CONSULTANT REFERENCE MANUAL

CONSULTANT™

MINICONSULTANT™

ACTIVITY EXTENSION

CONTACT EXTENSION

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Chapter 1: Introduction

Chapter 2: Install Consultant

Chapter 3: Get Started

Chapter 4: 25 Step Tutorial

Chapter 5: The Button Bar

Chapter 6: Online Help

Chapter 1

Introduction

The purpose of this chapter is to introduce you to *Consultant*. Since Consultant is a full-feature time and contact manager, it has many features that you can utilize for your personal information management needs. This chapter will introduce those features and give you a basic understanding of how Consultant works. This chapter will not attempt to teach you the details of how to use Consultant nor how to install Consultant. For information on these topics see the Table of Contents.

Topics Covered

- **About Chronos L.C.**. Introduces you to Chronos L.C., the producer of Consultant.
- **Customer Support And Registration**. Describes how to receive answers to your questions and problems.
- **Welcome**. Welcomes you to Consultant and gives an overview of how Consultant can help you.
- **Product Features**. Lists product features so you know in advance what Consultant can do.
- **How To Use This Manual**. Describes the layout of this manual and how to use it for maximum effectiveness.
- **Fundamentals**. Teaches fundamental concepts upon which Consultant is based. It is highly recommended that you read this section regardless of your skill level.

About Chronos L.C.

The name Chronos comes from the Greek word *khronos* which means time. As this name implies, Chronos is a premier provider of software-based time management solutions. Chronos believes the information flow of the twenty-first century will require faster and more elegant ways to deal with time-based components. Furthermore, Chronos believes that the scope of time management covers a broad class of components, not limited to the calendar itself. For example, most appointments are comprised of several elements such as a time, a date, a place and the people involved. Thus it only makes sense that a time manager should incorporate people with its calendar features. In an effort to provide such a time management solution, Chronos is very pleased to present to you *Consultant*, which elegantly combines time management with contact administration. Chronos sincerely hopes you enjoy this product and welcomes your comments.

Customer Support And Registration

Chronos offers several types of support for Consultant should you need it. If you find that you have a question or problem with Consultant, please use the support services in the sequence listed below. Chronos has invested significant time and effort in its on-line help facilities and user manuals so direct support is minimized. This creates a win-win situation for both you and us. You win because you can get answers in the quickest way possible. We win because we need less support resources and can thus offer Consultant to you at a lower price. You will find that our support is comprehensive and prompt.

- **On-line Help**. There are three different help facilities built into Consultant. The purpose of these help facilities is to provide immediate answers to your questions without having to refer to a user manual or contact Chronos. For more information on online help see Chapter 6 *Online Help* on page 39.

- **User Manuals**. If you can't find your answer using the online help facilities, then refer to either this User Manual or the Consultant Reference Manual. These manuals describe how to use every feature in Consultant, MiniConsultant, and the Activity/Contact extensions.
- **Website**. The Chronos website contains answers to many questions/problems. You should visit the Support page at *www.chronosnet.com/support.html* for answers to common questions and to find out information on late breaking issues. You can also visit the Download page to make sure you have the latest version of Consultant and the Consultant Reference Manual. The Download page is at *www.chronosnet.com/download.html*.
- **E-mail**. If you aren't able to answer your question or problem via online help, the user manuals, or the website please e-mail chronos at *support@chronosnet.com*. E-mail support should be used primarily in situations when you believe that the software is not working properly. These e-mails are answered directly by the programmers of Consultant so you get professional and accurate answers. We therefore ask that you use their time wisely so they can continue to improve the product. Chronos welcomes product suggestions which can be sent to the same address above. Product suggestions are filtered and added to a feature wish list which Chronos constantly uses to improve the product. We really do listen and incorporate your ideas. Thanks.

Welcome

Welcome to *Consultant*! Chronos is pleased to present this product to you and hope that you enjoy it. Consultant is nothing less than your own personal adviser or consultant. You can treat it as if it were a personal consultant always at your side. Communication with Consultant is easy – all you have to know is English. Type "Meet Mary Johnson tomorrow from 9 - 1" and Consultant will update your schedule with an appointment tomorrow from 9 a.m. to 1 p.m. Your personal consultant is even smart enough to lookup Mary Johnson's information in its address book and link this information to the appointment for easy access. You can also schedule activities and manage contacts in the traditional manner by using Consultant's graphical drag and drop interface.

Besides the ability to inform Consultant of meetings and contacts, you can just as easily request information from Consultant and view it in a myriad of different and customizable formats. Choose from Day, Multiday, Week, Month, Year, Gantt, List, Contact List and Contact Card Views. Consultant provides Categories and filters called *Sets* so you only see the information you want.

