SeQuel NETPIM
PERSONAL INTERNET MANAGER — *Quick Start*
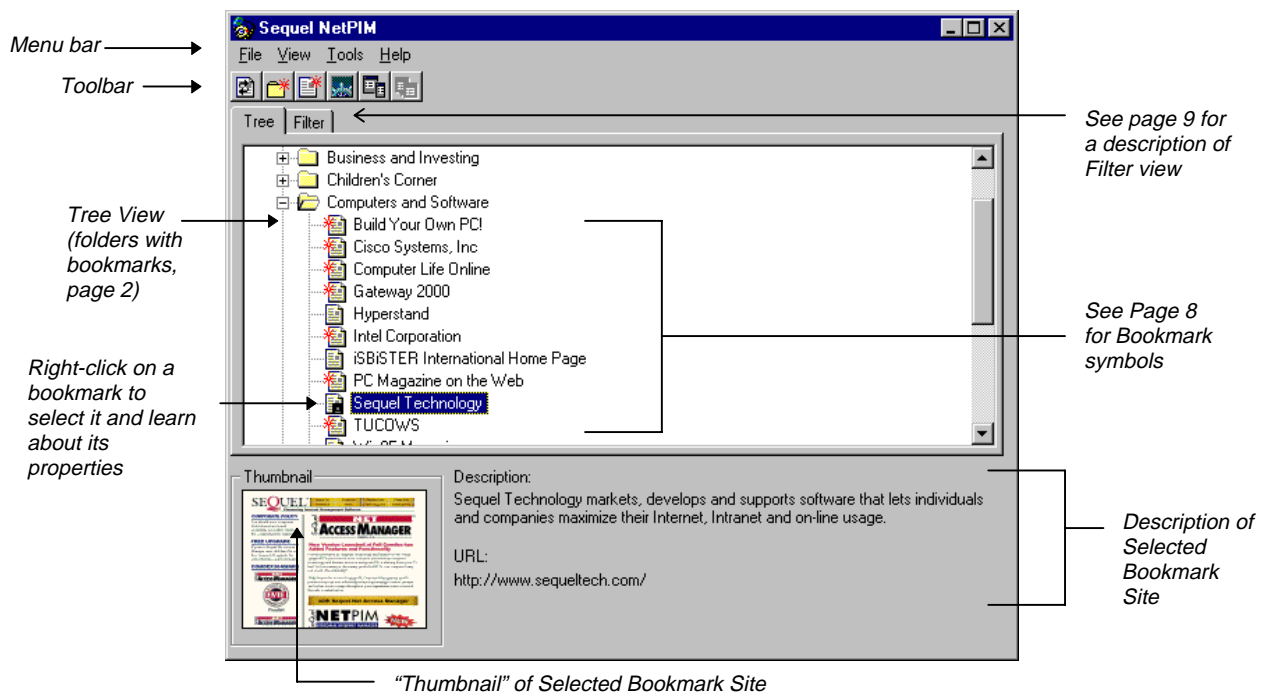
Sequel NetPIM™ is the easiest way to update, manage, and share Web-based information. Now you can make the most productive use of your online time with *Sequel NetPIM*—the world's first Personal Internet Manager.

Using *Sequel NetPIM* is easy, and it works with popular Web browsers, such as Netscape Navigator and Internet Explorer. This *Quick Start* guide shows you how to get started filing, managing, and browsing WWW information, either online or offline.

This *Quick Start* guide covers the following topics:

- Starting *Sequel NetPIM* for the first time
- Setting Up or Modifying an Agent

- Accessing Predefined Bookmarks
- Sharing Your Bookmarks by E-Mail

- Importing Your Web Browser's Bookmarks
- What *IS* this Cache Thing?

- Adding a New Bookmark
- Even More Features

Menu bar ——→

Toolbar ——→

Tree View (folders with bookmarks, page 2)

Right-click on a bookmark to select it and learn about its properties

Description of Selected Bookmark Site

"Thumbnail" of Selected Bookmark Site

Hints: (1) As you explore Sequel NetPIM, *use your right mouse button to access shortcuts. Also, when you "click" some of the items on your screen, your menu options and other possible choices may change.*

(2) To learn more about a feature, select it (by clicking it with your mouse) and use the "F1" key to get online help about that feature.

