Switch, a list of the databases you have copied into BCL will appear. Select one of the choices by using the arrow keys.

**Delete** This option will remove the copy of a database file from BCL's roster of active files.

**Update** Use Update to update the records in a database when the data has changed since the last time you printed. This function is necessary only for ASCII Delimited Files. All other types will UPDATE automatically.

**Compress** The Compress option removes all but the formatting information from an active database. This can save a great deal of space on your hard disk. The next time you need to print data, BCL automatically asks if you would like to UPDATE to restore up-to-date record information.

**The Forms Menu**

When you want data to be printed on a pre-printed form or just standard paper, select FORMS from the Main Menu. Use this menu for Selecting a Form, Size or even the Organizer you carry. Some sample forms are shown in Appendix D.

```
 File   Forms   Labels   Sort   Select   Options   Print   System   Calendar

       Day-Timer Forms...
 Pap   Organizers...
 8-1   3" x 5" (Little Black Book)
       3-1/4" x 6-1/2" (A100)                              rganization
       3-3/4" x 6-3/4"                                     es
    ≈  5-1/2" x 8-1/2", Paper...                           o
    ≈  8-1/2" x 11"...                                     isabled
    ≈  User Defined...                                     e
    ≈  4" Rolodex Style Cards...
    ≈  5" Rolodex Style Cards...
    ≈
    ≈ ~~~~~~~~~~~ ≈
                         Select ALL Records


                                  Sort Order    : Organization
   ▌ ▬▬▬  ▬▬▬  ▬▬▬ ▐
   ▌ ▬▬▬  ▬▬▬  ▬▬▬ ▐        1" x 2-5/8",
   ▌ ▬▬▬  ▬▬▬  ▬▬▬ ▐        Standard Mailing Labels (three across)
   ▙ Agenda people.dbf(1)
```

**Day Timer Forms**

When you select Day-Timer Forms from the FORMS Menu, a list of Day-Timer forms appears. You can move the highlight by pressing the up or down arrow. As you move the highlight, information about highlighted form appears on the prompt line at the top of the screen.

**The Day-Timer forms from which you can choose are:**

        B size #13533 B (Jr.) Wire Bound Pocket (2-3/8" x 5", fold and staple)

        C size # 13633 C (Sr..) Wire Bound Pocket (2-7/8" x 6-1/2" fold and staple)

        J size # 13833 J (Jr.) Loose-Leaf Pocket (2-3/4" x 5", 6 holes)

        K size # 13933 K (Sr.) Loose-Leaf Pocket (3-3/4" x 6-1/2", 6 holes)

        L size # 14333 L (Jr.) Loose Leaf Desk (5-1/2" x 8-1/2', 7 holes)

        M size # 14433 M (Sr.) Loose Leaf Desk (8-1/2" x 11",7 holes)

**Organizers**   When you select Organizers from the Forms Menu, a list of forms appears as shown below. You can move the highlight by pressing the up or down arrow. As you move the highlight, information about the highlighted form appears on the prompt line at the top of the screen.

```
Prints on Day-Timer forms - Continuous #13521 or Laser #13531
File  Forms  Labels  Sort  Select  Options  Print  System  Calendar

      Day-Timer Forms...
  Pap  Organizers...
  8-1  3" x 5" (Little Black Book)                        rganization
       3-                                                 es
       3-  B (Jr.) Wire-Bound Pocket                      o
       5-  C (Sr.) Wire-Bound Pocket                      isabled
       8-  J (Jr.) Loose-Leaf Pocket                      e
       Us  K (Sr.) Loose-Leaf Pocket
       4"  L (Jr.) Loose-Leaf Desk
       5"  M (Sr.) Loose-Leaf Desk
       ~~  Filo Fax...
           Lefax
           Running Mate
           Classic Day Runner
           Franklin Day Planner
                                              r   : Organization

                                    1" x 2-5/8",
                                    Standard Mailing Labels (three across)

        Agenda people.dbf(1)
```

### Organizers to choose from are:

B (Jr.) Wire-Bound Pocket
> Prints on Day-Timer forms - Continuous # 13412 or Laser #13413

C (Sr.) Wire Bound Pocket
> Prints on Day-Timer forms - Continuous # 13422 or Laser #13423

J (Jr.) Loose Leaf Pocket
> Prints on Day-Timer forms - Continuous # 13432 or Laser #1343

K (Sr.) Loose Leaf Pocket
> Prints on Day-Timer forms - Continuous # 13442 or Laser #13443

L (Jr.) Loose Leaf Desk
> Prints on Day-Timer forms - Continuous # 13452 or Laser #13453

M (Sr.) Loose Leaf Desk
> Prints on Day-Timer forms - Continuous # 13462 or Laser #13463

Filo Fax
> Pocket
> Personal
> Professional

Lefax - Form Length 6-3/4", one form per page

Running Mate
> Prints on Day-Timer forms - Continuous # 13442 or Laser #13443

Classic Day Runner
> Prints on Day-Timer forms - Continuous # 13452 or Laser #13453

Franklin Day Planner
> Prints on Day-Timer forms - Continuous # 13452 or Laser #13453

**Book
Forms**

The Forms Menu includes a list of book style forms.   You can move the highlight  by pressing
the up or down arrow. As you move the highlight, information about the highlighted form
appears on the prompt line at the top of the screen.

**The Book Forms to choose from are:**

3" x 5" (Little Black Book)

This book is printed on standard 8-1/2" x 11" continuous fanfold paper for non-laser printers or
8-1/2" x 11" single sheets for laser printers.  You will trim the pages then fold and staple.

3-3/4" x 6-3/4"

Select this option to print a report in a 3-3/4" x 6-3/2" area on standard 8-1/2" x 11" paper that
can be cut and trimmed to fit your binder.

5-1/2" x 8-1/2", Paper

8-1/2" x 11" ...

You may select a variety of reports on standard 8-1/2" x 11" paper. Press **ENTER** to display
these options.

**Two columns per page.**  Prints on 8-1/2" x 11" paper, two columns wide.  Handy for printing
an "Edit list".

```
Prints on 8-1/2" x 11"
 File   Forms   Labels   Sort   Select   Options   Print   System   Calendar
        ┌──────────────────────────────────────────┐
   fol  │ Day-Timer Forms...                        │
   2.5  │ Organizers...                             │
        │ 3" x 5" (Little Black Book)               │
        │ 3-1/4" x 6-1/2" (A100)          rganization│
        │ 3-3/4" x 6-3/4"                 es         │
        │ 5-1/2" x 8-1/2", Paper...       o          │
        │ 8-1/2" x 11"...                 isabled    │
        │ User Defined...                 e          │
        │ 4" Rolodex Style Cards...                  │
        │ 5" Rolodex Style Cards...                  │
        └────┌───────────────────────────────────┐──┘
             │ Two Columns per Page              │
             │ One Column per Page 2-3/4"        │
             │ One Column per Page 5"            │
             │ 5-1/2" x 8-1/2", One Form per Page│
             │ 5-1/2" x 8-1/2", Two Forms per Page│ : Organization
             │ 5-1/2" x 8-1/2", Book Format      │
             └───────────────────────────────────┘
                        Standard Mailing Labels (three across)
     Agenda people.dbf(1)
```

**One column per page.**  2-3/4" Prints on 8-1/2" x 11" paper, one 2-3/4" column wide.
**One column per page.** 5" wide.  Prints on 8-1/2" x 11" paper, one 5" column wide.

