



*The Ultimate Solution For  
Reunion Management!*

USER GUIDE

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# ***What is Reunion Planner?***

Reunion Planner is the ultimate tool in planning and coordinating your family, college, high school or company reunion. It features a complete address book, integrated mail merge, budget planner, mailing labels, name badges and much, much more! At the low price of only \$59.95 , it can save hours of labor and headaches.

Reunion Planner is password protected, but you can try this working demo for free! The demo is limited to a maximum of ten records.

If you find you simply can't do without Reunion Planner, fill out the registration form and enclose payment. Upon receipt, you will be sent the password to unlock the full unrestricted program. The password will be sent via email (if possible) or standard mail, usually within 5 days of receipt of payment.

## ***FEATURES***

- College, high school, family or company reunion planning
- Year 2000 compliant
- Built-in budget planner
- Built-in questionnaire form
- Built-in spell checker
- European A4 and DL letter & envelope layouts
- Track alumni's marital status, children, interests, occupation, email addresses and more
- Print photo name badges
- Print Avery™ labels, mailing lists, merge letters, envelopes and booklets
- Modem phone dialing
- Send E-mail and launch URL's
- Multiple export and import options, including email
- Electronic User Guide (PDF) requires Adobe Acrobat 3.0

## **SYSTEM REQUIREMENTS**

### *Minimum Requirements*

*14" monitor (640 x 480) Minimum size*

*Laser or Ink Jet Printer*

### ***Macintosh or Power Macintosh***

System 7.1 or later

680XX processor or faster

4MB available memory (8MB for Power Macintosh)

### ***IBM Compatible***

Windows '95, '98 or NT

486 processor or faster

4MB available memory (8MB for Pentium)

# Installing from Floppy Disks

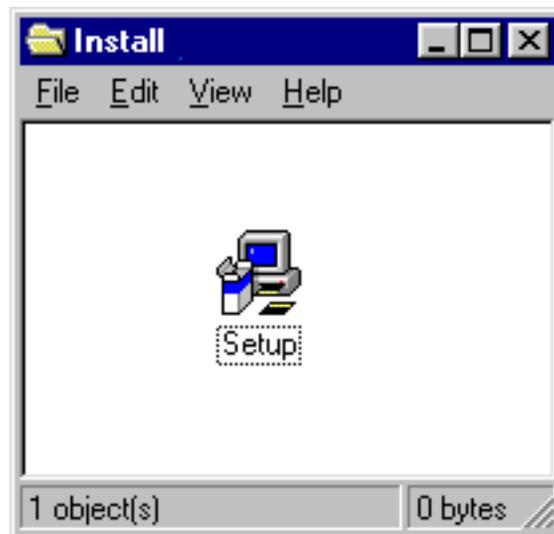
## MACINTOSH

To prevent excessive disk swapping while running the installer **RESTART** your computer with the **EXTENSIONS OFF** by holding down the **SHIFT** key while restarting. Continue to press the key until a dialog box says "*Extensions Disabled*". Insert the disk labeled **Disk 1** and double-click on the file named **Reunion Planner Installer**. Insert the other disks when prompted. The installer will install the Reunion Planner folder on your **Startup Volume**. You can specify another location. Restart the computer.



## WINDOWS

Quit all open applications before you run the installer. Insert **Disk 1** in your **floppy** or '**A**' **Drive**. From the **START MENU** select **RUN**. Locate the setup file on the '**A**' drive and click **OPEN**. Follow the instructions and insert the other disks when prompted. The installer will install the Reunion Planner folder in your **PROGRAMS** folder by default. You can specify another location from the installer dialog box when prompted. An **Uninstaller** is also included if you need to remove the program at a later date.



# Installing from a CD ROM

## MACINTOSH

Insert the CD ROM in your computer's CD Rom drive. Double-click on the **Reunion Planner Install** file. The installer will install the Reunion Planner folder on your **START UP VOLUME**. You can specify another location.



## WINDOWS

Insert the CD ROM in your computer's CD Rom drive. Double-click on the **RP\_Setup** file. The installer will install the Reunion Planner folder in your **PROGRAMS** folder by default. You can specify another location from the installer dialog box when prompted.



## USER GUIDE

The Reunion Planner User Guide is a .PDF, or Portable Document File. You must have Adobe Acrobat 3.0 in order to view it. An installer is included on the **CD ROM** if you do not have it on your computer. It can also be downloaded from the Adobe Web Site free of charge.

<http://www.adobe.com/prodindex/acrobat/readstep.html>

# Downloading from the Web



[www.minutiaesoftware.com](http://www.minutiaesoftware.com)

## Macintosh

1. Go to the Minutiae Software web site and select the file to download. Download the .hqx version.
2. When the file has completed downloading, your browser should automatically decode the .hqx file. (Aladdin offers a free Expander program should you need to manually decode encrypted files)
3. Double-click on the **INSTALL** file.
4. The installer will install the Reunion Planner folder on your startup volume. You can specify another location.

## Windows

1. Go to the Minutiae Software web site and select the file to download. Download the file named "RP\_Setup.exe"
2. When the file has completed downloading
3. Double-click on the **Setup** file.
4. Follow the instructions in the installer. The installer also places a shortcut in the Start Menu along with an Uninstaller.

## Shareware Edition

The shareware edition is identical to the runtime edition, except it requires that you own a copy of FileMaker Pro 4.0 or greater. You will need to obtain an unlocking code by using the included Order Form.

The file is compressed and encoded to allow for faster downloading.



To decode and decompress the file, I recommend that you use Stuffit Expander™, a utility from Aladdin Systems that expands many other formats, including .zip files. Best of all it's free!

Both Windows and Macintosh versions for are available online at their web site:

<http://www.aladdinsys.com/expander/index.html>

The Installer for the Runtime Edition places the following files in the Reunion Planner Folder.



### **MACINTOSH**

- Reunion Planner (Application)
- Reunion.FP3 (Data File)
- Links.FP3 (Web Links file)
- Photos (Folder)
- Letters (Folder)
- Exports (Folder)
- RP\_Guide (.PDF File)

### **WINDOWS**

- Reunion Planner (.EXE)
- Reunion.USR (Data File)
- Links.USR (Web Links file)
- Photos (Folder)
- Letters (Folder)
- Exports (Folder)
- System (Folder)
- RP\_Guide (.PDF File)

Also included are six .Dll files

*Note: The RP\_Guide requires Adobe Acrobat Reader™ 3.01 (available free online)*  
<http://www.adobe.com/prodindex/acrobat/readstep.html>

### **WARNING!**

**Do not move or delete any of these files or Reunion Planner may fail to operate properly!**

You can now start using Reunion Planner! Click on the Reunion Planner icon and begin planning!



# HOME

When you open Reunion Planner, you'll find a good place to start is the **HOME** window. From here you can easily get to almost anywhere. You can configure Reunion Planner to automatically go to the Home Page from the Preference Settings.



**Directory** Enter the person's information here.

**Administration** Enter your committee information here.

**Event Information** Enter the information regarding the event here.

**Import / Export** Export to and from other PIMS (Personal Information Managers)

**Preferences** Set up and customize Reunion Planner.

**Web Links** Enter your favorite Web Links as resources and launch your web browser.

**Register** Enter the unlocking code to register.

**Order Form** Order the program

**About** Get information about the Reunion Planner program.



# REGISTRATION

**Reunion Planner** is fully functional. You can use all of the many features such as edit & find records, print lists or layouts.

The only restriction is that you are limited to a maximum of ten records. You can disable this limitation by entering an unlocking code.

## REGISTRATION

Unlocking Code   If you have the password, enter it here. If not, you can still use the program as a demo. However, you are limited to a maximum of ten records.

**Enter Password**

FIRST NAME  LAST

COMPANY

ADDRESS

SUITE/APT

CITY ST ZIP

COUNTRY  PHONE

EMAIL

The password will unlock the program from the demo mode, and allow the user to enter an unlimited number of records.

Simply fill out the user information fields and click **ENTER**. You will then be given an option to print out, fax or email an order form. Select a payment method, check, money order (US funds only) or credit card (Visa, MasterCard, Discover or American Express). If you include your email address, a password can be sent immediately, otherwise you should receive it within 5-7 days via Standard UPS or regular mail.





# PREFERENCES

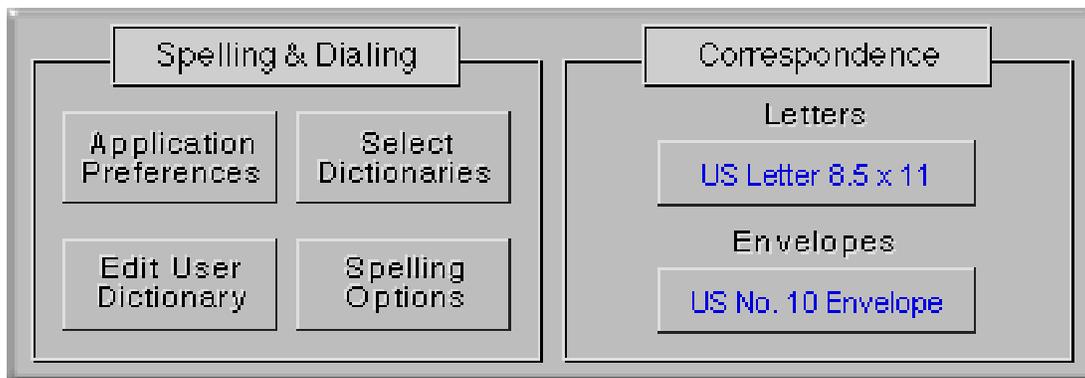
## ***SPELLING & DIALING***

**Application Preferences** Set the application preferences, such as General, modem memory, and dialing here.

**Select Dictionaries** Allows you to select your Main Spelling Dictionary and User Dictionary.

**Edit User Dictionary** Once you select a User Dictionary, you can edit it's contents by clicking here.

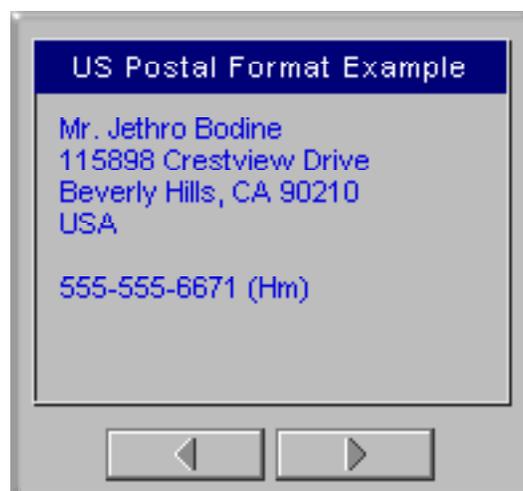
**Spelling Options** You can have Reunion Planner perform various Spell Check functions, such as: Beep or Flash in menu bar when a questionable spelling error occurs.



## ***CORRESPONDENCE***

**Letters** You can choose between two letter sizes: US Letter and A4 (European)

**Envelopes** You have two envelope choices: US #10 Envelope and European DL



## WHEN LAUNCHING

**Go To Layout** Takes you to the selected layout when you launch the program.

**Highlight In List View** Shows the selected record set in the list view for easy identification.

**Default Country** Enters the selected Country automatically in a newly created record.

The image shows two side-by-side dialog boxes. The left dialog box is titled 'When Launching' and contains three sections: 'Go To Layout' with a 'Home' button, 'Highlight In List View' with a 'Marked Records' button, and 'Default Country' with a 'USA' button. The right dialog box is titled 'Formatting' and contains three sections: 'Address Style' with a 'US Postal' button, 'Phone Formats' with a '###-###-####' button, and 'Display Maiden Name' with a 'Maiden Name (Last Name)' button.