Starting *Sequel NetPIM* for the First Time

Once you have *Sequel NetPIM* installed, starting it is easy:

- From the Windows **Start** menu, select **Programs**, then select the **Sequel NetPIM** folder. Click **Sequel NetPIM** to start the program, *or*

- Double-click the **Sequel NetPIM** icon on your desktop (if you have created a shortcut from Windows).

Accessing a Predefined Bookmark

To help you get started, *Sequel NetPIM* comes preconfigured with *bookmarks* for many popular WWW sites. A bookmark is a collection of information about a specific Web site. Some Web browsers also refer to bookmarks as "favorites" or "favorite pages."

1. From the **Tree** view, double-click a folder to access bookmarks for a topic that interests you (there may be sub-folders as well). For example,

    Business and Investing $\longrightarrow$ Investors Edge

    Click on the plus (+) sign to the left of a folder to open it; click on the minus (-) sign to close it.

2. Double-click a bookmark to view the selected Web site in your browser.

    You must have a Web browser already installed and configured on your computer.
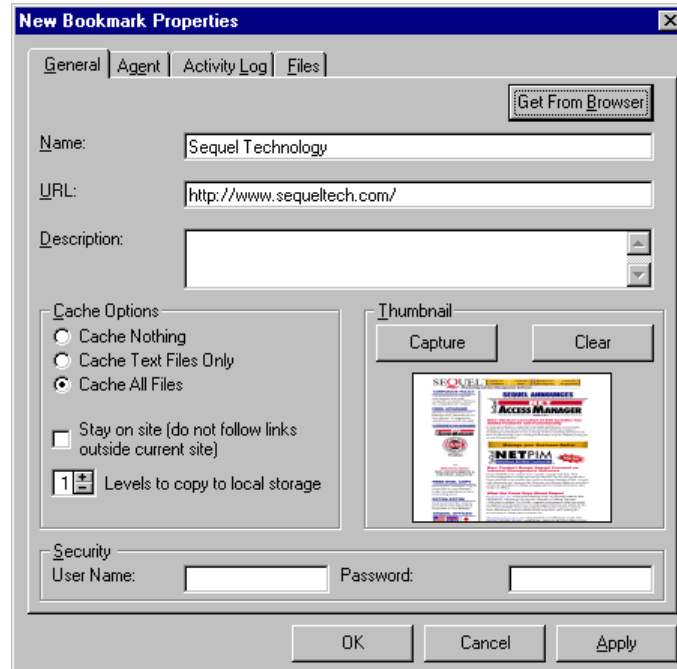
Importing Your Web Browser's Bookmarks

You can also import your collection of bookmarks from your *default* Web browser. (You may have more than one Web browser on your computer, but only one of them is the default.)

1. Select the **Tree** view, and select the **Web Address Store** folder. Once you import your Web browser's bookmarks, these bookmarks and the folders they are in will appear under the **Web Address Store** folder.

2. From the **File** menu, click **Import Browser Bookmarks**. Note: Any duplicate bookmarks will not be imported.

3. To configure *Sequel NetPIM*'s features for an imported bookmark, select a bookmark by right-clicking on it; select **Properties**, and then edit the properties as described in the next section.

Adding a New Bookmark

To add a new bookmark:

1. Start your Web browser, for example, Netscape Navigator (version 2.0 or newer) or Microsoft Internet Explorer (version 2.0 or newer).

2. Using your Web browser, go to the Web site that you want to bookmark.

3. From the *Sequel NetPIM* **File** menu, select **New Bookmark**.

4. Select the **Get From Browser** button to automatically add the Web page name, the current URL (Web page address), and thumbnail to your new bookmark.

5. Enter your preferences for the following information. For the **General** tab:

- Description — Enter text that can help you track this bookmark later. All of this bookmark information is available when you right-click any bookmark (and select **Properties**).

- Cache Options — To enable offline viewing of a Web site, select as much of the information as you would like to view offline. **Cache Nothing** — no offline viewing; **Cache Text Files Only** — permits offline viewing of text but not graphics (pictures); **Cache All Files** — offline viewing of both text and graphics.

  Stay on Site — Only cache text and graphics local to the Web site being bookmarked. That is, do not cache information linked to other Web sites.

  Levels to copy to local storage — Select the number of levels of pages from this site to be cached, from 1 to 5.

> *Note that the more levels you select, the more hard disk space that will be used for storing your information.*

- Thumbnail — **Capture** a snapshot (small picture) of the page currently visible in your Web browser. **Clear** allows you to delete the snapshot.

