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USING ENVOY

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InfoCentral™
Personal Information Manager v.1.1

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Getting Started

.....

Welcome

Welcome to InfoCentral— a revolutionary tool for organizing all your information. Simple and easy to use, InfoCentral lets you access important information quickly.

InfoCentral is available as a stand alone product or as a component of PerfectOffice™, a suite of Business applications.

Installing InfoCentral

To install PerfectOffice™, see the installation instructions in the *Up and Running Guide*.

Recommended System Requirements

To use WordPerfect InfoCentral, you should have the following:

- IBM or IBM compatible personal computer with at least a 386 processor and 4M RAM
- Hard disk with 5-11M free disk space
- Windows 3.1 running in enhanced mode
- VGA graphics adapter and monitor
- A mouse that works in Windows

Questions and Answers about Installing

Which installation option should I choose?

The Standard installation is the recommended installation type for most users installing InfoCentral for the first time. The following table will help you decide which installation option to choose:

| Installation Type | Use |
|--------------------------|--|
| Standard | To install InfoCentral for the first time. |
| Custom | To customize your installation by installing only part of the program or sets of files to directories you specify. |
| Update | To update to a new version of InfoCentral. |

I accidentally deleted some InfoCentral files. Can I reinstall only part of InfoCentral?

Yes. Start the InfoCentral installation program, choose **Custom**, choose **Files**, then select those files you want to reinstall.

Installing InfoCentral

Because the InfoCentral files are compressed, you must use the InfoCentral Installation program to place the files on your hard disk.

To install InfoCentral on your hard disk,

- 1 Start Windows if you have not already done so.
- 2 Insert the **Program 1** disk into drive A (or drive B).
- 3 Choose **Run** from the **File** menu in the Windows Program Manager.
- 4 Type **a:\install** (or **b:\install** if you are installing from the b: drive), then choose **OK**.
- 5 Choose an installation type. Follow the on-screen prompts to complete the installation process.
- 6 Type your name, your organization, your title, license #, iBase, country code, and area code when prompted.

HINT: The iBase (information base) that the installation program creates for you is named **Personal**. You may change the name if you want.

- 7 Set up a Program Manager group by selecting the Program Group in which you want the InfoCentral icon to appear, then choose **OK**.
- 8 If you are new to InfoCentral, we strongly recommend that you spend a few minutes watching the quick tour that begins when installation is complete.
- 9 When you exit the quick tour, InfoCentral starts and displays the Quick Start coach. This coach can help you get started quickly by adding yourself to your iBase.

When you've finished installing, put the original disks in a safe place. Avoid exposing them to sunlight, dust, and magnetic fields (even televisions, telephones, and stereo speakers contain magnets).

Things You Need to Know

What Is Included?

The stand alone version of InfoCentral includes four iBases already filled with content, and a number of iBase templates to give you a head start. Use the templates to track your own information or to get ideas about how you can use InfoCentral.

The PerfectOffice™ version of InfoCentral includes one pre-filled content iBase (TravelCentral™), and a few templates.

The four pre-filled content iBases included with InfoCentral are:

- ComputerCentral™ (computer.ica) Information on hundreds of companies and people in the computer industry.
- ConsumerCentral™ (consumer.ica) Consumer service telephone numbers for hundreds of companies.
- TravelCentral™ (travel.ica) Business travel information on hotels, airlines, convention centers, restaurants, and more for cities around the world.
- WineCentral™ (wines.ica) Information on fine wines of the world, including regions, price ranges, classifications, and festivals.

You can add to and change any of the information in these iBases. See *Using the Pre-Filled Content iBases* later in this guide for information on how to open them.

The templates are iBases that have object categories and connection descriptions already set up, and include a few sample objects. You can use them as a starting point for tracking your own information. See *Using the Templates* later in this guide for information on how to open them.