## FORMATTING

**Address Style** Select a address format from the pull down menu.

**Phone Formats** Do not enter any formatting characters in the number fields. Instead, select a formatting style for 10 digit phone numbers from the pull down menu. Other countries are formatted automatically depending on the number of digits entered.

**Display Maiden Name** Lets you choose how you want the Maiden Name displayed and printed. For example: if you were having a school reunion, you would probably want the [Maiden Name-Last Name](#), or [Maiden Name \(Last Name\)](#) format, where a family reunion would likely want the [Last Name \(Maiden Name\)](#) format. Click the button to toggle between the 3 different formats.

The image shows a dialog box titled 'When Printing'. It contains two sections: 'Display Page Setup' with a 'No' button, and 'Display Print Dialog' with a 'Yes' button.

## WHEN PRINTING

**Display Page Setup** Before printing, shows the page setup dialog box.

**Display Print Dialog** Shows the print dialog box before you begin to print.



## MODEM SET-UP

If you have a modem, you can use it to dial phone numbers in your database.

First, set up the modem preferences. From the Home layout go to Preferences, then Application Preferences, choose Modem from the pull down list. Select which port your modem is connected to.

*(If you use a Macintosh, you have the option of dialing from your computer's speaker)*

Next, select the fastest speed your modem is capable of.

The image shows a 'Preferences' dialog box with a 'Modem' dropdown menu. Below it are two sections: 'Modem Commands' and 'Connection'. The 'Modem Commands' section has three text input fields: 'Setup:' with 'ATQ0V1E1S0=0', 'Prefix:' with 'DT', and 'Hang up:' with '+++ATH'. The 'Connection' section has two dropdown menus: 'Output:' set to 'Modem Port' and 'Speed:' set to '14400 baud'. At the bottom of the dialog are 'Defaults' and 'Done' buttons.

Section	Field	Value
Modem Commands	Setup:	ATQ0V1E1S0=0
	Prefix:	DT
	Hang up:	+++ATH
Connection	Output:	Modem Port
	Speed:	14400 baud

Generally, the default setting will work with most current modems. If you have questions, refer to the documentation that came with your modem.



## DIALING SET-UP

If you want to dial using your modem, you should configure your local area code and outside line settings.

### DIALING (Windows)

Make sure you have set up your computer's Dialing Properties. From the ....  
START MENU / PROGRAM FILES / ACCESSORIES / DIALER / PROPERTIES

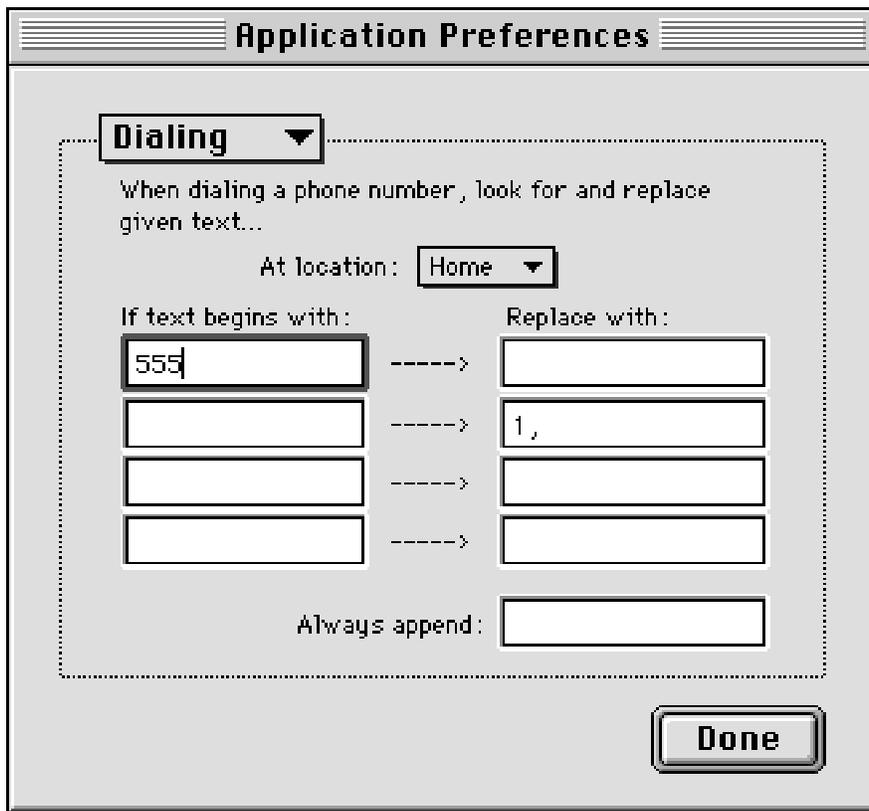
A screenshot of the 'Dialing Properties' dialog box in Windows. The title bar reads 'Dialing Properties' with a help icon and a close button. The dialog is divided into two main sections. The first section, 'Where I am:', contains a dropdown menu for 'I am dialing from:' set to 'Home', with 'New...' and 'Remove' buttons to its right. Below this is a text box for 'The area code is:' containing '555'. The second section, 'How I dial from this location:', includes a field for 'To access an outside line, first dial:' with '1,' entered, and a 'Change...' button. There are also checkboxes for 'Dial using Calling Card:' and 'This location has call waiting. To disable it, dial:'. At the bottom, there are radio buttons for 'Tone dialing' (selected) and 'Pulse dialing'. 'OK' and 'Cancel' buttons are at the bottom right.

Windows Dialing Properties

Configure the settings for the location you will be using Reunion Planner.

## DIALING (Macintosh)

From the Home layout click the Preferences button. Select Application Preferences, then Dialing from the pull down menu.



Macintosh Dialing Preferences

### At Location:

Choose a location such as, office or home.

### If Text Begins With:

Enter your local area codes for work or home or both. If the number begins with that string, it will ignore it when it dials the number.

### Replace With:

If you work from a office that requires a prefix such as 9 to get an outside line, enter it in the right column. A comma adds a 3 second pause in the dialing string. If you are dialing from home, exclude the number 9.

### Always Append

You can also add a suffix string for MCI, Sprint or similar long distance carriers. Offices also may use billing number suffixes for call tracking purposes.

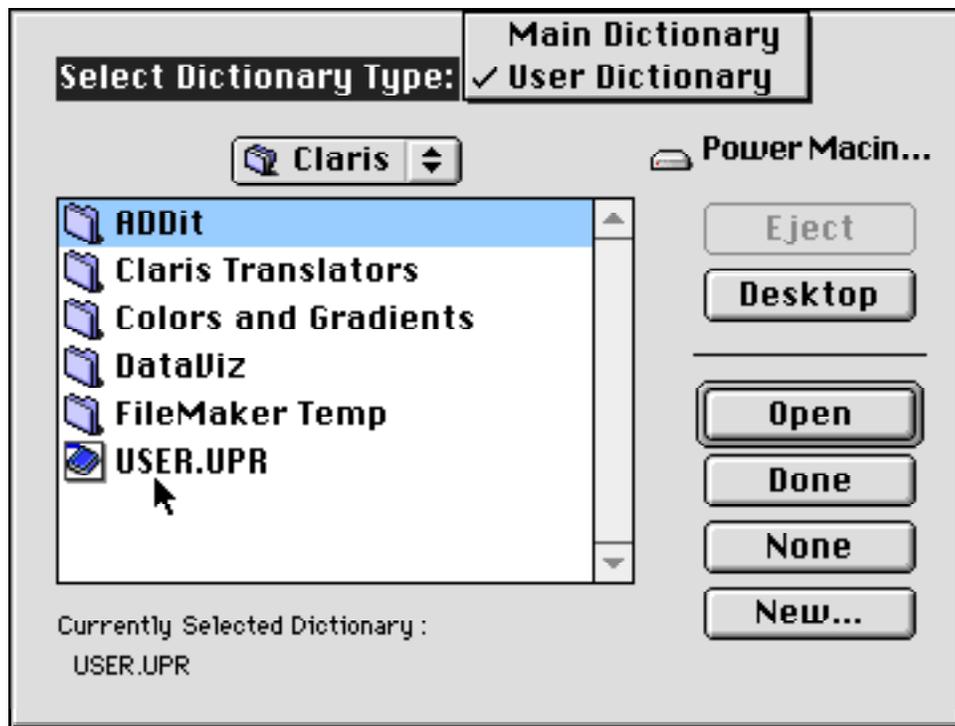
# SPELLING DICTIONARIES

## SELECT USER DICTIONARY

You should select the USER DICTIONARY before you can properly do a spell check. Go to HOME and select PREFERENCES. You can then select the MAIN and USER dictionaries.

The USER DICTIONARY must be selected before you can EDIT USER DICTIONARY.

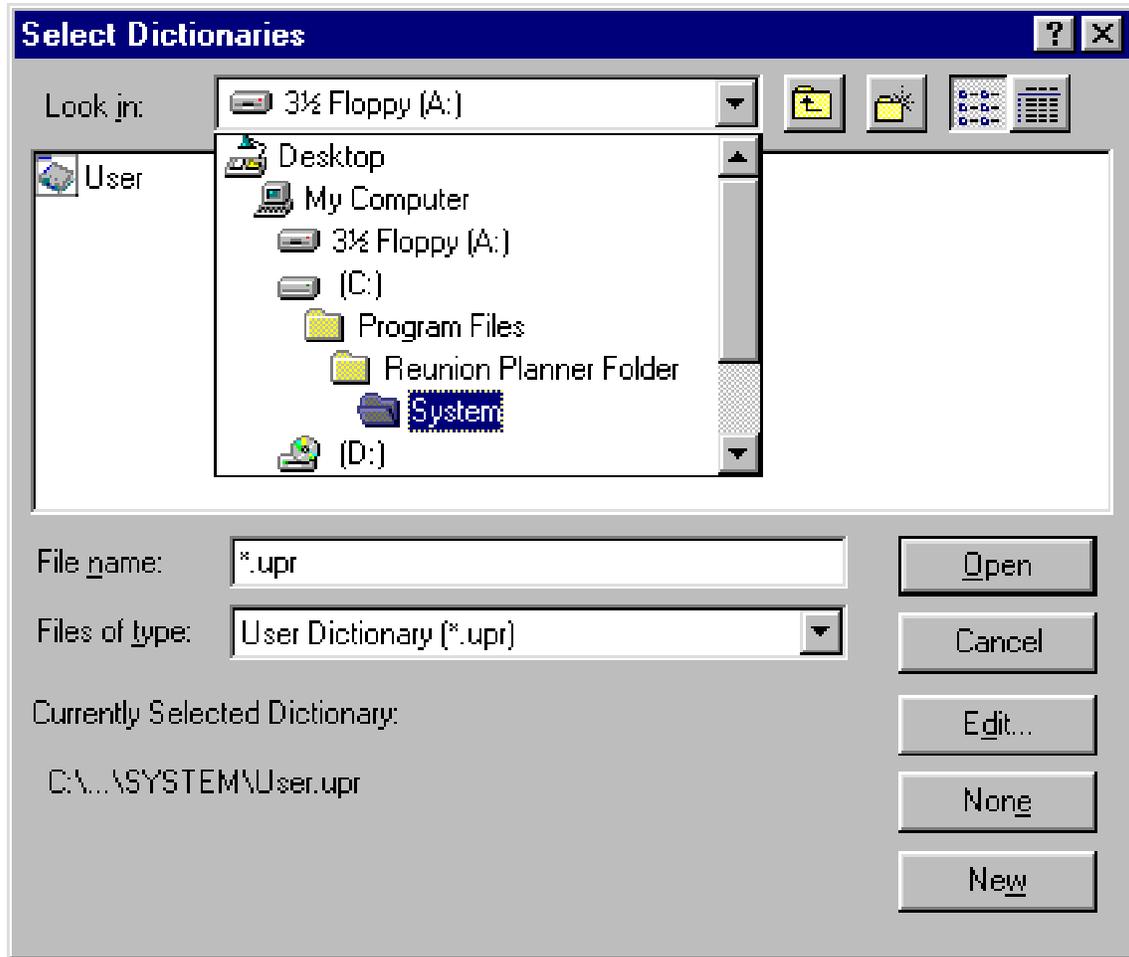
They can either be found inside the System Folder (Windows Runtime Edition), or in the Claris folder (Shareware Edition).