Consultant will soon become your much valued friend. Let it remind you of appointments, automatically forward your To-Dos, assign tasks, leave messages, handle your mailing lists, automatically enter data into fields when it thinks it knows what you want, keep detailed notes on contacts, design projects and print planner pages. Consultant does all this and more…

Product Features

Consultant provides you with a rich set of features to assist you in your information management needs. Many of these features will be readily apparent as you begin to work with the program. Others will remain beneath the program's surface and will only manifest themselves when a particulars situation warrants it. The concealment of certain features gives Consultant its clutter-free interface which makes the program easy to use and enjoyable. It also creates an atmosphere in which you won't be bothered by unnecessary details.

This section lists Consultant's various features. Features are divided into Activity Scheduling, Contact Management, General, Interface, Text Processing, Printing, Database and Multi-User categories.

Activity Scheduling

- Smart-Translation of English phrases

- View activities from Day, Multiday, Week, Month, Year, Gantt, List, Contact List and Contact Card Views
- Use the mouse to schedule and resize any activity – even repeating and multiday activities
- Appointment, To-Do, Goal, Event and Banner type activities are supported
- Any number of simultaneous activities allowed
- Conflict checking
- Link activities to other activities and contacts
- View Goal statistics
- Build projects with the Gantt View
- Prioritize activities
- Audible and visual alarms

Contact Management

- Store 37 fields of information for each contact
- 8 customizable phone fields per contact
- 8 custom fields per contact
- Automatically dial phone numbers via modem
- Automatic phone number formatting
- Automatically dial special prefixes/suffixes given an area, exchange or country code
- Simplified dialing with long distance services and calling cards
- Integration with your e-mail client and web browser
- Link contacts to other contacts or activities
- SmartType automatically fills in fields as you type
- Sort on up to four fields at once in ascending and/or descending order
- Use any field to define complex boolean search Criteria

General

- Group activities and contacts in user-defined Categories
- Add an unlimited number of pages of notes to any activity or contact
- Link documents created by other applications to any activity or contact
- Use built-in chronograph for customer billing
- Drag and drop activities and contacts between Views
- Keep a daily journal

Interface

- Customizable Button Bar provides quick access to program functions
- Translate dialog box interprets any English phrase and schedules activities for you
- Launch other applications from the Button Bar
- Use the integrated Phone Message Pad to take phone messages
- Open multiple Views simultaneously
- Resize any View

Text Processing

- Built-in text processor which is tightly integrated with time and contact management features
- Open standard TEXT files
- Supports multiple fonts, font styles, font sizes
- Supports customized page sizes
- Supports colored text
- Supports different text alignments including left, center, right, justified, and various forms of indentation and bulleted lists
- Supports several types of line spacing
- Supports imbedded graphics and sounds

- Supports Internet integration including e-mail address and web address hot links
- Supports Templates whereby Consultant can generate mail-merges, custom reports, fax covers, address books, envelopes, labels, etc.
- Supports file sizes larger than 32k

Printing

- Print any calendar View in popular appointment book and desktop formats and sizes
- Print envelopes, labels, address books, schedules, reports, letters, fax covers, and basically anything using Templates and the built-in text processor

Database

- Save up to 2 billion activities and contacts per database
- Database size is not limited by memory
- Quick database access and retrieval
- User controllable database cache

Multi-User

- Use a single file, accessible by all, to store everyone’s information
- Schedule group activities and meetings
- Maintain company-wide contact lists and calendars

How To Use This Manual

This manual has been specially designed to meet the needs of both novice and advanced computer users. The manual's layout is such that you can selectively choose the level of detail which suits you best.

The manual is divided into two parts.

- **An Overview.** The first four chapters of this manual contain information to help all users quickly get started with Consultant and understand fundamental concepts unique to the program. Reader's of all computer experience levels should read the chapters in this part.
- **Reference Manual.** The remaining chapters contain detailed information for all program features. Novice users should read this part to gain familiarity with the software and how it works. Advanced users will most likely figure out most of the information in this part on their own and will probably prefer to use this part on a reference basis as questions arise.

So You Don't Read Manuals

If you don't typically read software manuals, but you have made it this far, a couple of recommendations follow. First, please at least read the next section which cover program fundamentals. This section provides the underlying concepts upon which Consultant is based. An understanding of these concepts will be of great importance to novice and advanced users alike. To jump to this section see *Fundamentals* in Chapter *Introduction* on page 4. Second, thumb through the manual to acquaint yourself with its contents in case you need to refer back to it. Much effort went into Consultant's intuitive interface, so Chronos actually hopes that, beyond an understanding of the fundamental program concepts, you don't use the manual for much more than an occasional reference guide.