> **NOTE:  All 8-1/2 x 11" paper formats print a page number in the right-hand corner
> of each page to help you keep the pages in order.  The left-hand margin is greater
> than the right-hand margin on the front side (vice versa if you print on the back side);
> this is so you can use a 3-hole punch without interfering with the printed data.**

**User Defined Forms**

This option lets you define your own forms. This option is not recommended for labels or to replace existing forms. When selected, additional options are displayed. Use the Up Arrow and Down Arrow keys to select the desired option and enter a suitable choice or number, as required. Fractional numbers (i.e., 0.52) are supported. Press **ENTER** after each change. Press **ESC** when you are finished making all changes (or press **ENTER** from the last option). A prompt window asks if you are finished. To return to the menu line, type: **Y** or press **ENTER**. If you are not finished, press **Esc** or type: **N** to return to the option window. A description of each user defined option follows:

| | |
|---|---|
| **Top margin offset (inches)** | Enter the desired top margin, in inches. |
| **Print area width (inches)** | Enter the print area column width, in inches. |
| **Page length (inches)** | Enter the length of the paper the form will print on. |
| **Print area length (inches)** | Enter the print area column length, in inches. |
| **Center margin (inches)** | For two column forms, enter the middle margin, in inches. |
| **Front left margin (inches)** | Enter the front page left margin. |
| **Back left margin (inches)** | For double-sided printing, enter the back side left margin, in inches. |

**Explicit page format F, T, X, B, O, Z** Enter one of the following choices:

| | |
|---|---|
| **F** | Print two columns wide on the front side of the page. |
| **T** | Print two columns wide on both sides of the page. |
| **X** | Print two columns wide on both sides of the page. This is used when you separate the pages and use them independently. |
| **B** | Print data in book format, two columns wide front and back. The pages can be folded and stapled to make a book. |
| **O** | Print one column wide on both sides of the page. |
| **Z** | Print one column wide on the front side of the page. |

**Paper orientation (Portrait/Landscape)** Enter **P** for portrait or **L** for landscape.

```
        User Defined

Top margin offset (inches)                          0.0
Print area width (inches)                           2.6
Page length (inches)                                5.0
Print area length (inches)                          4.17
Center margin (inches)                              0.50
Front left margin (inches)                          0.125
Back left margin (inches)                           2.25
Explicit page format F,T,X,B,O,Z (See Manual)       Z
Paper orientation (Portrait/Landscape)              P
```

After you configure a user-defined form, use the form to print a report to ensure your option settings print accurately. Depending on your printer, you may have to experiment with the User Defined options to achieve the exact desired page measurements.

**Rolodex Cards 4" or 5"**

This option lets you choose from the following styles of Rolodex Style cards.

4-inch Rolodex Style Cards (4 x 2-1/8").

5-inch Rolodex Style Cards (5 x 3").

**Non-Laser Printers** Use standard continuous cards available in most stationary stores. The cards will go through your printer more easily if you fold them along the perforations first.

**Laser Printers** When you select 4" or 5" Rolodex Style Cards, you will see a sub-menu offering choices for: labels; Day Timer Form 14451; or Rolodex Form LC24. You can highlight your choice and press **ENTER** to select it.

```
Prints on labels, then you attach to your cards
File  Forms  Labels  Sort  Select  Options  Print  System  Calendar
     ┌─────────────────────────────┐
     │ Day-Timer Forms...          │
4" R │ Organizers...               │
     │ 3" x 5" (Little Black Book)  │      rganization
     │ 3-1/4" x 6-1/2" (A100)      │      es
     │ 3-3/4" x 6-3/4"             │      o
     │ 5-1/2" x 8-1/2", Paper...   │      isabled
     │ 8-1/2" x 11"...             │      e
     │ User Defined...             │
   ≡ │ 4" Rolodex Style Cards...   │
     │ 5" Rolodex Style Cards...   │
     └──────┬──────────────────────┘
            │ Labels                    │
            │ Day-Timer Form 14451  cords│
            │ Rolodex Form LC24         │
                          Sort Order    : Organization
     ┌──┐ ┌──────┬──────┬──────┐
     │▓▓│ │▓▓▓▓▓▓│▓▓▓▓▓▓│▓▓▓▓▓▓│  1" x 2-5/8",
     │▓▓│ │▓▓▓▓▓▓│▓▓▓▓▓▓│▓▓▓▓▓▓│  Standard Mailing Labels (three across)
     │▓▓│ └──────┴──────┴──────┘
       Agenda people.dbf(1)
```

**Labels for Rolodex Cards**

This selection will print data on the following labels to be attached to your cards:

The 4-inch selection will print on labels 1-1/3 x 4" Avery Form 5162/5262 (14 labels), prints 8 lines.

The 5-inch selection will print on labels 1-1/2 x 4" Avery Form 5197 (12 labels), prints 9 lines.

**Rolodex Cards from Rolodex Form LC24** Prints six 4-inch Rolodex Style Cards (4 x 2-1/8") on an 8-1/2 x 11" form (LC-24). Only Laser printers with Landscape Orientation support can print on these cards (HP Laser Jet + or Series II and above or Printers that emulate the HP).

## The Labels Menu

When you want data to be printed on Mailing Labels, Shipping Labels, or Envelopes on Avery (or equivalent) labels, select **Labels** from the Main Menu line to specify the format you want. The label formats are described below.

## Standard Labels: Non-Laser Printers

The following are your choices of label formats if you are using a dot matrix printer:

**Standard Mailing Labels 15/16 x 3-1/2 one across** Prints the most common label used for mailing, one label per form, 6 lines per label.

**Standard Mailing Labels 15/16 x 3-1/2 3-across** Also prints the most common label used for mailing, three labels per form, 6 lines per label. This selection requires Avery Form 4144 or equivalent (36 labels on a 9-1/2 x 12" continuous form).

**1-1/2 x 4, 9 Lines Per Label** Prints standard 1-1/2 x 4", one across labels.

## Labels with Return Address

The following selections (Shipping Labels through Monarch Envelopes) have the added feature of allowing you to have a return address printed. See: **The Options Menu.**

**Shipping Labels** Prints standard continuous 4-1/3 x 4", one across labels.

**Commercial 10 Envelopes (Manual)** Prints Commercial 10 Envelopes (4-1/8 x 9-1/2") manually. PrintBase will stop between each address to allow you to insert a new envelope.

**Commercial 10 Envelopes (Automatic)** Prints continuous 10 Envelopes (4-1/8 x 9-1/2"). These are envelopes attached to a sheet that overlap each other.

**Monarch Envelopes (Manual)** Prints the smaller Monarch Envelopes (3-7/8 x 7-1/2") manually. PrintBase will stop between each address to allow you to insert a new envelope.

**Monarch Envelopes (Automatic)** Prints the smaller Monarch Envelopes (3-7/8 x 7-1/2") continuously (envelopes attached to a sheet that overlap each other).

**File Folder Labels** Prints 2 lines of text (Heading 1,2) on continuous file folder labels Avery Form 4266 (3-1/2 x 7/16").

## Labels from Laser Printers

**Standard Mailing Labels 1 x 2-5/8", 3-across** Prints the most common label used for mailing, Avery Form 5160 or equivalent (30 labels in 3 columns of 10 on an 8-1/2 x 11" sheet) with 6 Lines Per Label.

> **NOTE: When printing 3-across labels on a laser printer, the last partial sheet of labels will be left in the printer and the program will display the number of labels you will waste if you print the last sheet. If you like, you may substitute a sheet of paper to avoid wasting an entire sheet of labels before ejecting the last page.**

**1-1/3 x 4", 8 Lines Per Label** Prints 1-1/3 x 4", two across labels. Avery Form 5162/5262 or equivalent (14 labels on an 8-1/2 x 11" sheet).

**1-1/2 x 4", 9 Lines Per Label** Prints 1-1/2 x 4", two across labels. Avery Form 5197 or equivalent (12 labels on an 8-1/2 x 11" sheet).

**File Folder Labels** Prints 3 lines of text (Headings 1,2,3) on 11/16 x 3-7/16", two across labels using Avery Form 5266 or equivalent (30 labels on an 8-1/2 x 11" sheet).

**Labels
from Laser
Printers
continued**

> NOTE: The following selections (Shipping Labels through Monarch Envelopes) have
> the added feature of allowing you to have a return address printed. See: The Options
> Menu.

**Shipping Labels** Prints 3-1/3 x 4", 2-across labels. Avery Form 5164 or equivalent (6 labels, 2 rows of 3 on an 8-1/2 x 11" sheet).

**Commercial 10 Envelopes (Manual)** Prints Commercial 10 Envelopes (4-1/8 x 9-1/2") using the manual feed option on your HP Laser Jet Printer.

**Commercial 10 Envelopes (Automatic)** Prints continuous Commercial 10 Envelopes (4-1/8 x 9-1/2") using the Envelope Tray you purchased from Hewlett Packard.

**Monarch Envelopes (Manual)** Prints Monarch Envelopes (3-7/8 x 7-1/2") using the manual feed option on your HP Laser Jet Printer.

**Monarch Envelopes (Automatic)** Prints continuous Monarch Envelopes (3-7/8 x 7-1/2") using the Envelope Tray you purchased from Hewlett Packard.

> NOTE: Lasers print envelopes in the Landscape font you selected when installing the
> printer. See: The SYSTEM Menu to change the printer setup. When printing
> envelopes with laser printers, you must use an HP LaserJet II (or compatible) laser
> printer. BCL does not support the HP Desk Jet for envelope printing.

**How to
Print
Labels**

1. Select the database that has the records you wish to print from the file menu by highlighting **File** and pressing **ENTER**, and then highlight **Switch** and press **ENTER**. The list of databases will appear. Highlight the desired choice and press **ENTER**.