- Security — To access detailed articles on some Web sites, you must first register. In order for *Sequel NetPIM* to access those sites for you, you must enter the **User Name** and **Password** with which you registered at each Web site. For example, a subscription to the Wall Street Journal requires registration.

1. To configure *Sequel NetPIM* so that it automatically retrieves and updates information from the Web site, select the **Agent** tab.

> *Refer to the next section for more information about Agents, including how to configure a new Agent or to modify or delete an existing one.*

- Select the name of the Agent that you wish to associate with this bookmark, then click **OK**. Once you select the Agent name in the **Bookmark Agent** window, information about the Agent appears in the **Agent Description** field below it (that is, the dates and times the Agent runs).

Setting Up or Modifying an Agent

Agents are the part of *Sequel NetPIM* that automatically retrieve the latest information from the Web for you. This is especially useful, for example, if you are using a dial-up, Internet Service Provider (ISP). When you dial up your ISP, it may be busy at the time you want to view Internet information, or you may want to save time by having the information ready for you. *Sequel NetPIM* gives you the ability to download this information in advance, and view it later at a time convenient for you.

> *Also see page 11,* Agent Manager, *for more information about monitoring and managing your Agents.*

Once you have configured an Agent, you can associate it with as many bookmarks as you like. Remember that for a specific Agent, the following settings apply to all bookmarks that use it.

To set up a new Agent or modify an existing one:

1. From the *Sequel NetPIM* **Tools** menu, select **Agents**.

2. From the **Agent List** window:

   - To modify an existing Agent: select (highlight) the Agent you want to modify and then select the **Properties** button, *or*

   - To create a new Agent: click the **New** button.

3. On the **General** panel, configure the following:

   - If this is a new Agent, enter a name.

- Enabled — Select this checkbox to allow this Agent to run at the configured days and times.

- How Much — Select the maximum running time (in minutes) and the maximum disk space (in megabytes) values.

4. Select the **Schedule** tab.

5. On the **Schedule** panel, configure the following:

- Overall Frequency — Select how often you want this Agent to run. Note that for most options, once you select an option, more options are available to the right.

- Daily Frequency — Select either the hour the Agent runs, once per day, or else how often the Agent runs during a day (in hours or minutes).

  - Starting and ending times, as well as the **Start Date**, can also be configured.

6. Click **OK** to finish.

> *Remember: You associate an Agent with a bookmark using the bookmark's properties. Right-click a bookmark to access its properties. See the end of the previous section for more information.*

Share Your Bookmarks by E-Mail

You can share your Bookmarks and cached information with other *Sequel NetPIM* users.

> *Your e-mail program must be MAPI compliant; for example, Microsoft Mail, Microsoft Exchange, or QUALCOMM Eudora 3.0.*

Sending Bookmark Information

1. From the *Sequel NetPIM* **Tree** view, select a bookmark.

2. Right-click the bookmark and click **Send**.

3. When prompted, answer *yes* if you want cached information to be included as part of the e-mail message. Cached information includes any text and pictures that you have collected for this bookmark.

> *Caching must have been previously configured for this bookmark, or else these text and picture files do not exist on your computer.*

4. Once the *Sequel NetPIM* information has been prepared, your default e-mail program is started. Complete the information in your e-mail program, and send the message.

Receiving Bookmark Information

When you receive a bookmark in e-mail from another *Sequel NetPIM* user:

1. Open the e-mail message in your e-mail program, and double-click on the attachment (the bookmark information).

2. If *Sequel NetPIM* is not running, it will be started.

3. The bookmark is added as a highlighted entry in the **Tree** view within the Web Address Store (individual bookmarks are listed after the folders). If you already have this bookmark, you will be asked if you want to replace it.

What *IS* This Cache Thing?

The *Sequel NetPIM* cache (storage area of your hard disk) is the key to the offline viewing of new or updated Internet information for your bookmarks. The text and pictures of the Web pages that you view are placed in this cache, so that you can access them when you want to. (You can define the cache properties for *each* bookmark.)

The size of the cache is limited by the amount of available free, hard disk space on your computer as well as options that you can configure within *Sequel NetPIM*. Configuring this information is discussed in the following steps.