Fundamentals

Consultant's design is based on the simple premise that activities often deal with people and hence any sort of time management ought to naturally include contact management. Such is the approach Consultant takes: activities and contacts are tightly integrated together in a single application. In fact, Consultant even saves activities and contacts in the same file.

Since activities and contacts are the two constituent elements on which Consultant is based, this section starts out with description of each. This section will then discuss how Consultant allows you to link any number of contacts together and add notes to any activity or contact. Finally, this section covers some fundamental or basic concepts upon which Consultant functions. An understanding of these basic concepts is essential for both novice and advanced computer users.

Activities

An activity is any event that you can place on a calendar, regardless of whether it occurs at a specific time or not. Every activity is comprised of a few basic fields like a title, date, time, etc. Consultant recognizes a variety of different activities types; each type defined by the fields it contains. Furthermore, activities can span ranges of days that may or may not be consecutive. Such activities are often called repeating activities.

Activity Fields

There are two required fields that each activity must have.

- **Title.** Each activity must have a title to describe it.
- **Date.** Each activity must have a date, a range of dates or a set of nonconsecutive dates. A set of nonconsecutive dates is, for example, “every third Thursday.”

There are several optional fields that an activity may or may not have.

- **Time Range.** If an activity occurs at a specific time, you may optionally have a time range associated with it like 1:30 p.m. to 3:30 p.m.
- **To-Do Indicator.** If an activity is a task to complete, you may optionally designate it as a To-Do.
- **Alarm.** An activity may optionally have an alarm associated with it that you can set to go off at a predetermined time before or after the activity begins.
- **Banner.** You may optionally designate any activity to appear as a Banner in the Month View. Banners can only span consecutive days.
- **Notes.** An activity may have an unlimited amount of notes.
- **Links.** An activity may have links to other activities, contacts and documents created by other applications.

Consultant supports a wide variety of activity types that are divided into several types: Appointments, Events, Banners and To-Dos. Consultant associates a universal icon with each activity type to help you quickly distinguish between them.

Appointment Activity Type

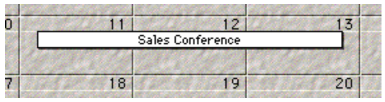
Appointment. Any activity with a specified time range.

Event Activity Type

Event. Any activity which does not have a specified time range and which has not been designated as a To-Do.

Banner Activity Type

Banner Activity. Any activity which spans one or more consecutive days. A Banner Activity only appears as a Banner when displayed in the Month View. It appears as a normal activity in other Views.



To-Do Activity Type

To-Do Activity. Any activity which does not have a specified time range and which has been designated as a To-Do. You may mark a To-Do as Completed, Forwarded, Underway, Deleted, Assigned, Assigned/Done or Not Completed. When so marked, the To-Do will have a special icon associated with it to indicate its status.

TABLE 1. To-Do Marks

Icon	Meaning
	**Completed**. You have started and completed the To-Do or task.
	**Forwarded**. You wish to forward the To-Do or task to the following day.
	**Underway**. You have started the To-Do or task, but have not yet finished it.
	**Deleted**. The To-Do or task has been cancelled. Rather than deleted the task from your schedule use this mark to keep a record of it.
	**Assigned**. You have assigned the To-Do or task to someone, but have not received notice that the task is complete.
	**Assigned/Done**. You have assigned the To-Do or task to someone, and they have completed it.
	**Not Completed**. You have not completed the To-Do or task.

Goal Activity. You may further define any activity which does not have a specified time range and which is designated as a To-Do to have certain Goal like characteristics. A Goal Activity is essentially a To-Do. Rather than mark a Goal as Completed, Forwarded, etc., you mark a Goal with a numeric value. Assume for example that you created a To-Do entitled, “Exercise 30 minutes.” Rather than mark it as Completed, you can type “25” to indicate that you exercised 25 minutes. Since both To-Dos and Goals may span more than one day, you can create a Goal to track your progress in a certain area over a period of time. Consultant offers a feature called To-Do Statistics to graphically view your progress or results. For more information see *To-Do And Goal Statistics* in Chapter *Calendar Management* on page 98.