2. Highlight **Sort** from the main menu and press **ENTER**. Highlight the sort order you desire and press **ENTER**. The options are illustrated below.



```
Select the order in which the Contacts are printed
File  Forms  Labels  Sort  Select  Options  Print  System  Calendar

4" Rolodex Style Ca   Reports by Organization
                      Reports by Last Name
                      Reports by Type
                      Labels by Organization    : Organization
                      Labels by Last Name        : Yes
                      Labels by Zip Code         : No
                                                 : Disabled
                           Select a Date Range


         Select ALL Records


                         Sort Order    : Organization

                      1" x 2-5/8",
                      Standard Mailing Labels (three across)
    Agenda people.dbf(1)
```

3. Highlight **Labels** from the main menu and press **ENTER**. The list of available label formats will appear. If you are using a laser printer, the choices are those shown below. If you are using a non-laser printer you choices will be different. Highlight your desired choice and press **ENTER**.

```
Avery 5160, 30 labels (10 rows of 3) on 8"-1/2" x 11" Sheet
File   Forms   Labels   Sort   Select   Options   Print   System   Calendar

                    1" x 2-5/8", Standard Mailing Labels (three across)
  4" Rolodex       1-1/3" x 4", 8 Lines per Label
                    1-1/2" x 4", 9 Lines per Label
                    3-1/3" x 4", 24 Lines per Label (Shipping Labels)
                    Commercial 10 Envelopes (Manual)
                    Commercial 10 Envelopes (Automatic)
                    Monarch Envelopes (Manual)
                    Monarch Envelopes (Automatic)
                    11/16" x 3-7/16" (File Folder Labels, 5266)

                        Select ALL Records

                                Sort Order     : Organization

                                1" x 2-5/8",
                                Standard Mailing Labels (three across)

    Agenda people.dbf(1)
```

4. Select Options from the main menu by highlighting Options and pressing **ENTER**. This step allows you to specify whether or not you wish to print a salutation on the label such as Mr., Ms., etc. and whether or not you wish to print your return address on the label. The choice for printing the Preferred Address allows you to print the work address as the primary address or the home address as the alternate address. The final option allows you to specify one of three character pitch sizes for your labels. The setting "C" will print 17 characters per inch; the setting "E" will print 12 characters per inch; "P" will print 10 characters per inch. To change any of these settings, position the highlight on the setting and type the letter that corresponds to the desired settings choice. A prompt will appear at the top of your screen to help you decide which option to select. When these optional settings are as you want them, press **ENTER** to continue.

5. To print the labels select highlight Print on the main menu and press **ENTER**. Then highlight Labels and press **ENTER** to begin the printing process.

**The Sort Menu**

BCL allows you to change the order in which the records are printed. To sort records in the selected database, follow the steps below.

1. Highlight Sort on the main menu and press **ENTER**. The screen shown below will appear.

```
 Select the order in which the Contacts are printed
  File   Forms   Labels   Sort   Select   Options   Print   System   Calendar
 ┌──────────────────────────────────────┐
 │ Reports by Organization              │
 │ Reports by Last Name                 │
 4" Rolodex Style Ca│ Reports by Type    │
 │ Labels by Organization      : Organization │
 │ Labels by Last Name         : Yes    │
 │ Labels by Zip Code          : No     │
 └──────────────────────────────────────┘: Disabled
                    Select a Date Range

             Select ALL Records


                     Sort Order     : Organization
 ┌──────────────────────────────────────┐
 │ ═══   ═══   ═══                       │  1" x 2-5/8",
 │                                       │  Standard Mailing Labels (three across)
 │ Agenda people.dbf(1)                  │
 └──────────────────────────────────────┘
```
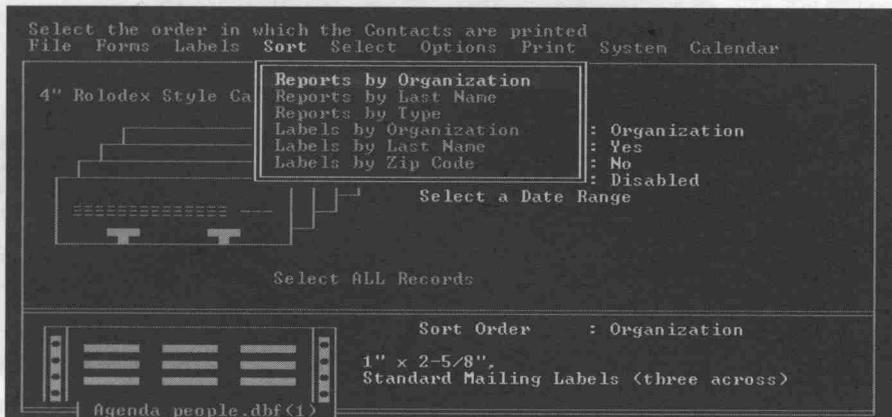
2. Highlight the desired sort criterion and press **ENTER**.

The headings **Organization**, **Last Name** and **Type** are the headings that were chosen for the selected application. The heading **ZIP Code** is a fixed heading used for sorting labels.

The exact menu displayed will depend on the Application you selected when the program was installed.

Reports sorted by Organization (Heading 1) or Last Name (Heading 2) will print two cross-reference listings after the main list. This will allow you to find a record in your report more than one way. See: **Sample Reports in Appendix D**.

Some helpful hints:

- Reports sorted by Type (Heading 3) will not print a cross-reference listing.
- Advanced Cross-References will sort by Organization, regardless of this setting.

**The Select Menu**

BCL allows you to select all records in a database, or a sub-set of records for printing. To select the records you wish to print, sollow the steps below.

1. Highlight Select on the Main Menu and press ENTER. The following selections will appear:

    All Reports Records

    Select Report Records

    Select Calendar Records

2. Highlight your choice and press **ENTER**.

**The Options Menu**

This menu contains further format options for Reports and Labels. To enter the Options Menu, highlight Options on the Main Menu and press **ENTER**. The screen shown below will appear.

```
 File   Forms   Labels   Sort   Select   Options   Print   System   Calendar

                                    ┌─────────────────┐
  4" Rolodex Style Cards            │ Reports...      │
                                    │ Labels...       │
  ┌──────────────────────┐         │ Advanced...     │  : Organization
  │ ┌──────────────────────┐       │ Calendar...   e │  : Yes
  │ │ ┌──────────────────────┐      ├─────────────────┤
  │ │ │                       │     │ Page Breaks   : No
  │ │ │ ═══════════════════   │     │ Calendar      : Disabled
  └─┤ │                       │     │ Select a Date Range
    └─┤     ┬         ┬       │
      └──────────────────────┘

              Select ALL Records

  ┌──────────────────────────┐     Sort Order      : Organization
  │ ▪ ═══   ═══   ═══  ▪ │
  │ ▪ ═══   ═══   ═══  ▪ │     1" x 2-5/8".
  │ ▪ ═══   ═══   ═══  ▪ │     Standard Mailing Labels (three across)
  └──────────────────────────┘
 └ Agenda people.dbf(1)
```
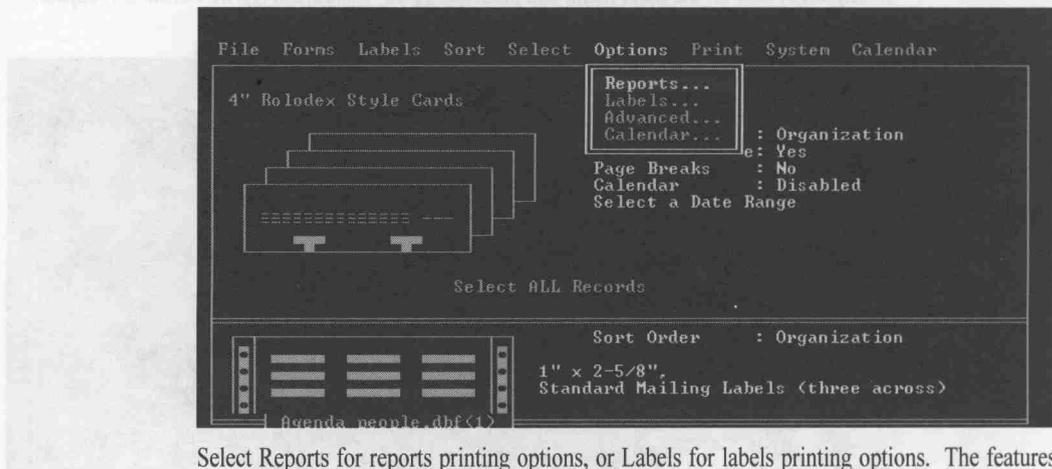
Select Reports for reports printing options, or Labels for labels printing options. The features on the Advanced menu will depend on your application. Select Calendar for printing calendar printing options.

**Report Printing Options**

To select reports printing options use the arrow keys to select the option you wish to change, then press the **SPACE BAR** to cycle through the valid settings.