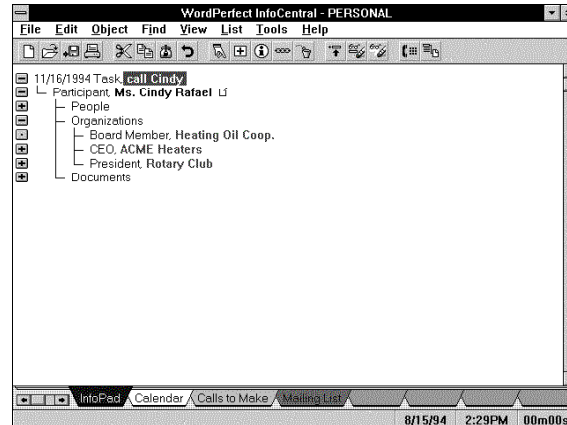
About InfoCentral

InfoCentral is a personal information manager (PIM), plus a lot more. Intelligent connections between people, places, and things make it easy to find any information. Randomly scattered data becomes organized and accessible. Your world of information will never be the same.

Once all your information is entered, you have to remember only one detail about anything, and you can find it. Once you've found it, all the other information that it is connected to it is immediately visible.

For example, you may remember that a potential client called you last Tuesday, but you can't remember his name. Because you logged the call in InfoCentral when it happened, you have only to look at the calls for last Tuesday.

The phone call is in your information base (iBase) as an event. Connected to that event is the client's name, the company he works for, telephone numbers, addresses, and the notes you took while talking to him.

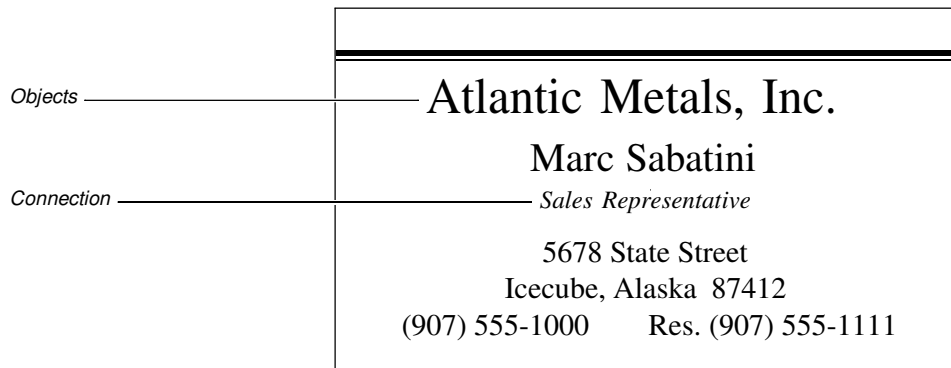


How it Works

Information in InfoCentral is organized in discrete pieces called *objects*, which are then connected to show relationships. Objects can be people, organizations, locations, cars, software titles, letters, spreadsheets, photographs, lunch dates, meetings— anything that has a name.

Connections between objects (people, organizations, events, and so forth) describe their roles and relationships.

For example, Marc Sabatini is a Sales Representative for Atlantic Metals, Inc. His business card looks like this:



The two objects on this card are:

- Marc Sabatini, a person
- Atlantic Metals, Inc., a company

When you add an object, like a person, to an iBase, you can connect that person to other objects in that iBase, like a company. Connections describe relationships between objects.

For example, the connection between Atlantic Metals, Inc. and Marc Sabatini describes him as a **Sales Representative**.

Taking a Quick Tour of InfoCentral

We strongly recommend that you take a few minutes after installing InfoCentral and watch the quick tour. The quick tour is a learning tool that will help you become more familiar with InfoCentral.