Single Day, Multiday and Repeating Activities

When you create an activity in Consultant, you must specify if the activity occurs on a single day, spans consecutive days, or repeats. The terms *repeating activity* and *multiday activity* have different meanings for different people. Most will agree that a repeating activity denotes an event that repeats or recurs over a period of time. A prime example of a repeating activity is a church service that recurs every Sunday at 10:00 a.m. A multiday activity, on the other hand, commonly represents an activity that lasts or spans more than one day. A prime example of a multiday activity is an eight day vacation to the Caribbean.

The confusion between these two terms arises because a repeating activity often recurs on many days throughout the year and is thus multiday in that it occurs on more than one day. So that there is no confusion, this manual and Consultant will use the following definitions for repeating and multiday activities:

- **Repeating Activity.** A repeating activity is an activity that recurs along some sort of pattern over a number of days. Although, a repeating activity can recur on consecutive days and thus look like a multiday activity, it is usually thought to be nonconsecutive.
- **Multiday Activity.** A multiday activity is an activity that lasts or spans two or more consecutive days.

Thus a repeating activity is usually thought to be nonconsecutive in nature while a multiday activity must be consecutive.

Contacts

A contact is a family member, friend or client with whom you have an association. A contact is comprised of a collection of fields, all of which define the contact. This collection of fields is divided into two broad classes: Standard fields which are fixed and unchangeable and Customizable fields which are changeable to fit your needs.

Standard Fields

Standard fields are fields that always exist in every contact and always represent the same item of information.

- **Salutation.** Specify Mr., Mrs., Miss, etc.
- **First Name**. Specify a person's first name or the name they go by when addressed.
- **Last Name**. Specify a person's last name, family name, or surname.
- **Title.** Specify titles such as President, Sales Manager, etc.
- **Department.** Specify departments within a company such as Sales, Marketing, Human Resources, etc.
- **Company**. Specify the name of the company if a business contact.
- **Primary Address.** Includes fields for street address, city, state, zip and country.
- **Secondary Address**. Includes fields for street address, city, state, zip and country.
- **Notes**. A contact may have an unlimited amount of notes.
- **Links**. A contact may have links to other activities, contacts and documents created by other applications.

Customizable Fields

Customizable fields are fields that exist in every contact, but you can change them to represent anything you wish.

- **8 Phone Fields**. You may give each of the eight phone fields a label to designate what type of phone number it represents. Phone labels include, but are not limited to Work, Home, Mobile, Modem and Fax. Each contact may have its own set of customized phone field labels.
- **8 Custom Fields**. You may give each of the eight custom fields a label of your choice. Sample custom labels might include E-mail address, Spouse, Birthday, Internet, Address, etc. Each contact may have its own set of customized fields.

Notes

Each activity and each contact may have an unlimited amount of notes associated with it. Notes can contain any type of text information. This includes call logs and conversations with customers. Special instruments are available to automatically insert the current date and time into the notes. Additionally, you may use the built in chronograph to time phone calls or other events and then insert the elapsed time into the notes. This is useful for consultants, attorneys and others who bill time. For information on how to enter notes see *Enter Notes* in Chapter *The Activity Window* on page 48. For information on the insertion of the current time/date and elapsed time into notes see *Insert Time/Date Button* in Chapter *The Activity Window* on page 48.

Links

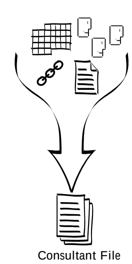
Since activities often deal with people, it follows that there must be some way to connect or link the two together to form relationships. For example, wouldn't it be nice for a dentist to schedule an appointment with a patient and have an automatic link created between the appointment and the patient. If the dentist then brings up her schedule and clicks on the appointment, not only will the appointment information appear, but the link will reveal exactly who the patient is. A click on the link will then in turn bring up the entire patient's contact record. Likewise, the patient's contact record will show links to all appointments that particular patient has. A click on one of those linked appointments will then bring up a calendar that contains the appointment.

As you can see, links are two way connections between one or more activities or contacts. You may link an unlimited number of activities and contacts to a activity. Likewise, you may link an unlimited number of activities and contacts to a contact. Also, you can link documents created by other applications to any activity or contact. Suppose you have a To-Do activity on your schedule to prepare an annual sales report. The ability to link documents makes it possible to link the spreadsheet that contains your sales figures directly to the activity. This sort of outside link provides a means to bring your calendar and work closer together. For information on links, see Chapter 13 *Links* on page 135. For information on how to link documents created by other applications, see *The Link Memo Command* in Chapter *Links* on page 138.

Basic Concepts

As previously described, Consultant manages two different types of objects: activities and contacts. Time and contact management are so tightly integrated in Consultant that activity and contact objects are actually stored in the same file along with all their corresponding notes and links. Figure 27: "File Contents" on page 8 depicts the information that comprises a Consultant file or document.