**Print a Cross Reference**

Use this option to tell the program whether to print or suppress cross reference lists. Cross-reference lists make it easier to find information in your database if you want to search by a heading other than the one used to sort the report. For example, if your list is printed by Organization and you are looking for 'John Smith', the realtor, but forgot he worked for Western Realty, you could consult the cross-reference by **Type** where he would be listed under "Realtor". If you were to look at the cross-reference by **Last Name**, he would be listed under Smith. Use the Space Bar to select **Y** to print cross-references, or **N** to suppress them. The default value is N.

**Print Extra Cross Reference**

Use this option to print additional cross references such as:

**T** City and State
**S** State and City
**Z** Zip Code
**C** City and Zip Code
**P** Phone number (phone #1 only)
**F** First Name (of name #1 only)

Select **N** to suppress the extra cross reference. Entering the value **V** in this option will place the first phone number in the standard cross reference printout (Does not print an extra list). If you would like to print *just* the extra cross reference, then set 'Print Cross Reference' to **N** and 'Extra Cross Reference' to **T, S, Z, C, P, or F**. This will suppress the body of the report.

## Page Breaks for Each Letter

This option, tells PrintBase to start a new page when the first letter of the field you are sorting changes. This is mandatory if you are planning to use your report in an organizer that has A-Z dividers. The default is **N**. Depending on the amount of data under each letter of the alphabet, when page breaks are enabled and you have requested a front- and back-page format, there may be nothing to print on the back sides but the page numbers.

## Include Addresses

Use the Space Bar to select **N** in this field if you wish to suppress the printing of addresses for the records you have selected. The default is **Y**.

## Include Other Fields

Use the Space Bar to select **N** if you wish to suppress the printing of the Notes. The default is **Y**.

## Line Options

This field will tell the program how to lay out the printed records to suit your needs. Your options for this field are as follows:

2. Draw a line after each record and print the next record immediately underneath it. The HP LaserJet prints a dotted, instead of solid, underline for this option

4. Do not draw lines between records. Do not skip spaces between records

6. Do not draw lines between records. Skip a space between records

8. Draw a line after each record, and skip one line before the next record. HP LaserJet prints a dotted underline instead of a solid underline for this option. Enter '9' to print a solid line with an HP LaserJet

## Include Heading 2 (Type)

Use the Space Bar to select **Y** to tell the program to print the Heading 2 field next to the Heading 1 field. The default is **N** because the information in Heading 2 is usually not necessary to understand the record and is included in the cross-reference listing.

|  |  |
|---|---|
| **Y** will print: | Bank of Los Angeles - Financial |
| **N** will print: | Bank of Los Angeles |

## Pitch (Character Size)

To specify the character pitch, the options are:

**C** Condensed
**E** Elite
**P** Pica

## Font (Character Style)

To specify the character font, the options include:

**B** Bold font
**2** Bold italic font
**I** Italic font
**<Space>** Roman font

Condensed prints 17 characters per inch (cpi), while Elite prints 12 cpi. Thus, condensed prints more characters per line than regular. Laser printer users should refer to Chapter 7 for additional information regarding fonts.

HP Laser Jet Users see **Appendix B**.

### Line Spacing 6/8

Use this field to specify whether you want information printed 6 lines per inch (the default, and generally considered standard) or 8 lines per inch.

### Print on 1 side or 2 Sides

**1** Print data on one side of the page.

**2** Print data on both sides of the page.

### Page Lettering

**E** Enable page lettering. The program will print the first letter of each entry in brackets ([ ]) on the outside of each page. This is automatic for the Useful Small Book. For any other form it must be Enabled.

**S** Suppress page lettering.

**Label Printing Options**

Select **Labels** from the **Options** menu to select the following Label printing options.

### Print Salutation

Use the Space Bar to select **Y**. This prints the Salutation (Mr., Mrs., etc.) on all labels and envelopes.

### Print Return Address

Use the Space Bar to select **Y**. This prints your return address on shipping labels or envelopes. If you have Print Return Address set to **Y**, PrintBase will ask you to enter a Company Name before printing the shipping label or envelope. The program will prompt you as follows:

ENTER or enter a new Organization

The program will print your Name and Address data as you entered it when you installed the program. See **The System Menu** to edit your Return Address. You may change the Organization, press **ENTER** to use the name displayed or Blank it out (F8) and the program will not print the return address.

### Preferred Address

This is where you tell the program which Phone Book addresses to print (assumes your database has two addresses--work and home). Use the Space Bar to select **W** (the default) for work or **R** for residence. If you have only one address entered, the program will print that address regardless of your selection of Preferred Address.

### Pitch and Font

Labels can be printed in the size and style listed below.

*Pitch* **(Character Size)**  To specify the character pitch, the options are:

    **C** Condensed
    **E** Elite
    **P** Pica

*Font* **(Character Style)**  To specify the character font, the options include:

    **B** Bold font
    **2** Bold italic font
    **I** Italic font
    **<Space>** Roman font

Condensed prints 17 characters per inch (cpi), Elite prints 12 cpi. Thus, condensed prints more characters per line than regular. Laser printer users should refer to Appendix A for additional information regarding fonts.

## Advanced Options for Reports

Select **Advanced** from the Options menu to select special printing options. The screen shown below will appear.

```
'N' does not suppress duplicate Company Names on reports
 File   Forms   Labels   Sort   Select   Options   Print   System   Calendar
                                        ┌─────────────────┐
    4" Rolodex Style Cards              │ Reports...      │
                                        │ Labels...       │
                                        │ Advanced...     │ : Organization
                                        │ Calendar...     │
                              ┌─────────┴─────────────────┴──────────────┐
                              │ Suppress Data                          N │
                              │ Suppress Title (i.e. Vice President)   N │
    ══════════════════ ───    │ Enable Address Break on Reports        N │
                              │ Enable First Name first on Reports     N │
        ▼         ▼           │ Number of Other Fields to Print        N │
                              │ Disable PrintBase Index                N │
                              │                                          │
                  Sele        │ Use note field as an address             │
                              │ Suppress Title Page/From & To on Labels  │
                              └─↑ ↓, Space bar to change values, ◄┘ to save─
                                        Sort Order    : Organization

                              1" x 2-5/8",
                              Standard Mailing Labels (three across)

    └─┤ Agenda people.dbf(1) ├
```

### Suppress Data ('From' and 'To') and ('Company')  Suppress Data (From, To and Report)

Used for reports and labels. Y suppresses the 'From:' and 'To:' fields when printing shipping labels on laser printers. This is handy when you already have information printed on the label, such as a company logo. N suppresses the company Name and Address. For example, if you have several Contacts at one company, this keeps the company Name and Address from printing with each Contact. BC&L prints a "^" before the Contact names on repeated records, indicating the company Name and address has already printed.

### Suppress Title

Y suppresses the label/envelope title.

### Enable Address Break on Reports

Y forces the program to break the address at city, state and zip.

### Enable First Name First on Reports

Y prints report names in "first name last name" format.

### Number of Other Fields to Print

You may optionally print up to 8 note fields. Use the Space Bar to increase or decrease the number of fields to print.

### Enable Selective Page Printing

You can now reprint a page of a report. This must take place immediately after the report was printed in case a page is ruined during the printing. This only works on the last report printed and will not reflect any changes made to the data. Its purpose is to avoid reprinting an entire report should a page jam or get ruined. This will not work for the P100J or P100B. To use this option you will select **REPRINT** from the Print Menu. The program will prompt you to Begin Printing and then the following prompts will be displayed:

> Left Page #
> Right Page #
> Finished (Y/N) or C = Print continuously from here

**Advanced Options for Reports continued**

You will enter the page numbers from the page you wish to print starting with the Front Sides, the back side will prompt you again for the page numbers on the back. To print one page, enter **Y** at the **Finished** prompt to print the front side of the page. The program will print the page you requested and then prompt you for the page number on the back, enter **Y** again for the back side. Enter **C** to print the rest of your report from that page.