To see any part of the quick tour from InfoCentral,

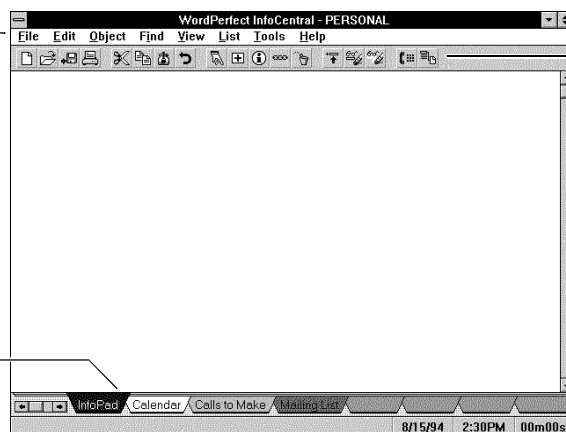
- 1 Choose **Quick Tour** from the **Help** menu, then choose the topic you want to view.

You can also view a segment of the quick tour by choosing **Watch quick tour of...** from a Help topic. See *Using Online Help* later in this guide for more information.

Starting InfoCentral

- 1 If you have not done so, turn on your computer and start Windows.
- 2 Double-click the InfoCentral program icon in the InfoCentral program group to start InfoCentral.

You can perform most InfoCentral tasks using the items in the Menu bar.



The Toolbar gives you quick access to commonly used features.

Tabs let you save views of similar types of information.

Adding Yourself to the iBase

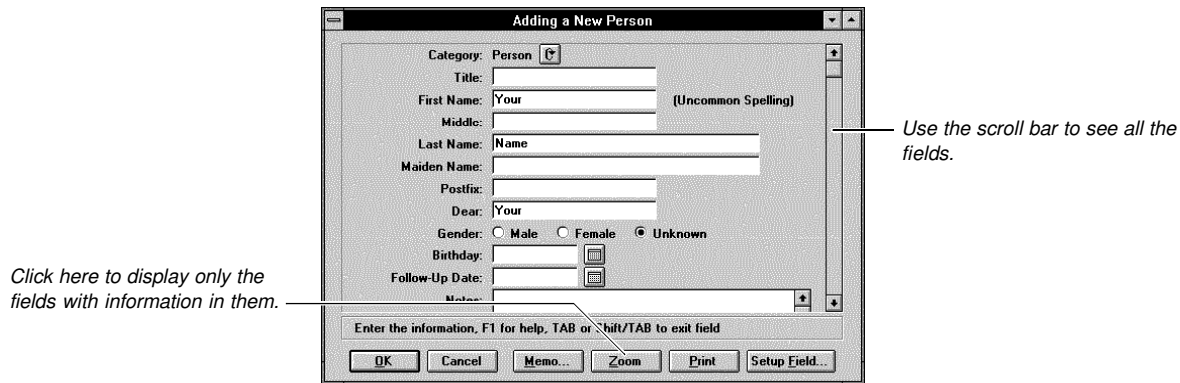
To become familiar with InfoCentral, add yourself to your iBase.

- 1 Click **Add** on the Toolbar.
- 2 Choose the category **Person**, then choose **OK**.
- 3 Type your name, then choose **OK**.

or

If you have already added yourself using the InfoCentral Quick Start coach, type another person's name, then choose **OK**.

- 4 Complete the **Adding a New Person** dialog box, inserting information as shown below.



HINT: Choose **Zoom** to display only the fields with information in them. This makes the information dialog box easier to read. You can restore the blank fields to view by choosing **Unzoom**.

- 5 Choose **OK**.

- 6 Choose **No**.

BASICS: Each piece of information is an *object*. You add people, organizations, places, things, events, and tasks to your information base (iBase) as single information objects. An object is anything with a name. A person is an object. A company is an object. A meeting is an object.