Select User Dictionary (Macintosh)

# Selecting Dictionaries on Windows

The procedure for selecting the Main and User Dictionaries on Windows is basically the same as for the Mac, however the dialog boxes look a bit different.



Select User Dictionary (Windows Edition)

First choose which dictionary you wish to select, **Main** or **User** from the **Files of Type** pull-down menu, then navigate to that file and click **Open**.

Once you select the User dictionary you will be able to edit the contents by clicking **Edit**.

## SELECT MAIN DICTIONARY

The **MAIN DICTIONARY** is also located in either the Claris folder, or System Folder (Windows Runtime Edition).

Use the Select Dictionary Type pull-down menu and select MAIN DICTIONARY (fig. 3B).

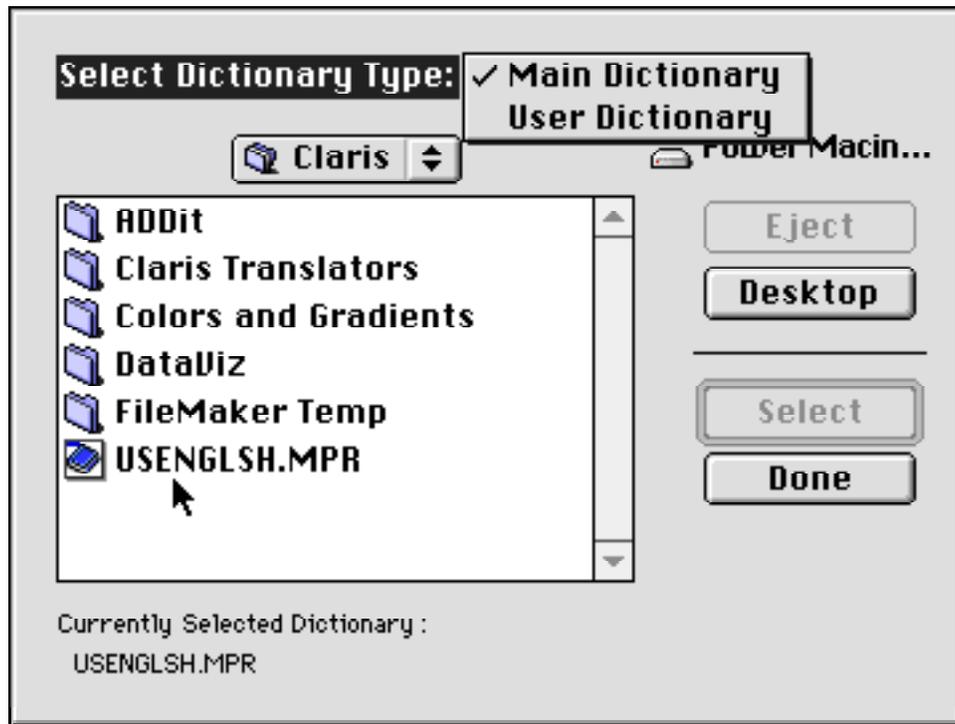


FIGURE 3B

## EDIT USER DICTIONARY

You can click the **Edit User Dictionary** button and add or remove entries. You can also import and export the words.

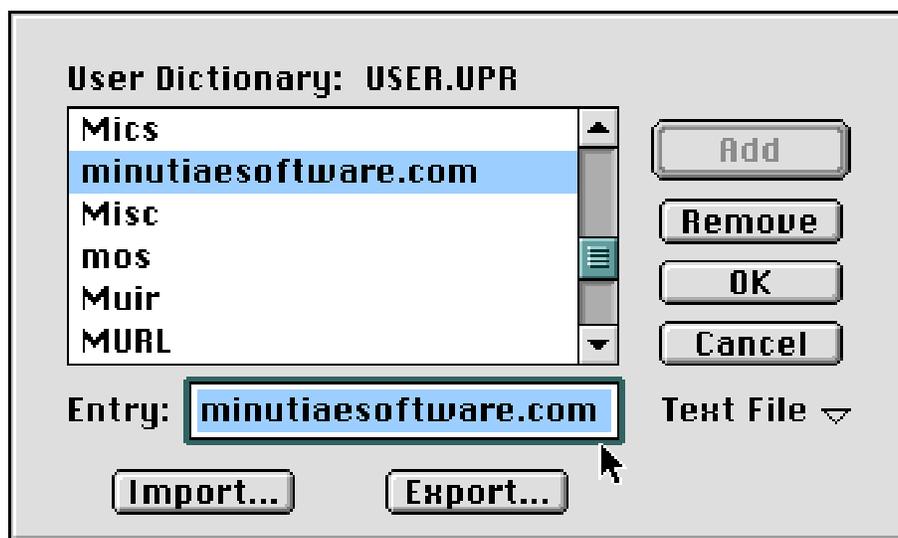
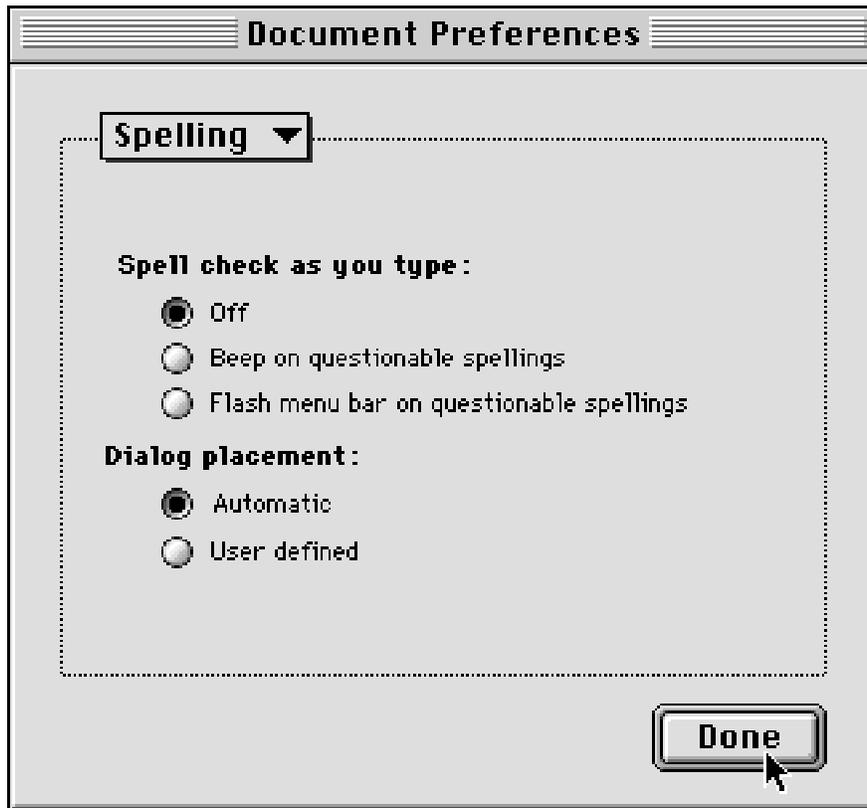
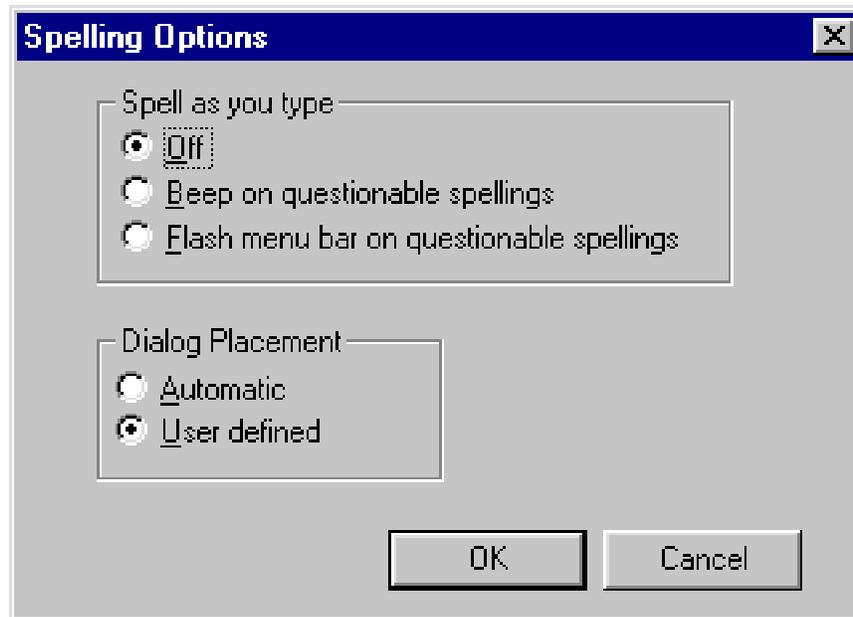


FIGURE 3C

# SPELLING OPTIONS



*Spelling Options (Macintosh)*



*Spelling Options (Windows)*



# ADMINISTRATION

## Committee Name

Enter the name of your reunion committee. An example might be "Jones Family Reunion Committee".

## Address

Enter the address that will be used for all communication with the alumni.

COMMITTEE INFO	
Committee Name	
<input type="text" value="Huxley College Alumni Association"/>	Phone <input type="text" value="(555) 555-1234"/> Fax <input type="text" value="(555) 555-1235"/>
Address	Email Address
<input type="text" value="820 Main Street Anytown, IL 84469"/>	<input type="text" value="qwaggstaff@huxley.edu"/>
Chairperson	Web Page URL
<input type="text" value="Quincy Waggstaff"/>	<input type="text" value="http://huxley.useless.net"/>

## Phone

Enter the phone number for the committee.

## Fax

Enter the committee fax number.

## Chairperson

If your committee has a chairperson enter their name here.

## Email Address

Include an Email address (if possible) as it becomes a very effective means of communication.

## Web Page URL

If you have built a web site for your reunion be sure to include the URL as it is the best way to keep all your alumni informed.