**Advanced Options for Calendars**

There are several calendar format options. It is best to leave these options set to their default values. Only change these options if you experience printing problems with underline, shade or compressed bold characters. To use the options, highlight **Options** on the Main Menu and press **ENTER.** Then highlight **Calendar** and press **ENTER.** The screen shown below will appear.

```
 You may print Only the Calendar
 File  Forms  Labels  Sort  Select   Options   Print   System   Calendar

                                    ┌─────────────┐
     4" Rolodex Style Cards         │ Reports...  │
                                    │ Labels...   │
                                    │ Advanced... │
   ┌──────────────────────────┐     │ Calendar... │  : Organization
   │                          │     └─────────────┘
   │                          ├──────────────────────────────────────────┐
   │                          │ Calendar 'W'ith Report, 'O'nly         O │
   │  ▒▒▒▒▒▒▒▒▒▒▒▒▒ ───▲      │ Suppress Underline                     N │
   │     ▼        ▼           │ Disable the Shade Character            N │
   │                          │ Suppress Compressed Bold               N │
   │                          │ Use the entire line for appointments   N │
   │                          │ Number of Cells to wrap                N │
   └──────────────────────────┤ ↑ ↓, Space bar to change values, ◄─┘ to save │
              Select ALL Records └──────────────────────────────────────────┘

   ┌──────────────────────────────────────────────────────────┐
   │ ▐█▌ ▬▬▬  ▬▬▬  ▬▬▬      Sort Order    : Organization      │
   │ ▐█▌ ▬▬▬  ▬▬▬  ▬▬▬                                        │
   │ ▐█▌ ▬▬▬  ▬▬▬  ▬▬▬      1" x 2-5/8",                      │
   │   Agenda people.dbf(1)  Standard Mailing Labels (three across) │
   └──────────────────────────────────────────────────────────┘
```

**Calendar 'W'ith Report, 'O'nly**

Select **'W'**ith to print the Calendar with your phone book or **'O'**nly to print only your phone book without your calendar. This is useful if the calendar format you selected required 8 lines per inch but you want your phone book to print 6 lines per inch.

**Suppress Underline**

Normally this setting is N for No. If you encounter problems with underlining, you can turn it off by pressing **Y** to suppress it.

**Disable PrintBase Index**

Print records in the order of your file (You may want to contact Tech Support if you feel you need this feature).

## The Print Menu

When you are ready to print Reports or Labels, highlight Print on the Main Menu and press **ENTER**. You may also re-print the last Report you selected as long as nothing has changed since you last attempted to print (Use REPRINT if the printer jammed and you selected "Abort" to start the printing over). The Print menu will also let you Position the record in the file to begin printing.

First, PrintBase will enter the 'Prepare Phase' where it will go through the database, select the records you have requested and format them for your selected output form. You will see the following display:

```
              REPORT SET UP For ALL
              4" Rolodex Style Cards




              ┌──────────────────────────────────┐
              │                                  │
              │                                  │
              │                                  │
              │                                  │
              │       ┌─┐            ┌─┐         │
              └───────┘ └────────────┘ └─────────┘

Final processing
 lpt1                                     Michae  Michae      1
```

At the lower right-hand corner of the display, PrintBase displays the first 6 characters of the record being processed. If the record is to be included in this printout (See: The Select Menu), it is displayed again to the immediate left.

The top line on the screen, 'REPORT SET UP For ..', indicates the selection criteria you have requested. The second line is the format you have selected from the Reports Menu.

The diagram at the center of the screen shows the data being placed on the page.

If the wrong form or record is displayed you may interrupt processing by pressing **Ctrl** and **X** simultaneously. **Ctrl** and **X** can also be used if you would like a mini-report to verify the form and format before you print the entire report. When you press **Ctrl** and **X**, the following prompt is displayed:

<div align="center">

**Abort     Preview     Resume**

</div>

Select **Preview** in order to print a mini-report before you print the entire file. After reviewing the printout and making any necessary changes to the Printing Options or Reports Form, start the PRINT again.

> **NOTE:  Preview is not a screen preview and Cross-references do not appear in the mini-report.**

When the "Prepare Phase" has finished the following prompt is displayed:

Begin Printing?

as well as some information that will assist you in loading and aligning your forms. The exact screen will depend on the printer and/or the form you are printing.

**If you do not have a laser printer,** align the printhead just below the first line on the page you want printing to begin. On forms with shaded areas, *the printhead goes just below the first line of shading.*

When you are ready enter **Yes** to begin printing.

If you do not have a laser printer the program will print a few lines and then display the following:

YES Form is Aligned   NO Form is NOT Aligned

If your form is not aligned, adjust and position it to the next form before you answer NO - Form is Not Aligned. You may press **ESCAPE** to abort the process completely.

While the program is printing, a graphic representation of your printer will be displayed on your screen showing the movement of the page or forms.

> **PRINTING TIP: laser printer users,** *If you are printing on both sides of a report form,* **make sure the first page that came out of the printer on the front sides is the first page that you put back into the printer when printing the back sides.**
>
> **Non-laser printer users,** *if you are printing on both sides of a report form and you required more than one page to perform the alignment, be sure to discard any extra pages before you turn the forms around.*
>
> **After they are printed, some reports will require trimming, folding, stapling, etc.**

When Position is selected, the following prompt is displayed:

**Enter the Record to begin printing**

If you sorted your report or labels by the Company or Last Name field, you can enter the Company or Last Name, respectively, that you would like to begin printing from. Enter the Company or Last Name, as desired, and press **ENTER**. BCL prints the job, as requested.

While your output is formatted for printing, you can press **Ctrl** and **X** to Preview, Resume or Abort the print. Preview prints a small, sample portion of the report or label. (Three-across labels cannot be previewed). Resume continues processing the print and Abort cancels the print.

**The System Menu**

To modify settings and headings that were set up at installation time, highlight System on the Main Menu, and press **ENTER**. Use this menu to edit the headings, change printer definition, change the color of the screen, or Re-Index files.

```
File  Forms  Labels  Sort  Select  Options  Print  System  Calendar
                                                   ┌─────────────────┐
4" Rolodex Style Cards                             │ Edit Headings   │
                                                   │ Printer Definition
                                                   │ Change Color    │
                                    Sort Order     │ Re-Index        │
                                    Cross Reference│ Letter          │
                                    Page Breaks    │ A4              │
                                    Calendar       │ Holidays        │
                                    Select a Date R│ Print Duplex    │
                                                   └─────────────────┘

            Select ALL Records

                             Sort Order    : Organization
                             1" x 2-5/8",
                             Standard Mailing Labels (three across)
    Agenda people.dbf(1)
```
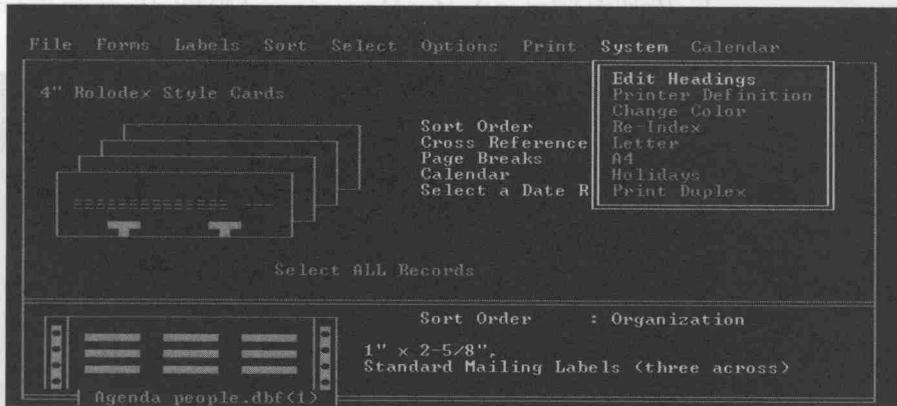
### Edit Headings

Will allow you to change the name and address information you entered when the program was installed. See **Menu Title and Name, Address Screen** in the section on **Application Installation**.

### Printer Definition

Will allow you to define a different printer for PrintBase than the one you originally set during installation of PrintBase. The process involves the same steps you followed during the installation described in **Printer Installation**.

### Using Multiple Printers with PrintBase

The file PHONE.001 found in the \PRB directory with the system files contains the definition of the last printer you defined. For example, if you have an Epson dot matrix and an HP LaserJet, to use them both you would first:

1. Install the Epson, add your application, and Exit to DOS.
2. Copy the file PHONE.001 to EPSON.001.
3. Restart the program, and use this option 'Printer Definition' to install the Laser Jet.
4. Exit to DOS and copy the file PHONE.001 to HP.001.
5. Now, whenever you want to switch to the Epson, copy EPSON.001 to PHONE.001, or to switch to the Laser, copy HP.001 to PHONE.001.

### Change Color

Will allow you to change the color settings on your monitor.

### Re-Index

Rebuilds the index files in case they were deleted or damaged.

### Letter and A4

Will allow you to specify the paper tray size.

### Holidays

Will allow you to specify holidays by country.

### Print Duplex

Will allow duplex printing on Hewlett Packard II or IIID series printers only.

**How to Print Calendars**

Use BCL to print calendars for your organizer or office. Calendars can be printed in a daily, weekly or monthly format and will contain items assigned to specific dates in Agenda. Use the following procedure to print a calendar.