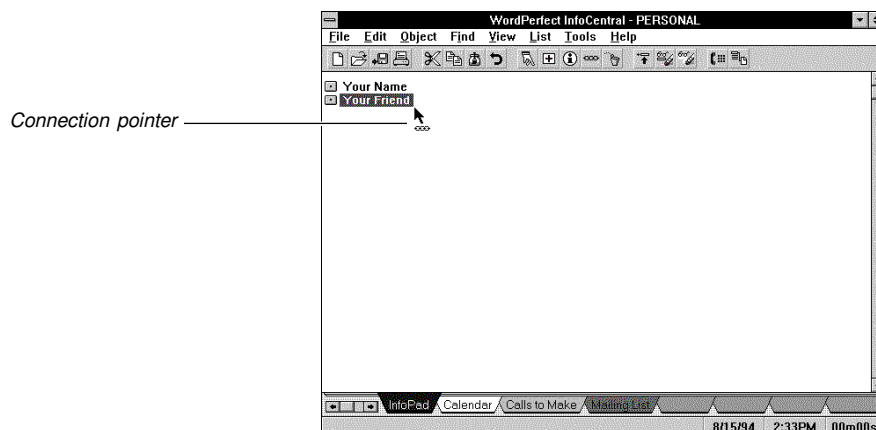
Objects fall naturally into different categories. Person objects are different from organization or event objects.

- 7 Practice: Follow the steps above to add one of your friends.

Making Connections

You make connections between objects that relate to one another. For example, a job title can be a connection between a person and a company. A family relationship can be a connection between two people.

- 1 Select your name.
- 2 Click **Connect** on the Toolbar. The insertion point changes to the Connection pointer.



- 3 Double-click the other person you just added.

- 4 Select the **Friend/Friend** relationship (or any appropriate relationship), then choose **OK**.
- 5 Complete the **Connection Information** dialog box, then choose **OK**.

BASICS: In InfoCentral, you store information on connections as well as on objects. You should carefully distinguish which information goes where. For example, a home telephone number is stored with a person *object*. A person's office telephone number is stored with the job title *connection* between that person and the employing company. The company's main telephone number is stored with the company *object*.

Making Connections While You Add

To add something and make a connection in a single process,

- 1 Click **Add** on the Toolbar.
- 2 Add something as described in *Adding Yourself to the iBase*, steps 1-5 above. This time, add an event or activity that is related to your company, such as a presentation or company picnic.
- 3 Choose **Yes** when asked if you want to connect this event to anything else.
- 4 Double-click your company name to connect it to the event.
- 5 Select the appropriate connection, then choose **OK**.
- 6 Complete the **Connection Information** dialog box, then choose **OK**.
- 7 Choose **No** to indicate that you do not want to connect the event to any other person, organization, or thing.

Seeing Every Connection

InfoCentral displays information in outline format, from the "point of view" of one object that you specify. That object is displayed at the top, and all the connected information is shown beneath it. Connected information need not be displayed on the screen. Objects with undisplayed connections have a plus (+) button next to them. A minus (-) button means all immediate connections are displayed, and a dot (•) button means the object has no connections beneath it.

When you want to see all the connections to just one object, click **Hoist** on the Tollbar. Hoist moves the selected object to the top of the screen and displays all information in the iBase that is connected to the object. All other information is removed from view.

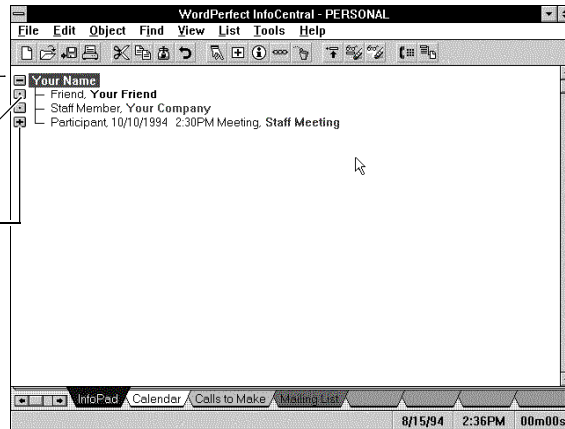
- 1 Select an object.
- 2 Click **Hoist** on the Toolbar.

HINT: If you want to return to the view before you used **Hoist**, click **Undo** on the Toolbar.