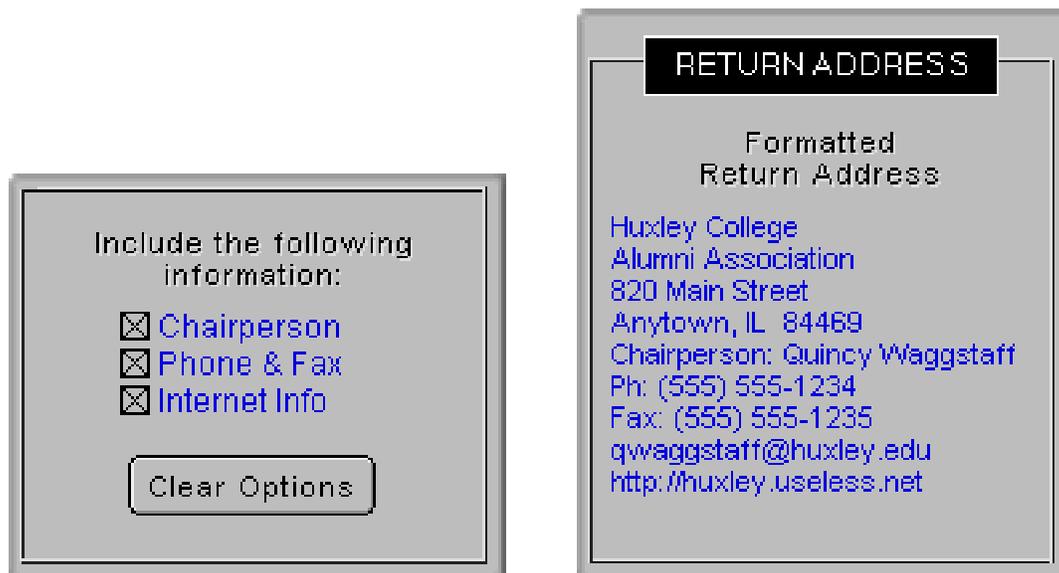


FIGURE 4A

### Return Address Options

Check the field you wish to include as part of your return address on correspondence and letterhead. (Figure 4A)

### Bank Name

If you have set up a bank account for the event, enter the name of the bank here.

### Contact

Your contact person at the bank.

### Address

The bank's street address, city state and zip code.

### Bank Account #

Your account number at the bank.

### Bank Phone #

The phone number at the branch.

### Account PIN #

The PIN (Personal Identification Number) for you account.



# EVENT INFORMATION

## Institution or Family Name

Enter the name of your alma mater, family, company or whatever reunion you are involved in. For example UCLA, Smith, or Textron. The program will format the rest when you choose the reunion type.

## Reunion Type

What type of reunion is it? Family, High School, College, Military, etc.

## Class Of

Enter the graduation year if it is a school reunion, or a range of years, if necessary.

## Year Number

Enter the number of years since the graduation, or initial event.

Institution or Family Name		Event Start Date	
Huxley		Saturday, August 26, 2000	
Reunion Type		Number of Days	
College		2	
Event Time		Days Remaining	
7:30 PM		466	
Class Of	Year Number		
1987-1989	10		

## Event Start Date

Enter the starting date for the event. The date should be entered as DY//MO/YEAR. Reunion Planner is Year 2000 compliant. You should enter the 4 digit year to be compatible with exported information.

## Number of Days

Enter the number of days for the event. If it is a single day event, enter the number 1.

## Event Time

Enter the time of the event. The entry should be in military time, for example 19:30 would be 7:30 PM.

## Days Remaining

Shows the number of days till the event begins. The field is not editable.

# VENUE

## Event Venue

Enter the name of the location for your reunion, hotel, restaurant or other facility.

## Location

Enter the address of the facility, including ballroom name, etc.

## Thomas Bros Guide

If your city has been included in Thomas Bros Guide, enter the map coordinates, page number, etc.

*Note: Recently Thomas Bros was purchased by Rand McNally, so it's very likely that a grid type map system will be available for your area soon, if not already.*

Event Venue		Thomas Bros Guide	
<input type="text" value="Holiday Inn"/>		<input type="text" value="Page 567 (C-3)"/>	
Location		Single Fee	
<input type="text" value="Grand Ballroom&lt;br/&gt;10232 Memory Lane&lt;br/&gt;Anytown, IL 84469"/>		<input type="text" value="\$75.00"/>	
<input type="text" value="Phone"/>	<input type="text" value="Fax"/>	Couple Fee	
<input type="text" value="(555) 555-4785"/>	<input type="text" value="(555) 555-6748"/>	<input type="text" value="\$125.00"/>	

## Phone

Enter the facility phone number. Clicking the small phone icon dials the number.

## Fax

Enter the fax number for the facility.

## Single Fee

If you are charging a fee or donation, enter the cost for a single person.

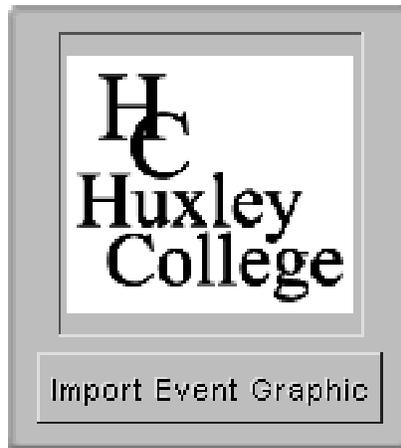
## Couple Fee

If you have a separate fee for couples enter that amount here. You do not need to add the dollar sign. It will be formatted automatically.

## Event Graphic

Click on the Import Event Graphic button to paste a logo or other graphic into Reunion Planner. It could be a family crest for a family reunion, or a corporate logo for a company reunion.

Scanning services are available for a reasonable fee at most Kinko's™ print shops, or other fast print copying businesses if you do not own a scanner. The final image size should be around 2" square.



## Supported Graphics

Reunion Planner supports several graphic formats including:

### Macintosh

PICT

TIFF

PAINT

EPSF

### Windows

.PIC

.TIF

.BMP

.EPS

Generally logos saved as either EPSF or TIFF files.

EPSF, (Encapsulated Post Script Files) are designed for Laser printers. TIFF files work equally well with Laser or Ink Jet printers.

Photos are usually saved as TIFF or PICT files. A resolution of 300 dpi, or dots per inch is usually sufficient for most print outs.



# DIRECTORY

## Salutation

Select from a pull down menu, such as Mr., Mrs., etc.

## First Name

Enter the person's first name. You must have a first name entered.

## Last Name

Enter last name of the person. You must have a last name entered.

## Maiden Name

If the person had a maiden name, enter it here.

Salutation	First Name	Last Name	Maiden Name	
Mr.	Bud	Anderson		
Class of	Marital Status	Spouse Name	Yrs Married	Children
1987	Married	Debbie	21	Johnny (12), Julie (8), Mortimer (2)
Street Address	2342 Mockingbird Lane			
Suite/Apt				

## Class Of

Enter the graduating class year.

## Marital Status

Enter the person's marital status from the pull down menu. Only married persons' information will be printed.

## Spouse Name

Enter the person's spouse name.

## Yrs Married

Enter the number of years they have been married.

## Children

Enter any children's names and age (in parentheses). *Do not use the return key. The field will automatically wrap the text!*

## Street Address

Enter the street address.

## Suite/Apt

If it is a work address and has a suite number, enter it here (Be sure to include the word, Suite or Apartment along with the number)

## City, ST Zip

Fill out the City, State or Province and Zip or Postal code.

## Country

Select a Country from a pull down menu. If you selected a Default Country in the Preferences, it will automatically be entered for you.

## Email

Enter the person's email address. To send email, click on the small icon. *Note: You must have an Internet connection and Claris EMailer, Qualcomm Eudora Light, or Eudora Pro installed to send email with Reunion Planner. Netscape Mail and Outlook Express will not work.* Mac users also should have **Internet Config** (version 1.1 or higher) installed and configured to process the **mailto** protocol.

## URL

Enter the person's web address. To go to the person's site, click on the small globe icon. Reunion Planner determines how to handle the URL by using the preferences in **Internet Config.**, such as Netscape or Internet Explorer.

City, St Zip	Springfield	IL	33861-5387
Country, Email	USA		bander5197@pseudonm.com
URL		http://www.pseudonm.com	
Home Phone	▶ 555-555-7595		Fax
Work Phone	555-555-0653		Primary Phone HM

## PHONES

### Home Phone

Enter the Home Phone number here. Do not use any formatting characters such as "-" or "/" or "(" . Formatting for 10 digit numbers is automatic, based on the Phone Format Options in the Preference Setting.

### Work Phone

Enter the Work number here.

### Fax

Enter the Fax number.

### Primary Phone

If both a home phone and a work phone are entered, you can select which should be the primary number by clicking on the Primary Phone button. A small blue arrow will indicate the current primary number. (If only one number is entered, the button has no effect)

### Dial Phone Number

Click on the small phone icon to dial the number through your computer's modem. (See the chapter on modem dialing for more information)

# KEEPING TABS ON THINGS

## Interests & Comments

Enter alumni or guest's brief personal comments and interests up to 50 words. Personal notes should be kept in the notes field by clicking on the notes icon.

## Occupation

Enter the person's profession or job from the pull down menu.

## Referred By

If the person was referred by a fellow alumni, enter their name here.



The screenshot shows a form with the following fields and controls:

- Interests & Comments:** A text area with a character count "16 of 50 Words Max" and the text "Model airplanes, mountain biking. I hope all you others have changed as much as I have!".
- Occupation:** A pull-down menu showing "Auto Mechanic".
- Referred By:** An empty text field.
- Has Notes!**: A green text label next to a notepad icon.
- Letter Sent:** A button labeled "Yes".
- Followup Letter:** A button labeled "No".
- Materials Sent:** A button labeled "Yes".
- Response Status:** A pull-down menu showing "Pending".

## Notes

Indicates whether the person has notes entered. A red circle indicates that there are no notes. Click the notes icon to enter or edit the notes.

## Letter Sent

You can manually change the initial first letter sent status by clicking here. A dialog box asks you if you want to append the notes to indicate the change.

## Follow up Letter

Additionally, you can manually change the initial follow up letter sent status by clicking here.

## Materials Sent

If you have sent materials such as maps, questionnaire, or other materials, click here.

## Response Status

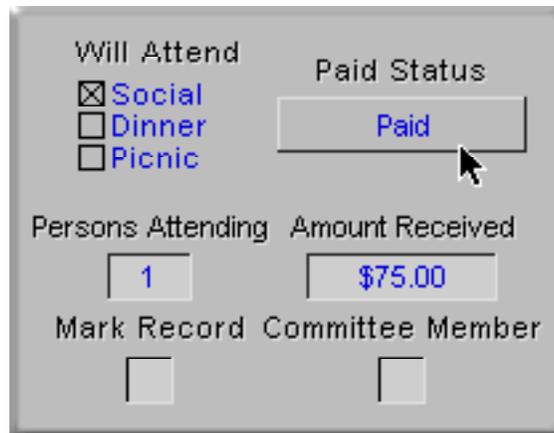
Select the response status from the pull down menu: confirmed, no reply, pending, etc.

### Will Attend

Check which functions the person plans to attend.

### Paid Status

Select the Paid Status from the pull-down menu.



The screenshot shows a software interface with several input fields and checkboxes. Under the 'Will Attend' section, there are three checkboxes: 'Social' (checked), 'Dinner', and 'Picnic'. To the right, under 'Paid Status', there is a pull-down menu currently displaying 'Paid'. Below these are two input fields: 'Persons Attending' with the value '1' and 'Amount Received' with the value '\$75.00'. At the bottom, there are two checkboxes: 'Mark Record' and 'Committee Member', both of which are currently unchecked.

### Persons Attending

Enter the number of persons attending.

### Amount Received

Enter the amount of payment received from the person.

### Mark Record

Check this box to mark the record for future find purposes.

### Committee Member

Check this box if the person is on the reunion committee.



### Spell Check

Checks the spelling of the current record. Make sure you have selected the Main & User Dictionaries from the Preference Settings.



### Import Photo

If you want to include photographs. You must first scan them, and then import them. Click this photo icon to clear the current photo, or import a new one. Reunion Planner supports TIF, JPG (JPEG), BMP (Windows), PICT (Mac) and EPS graphic formats.