Figure 27: File Contents

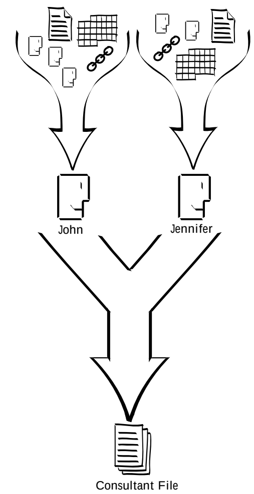


Consultant is much more powerful than Figure 27: "File Contents" suggests. In fact, Consultant allows information for multiple users to exist in a single file. Additionally, you may view your information from any number of Views simultaneously, even if you have multiple files open at once. To help you, the Primary User, organize your information, Consultant provides Categories and Sets which will be discussed below.

Multiple Users Per File

The illustration in Figure 27: "File Contents" is not yet complete. You see, Consultant can store activity and contact information from several users in the same file or document. For example, a husband and wife that use Consultant on their home computer need not each have their own file. They can both store their information in a single file under certain protections. The ability to store information from multiple users in the same file provides a way to share information. Plus, Consultant lets you view the information from multiple users at the same time. A more accurate picture of a file is shown in Figure 28: “Multiple Users Per File” on page 9.

Figure 28: Multiple Users Per File



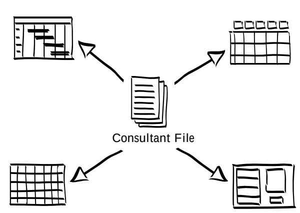
Public User

Every file has one special type of user called the *Public User*. The Public User provides a space in the file where you can post any community or public-wide information. Suppose, for example, that you have five users in a file who all wish to share a public calendar for group planning. Or suppose you have a list of contacts that each of the five users need access to. The Public User is a special type of user that all users in a file have immediate access to. It provides a simple way to share information.

Multiple Views Per File

The real power of Consultant lies in its ability to show you the information in your file in several different formats simultaneously. While other programs only let you see your information in one View at a time, Consultant will let you open as many different Views as memory permits. If you make a change to your schedule in one View, all other applicable Views are instantly updated. This means, for example, that you can see your schedule in the Month View and the Day View at the same time. Figure 29: “Multiple Views Per File” on page 9 depicts the relationship between a file and the various View windows.

Figure 29: Multiple Views Per File

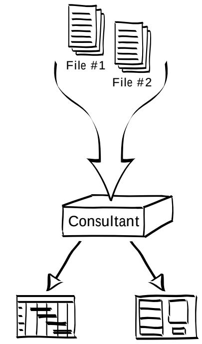


Multiple Files Open At Once

Consultant doesn't, of course, limit you to only one open file at once. You can have any number of files open at a single time. All open Views will reflect the information contained in all of the open files. This provides a way to overlay information from several files in a single View. Figure 30: “Multiple Files

Open at Once" on page 10 depicts this situation.

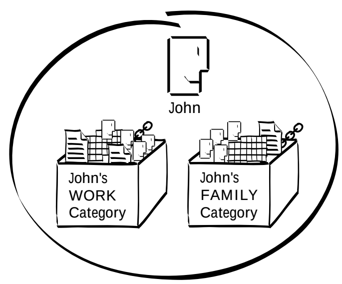
Figure 30: Multiple Files Open at Once



Categories

At this point you probably wonder how you can make sense of your information if you have several different users in a file, several files open at once and all this information displayed at once in one or more Views. Consultant lets you divide your information into different Categories to help you organize your information. Each user in a file can define his/her own Categories. Whenever you create a new activity or contact, you assign it to one of your Categories as shown in Figure 31: "Categories" on page 10.

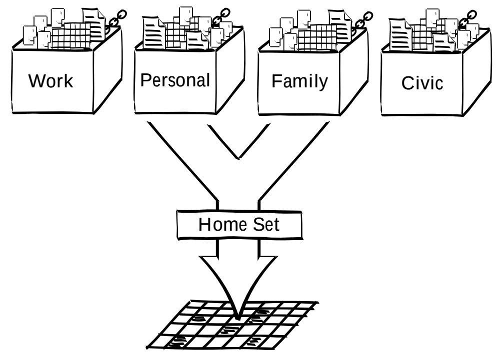
Figure 31: Categories



Sets

Categorizing activities and contacts does not control how much information you see in a View. Consultant provides a mechanism called a Set by which you can specify what categories you want to display in a View. Suppose, for instance, you have Personal, Civic, Work and Family Categories, but you only want to View your Personal and Family Categories in the Month View. To do so, you might create a Set and add the Personal and Family Categories. When you open the Month View, you tell it to use your new Set to filter out all activities except those categorized as Personal and Family. Figure 32: "Filter-Effect of Sets” on page 11 depicts the filter-effect of a Set.