1. Highlight Select on the Main Menu and press **ENTER**. The screen shown below will appear.
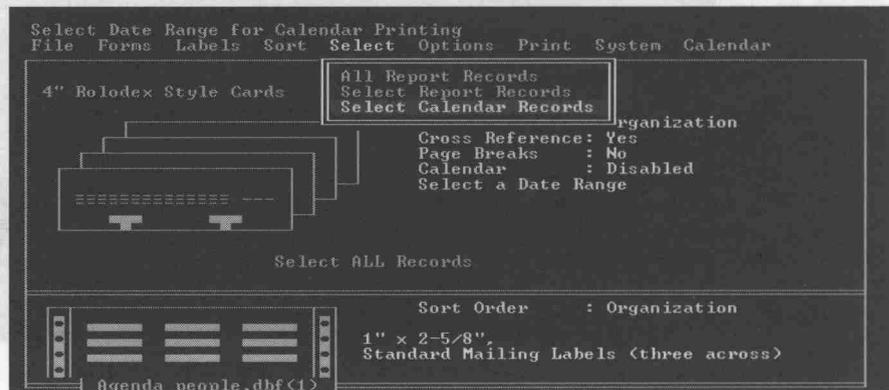


2. Highlight Select Calendar Records and press **ENTER**. At the bottom of the screen, the calendar date range will appear. Type the date you want the calendar to start with and press **ENTER**. Then type the end date and press **ENTER**.

3. Highlight Calendar on the Main Menu and press **ENTER**. Select the calendar type from the choices shown on the screen by positioning the highlight on the desired choice and pressing **ENTER**.
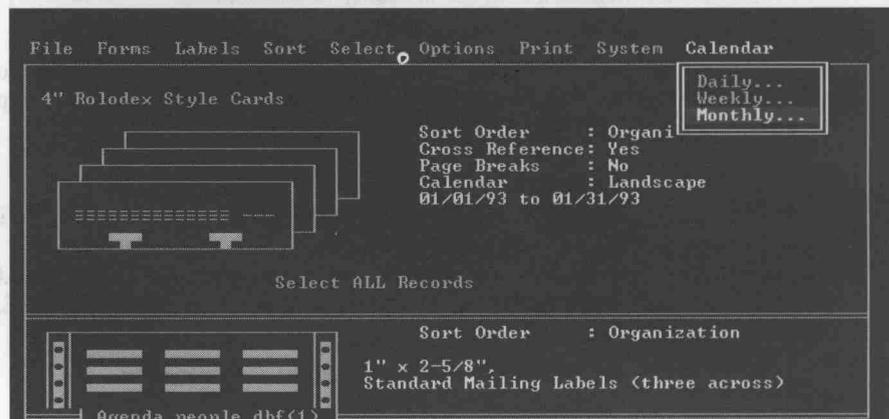


4. Highlight Print on the Main Menu and press **ENTER**. From the subsidiary choices, highlight Calendar and press **ENTER** to print the monthly block calendar.

Daily and weekly calendar formats are printed in a condensed or expanded format. The expanded format option simply provides more space between lines than the condensed format, allowing more room for information. The hours on left, hours centered, and hours on right menu options print the day hours in the left, center or right columns, respectively. The monthly calendar format prints portrait (non-laser printers only) or landscape (all printers) block

calendars for one standard month (October, November, December, etc.), based on the entered beginning calendar date. For example, if you enter a calendar date range of October 15 to November 10, BCL only prints a monthly calendar for October (October 1 - 31).

### Laser Printers Only

The monthly calendar always prints landscape, even if portrait is selected, and always prints on a full 8-1/2 x 11" landscape form, even if another form size is selected.

### Non-Laser Printers Only

Landscape monthly calendars printed on non-laser printers require a wide-carriage printer.

Avoid printing calendars with large numbers of days between the calendar beginning and ending dates. Since BCL formats each day individually, regardless of whether or not there are activities, lengthy calendars result in lengthy processing.

BCL wraps your activities within allotted physical spaces on the calendar. If data will not fit in a space, BCL prints a greater-than (>) character, indicating the complete text follows on a Calendar Addendum Page. The Calendar Addendum Page, if required, prints immediately after the applicable calendar. The wide combination of supported calendar types, forms, fonts and printers may occasionally cause the resultant calendar to vary from the desired appearance or simply not print at all. Each calendar format has a minimum number of lines and width to print properly. BCL always attempts to scale the calendar type to the selected form. BCL will inform you if it cannot print a calendar type and form combination. In most cases, you are presented with an option to print the calendar with less hours per day or at 8-lines per inch. If you select the 8-lines per inch option and you are also printing a report with the calendar, the report also prints at 8-lines per inch.

### Appointments

BCL will wrap your appointments in the slots provided by the Calendar format. If the text will not fit in the space allotted you will see a '>' indicating the complete appointment To Do can be found in the Calendar Addendum page. This page will be printed immediately following the calendar pages.

The permutations of Forms, Formats, and Printers may cause results to vary slightly as well as causing some combinations to not print at all. Each format has a minimum number of lines and a minimum width to print properly. The program will attempt to scale the form to the size requested. If BCL is unable to print the form at all it will inform you to select another Report Form or Calendar Format. In many cases you will be given the option to print with less hours or at 8 lines per inch.

> **NOTE:** The lines per inch setting in the Reports Options is overridden when printing a calendar.

> **WARNING:** If you must select 8 lines per inch to get the calendar you desire, the program must print the entire report at 8 lines per inch. To avoid this you must print the Calendar and the report separately. See the Calendar options above.

# Appendix A   IMG's Quality Support Program

IMG provides free technical support to registered users of this product.

As soon as you open your package, please call IMG's tolls free number 800-775-4836 to register your copy of Beyond 2.0. Registering your copy assures you of receiving the latest information and updates for this product.

Before you call IMG's Technical Support line 301-585-0128, please go through the following checklist to make sure that you haven't overlooked an obvious answer to your problem.
**Thoroughly examine the manual.**

Support is available from 9:00 AM to 5:00 PM Eastern time Monday through Friday, except holidays.

1. Have your software registration number ready. It is printed on a label attached to Disk 1 of the distribution disk set.
2. Have the program up and running.
3. Write down any error messages that appeared when you encountered the problem.
4. Jot down the series of keystrokes you pressed or the screens that appeared prior to the occurrence of the problem.

# Appendix B   Laser Printers

**Recommended Fonts and Sizes**

Included with BCL are Bitstream Charter Roman Soft fonts in several styles. If you want to download soft fonts and they are in another directory set the environment variable EPATH=C:\FONT (c:\font is the directory where the files are located).

BCL does not support fonts smaller than 6 points or larger than 12 points. When printing at 8 lines per inch, use the compressed font. A 9 point font is the largest you can use without over-printing the data at 8 lines per inch.

The Bitsteam(TM) soft fonts will be automatically loaded when this set of disks are installed. Other soft fonts can be purchased separately. The enhanced font is used for highlighting the first line of each entry in reports and is always used in printing envelopes. You may substitute any valid softfont file name in place of the defaults.

**Tips for Using Laser Printers**

Be aware that some lasers will have difficulty printing on the back sides of the page. The following hints will help you in this regard:

1. Use *only* high-quality Xerographic paper recommended by Hewlett Packard, preferably 24 pound.
2. If possible, choose a straight-through paper path. For example, if you are using a Canon or HP laser printer, allow the paper to exit through the rear output tray in the back. Load the paper with the top of the page passing through the printer first; the printed side will usually come out face down (face up with the *original* HP LaserJet). There are numerous output formats that do not require putting the paper back through the printer.
3. Some laser printers flip the paper 180 degrees within the printer mechanism, so you must reverse the order of the pages before loading them back into the paper tray. A good indicator that your printer does this is when the pages come out, they are stacked with the print side down. The LaserJet Series will do this if the pages come out the top of the printer.

**Tips for Envelope Printing on Laser Printers**

The following hints will help you print envelopes on your HP:

1. Use of the Envelope feature of the LaserJet may cause DOS to "time out." To avoid having to type in **R** (retry), put the following Mode command into your AUTOEXEC.BAT file:

   MODE = LPT1;,,,,,P

3. When you are using manual envelope feed, you must wait for the printer to prompt you to load the appropriate-size envelope.

4. When you are using the automatic envelope tray, you must insert the envelope tray and reset the printer before you start printing.

Network Users - If you are having trouble downloading softfonts, add the following network command:

   CAPTURE NFF NT TI=60 (Printer or Queue)

# Appendix C  BCL Error Messages

**General Information**

For any abnormal termination:

1. Warm boot (Ctrl Alt Del) or Cold boot (turning the power off and back on) be sure to re-index your files.
2. The correct way to abort a process is to hold **Ctrl** while you press **X**.
3. Most of the messages that follow will be displayed at the top line of the screen. If the machine stops functioning then error messages can appear anywhere on the screen.