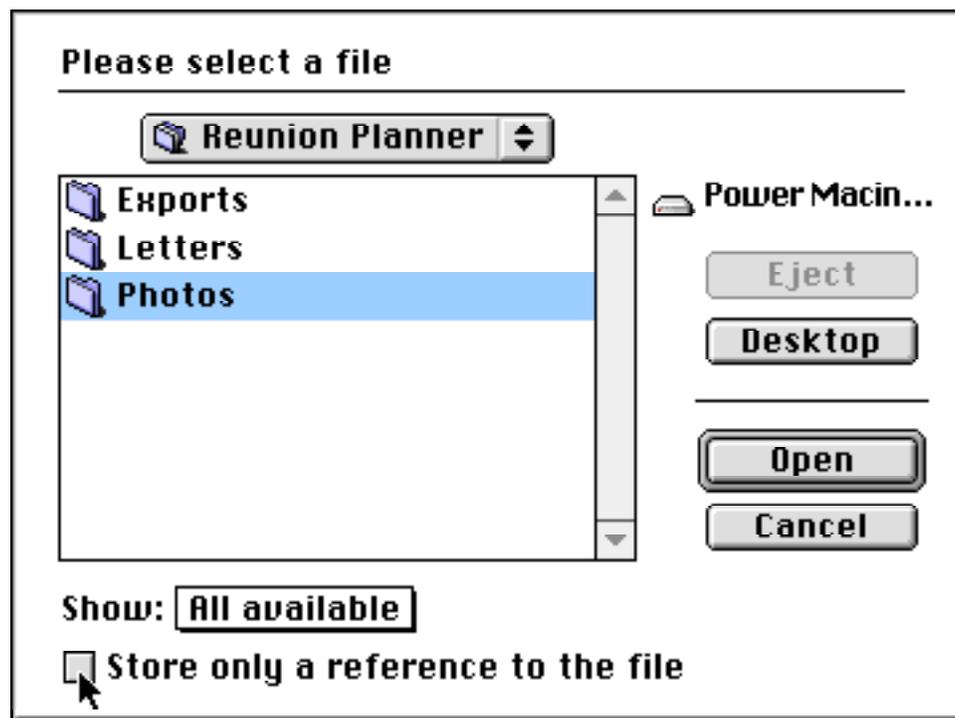
# USING PHOTOS

Using photos in **Reunion Planner** makes it possible to print name badges, souvenir booklets and address books. You can use either current or historical photographs, greyscale or color. Generally, a scanner is used to create digital pictures from original photographs, however digital cameras are becoming more and more common.

When you scan your photos you should keep in mind the file size and resolution. Files can become quite large and can easily consume a hard drive's storage area. A good average photo file size should be around 30k- 50k.

## ***Some tips to remember:***

- Final scan dimensions to approximately 2" x 2"
- Scan at 150 to 300 dpi (dots per inch)
- Save photo as .PIC (Mac), .TIF, or .BMP (Windows) file format
- Name the photo with the person's name. Example: Last Name\_First Name
- Keep photos in "Photos" folder of Reunion Planner



## **STORE ONLY AS A REFERENCE**

You also have the option of storing only a reference to the photo (see dialog box). This works much the same way as an alias, allowing you to keep the database from getting too large which can slow down performance and is strongly recommended. Once a photo is stored, you should not move it from it's folder or you will have to re-link it!



# LIST VIEW

## Marking Records

By *marking* selected records, you can easily return to that selected set. You may want to mark all persons from Arizona. You would first do a find and choose AZ from the list of states. Next, click the Mark List button from the Main List. A dialog box asks if you want to mark the current list. You would click YES and the list is updated to reflect the change. If you selected Marked Records to be highlighted from the Preferences, the records will be highlighted in Blue.



## Scrolling The List

When your list gets larger you can use the scroll buttons to navigate through several records at a time. This is sometimes easier than using the elevator scroll button on the right hand side of the list.

## Previous, Next / First, Last Arrows

A set of four arrows allow you to go to the First, Previous, Next and Last record in the list. In essence, you can go from the First to the Last record with a single mouse click.

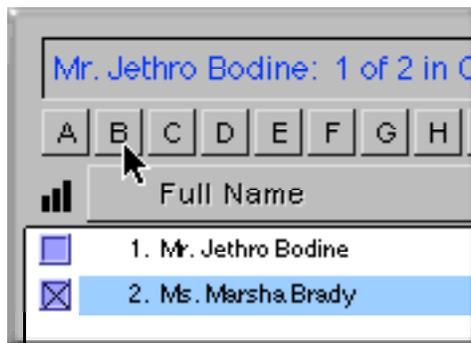


## The Button Bar

Use the buttons on the button bar to navigate or find specific records from the list view.

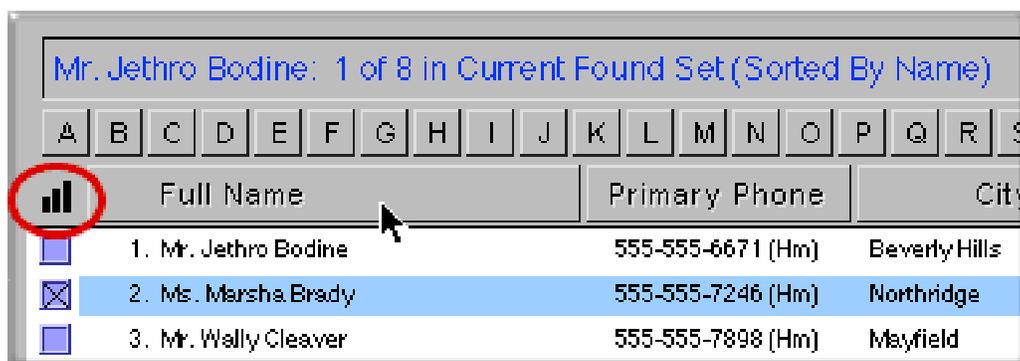
## Finding By Alphabet

You can easily find a group of records by using the alphabet tabs in the list view. Simply click on the alpha tab just above the header. To find marked records, click the check mark at the far right hand side. To find ALL the records, click the button right next to it. A click on the person's name takes you to the Directory layout.



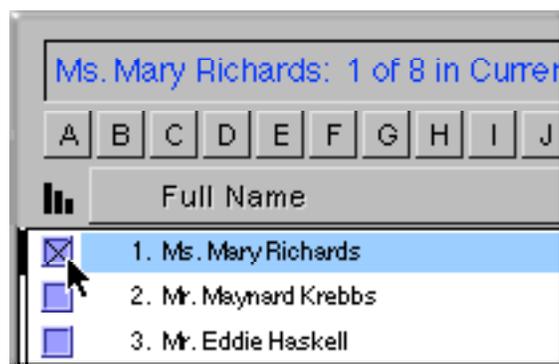
## Sorting Records

You can sort the current set of found records by clicking on the header just above the list. In the example shown below, the status line indicates that the records have been sorted by name. To do a reverse sort, hold down the SHIFT key while clicking the header. A small icon in the left corner displays the current sort status.



## Highlighted Records

You can select the option of having Reunion Planner highlight certain sets of records in the list by going to Preference Settings and choosing the set from the pull-down menu. The example below shows Marked records highlighted. (Note the sort order is reversed)





# PRINT CENTRAL

## Correspondence

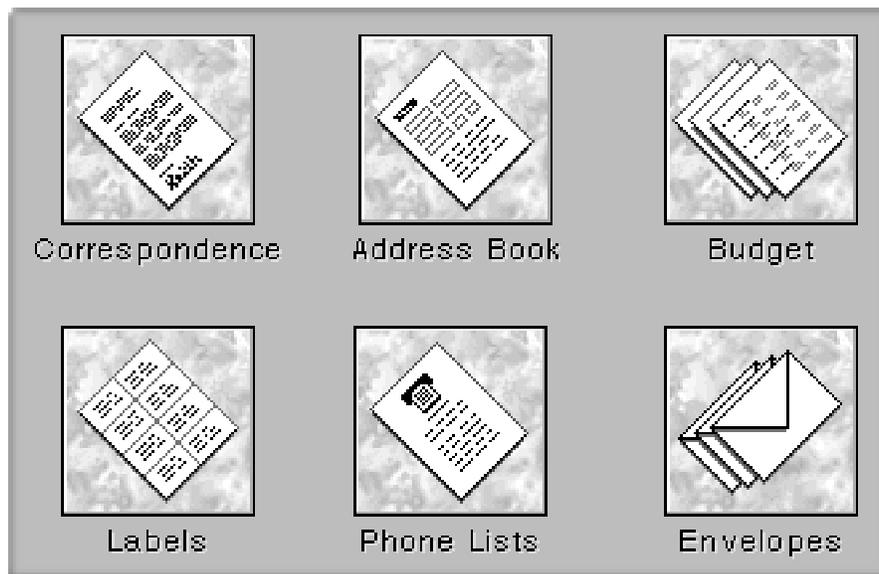
Offers two letters and a questionnaire for obtaining current information. You can select the default US 8.5 x 11" or the European A4 from the Preferences settings.

## Address Books

Offers two types of address books. One with photographs, the other without. You can select which information you wish to print as well.

## Budget

Prints out the budget.



Print Central

## Labels

Gives you a variety of Avery™ labels and a Photo Name Badge.

## Phone Lists

Gives you several types of lists to choose from.

## Envelopes

There are two types of envelope layouts, #10 envelope and European DL. Select the one you normally use from the Preferences settings.

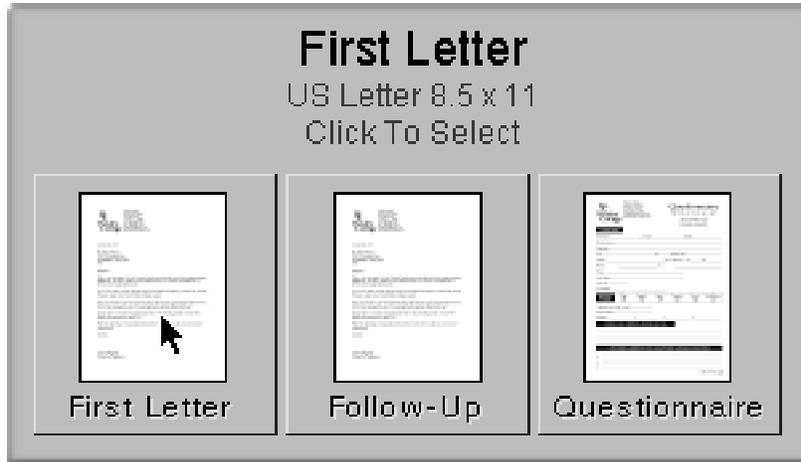
# Printing Correspondence

## First Letter

This should be an introductory merge letter giving basic information and might include a copy of the questionnaire. The amount of text is limited to the size of the letter field.

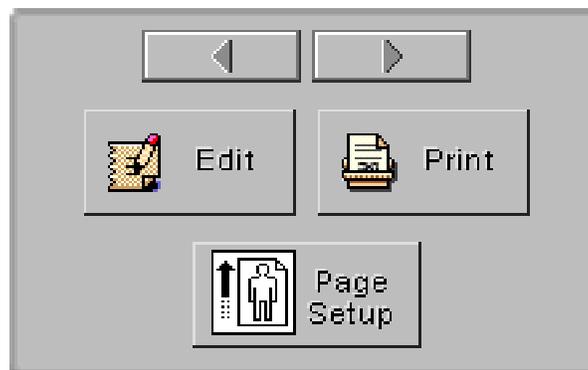
## Follow Up Letter

You can create and save unlimited numbers of Follow Up Letters. Save them to the Letters Folder inside the Reunion Planner folder for easy retrieval. They must be saved as Tab-Separated files. The amount of text is limited to the size of the letter field.