Figure 32: Filter-Effect of Sets



Each user in a file can create his/her own Sets. You can assign a different color, font and style to each Category in a Set to help you visually differentiate among Categories. Each View has a Set button which selects which Set you want to filter information for that View. This allows you to have several Views open at once, wherein each View displays a different Set of activities and/or contacts.

Primary User

Consultant allows information for several users to appear at once. Each user has his/her own Sets. This presents the question as to which user's Sets filter information. The answer is that the your Sets always filter information when you have more than one user's information open. You are referred to as the Primary User.

When you first launch Consultant and open a file, you are asked to type in your user name. At that point, you become the Primary User and your Sets filter information. In other words, the first user to logon in the first file opened is always the Primary User. The significance of the Primary User will become more apparent in later chapters.

File Administrator

The person who creates a new file is called the *File Administrator*. The File Administrator is the only person who can add and delete users from a file. The File Administrator is also the only person who can add public categories and priorities. In other words, the File Administrator is the person in charge of the file. If your file only has one user, you, then you are the File Administrator. Please note that the File Administrator is different than the Primary User. The File Administrator can be the Primary User if he/she logs open the file first with his/her user name. But the Primary User isn’t necessarily the File Administrator.

Chapter 2

Install Consultant

The purpose of this chapter is to show you how to install Consultant. Before you can begin to use Consultant, you must first install it. You can install Consultant from the Installation disks or the install program which you can download from Chronos' website. Once Consultant is on your hard disk, you can launch and use it. The installation process should be simple enough for any user with a minimum amount of MacOS experience. If you have not acquired basic MacOS skills, read the Macintosh User's Guide that came with your computer before you proceed. Computer terminology that may be unfamiliar to novice users will be defined where appropriate. Advanced users may simply skip over such definitions.

Topics Covered

- **Installation Contents**. Lists the items that the install program will install on your hard disk.
- **Licensing Agreement**. Discusses the importance of your promise to abide by the licensing agreement before you use Consultant.
- **System Requirements**. Describes the minimum system software and hardware requirements to successfully use Consultant.
- **Install Consultant**. Steps you through the installation of Consultant.
- **Register Consultant**. Describes how to register your copy of Consultant and the benefits you receive therefrom.
- **Uninstall Consultant**. Describes how to remove Consultant from your hard disk.

Installation Contents

This section lists the items that the install program will install on your hard disk.

- **Consultant**. This is the main Consultant application.
- **MiniConsultant**. This is a miniature version of Consultant. It uses less than half the memory of the full-blown Consultant, yet provides basic calendar and contact features. The purpose of MiniConsultant is to provide a version of Consultant that requires less memory so you can more easily leave it open all the time.
- **Activity & Contact Extensions**. The Activity and Contact extensions are placed in the Extensions folder located in your System Folder. They appear in the menu bar after your computer is restarted. The Activity extension notifies you of alarms even when Consultant and MiniConsultant aren't running. These extensions let you see your schedule and favorite contacts at any time.
- **Templates**. Consultant ships with standard templates for envelopes, labels, fax covers, address books, reports, etc.
- **Textures**. Consultant comes standard with several background textures so you can customize the look and feel of Consultant to suit your own tastes.
- **ReadMe Files**. Consultant comes with several ReadMe files to help you get a quick start using the program. There is even a ReadMe file to help you convert from older versions of Consultant.
- **Licensing Agreement**. Consultant comes with the licensing agreement you agree to if you use the software. If you have any questions regarding this agreement feel free to contact Chronos L.C. for clarification.
- **Internet Config**. Consultant uses a MacOS standard piece of software called *Internet Config* to access your e-mail program and web-browser. The Internet Config software consists of an extension

that is placed into the Extensions folder in the System Folder and an application program that is placed in an Internet Config folder inside the Consultant folder. The Internet Config software provides a common storage place for internet related information such as your e-mail address, your preferred web browser, your preferred e-mail program, etc. When Consultant needs to open your browser or e-mail program, it asks Internet Config which program it should launch. It is therefore imperative that you run Internet Config and do some basic setup. For more information on Internet Config see the accompanying instructions found in the Internet Config folder.