### File PNALL.000 must be available

The program is trying to install the printer, and you have erased the printer definition file. Copy all data files (those in DBF format) to another directory and reinstall the product from the distribution diskettes. Then copy the preserved DBF files into the directory where the program files are located.

### proc XXXXX line 0, printer not ready          Retry? (Y/N)

The program is trying to print and the printer is either not connected or is off line.

> **NOTE:  Some computers will only display the DOS not ready message (abort, retry, ignore when the printer is not ready. Make sure your printer is on line and answer 'r' to retry).**

### Program too big to fit into memory

The copy of the program you are trying to load into memory is corrupted. Copy all data files (those in DBF format) to another directory and reinstall the product from the distribution diskettes. Then copy the preserved DBF files into the directory where the program files are located.

### Your computer does not have enough memory to operate     properly ..
### System error memory error .....
### System error memory fault .....

There is not enough RAM memory to run PrintBase. Do not continue.

At the DOS prompt, type 'SET' and examine the settings. If you have a line that reads 'SET CLIPPER=RXXX;VXXX', you will have to run BCL from a batch file. The batch file would look something like the following:

```
cd \BEYOND20
PRB
SET CLIPPER=RXXX;VXXX
```

**PRBINDEX out of memory .....**

You will not be able to continue therefore exit to DOS, re-start the program with the command PHARD, ignore the DOS warning messages, then re-select your application. Be sure to remove any TSR's or increase the amount of memory available at the time PrintBase executes.

**Error 4, Your config.sys file is not set correctly**

**database required          Continue?**

Both messages are associated with a missing or improperly set CONFIG.SYS. Make sure your CONFIG.SYS file contains the necessary FILES and BUFFERS values. (See Chapter 1).

Networks, menu shells and memory resident programs may cause Error 4 to persist (regardless of the files and buffers settings). If you are having trouble, try the following:

1. Increase the files statement to an odd number.

2. Ensure the buffers statement is a multiple of 8.

3. Add the following statement to a batch file that starts BCL:

```
SET CLIPPER=FXX
```

Where XX in the FXX is a number less than or equal to the number you have in your files statement.

**Your data files are not installed correctly, call for support!**

You have mixed data files with the system files. Since PrintBase keeps no permanent data delete everything and start over with the original disks.

**Error 2, Could not find File C:XX.CSD**

You have accidentally erased a file (or files) that the program requires. Since PrintBase keeps no permanent data, delete everything and start over with the original disks.

**Proc GNEXT line 0, index file corrupted (in index key)**

**NTX Header error**

**Proc GRESET 00**

This message appears when the index files have been damaged. Since PrintBase keeps no permanent data delete everything and start over with the original disks.

**Disk Full**

This is not the same as out of memory. Disk full refers to your hard disk. You have run out of room. Delete unnecessary data files to make room on your hard drive.

Filo Fax sorted by last name with automatic cross reference by Organization.

# Appendix D  Sample Reports

**Day Runner**    Day Runner any 5 1/2 x 8 1/2" or 7 ring binder.  Sort by Type (Heading 3) include Type (Heading 3)=Y

---

**Computers-Davis Business Machines**
Davis   David L. (Mr.)      B   (619)555-1000
Jones   Andrew              B   (619)555-1002
Company Fax Machine             (619)555-4011
They carry IBM, Sharp and Xerox, prices are
competitive and delivery is within 10 days.
B) 3434 Orangegrove Ave.   Vista, CA 91300

**Computers-IBM Personal Computers**
Junior  P.C.                    (305)555-8051

**Computers-Lotus Development Corp**
Spreadsheet Sandra              (201)555-8558

**Financial-Accountants Unlimited**
Mitchell  Pete                  (213)555-5011
H) 9145 Fallstaff Blvd.   Northridge, CA 91344
B) 2134 Spring Street   Los Angeles, CA 90032

**Financial-The Bank of the Oaks**
Kracker  Sadie                  (714)555-5446

**Financial-Union Bank & Trust**
Sense  Delores                  (805)847-3133
Customer Service                (805)847-3100

**Home Services-Athens Shoe Repair**
Soles  Robert                   (213)555-0122
B) 34112 Sunset Blvd.   Hollywood, CA 90032

**Home Services-Carpenter's Cabinets**
Woods  Will                     (213)555-8083
B) 23411 Superior Ave   Chatsworth, CA 91311

**Home Services-G & S Appliance Services**
Stovepipe  Herman               (714)555-5104

3

*Line Option = '6'  Pitch and Font = '3'*

80

[D]     Cross Reference by Organization

| | | | |
|---|---|---|---|
| Davis  Arnold L. | B | (619)555-1000 | *Organization |
| DAVIS BUSINESS MACHINES | | | |

Davis  Arnold L.    B  (619)555-1000
    DAVIS BUSINESS MACHINES
Company Fax Machine    (619)555-1002
IBM SHARP & Xerox - 10 day delivery.
B) 3434 Orange Grove Ave.
Vista, CA 91300
Elliot  Barbara    B  (213)444-8877
                   H  (805)449-0111
Kojak  Larry (Mr.)  B  (805)495-4094
    MOTOR SPORT EMPORIUM
Axelrod  William    O  (805)555-4092
Shop Phone            (805)555-4099
B) 2110 West Blvd.
Thousand Oaks, CA 95110
Portnoy  Herbert    B  /004/66/422011
    LLOYDS OF BRITAIN INSURANCE
Phillips  Miles     D  /004/66/433222
Fax Machine         FX /004/66/435322
Russell  Miriam (Ms.) B  (213)982-3649
    COMPUTERS ETC. MONTHLY
Williams  Barry     B  (213)982-4444
B) 10 Olive St.
Los Angeles, CA 90036-0011
Spencer  Philip (Mr.) B  (312)555-1234
Smith  John         B  (312)555-1222
Torres  Michael     B  (213)555-9900
TWA  Reservations   B  (800)433-7300
    AIRLINES
United  Reservations B  (800)756-2222
Warner  Larry       B  (214)777-6666
    YE OLD COMPUTER STORE
Technical Support      (214)555-6060

| *Organization | Last Name |
|---|---|
| Athens Shoe Repair | - Soules |
| ATOZ Cabinets | - Carpenter |
| Barrister's Legal | - Mason |
| Blue Printing | - Pressman |
| Clothes Connection | - Fabrick |
| Computers Etc. Mon | - Russell |
| Davis Business Mac | - Davis |
| Egghead Software | - Hibrow |
| Excellent Software | - Diebug |
| G & S Appliance Se | - Stover |
| Hartford Insurance | - Akuariel |
| IBM Personal Compu | - Komputor |
| Internal Revenue S | - Tackspayor |
| JR's for Chicken | - Cookler |
| Kindred Learning C | - Traynor |
| Lakeside Hospital | - Underweather |
| Lloyds of Britain | - Portnoy |
| Lotus Development | - Blossom |
| Motor Sport Empori | - Kojak |
| Northwest Airlines | - Planer |
| Quality Paperbacks | - Reider |
| Roaring Twenties | - Driscoe |
| Sony Corporation | - Toon |
| The Bank of the Oa | - Kracker |
| Union Bank & Trust | - Lender |
| Useful Software | - Bookscards |

*Line Option = '4' Pitch and Font = '3'*

**ACCOUNTANTS UNLIMITED**
Mitchell  Pete                                             (213)555-5011
H) 9145 Fallstaff Blvd.   Northridge, CA 91344
B) 2134 Spring Street   Los Angeles, CA 90032

**ATHENS SHOE REPAIR**
Soles  Robert                                             (213)555-0122
B) 34112 Sunset Blvd.   Hollywood, CA 90032

**BARRISTER'S LEGAL CLINIC**
Mason  Perry                                              (714)444-9555
B) 2200 Larson Ave. Suite 100  Long Island, NY 10023-0001

**BLUE PRINTING**
Pressman  John                              B  (817)555-6666
H) 15151 Chattanooga   Bedford, TX 76022
B) 24511 Worth Ave.   Fort Worth, TX 76001

**CARPENTER'S CABINETS**
Woods  Will                                               (213)555-8083
B) 23411 Superior Ave   Chatsworth, CA 91311

**CLOTHES CONNECTION**
Lorenzo  Miles                                            (213)555-1045

**COMPUTERS ETC. MONTHLY**
Russel  Miriam (Ms.)                        B  (213)982-3649
B) 10 Olive St.   Los Angeles, CA 90036-0011