## Questionnaire

Initially, you may want to collect current up to date information on the people you locate. The best way is to send out a Questionnaire. This form contains all the basic information that is in the Directory window. To print the Questionnaire, click on the ICON and select Print. Then select the number of copies you wish to print. It may be better to print just one, and have it duplicated at a copy house. NOTE: The Questionnaire layout cannot be edited.



After printing letters, you are given an option to update the notes with a date stamp for each of the persons who were sent the letter. This is an easy way to keep track of who was sent what, and when was it sent.

# Printing Address Books

## Printing Options

You have a choice of printing any or all of the following information options from check boxes.

They Include:

*Country*

*Phone Numbers*

*Internet Info*

*Marital Info*

*Occupation*

*Interests and Comments*

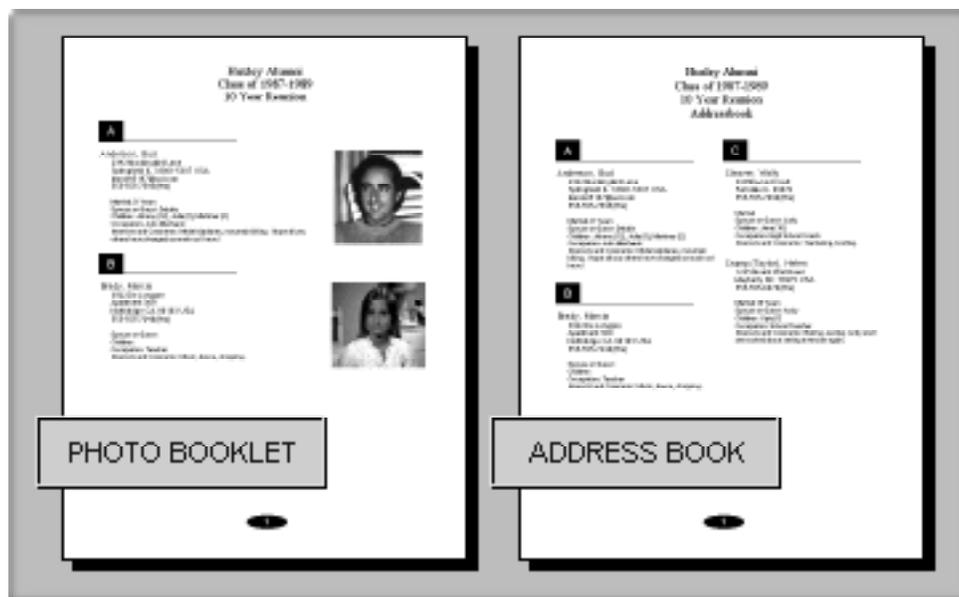


FIGURE 5A

## Photo Booklet

Prints the selected information options and includes the person's photo. Use this layout if you have imported scanned photos of classmates.

## Address Book

Prints the selected options in a two column layout, but does not include the photo. Use this layout if you have not imported photos of classmates.

*To find out how you can print folded mini booklets, see the special ClickBook™ offer later in the User Guide.*

# Printing Lists

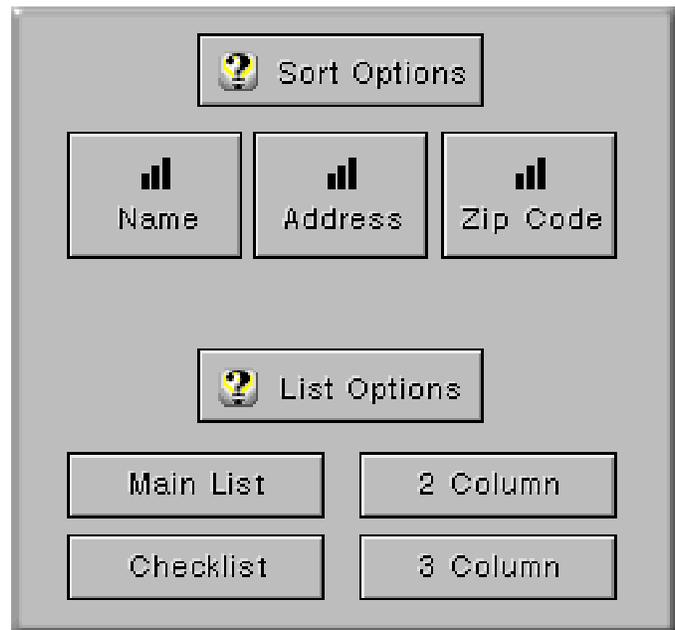
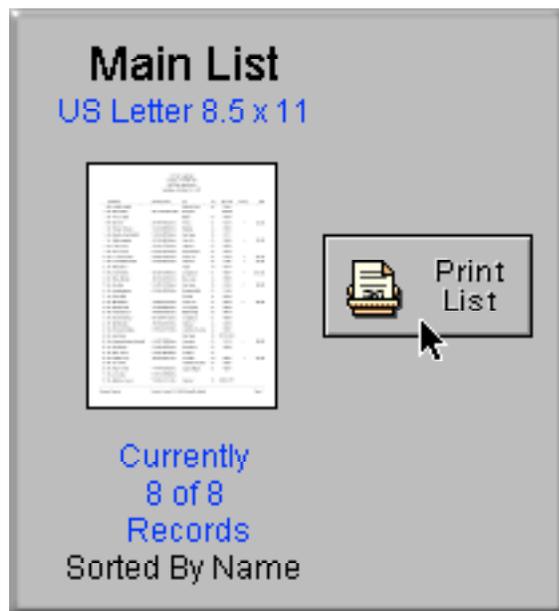
There are several printed list options to choose from. A click on the button will select the list, and a small graphic will give you an idea of how the layout will look.

## Main List

The Main List gives you up to date information on who will be attending.

## Checklist

The Checklist has a single line with a check box. Use this list at the event to mark the attendance and check their paid status.



## 2 Column

To select the 2 column list, click this button.

## 3 Column

To select the 3 column list, click this button.

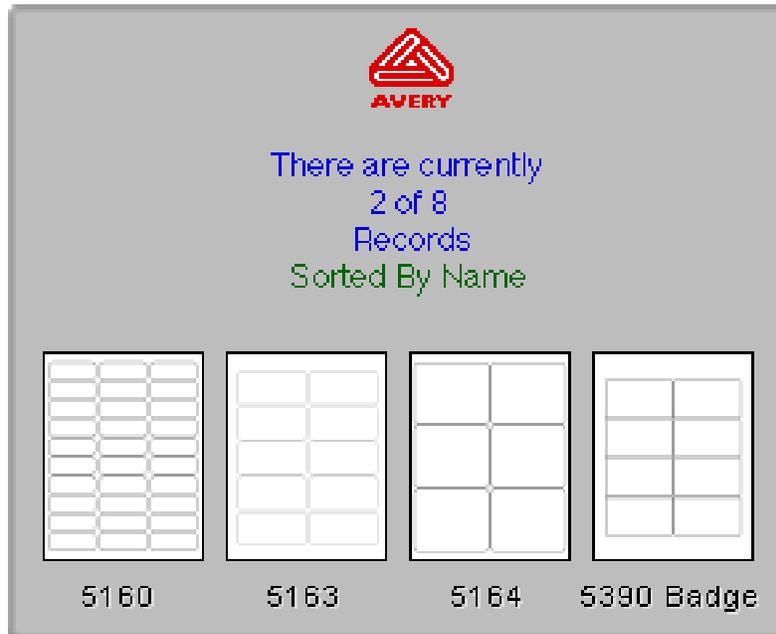
## Print List

To preview and print the selected list, click the Print List button.



## Printing Labels

The following Avery™ labels are supported.



**5160 Address label**  
1" x 2 5/8"  
(30 labels per sheet)

**5163 Mailing label**  
2" x 4"  
(10 labels per sheet)

**5164 Mailing label**  
3 1/3" x 4"  
(6 labels per sheet)

**5390 Perforated Laser Name Tags**  
2 1/6" x 3 1/2"  
(8 tags per sheet)

*\*All Avery codes are trademarks of Avery Dennison Corporation.*

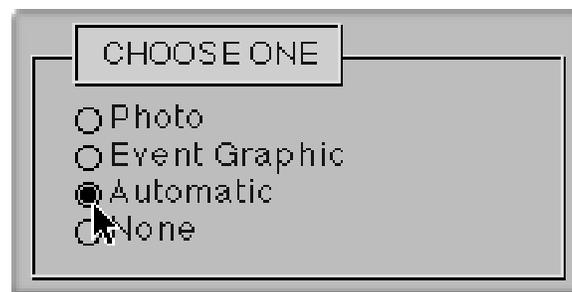
## **Name Badges**

Select the graphic for the name badge. If you have scanned photos of classmates and have imported them into Reunion Planner, choose Photo.

If you have not scanned photos but have scanned or created an event graphic, choose that option.

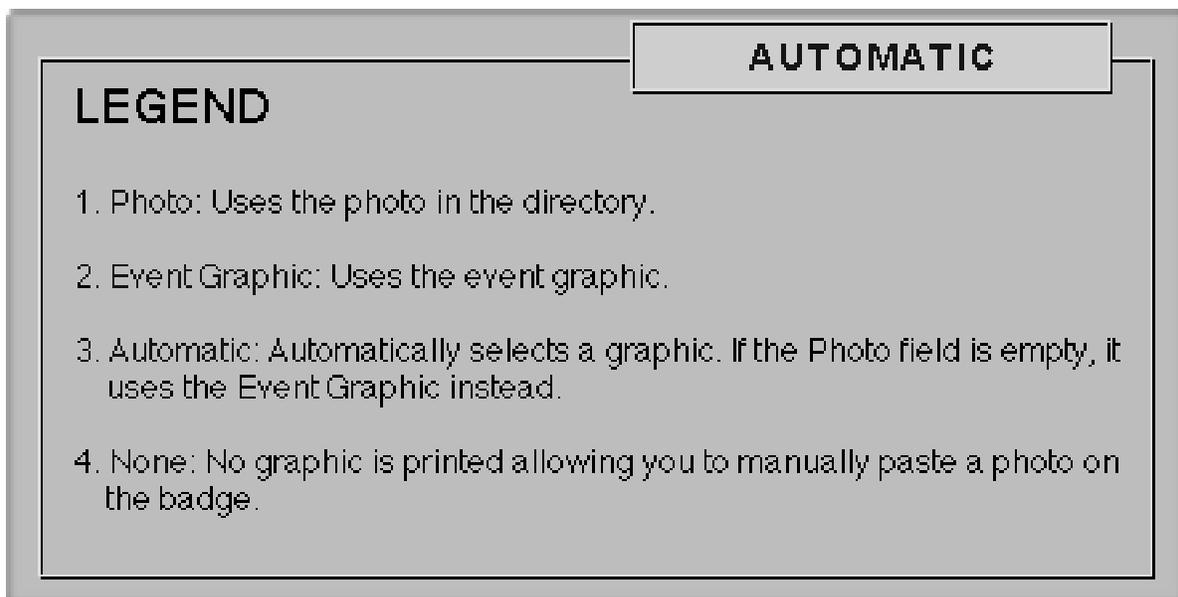
If you have some photos and an event graphic, you can select automatic, which substitutes the graphic in place of the person's photo if one does not exist. (Figure 6A)

If you have not scanned photos or an event graphic, you can select None, which still allows you to physically paste photos on the badge.