Licensing Agreement

Please read the enclosed licensing agreement before you proceed with the installation. Installing and/or using the software strictly implies that you agree to the terms of the licensing agreement. If you don't agree to abide by the licensing agreement after you read it, contact Chronos or your place of purchase for information on how to return the software. Don't proceed with the installation if you don't agree to the licensing agreement.

System Requirements

The following system requirements represent minimum preconditions that your system needs meet to ensure that Consultant will work properly.

- **MacOS computer with System Version 7.0 or higher**. Consultant is available in versions for both Macintosh and Power Macintosh computers. Make sure you have downloaded or ordered the correct version for you computer. If you try running the Power Macintosh version of Consultant on a Macintosh computer, you will receive a -192 error message.
- **Minimum 2500k (kilobyte) available memory**.
- **Minimum 5000k free hard disk space**.
- **Any monitor that displays at least 640 x 480 pixels**. All current PowerBooks and all Apple monitors that are 14 inches or larger meet this minimum requirement. For best display results use the Monitor control panel to set your screen to at least 256 colors or gray levels. For more information on how to use the Monitor control panel, consult the Macintosh User's Guide that came with your computer.

The remainder of this section contains information on how to determine your System version, available memory and free hard disk space.

Check The System Version And Available Memory

If you are unsure what version of the System software your computer has or if you are unsure how much available memory your computer has, follow the steps below:

1. **Make sure that you have quit any programs that are currently running on your computer**. If no programs are running, your computer will display the MacOS Desktop (the screen that appears when you first turn on your computer). Select the Apple icon in the upper left-hand corner of the screen. A pop-down menu will appear.
2. **While holding down the mouse button, choose "About This Computer" from the pop-down menu and release the mouse button**. A small window will appear in the middle of the screen that indicates the version of the System and the amount of memory available.

Check The Amount Of Free Hard Disk Space

Follow the steps below if you are unsure how much free hard disk space your hard disk has:

1. **Make sure that you are in the MacOS Finder**. You are in the Finder when the MacOS Desktop is visible.
2. **Double-click on your hard disk icon**. A window will open that shows the contents of your hard disk. In the upper right-hand corner of the window is a line of text that displays how much hard disk space is free. One megabyte equals 1024K.

Install Consultant

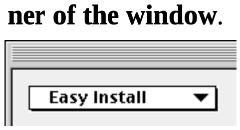
This section lists the steps to install Consultant using the Installer program.

1. **Insert Disk 1 into your floppy drive**. Skip this step if you downloaded the installer application from Chronos' website. An icon representing the disk will appear on your desktop. Double-click the disk icon if the window representing the disk's contents is not already showing.
2. **Locate the "Consultant™ Installer" application**. The installer application helps you in install the software.

3. **Double-click the "Consultant™ Installer" application to launch it**. A splash screen announcing Consultant will appear.
4. **Click the OK button to dismiss the splash screen**. A Licensing Agreement will appear.
5. **Read the Licensing Agreement and click the Agree button if you agree to abide by the terms of licensing agreement**. Installing Consultant signifies that you agree to abide by the terms of the licensing agreement. The main install window will appear.
6. **Click the "Switch Disk" button to specify where you want to install Consultant**. You may also use the pop-up menu button in the Install Location region to choose a volume.Your default hard disk is automatically chosen so you only need to perform this step if you have more than one hard disk and don't want it installed on the default drive.

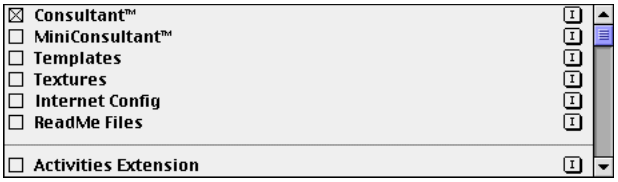
The installer program lets you perform either an Easy Install or a Custom Install. The Easy Install will install all the Installation Contents. For information on the installation contents see *Installation Contents* in Chapter *Install Consultant* on page 12. The Custom Install will let you selectively choose which components you want to install.

7. **Choose "Easy Install" or "Custom Install" from the pop-up menu in the upper-left hand corner of the window**.



The "Easy Install" option will install all of the different components that comprise the installation. Select "Custom Install" if you want to select which components to install. If you select "Custom

Install", you will be presented with a list of components that you can choose to install.



Click to place a check mark next to those components that you want to install. If you aren't sure what a particular component is, click the information button located at the far right of each line.

8. **Click the "Install" button in the lower right-hand corner of the window to start the installation process**.

The install will begin, show you its progress, and let you know when it is complete. Follow any directions it gives you along the way. When complete, you will find a newly created Consultant folder on your designated hard disk.