A - indicates that every connected object is visible. Click to hide the objects.

A • indicates that there are no other objects connected to this object.

A + indicates that there are unseen objects connected to this object. Click to view the objects.



Finding Things

To locate anything in your iBase,

- 1 Click **FastFind** on the Toolbar.
- 2 Type the name or the first few letters of the name of whatever you want to find.
- 3 Choose a search type (Find All, Find People, Organizations, Places/Things, or Find Events).

The search might find several objects that match the initials or other text that you typed. The object you are looking for should be among them.

Exiting InfoCentral

To exit InfoCentral,

- 1 Choose **Exit** from the **File** menu.

Getting Help

When you need information, online Help is your best solution. It's convenient, sensibly organized, and easy to use. Help is structured in a way that makes finding the information you need quick and enjoyable.

Using Online Help

Help appears in a separate window on your screen. For quick access, you can keep the Help window displayed on top of the application you're working in. Help is also context sensitive, which means that you can access Help wherever you are in the program, including menus and dialog boxes.

To use context-sensitive Help,

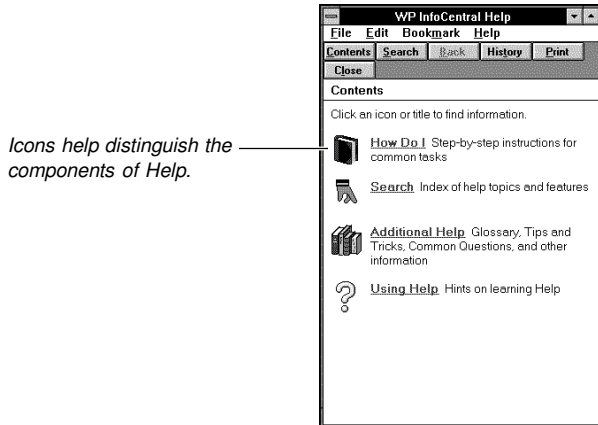
- 1 Press **F1**.
- 2 Place the pointer on the item you want information about, then click.

Contents

Use Contents to access the main components of Help. You can think of it as the *table of contents* of Help.

To access a Help component,

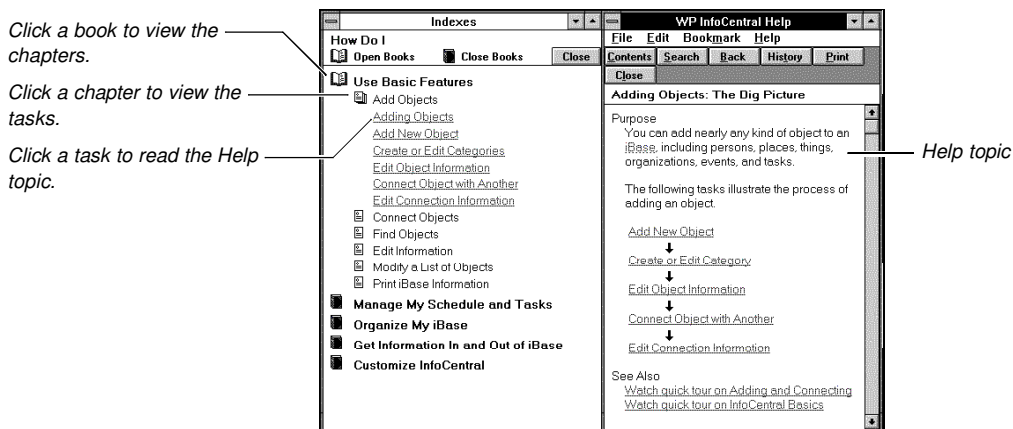
- 1 Choose **Contents** from the **Help** menu.



- 2 Click a Help icon.

How Do I

When you need information about performing a specific task, use How Do I. The information in How Do I is organized into books, chapters, and pages and displayed in an expandable outline.