A screenshot of a software dialog box titled "CHOOSE ONE". It contains four radio button options: "Photo", "Event Graphic", "Automatic", and "None". The "Automatic" option is selected, indicated by a filled circle and a mouse cursor pointing to it.

FIGURE 6A



A screenshot of a software dialog box titled "LEGEND". In the top right corner, there is a box containing the word "AUTOMATIC". The main area contains a numbered list of four items explaining the options:

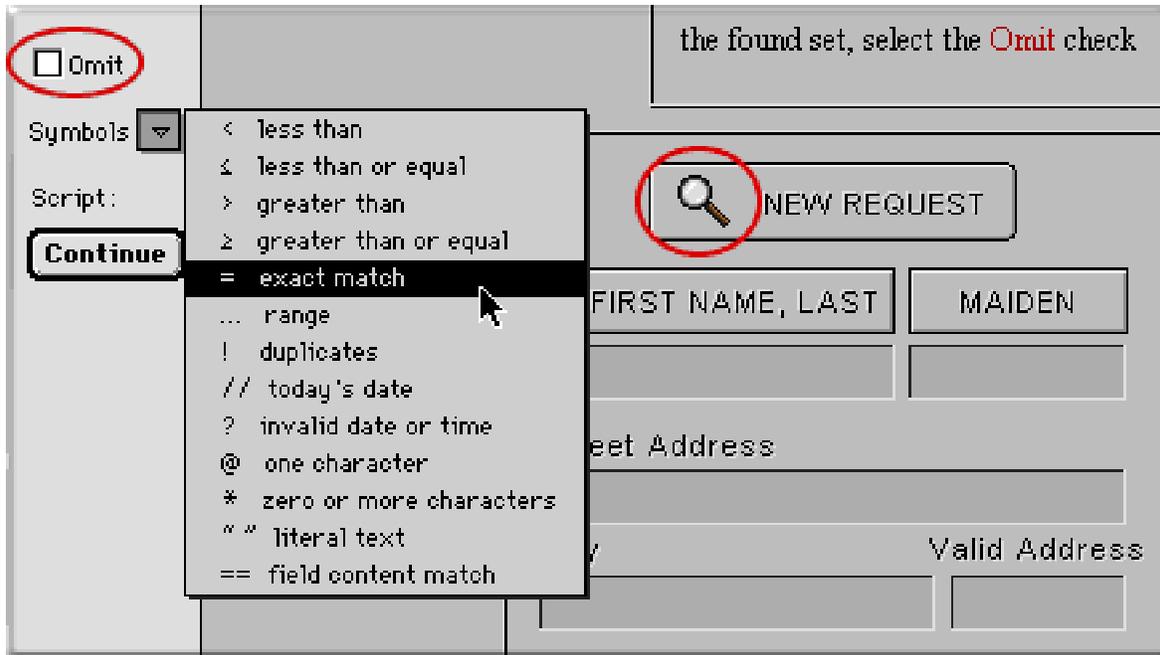
1. Photo: Uses the photo in the directory.
2. Event Graphic: Uses the event graphic.
3. Automatic: Automatically selects a graphic. If the Photo field is empty, it uses the Event Graphic instead.
4. None: No graphic is printed allowing you to manually paste a photo on the badge.

FIGURE 6B



# FINDING RECORDS

When you perform a general find, you can request very specific information by using the **Symbols** menu. For instance, you may wish to find all records with no zip code. Simply click in the zip code field, leave it empty and choose "= exact match" from the Symbols pull down menu. Click Continue or hit the Enter key. Any record with an empty zip code field will be displayed.



If you select the OMIT option, all records without a zip code will be hidden (not deleted) from the list. You can also make multiple requests such as "any record from the states of California and Oregon" by entering "CA" in the state field, next select the NEW REQUEST button, and enter "OR".

All records from both states will be displayed.

## Current Found Set

Shows total records, how many records are in the current found set, and how they are sorted.

Current Record in Found Set	Total Records
1 of 8	8
Sorted By Name	

# Web Links



You can easily store your favorite web pages as resources. Click the **ADD LINK** button to add a new URL, then enter the URL beginning with `http://` or `www.` followed by the link address. Next, enter a brief description of the web site that will serve as a reminder of the site

To remove a web resource, click in the row of the Resource Name and click the **REMOVE** button. You will be presented with a dialog box asking whether you want to delete that resource. If yes, click Remove.

To automatically launch your web browser and go to the web resource, click on the small globe icon next to the resource name.

Reunion Planner determines how to handle the URL by using your computer's internet browser preferences such as using Netscape or Internet Explorer. See chapter on troubleshooting for more information.



**ADD LINK** Click this button to add a new Web Resource to the list.

**REMOVE** Click this button to remove a Web Resource from the list.

**IMPORT** Imports web resources from a TAB-SEPARATED text file: Description (TAB) URL

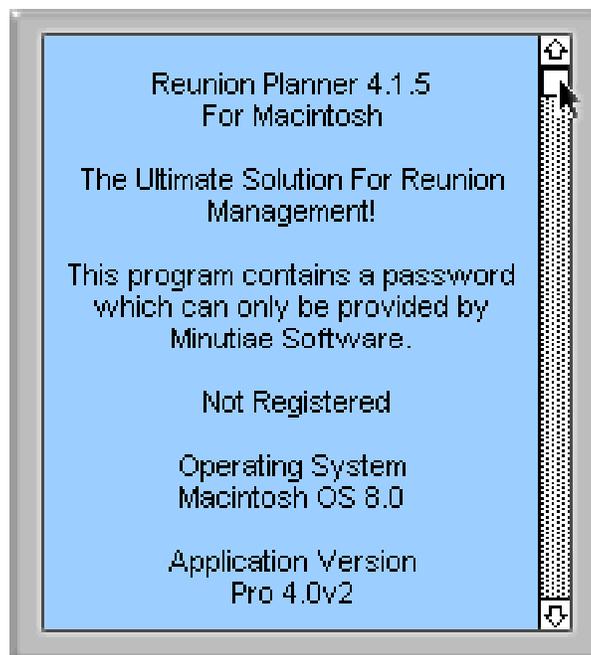
**EXPORT** Exports your current web resources to a TAB-SEPARATED text file.

**GO** Click on the small globe Icon to launch your web browser and go to the selected web resource. (Requires that you have an internet service provider to connect)

# BUDGET

BUDGET		
Item Description	Vendor	Phone
Entertainment		
Location Fees		
Caterer		
Mailings		

Reunion Planner has a built-in BUDGET layout where you can keep an accounting of expenses and monies received. Click on the button in the HOME Layout.



To determine which version of Reunion Planner you are using, go to the **ABOUT** window. The version will be displayed along with the registration status, number of records and developer address information. If you click on the Reunion Planner Logo in the window, you can export the information to a TAB-SEPARATED file. That could be emailed for troubleshooting.



# IMPORT / EXPORT



## Import Records

This allows you to import a previous Reunion Planner export file, or from a spreadsheet or PIM (personal information manager) program such as Claris Organizer, Now Contact, Eudora Planner, etc. The file must be a Tab-Separated file.

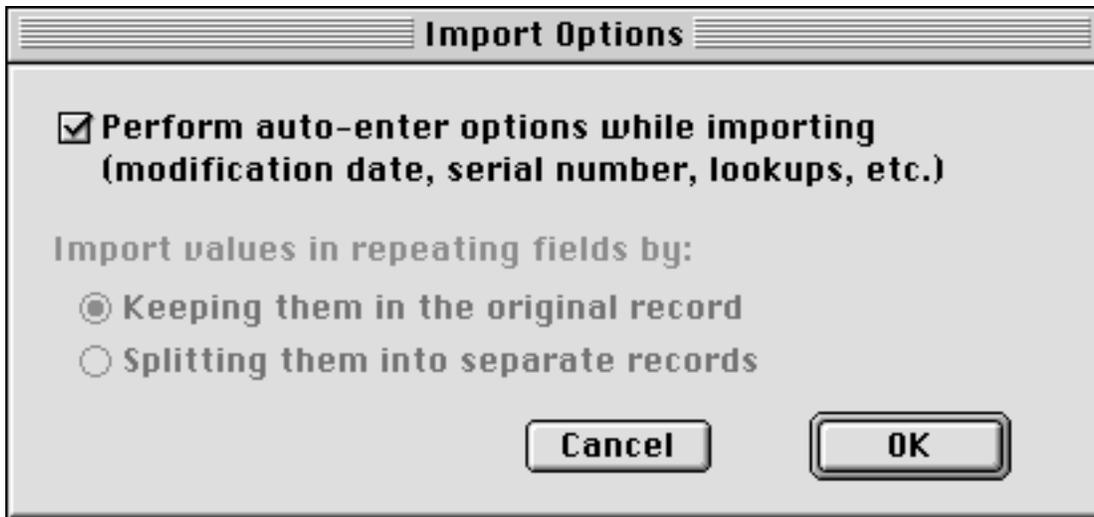
*Note: Photos cannot be imported in this process. You must import them from the Directory layout.*

*The import order is as follows:*

- Salutation
- First Name
- Last Name
- Maiden Name
- Street Address
- Address Line 2 (Suite or Apartment)
- City
- State
- Zip Code
- Country
- Home Phone
- Work Phone
- Fax
- Email
- Web URL
- Year Graduated
- Referred By
- Occupation
- Marital Status
- Years Married
- Spouse Name
- Children
- Interests/Comments
- Notes

## Import Options

When you import records you should select the Perform auto-entry options while importing. (modification date, serial number, lookups, etc.)



## (555) 988 Clean Phone Numbers

Reunion Planner formats phone numbers automatically. If you import phone numbers that have formatting characters, such as hyphens or parentheses, you can strip those characters, leaving the numbers clean. This applies to home, work & fax numbers. This procedure cannot be undone once the numbers have been cleaned.



## Export Records

This allows you to export your records to a Tab-Separated file named "Records.TAB", which can be imported into a contact manager program. The file is saved to the EXPORTS folder.

Before exporting information you should find and sort your data using the options provided. A status box will show how many records and how they are sorted. The exported files are saved to the **EXPORTS** folder inside the Reunion Planner folder.

*The export order is as follows:*

- Salutation
- First Name
- Last Name
- Maiden Name
- Street Address
- Address Line 2 (Suite or Apartment)
- City
- State
- Zip Code
- Country
- Home Phone
- Work Phone
- Fax
- Email
- Web URL
- Year Graduated
- Referred By
- Occupation
- Marital Status
- Years Married
- Spouse Name
- Children
- Interests/Comments
- Notes



## Letter Merge Export

This allows you to export a Merge file into a word processing program that supports merging, such as Microsoft Word™, Word Perfect™ or Claris MacWrite Pro™. A merge file has header info for field labels, and the data fields are enclosed in italics.

*The export order is as follows:*

Salutation  
First Name  
Last Name  
Maiden Name  
Street Address  
Address Line 2 (Suite or Apartment)  
City  
State  
Zip Code  
Country  
Home Phone  
Work Phone  
Fax  
Email  
Web URL  
Year Graduated



## Export Email Addresses

This allows you to export a Tab-Separated file of all records with Email addresses into a mail program such as Claris Em@iler™, Eudora Pro™ or Outlook Express™.