> *The basic information about a Web site (bookmark, address (URL), description, and thumbnail) are* not *part of the cache and are* not *affected by cache operations.*

By default, the *Sequel NetPIM* cache uses half of your hard disk free space, not to exceed 100 MB. To change these settings:

1. From the *Sequel NetPIM* **Tools** menu, select **Options**.

Size of disk free space plus Sequel NetPIM cache

Total size of hard disk or partition

2. On the **Cache Management** panel, configure the following:

- No Limit — The cache will use as much hard disk free space as is needed. In the example, up to 1023 MB is available. Normally, you would not allocate all of this space, since other programs will probably need to use it. The above example allocates 500 MB for cache.

- No More than [   ] MB — Specify the maximum amount of hard disk free space that can be used for cache. The example specifies to use no more than the default value of 100 MB.

- Action — What you want done when the allocated cache size has been exceeded (that is, when there is not enough available hard disk space for the Internet information that you want to add):

  - Remove oldest unused files until cache is below limit — *Sequel NetPIM* removes the oldest bookmark files first (text and graphics, but not the basic bookmark information).

  - Remove bookmark caches that haven't been looked at in [   ] days — *Sequel NetPIM* checks the time stamp of the bookmarks, and removes those that haven't been accessed in the number of days that you specify.

- A graphic representation of your hard disk and cache.

  - The left side of the graph (a blue area, often thin when *Sequel NetPIM* is first installed) — The amount of hard disk space currently used by the *Sequel NetPIM* cache. Its size (in megabytes) is indicated by the number you selected previously—either "No Limit" or "No more than [   ]".

  - The area toward the middle of the graph (often with a gray background, depending on your screen colors) — The amount of hard disk space that is *not* being used currently. Its size (in megabytes) is indicated by the number at the left end of the red bar. Often called disk "free space," this is the amount of space available for *Sequel NetPIM* cache.

  - Bar (red line or bar) at right — The amount of disk space that is *not* available to the cache. This hard disk area is already being used for other purposes (other programs, documents, and so forth).

  - Vertical, yellow line — The *Sequel NetPIM* cache limit. This line indicates how your cache limit relates to your hard disk free space and the amount of disk space already used.

Remember: You can configure exactly what to cache for each bookmark: nothing*,* text only*, or* all *(text and graphics). Select a bookmark, then right-click to access and configure the bookmark's properties.*

Bookmark Symbols

There are several symbols for bookmarks that let you see, at a glance, important information about that bookmark (that is, the entry for a Web site in *Sequel NetPIM*).

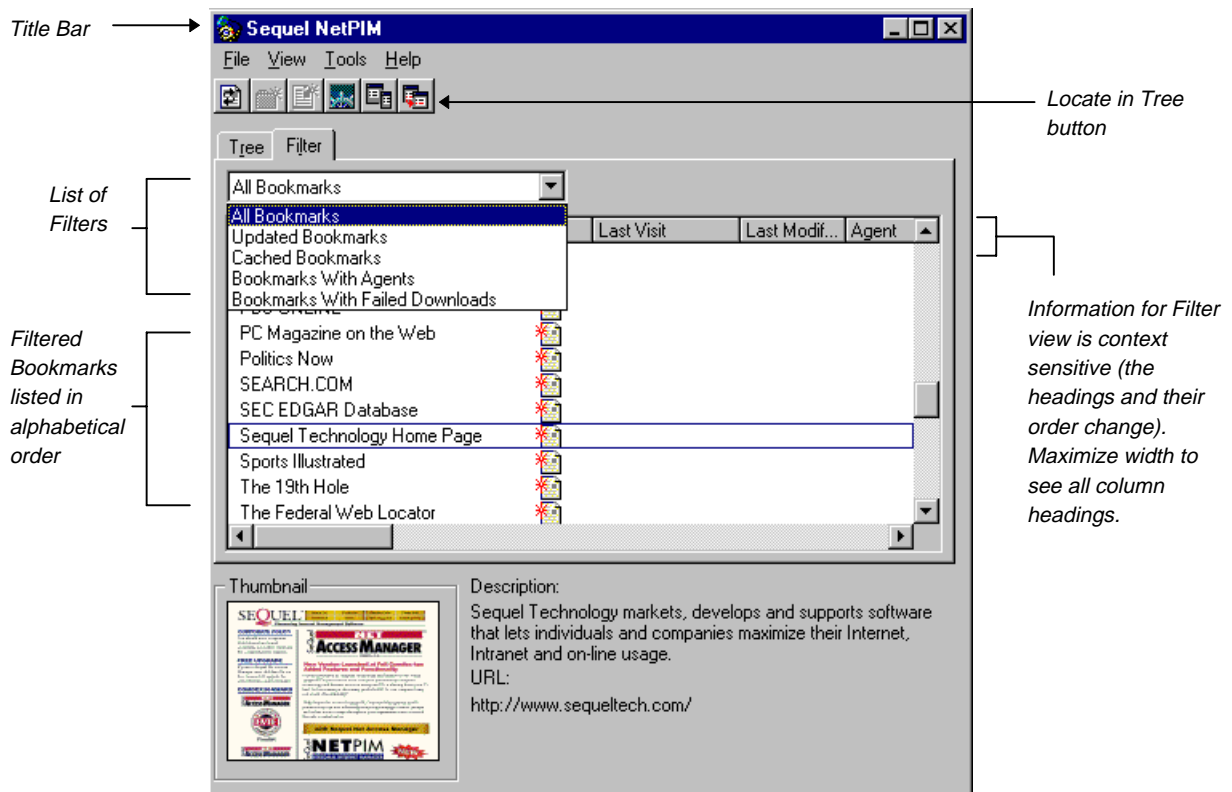| Symbol	Description
	The basic symbol for a bookmark.
	A red starburst indicates that bookmark has new information that you haven't viewed (either a new bookmark or one that has been updated).
	The diskette symbol indicates that you have configured this bookmark to maintain cached information (text and graphics, if you selected one or both of these properties).
	Both the starburst and the diskette symbols appear when you have both new information and cached information for the bookmark.
	A red *X* indicates that you had attempted to update information for a bookmark (either directly from the **File** menu or the toolbar button, or through a scheduled agent) but the update failed. This symbol only occurs in the **Agent Status** column of the **Filter** view (not in the **Status** column).