To find steps for performing a specific task, start at the book level. Each book listed in How Do I represents a category of tasks.

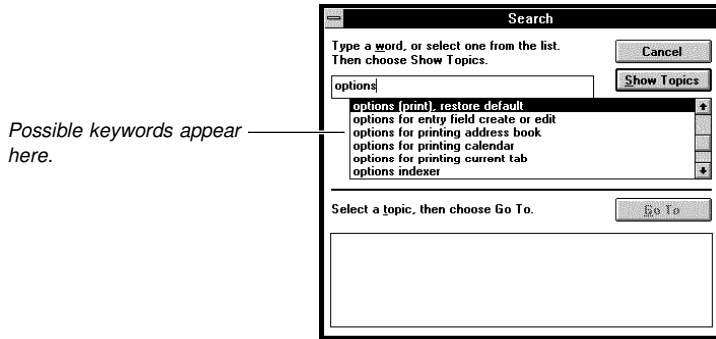
- 1 Click a book to open it.
Chapters contain specific tasks, or pages. (Some books contain only pages.)
- 2 Click a chapter to see the list of pages.
The pages represent individual Help topics.
- 3 Click a page to see the corresponding Help topic.

Clicking an open book or chapter closes it. Clicking Open Books at the top of the How Do I window displays all levels of How Do I (books, chapters, pages). Clicking Close Books closes all books, leaving only book titles displayed.

Search for Help on

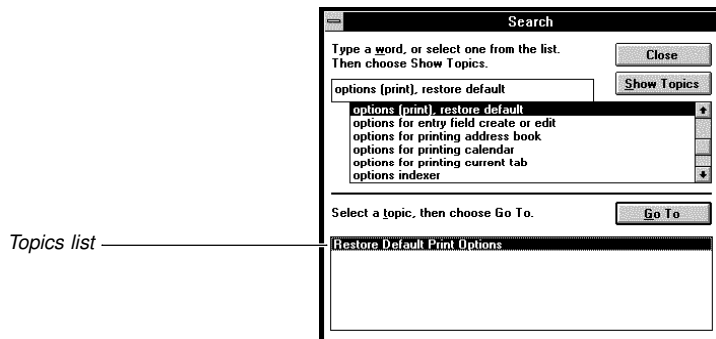
Use Search for Help on to find information by typing in a feature name, a keyword, a synonym, or a phrase.

- 1 Type a keyword or phrase for the subject that interests you.



- 2 Select a keyword from the keywords list, then choose **Show Topics**.

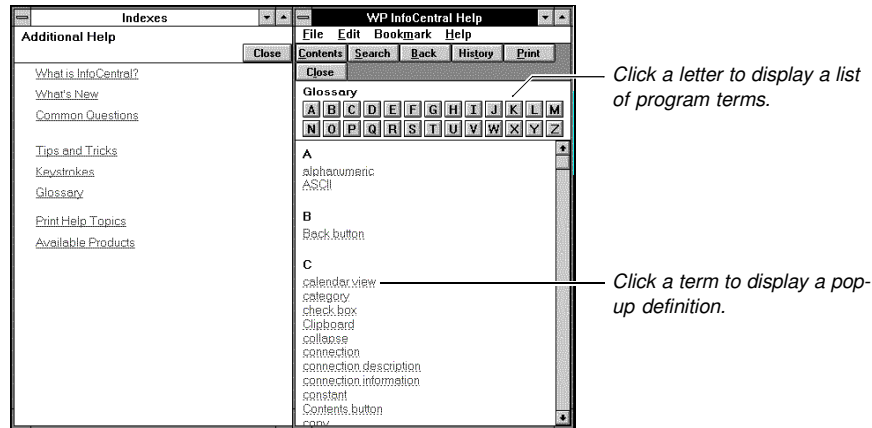
A list of related Help topics appears in the lower part of the dialog box.



- 3 Select a topic from the topics list, then choose **Go To**.