*The export order is as follows:*

First Name  
Last Name  
Description  
Email Address



## Backup File

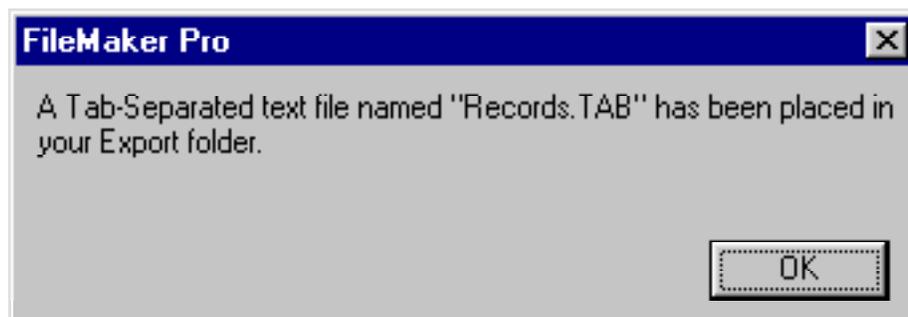
This script places compressed copies of your files in the EXPORTS folder. It is useful for maintaining a lean database which over a period of time can become bloated. It is also helpful on the rare occasion that your file gets corrupted.

*Make sure you rename the backup copy the same as the original if you delete your old file!*

You should also use a backup program to protect all your important files (including Reunion Planner), but you probably already know that.

After the records have been exported you will see a dialog box confirming the export. Be sure to keep the Reunion Planner folder intact, so the files can be placed properly.

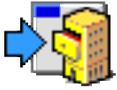
Here is a sample export dialog box:



Windows Export Dialog Box

Once you are finished merging, importing or exporting your data, you can move, delete or archive the exported files.

*Do not move or delete any of the Folders or other files, or Reunion Planner may fail to operate properly!*



## UPGRADE FROM A PREVIOUS VERSION (*Version 4.1.2*)

To upgrade from a previous version of Reunion Planner, you must first export your current data information, then you can import it into the newer version.

### STEP 1

Launch your CURRENT version of Reunion Planner (*must be version 4.1.2 or greater*).

### STEP 2

From the HOME layout select: IMPORT/EXPORT.

### STEP 3

While holding down the **SHIFT** key, click on EXPORT RECORDS.



You will be asked if you want to export to an UPGRADE File. Select YES. Two files named "UPGRADE DATA" and "LINKS DATA" will be placed in your EXPORTS folder. EXIT or QUIT the old program.

### STEP 4

MOVE Both DATA files to the EXPORTS folder of the NEW VERSION of Reunion Planner.

### STEP 5

Launch the NEW version and select IMPORT/EXPORT from the Home layout.

### STEP 6

While holding down the **SHIFT** key, click on IMPORT RECORDS.



You will be asked if you want to upgrade to the new version. *The files UPGRADE DATA and LINKS DATA must be in the Exports folder of the NEW version!* Select YES. A backup copy will be created, and your data will be imported into the new version. It will replace all data currently in the file with your old Reunion Planner information.

### STEP 7

If you have any photos, move the photos folder to the new version folder and replace them, as well as any Follow-up letters you may have saved. If you are certain all your information has been successfully imported, delete the previous version folder and the two import Data files that you moved to the new version.

# PRINTING BOOKLETS

## ***SPECIAL OFFER!***

### ***20% Off ClickBook™***

A powerful yet easy-to-use printing utility, **ClickBook** turns any Windows, Macintosh, CD-ROM and Internet files into double-sided booklets and brochures.

Transform your single-sided documents into professional booklets and brochures. ClickBook lets you create customized brochures, greeting cards, address books, catalogs, and more.

ClickBook works by intercepting standard-size pages on the way to your printer from virtually any Macintosh or Windows program that prints. ClickBook takes the pages, shrinks them down, and rearranges them to print out as a double-sided booklet.

**ClickBook** has a suggested retail price of \$49.95 for both the Windows and Macintosh platforms.

*As a Reunion Planner user you can save 20% off of ClickBook for a limited time by calling 800-403-0925 or sending an e-mail to [sales@bluesquirrel.com](mailto:sales@bluesquirrel.com).*

*Mention that you are a Reunion Planner user.*



Blue Squirrel Office Location  
170 West Election Drive  
Suite 125  
Draper, Utah 84020 USA  
Phone: (801) 523-1063  
Fax: (801) 523-1064  
Sales: (800) 403-0925  
<http://www.bluesquirrel.com/clickbook/>

# FAQ'S

## FREQUENTLY ASKED QUESTIONS

### Question

I get no response from the spell check button, or no response from Edit User Dictionary button in the preferences layout. What's wrong?

### Answer

Check to see that the Main Spelling Dictionary and User Dictionaries are installed. Macintosh: System Folder \ Claris Folder or Windows: Reunion Planner Folder \ System, you should see **USENGLSH.MPR** and the **USER.UPR** or **USER.USP** dictionaries. If not, try doing a find to see if they were moved to another location. If you still cannot find them, contact me and I can send a copy of them on floppy disk or Email you the files.

### Question

Can I change the fonts in Reunion Planner?

### Answer

No. The fonts are fixed in printed reports due to cross-platform differences. A great deal of effort has gone into using fonts that are available on both platforms, ie (Times, Times New Roman, Helvetica, Arial & Geneva). Until the day when a standard uniform font technology exists, we will have to tolerate the unique font metrics when using multiple platforms.

### Question

I do not have an event graphic. Will my information still print out OK in printed reports and address books?

### Answer

Yes, when the Event Logo field is empty, the information slides to adjust. You can also use another generic graphic in it's place. Local printing shops, such as Kinko's, will be able to provide scanning services if you do not own a scanner. Have them save your logo as a TIFF, PICT or EPSF file at 200 to 300 DPI. The final image size should be approximately 2 inches square.

### Question

When I quit Reunion Planner it usually takes some time to close, is this normal?

### Answer

Reunion Planner needs to perform certain 'clean up' functions when closing. Depending on the speed of your computer, it may take a second or two to close out and quit. This is normal.

# TROUBLESHOOTING

## Problem

"When I try to import a photo, nothing happens. What's the deal?"

## Possible Solution

You may not have the graphic translators installed or they have been moved to a different location. Open your System Folder and look in the Claris folder. Is the Claris XTND System installed and is there a folder named Claris Translators? If not, you should reinstall them by doing a custom install from your original FileMaker Installation CD or floppy disks. *Note: Reunion Planner v3.2.1 or greater has built-in detection for missing translators.*

## Problem

"When I click on the E-Mail or Web Icon, nothing happens. Why?"

## Possible Solution (Macintosh)

In order to work, both actions require an Internet connection and a freeware utility called Internet Config, version 1.1 or higher. Internet Config is bundled with many systems so you may already have it installed on your machine. You must have Claris EMailer, Qualcomm Eudora Light, or Eudora Pro installed, and you need to specify, in Internet Config under Helpers, one of these applications for the 'mailto' command. You should also select your default browser, which allows you to automatically launch your browser and open a URL when the icon is clicked.

## Possible Solution (Windows)

*To send mail, you must have:*

- 1) A [Mail] section in your Win.ini file. If you have Windows for Workgroups, you must have the entry MAPI=I in the [Mail] section.
- 2) Microsoft Exchange or another email applications that is MAPI compliant installed and configured properly.

*To automatically launch your default browser and open a URL:*

Your default browser is determined by which browser application is associated with Internet Document (HTML) files. To determine which program Internet Document files are associated with in *Windows 95 or NT*, follow these steps:

- 1) On the desktop, double-click My Computer.
- 2) On the View menu, click Options, and then click the File Types tab.
- 3) In the Registered File Types box, click Internet Document (HTML). The program listed on the Opens With line in the File Type Details area is the program that Internet Document files are currently associated with.

## Problem

"This file is damaged and needs to be recovered!" message when trying to open your file.

## Possible Solution

Power failures, hardware problems, or other factors can damage your file. The best protection is a good backup schedule. However, as a last resort, you may need to recover a file that has become corrupted.

To recover a file on a Macintosh, double-click the Reunion Planner application and press **Option+Command** keys while the file is opening.

On Windows, launch the Reunion Planner application and hold down the **Ctrl+Shift** keys while the file is opening.

Hold down the keys until you see the Recover File dialog box. Locate the damaged file, and perform the recovery.

In the recovery process, the application does the following:

- creates a new file
- renames the damaged file. It adds 'OLD' to the end of the filename. For example, REUNION.FP3 on the Macintosh is renamed REUNION.FP3 Old and REUNION.FP3 on Windows is renamed REUNION\_Old.FP3
- gives the repaired file the original name

You should then:

- open the recovered file
- save a compressed copy from the Backup button in the Import/Export layout
- rename the compressed file the same name as the original filename.

Be aware that this is an emergency measure and complete recovery is NOT guaranteed.

**REPEAT!!!**

**BACKUP YOUR REUNION PLANNER FOLDER FREQUENTLY!**

# VERSION HISTORY

## **Version 4.1.6**

Released May 26th, 1999

- Added the capability to handle multiple day reunion event
- Improved Maiden Name options to include hyphenated names
- Fixed problem with .PDF User Guide

## **Version 4.1.5**

Released May 16th, 1999

- Fixed a printing problem with 5160 labels
- Added an option for choosing how you want to display and print Maiden Names
- New Reverse Sort Option by using the SHIFT key
- Added new buttons for easier navigation

## **Version 4.1.3**

Released May 1st, 1999

- General maintenance release with minor script handling improvements

## **Version 4.1.2**

Released April 1st, 1999

- Added an export/import tool for future version upgrades
- Improved launch Help System (PDF) Requires Adobe Acrobat 3.01

## **Version 4.1.1**

Released March 18th, 1999

- Fixed alphabetic sort in booklets and address books
- Added Country field for registering

## **Version 4.1**

Released March 1999

- New click to send email feature
- New Web locator and Web Resources file for favorite web sites

## **Version 3.5.3**

Released January 1999

- Fixed problem printing booklets and address books
- Fixed problem with printing letters

## **Version 3.5**

Released November 1998

- Improved Windows '95 layout design
- Save unlimited Follow Up letters for importing
- Added support for 17" monitors (600x800)
- Added support for European A4 letter and DL envelopes
- Added Default Printer Settings with Display Options
- Added Preference Setting for default opening layout
- Added List View Highlight Options
- New Questionnaire Form
- New return address options
- New automatic phone formatting options

## **Version 3.2.2**

Released October 1998

- Added new options for printed name badges

### **Version 3.2.1**

Released September 1998

- Major design revamp for System 8!
- Newly revised scripts
- Avery Labels improved with graphic icons
- New Booklet Print Options with selectable fields
- New Preferences layout and default settings
- Improved Main List with status line and alphabet search
- Improved Import/Export features
- Ability to print notes

### **Version 2.5**

Released September 1997

- New Home Page main layout!
- Separate layouts for Committee & Event Information
- New fields for banking account information
- Improved scripts and directory layout
- Backup file added to import/export layout

### **Version 2.0**

Released July 1997

- New Runtime version! (FileMaker Pro not required)
- Totally redesigned interface with new layouts and buttons
- Multiple export and import options including Email
- New password entry for registration
- New layout exclusively for personal notes
- Added new buttons to main list view

### **Version 1.3**

Released May 1997

- Added phone number entry validation with auto primary phone selection
- Added vendor name and phone number with dialing feature in budget layout
- Fixed bug in phone list defaulting to "Name Sort" before printing
- Added new "Zip Code" sort script (as requested)
- Modified Print List Layout to include sort options

### **Version 1.1**

Released March 1997

- Added field for business phone and ability to select a primary phone number
- Added follow up letter field
- Added scripts for marking and un-marking selected records
- New phone list print layout with primary phone number
- Improved overall interface and design

### **Version 1.0**

Initial release June 1996

Revised  
May 24, 1999

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