Even More Features

There are many more features and options available to you with *Sequel NetPIM* that help you access and manage information from the Internet (the Web), including the following.

Filter View

Filter view is the second of the two main window views of *Sequel NetPIM*. It displays all of your bookmarks alphabetically and without folders, and it gives you the ability to sort and manage your bookmarks in various predefined ways. It also displays the summary information for the bookmarks in an easy-to-read format. To see all of these column headings, you will probably need to widen your view of *Sequel NetPIM*. (To see all of the column headings, double-click in the title bar of your *Sequel NetPIM* window.)

The detailed information for the bookmarks (that is, the column headings) changes, depending on the predefined filter that you choose.

Title Bar →

List of Filters

Filtered Bookmarks listed in alphabetical order

Locate in Tree button

Information for Filter view is context sensitive (the headings and their order change). Maximize width to see all column headings.
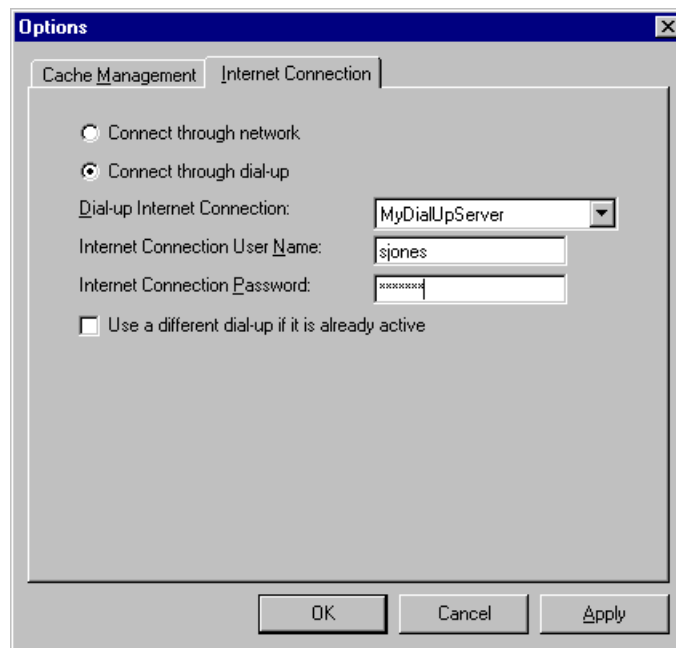
The predefined filters include the following:

- All Bookmarks — An alphabetical list of all of your bookmarks. This filter helps you locate a bookmark within a folder in the Tree view. Select a bookmark and click the **Locate in Tree** button to locate the bookmark in the Tree view.