**DAVIS BUSINESS MACHINES**
Davis  David L. (Mr.)                       B  (619)555-1000
Jones  Andrew                               B  (619)555-1002
Company Fax Machine                            (619)555-4011
They carry IBM, Sharp and Xerox, prices are competitive and
delivery is within 10 days.
B) 3434 Orangegrove Ave.   Vista, CA 91300-0013

**Eastwood  Clint**                         B  (213)444-8877
                              -             H  (805)449-0111
B) 1011 Canyon Drive   Palm Springs, CA 92011

**EGGHEAD SOFTWARE**
Databyte  Hilda                                           (206)555-2244
B) 22011 S.E. 51st   Issaquah, WA 98027

**EXCELLENT SOFTWARE, INC.**
Deebug  Ivan                                B  (214)456-8979
                                            T  (214)456-8900
H) 234 Best Place   Dallas, TX 75897

**HARTFORD INSURANCE SERVICES**
Policy  Kevin (President)                   B  (201)555-4567
Policy  Marilyn                             D  (201)555-4500
Fax Machine                                 FX (201)555-4560
Policy expires 12/01/89.
B) 1 Hartford Plaza   Hartford, CT 21000

*Line Option = '6' Pitch and Font = '3'*

# Appendix E  The Beyond 2.0 Macro Files

The following is a list of the Beyond 2.0 macro files and a brief description of the function of each file.

| | |
|---|---|
| **STPNOTE.MAC** | Creates an IMG Structured People Note. |
| **CATSTAT.MAC** | Allows you to change settings for the IMG Category Maker. |
| **EXPTOCAL.MAC** | Exports Items to BCL for calendar printing. |
| **NOTE2BCL.MAC** | Exports Structured People Notes to BCL for printing of address information. |
| **NOTE2DBF.MAC** | Exports Structured People Notes to a DBF file. The resultant DBF file can be imported into any software product that supports the DBF file format. |
| **NOTE2ORG.MAC** | Exports Structured People Notes to a CSV file readable by Lotus Organizer. These files can be imported into the Address Section of Organizer. |
| **ITEM2CCP.MAC** | Exports items to a Tab delimited ASCII file for import into Calendar Creator Plus 5.0. |
| **PMOVER.MAC** | Creates an STF file for items and their associated people, including their category notes and the categories for which an assignment action exists. This macro is used in creating new Agenda databases or exporting specific people or groups of people to other Agenda databases. |
| **CLIST.MAC** | The Beyond 2.0 Contact Manager. |
| **VMAKER.MAC** | Part of the Beyond 2.0 Contact Manager called by CLIST.MAC. |
| **CUSTOM.MAC** | Part of the Beyond 2.0 Contact Manager called by CLIST.MAC. |

# Appendix F
# The Structure of Beyond 2.0 Database Files

**CONTACT.DBF**    For the convenience of advanced users who may wish to develop other applications using the database files included in beyond 2.0, the following are the field specifications for these files.

The structure for database: CONTACT.DBF (used by general dBase export).

| Field | Field Name | Type | Width |
|---|---|---|---|
| 1 | W_PHONE | Character | 18 |
| 2 | COMPANY | Character | 50 |
| 3 | FAX | Character | 18 |
| 4 | TYPE | Character | 50 |
| 5 | TITLE | Character | 50 |
| 6 | GREETING | Character | 20 |
| 7 | FIRSTNAME | Character | 20 |
| 8 | MINIT | Character | 2 |
| 9 | LASTNAME | Character | 20 |
| 10 | NICKNAME | Character | 20 |
| 11 | W_ADDR1 | Character | 35 |
| 12 | W_ADDR2 | Character | 35 |
| 13 | W_CITY | Character | 20 |
| 14 | W_STATE | Character | 2 |
| 15 | W_COUNTRY | Character | 20 |
| 16 | W_ZIP | Character | 15 |
| 17 | H_PHONE | Character | 18 |
| 18 | H_ADDR1 | Character | 35 |
| 19 | H_ADDR2 | Character | 35 |
| 20 | H_CITY | Character | 20 |
| 21 | H_STATE | Character | 2 |
| 22 | H_ZIP | Character | 15 |
| 23 | H_COUNTRY | Character | 20 |
| 24 | OTHERPHONE | Character | 18 |
| 25 | NOTE1 | Character | 254 |
| 26 | NOTE2 | Character | 254 |
| 27 | NOTE3 | Character | 254 |
| ** Total ** | | | 1321 |

**PEOPLE.DBF**     The structure for database: PEOPLE.DBF (used by Books Cards and Labels PrintBase)

| Field | Field Name | Type | Width |
|---|---|---|---|
| 1 | RADDR | Character | 35 |
| 2 | RADDR1 | Character | 35 |
| 3 | RCITY | Character | 20 |
| 4 | RSTATE | Character | 2 |
| 5 | RZIP | Character | 15 |
| 6 | RXYZFOR | Character | 20 |
| 7 | WADDR | Character | 35 |
| 8 | WADDR1 | Character | 35 |
| 9 | WCITY | Character | 20 |
| 10 | WSTATE | Character | 2 |
| 11 | WZIP | Character | 15 |
| 12 | WXYZFOR | Character | 20 |
| 13 | COMPANY | Character | 30 |
| 14 | COID | Character | 20 |
| 15 | LNAME1 | Character | 20 |
| 16 | FNAME1 | Character | 15 |
| 17 | XYZMI | Character | 1 |
| 18 | NIDI | Character | 10 |
| 19 | DDESC | Character | 20 * Not used |
| 20 | PHI | Character | 18 |
| 21 | PH2 | Character | 18 |
| 22 | PH3 | Character | 18 |
| 23 | PH4 | Character | 18 |
| 24 | TITLE | Character | 18 |
| 25 | LINE01 | Character | 254 |
| 26 | LINE02 | Character | 254 |
| 27 | LINE03 | Character | 254 |
| ** Total ** | | | 1223 |

**CALENDAR.DBF**     The structure for database CALENDAR.DBF (Used for exporting Items and When Dates)

| Field | Field Name | Type | Width |
|---|---|---|---|
| 1 | ITEM1 | Character | 254 |
| 2 | ITEM2 | Character | 96 |
| 3 | WHEN | Date | 8 |
| 4 | WHENFREQ | Character | 15 * Not used |
| 5 | WHENTIME | Character | 5 |
| **Total** | | | 379 |

# Index

## Symbols

.DBF files  31
.STF files  viii, 55
\AMIPRO\MACROS  36
\AMIPRO\STYLES  36
\BEYOND20  29,
   31, 36, 41, 45, 50, 51, 58
\BEYOND20 directory  vii
~beylbl.sty  36
8-1/2" x 11" paper  63

## A

Access  vi, 27
Activities Planner  19
add or edit information in the Structued
   People Note  17
ADDRESS.CSV  45
Advanced Options for Calendars  74
Advanced Options for Reports  73
alignment  76
alignment process  10
Ami Pro  vi, 27
Ami Pro style sheets  34
ASCII files  49, 50
assignment action  vii, 15
asterisk next to the field name  15
Attach Data File dialog box  40
Attaching the Beyond 2.0 Macros Auto-
   matically  4
Attaching the Beyond 2.0 Macros Individu-
   ally  5
AUTOEXEC.BAT  1
Avery Laser Printer Labels  36, 40

## B

BCL Error Messages  82
beylbl.smm  36
binders  viii
Bitstream Charter Roman Soft  81
Bitstream Soft Fonts  viii
BookForms  63
Books Cards and Labels PrintBase  vi, viii

## C

Calendar Addendum Page  79
Calendar Creator Plus 5.0  vi
calendar formats  78
CALENDAR.DBF  7
CALENDAR.TDL  50, 51, 52
calendars  viii, 78
Canon laser printer  10
Category Maker  13, 28, 36, 44
CATSTAT.MAC  87
Change IMG Category Maker Settings  vii
Commercial 10 Envelopes  67
CONFIG.SYS  1, 83
Contact List of People  19
CONTACT.DBF  29, 36, 41, 47, 88
continuous fanfold paper  63
Conventions  1
Converting a Contact List Created with
   Lotus' Contact Manager  19
Create a Contact List of People  20
Create a Structured People
   Note  vii, 13, 15
Create a View by Work State  22
Creating a User Defined Field  15
Creating a View Showing Cities and
   People  22
Creating a View Showing States and
   People  22
Creating a View Showing Zip Codes and
   People  23
Creating Custom Views of People  23, 24
Creating the Contact List of People  19
CSV file format  vii
custom view maker  19

## D

data entry screen  16
Day Runners  viii
Day Timer Forms  61
Day Timers  viii
dBase  vi, 27
dBase III  30
DBF export file  36
DBF file format  vii, 16, 17, 19, 33, 39,
   47