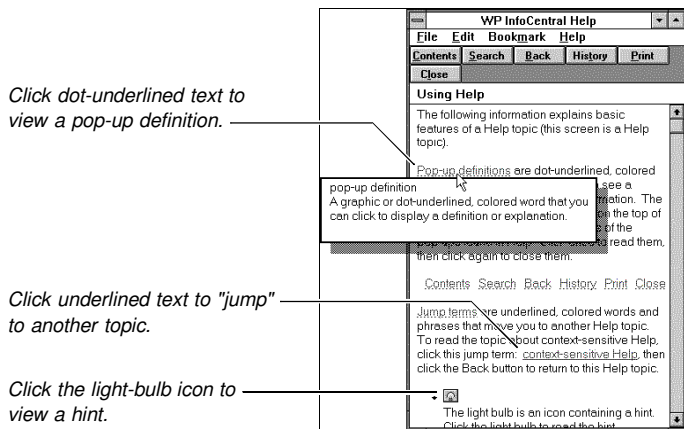
Additional Help

Additional Help contains supplementary information such as Tips and Tricks, Customer Support, Glossary, Keystrokes, Common Questions, What's New, Available Products, and other useful information.



Using Help

This section describes the elements of a Help topic (jump terms, pop-up definitions, icons), and shows you how to use them.



Coaches

Use Coaches to learn how to perform specific tasks. The Coach guides you through a task one step at a time.

- 1 Choose **Coaches** from the **Help** menu.
- 2 Select a Coach, then choose **OK**.
- 3 Follow the on-screen prompts to complete the task.

Common Help Tasks

The following table describes actions you can perform when using Help.

To do this when Help is open:

View a pop-up explanation

Do this:

Click a dot-underlined word or phrase. You may also be able to click graphics and view a pop-up explanation.

To do this when Help is open:

Jump to another topic

View a hint

Keep Help on top while you work in a document

Return to the topic you viewed last

Choose from a list of recently viewed topics

Print the current Help topic

Copy the current Help topic to the Clipboard

Add a note to the current Help topic

Read a note that has been added to a topic

Delete a note that has been added to a topic

Add a bookmark to the current Help topic

Move to a bookmark that has been added to a topic

Delete a bookmark that has been added to a topic

Do this:

Click an underlined word or phrase.

Click the hint (light bulb) icon.

Choose **Always on Top** from the **Help** menu in the Help window.

Click the **Back** button.

Click the **History** button.

Click the **Print** button.

Choose **Copy** from the **Edit** menu in the Help window.

Choose **Annotate** from the **Edit** menu in the Help window, type your note, then choose **Save**.

Click the paper clip icon above the purpose statement.

Click the paper clip icon above the purpose statement, then choose **Delete**.

Choose **Define** from the **Bookmark** menu, type a name for the bookmark, then choose **OK**.

Choose the bookmark name from the **Bookmark** menu in the Help window.

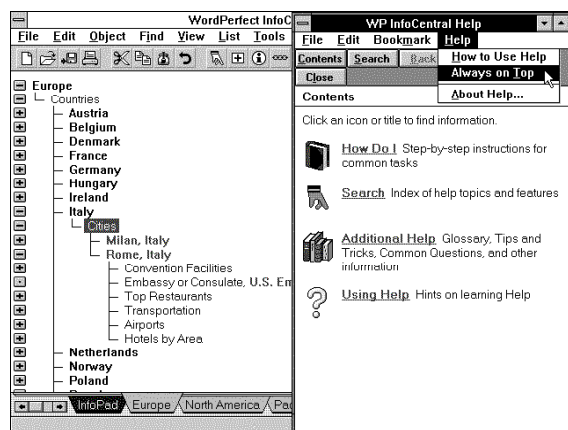
Choose **Define** from the **Bookmark** menu, select the bookmark name in the list box, then choose **Delete**.

Displaying Help Always on Top

For quick access, you can keep the Help window open on top of the application you're working in until you exit.