- Updated Bookmarks — Bookmarks that have received new information since the last time you viewed them (including new as well as updated bookmarks). These bookmarks have a red starburst symbol on them.

- Cached Bookmarks — All bookmarks that have cached information. These bookmarks have a diskette symbol on them.

- Bookmarks With Agents — All bookmarks that have Agents scheduled for them.

- Bookmarks With Failed Downloads — Use your maximize button or drag the right side of the *Sequel NetPIM* window to see all of the Filter view columns. The Failed Download icon (with the red *X*) appears in the *Agent Status* column (not in the *Status* column).

Internet Connection

You need to configure *Sequel NetPIM* for one of two types of Internet connection.

- In many businesses and similar organizations, you can connect to the Internet with a network.

- If you are using a PPP or SLIP direct dial up account with a modem, you can configure *Sequel NetPIM* so that Internet information can be collected for you when you are away from your computer.

To use a dial-up connection (modem), you must have already configured your ISP information in Windows. Refer to your Windows (95 or NT 4.0) user documentation or online help. Windows online help is available from the Windows Start *menu.*

To configure *Sequel NetPIM* to use a network (usually through wiring in the workplace):

1. From the *Sequel NetPIM* **Tools** menu, select **Options**.

2. Click on the **Internet Connection** tab, if it is not in the foreground.

3. Select **Connect through network**.

4. Click **OK** to finish.

To configure *Sequel NetPIM* to use a modem and an Internet Service Provider (ISP):

1. From the *Sequel NetPIM* **Tools** menu, select **Options**.

2. Click on the **Internet Connection** tab, if it is not in the foreground.

3. Select **Connect through dial-up**.

4. Select your **Dial-Up Internet Connection**.

    In the previous example, **MyDialUpServer** is the name given to the Internet connection configured from Windows.

    > *Note: If no name appears in the box and you cannot select any, you do not have a dial-up connection set up in Windows. See the instructions at the end of these steps.*

5. Enter your User Name and Password (from your Internet provider).

6. Click **OK** to finish.

For further information about configuring your Dial-Up Connection or your Modem, refer to the Windows 95 (or Windows NT 4.0) online help. Click your Windows *Start* button (usually in the lower left corner of your screen), and select *Help*. Click on the Index tab, and search for "Dial-up Networking," "Internet Connection," "Modem," etc.

Print
You can print a summary sheet for each bookmark. The summary sheet includes the information from the bookmark's properties window, including the thumbnail, Agent (if any), and related activity and cache information.

1. Select the bookmark for which you would like a summary (by clicking it with your mouse).

2. From the *Sequel NetPIM* **Files** menu, select **Print Bookmark Summary**.

Agent Manager
When you have Agent Manager running, a red "alarm clock" icon appears in the status area of the taskbar (this area is usually at the bottom right of your screen, unless you customized this Windows feature). When one or more Agents are collecting information from the Internet for you, the red alarm clock also includes a blinking diskette symbol.

To monitor the status of the Agent(s) that are collecting information:

1. Right-click on the Agent icon that is in your taskbar.

2. Select **Status**.

The *Sequel NetPIM* Agent Manager window is displayed and lists all bookmarks that have Agents running, as well as their URLs, and the status of the Agent (either "running" or "terminating").

- To stop a bookmark from being updated, select the name of the bookmark and click the **Terminate Update** button. Click the **Close** button when you are finished.

Icon	**Description**
	Agent Manager is installed, but no Agents are collecting information from the Internet at the moment. If, during installation, you had *Sequel NetPIM Agent Manager* added to the **Startup** group, this symbol will appear in the status area of your Windows 95 (or Windows NT 4.0) taskbar every time you start your computer.
	One or more Agents are downloading information from the Internet (that is, adding Internet information to the cache for later viewing).
	One or more Agents are updating bookmark information from the Internet (new information for the **Properties** of a bookmark).
	Two or more Agents are collecting information from the Internet. At a minimum, one is downloading files and one is updating information—see previous two symbols (also see the basic Bookmark properties).
	Agent Manager is purging files from the cache (for more information , see the **Tools** menu, select **Options**, and then click the **Cache Management** tab).
	Agent Manager is using a dial-up connection (telephone line) to collect information from the Internet.