- 1 Choose **Always on Top** from the **Help** menu in the Help window.

When you click the document window, the document becomes active, but the Help window remains on top.



HINT: You can size and drag the Help window to see the area of the document you are working on.

Printing Help Topics

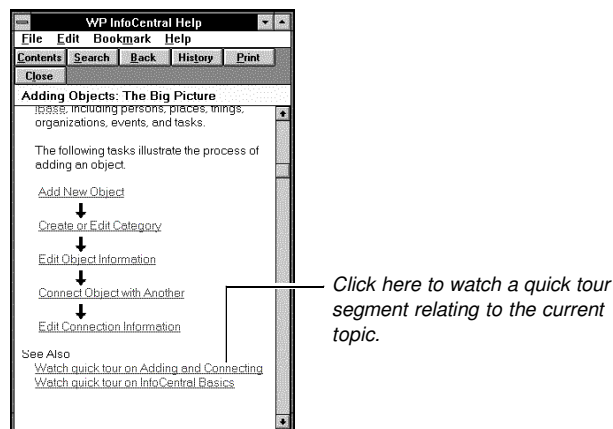
- 1 Choose **Print Topic** from the **File** menu in the Help window.
or
Click the **Print** button in the Help window.

Using Quick Tour

If you need basic information about InfoCentral, you can access a quick tour segment from the **Help** menu and from many Help topics. The quick tour includes the following InfoCentral basics: fundamentals, adding and connecting, finding, using the calendar, connecting information to your files, organizing, using the pre-filled content iBases, and using Help.

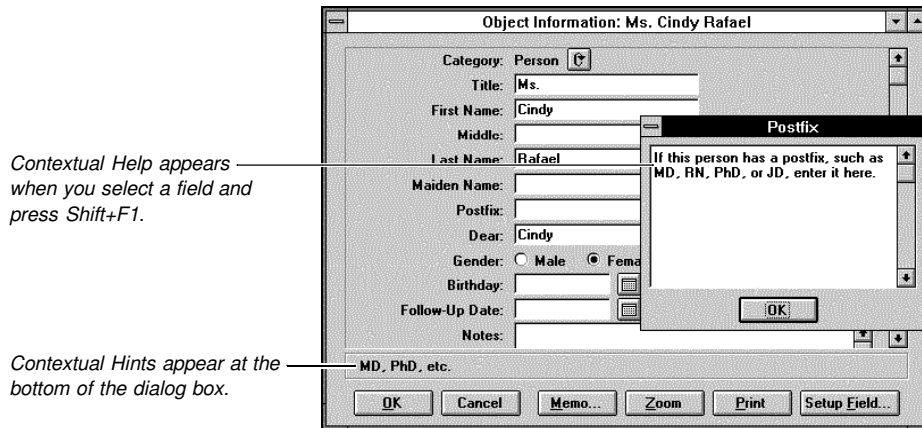
- 1 Choose **Quick Tour** from the **Help** menu, then choose the quick tour segment you want.
or
Click a quick tour topic from a Help topic, such as **Watch quick tour of Adding and Connecting**.

You can access quick tour segments from the Help menu, or directly from Help topics.



Writing Your Own Help

When your insertion point is in various fields in dialog boxes, you can see hints at the bottom that tell you what to enter into the field. Also, you can press Shift+F1 to get additional help about the field the insertion point is in. You can use Contextual Help and Hint to write your own Help about fields you set up in dialog boxes.



To write your own help,

- 1 Right-click an object, then choose **Information**.
- 2 Tab to a field in the **Object Information** dialog box.
- 3 Choose **Setup Field**.
- 4 Choose **Field Properties**, then choose **OK**.
- 5 Type a brief description or hint for the current field in the **Contextual Hint** text box.
- 6 Type more extensive helps and hints in the **Contextual Help** text box.
- 7 Choose **OK**.

Contact Management with InfoCentral

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