9. **Double-click the newly created Consultant folder to open it**. The contents of the folder will appear. You should see the Consultant application, the MiniConsultant application, a Template folder, a Textures folder, and a ReadMe folder. If you did a Custom Install, what you see may be slightly different. We suggest you read the ReadMe's in the ReadMe folder. Then see Chapter 3 *Get Started* on page 18 for information on how to launch Consultant and get started.

10. **Register Consultant**. Whether you installed Consultant from installation disks or a downloaded installer program, you will need to register Consultant within 30 days if you wish to continue using it. For information on registering Consultant see *Register Consultant* in Chapter *Install Consultant* on page 15.

Register Consultant

If you downloaded Consultant from the Internet, it is highly recommended that you register your copy of Consultant. If you installed Consultant from the installation disks, you will also need to register the software, but you will not need to contact Chronos L.C. for a registration number. Instead, you will find your registration number on the registration sheet that is part of your package contents. You will receive several benefits when you register the software.

- You can use the software beyond the 30 day trial period.
- You will receive e-mail notification of major upgrades.
- You will receive information on other related products.

This section describes how you register Consultant.

1. **Locate and open the folder where you installed Consultant**.

2. **Double-click the "Consultant™" program icon.**

Consultant will launch. As Consultant loads in, a splash screen will appear. After a short moment, a reminder to register dialog will appear. This dialog will not appear if you installed the software from the installation disks. Instead, you will immediately see the Registration dialog and you can skip to step 6.

3. **Click the Register button located in the lower right-hand corner of the dialog if applicable**.

The Registration dialog will appear.

You will notice a six digit code just below the picture in the Registration dialog. This is the code you must give to Chronos L.C. in order to receive a registration number.

4. **Write down the six digit code**. You will need this six digit code when you register this copy of Consultant with Chronos L.C.

5. **E-mail, call, or send Chronos L.C. your six digit code and registration information**. Consultant needs the following information in order to register your copy of Consultant.

   - You six digit code.
   - Your name and/or company name.
   - Your mailing address.
   - Your phone number (preferably day time).
   - Your e-mail address.
   - Your payment information. We accept Visa, MasterCard, American Express, and Discover. We also accept checks.
   - The number of licences you wish to purchase.

   A convenient order form that you can print or e-mail is provided in the same folder as the Consultant application.

   There are four ways to register Consultant. We highly recommend that you use the e-mail or secure order form methods. These are the quickest and easiest to use methods for both you and us.

   - **E-mail**. Fill-out the Consultant Order Form and send it to *sales@chronosnet.com*. Once your e-mail is received, it will be processed and you will receive a registration number in return.
   - **Secure Order Form Via Web**. Chronos L.C. has a secure order form that you can fill out on the web and submit to us. Our web address is *www.chronosnet.com*. Once your order form is received, it will be processed and you will receive a registration number in return.
   - **Telephone**. Call Chronos L.C. at 801-957-1774 between 9am and 5pm Mountain Standard Time to register Consultant. You will be asked by a customer service representative for your information and will receive a registration number in return.
   - **Postal Mail**. Print the Consultant Order Form and send it via postal mail to Chronos L.C. Include a check (checks take one week to clear) or your credit card information with your order. Once your order is received, it will be processed and you will receive a registration number in return via whatever method you request. If you include your e-mail address, we will e-mail your registration number to you.

     Chronos L.C.
     1092 Fir Avenue

Provo, UT 84601
U.S.A.
801-957-1774

6. **Enter your name, company name, and registration number into the Registration dialog**. Your registration number is the number you receive from Chronos L.C. after your order has been processed. It is not the six digit code you send to Chronos L.C.
7. **Click the Register button to register your copy of Consultant**. Consultant will check to make sure you have entered a valid registration number. If you have, you will see a message that indicates you have successfully registered Consultant. Congratulations. If the registration number you enter is invalid, you will receive notice. In this case, double-check to make sure that you have correctly entered the registration number Chronos L.C. gave you.

Your registration information is stored in a file called *Consultant Registration*. This file is located in the *Preferences* folder which is located in the *System Folder*. Make sure that you don't delete this file. If you do, you will have to get a new registration number from Chronos L.C. If you update your system software, make sure that you transfer this file to your new system folder in the event you do a clean install.

Uninstall Consultant

You can completely uninstall Consultant from your hard disk in several simple steps.

1. **Click and drag the Consultant folder to the trash can**. The Consultant folder contains the Consultant application, MiniConsultant application, Template folder, Textures folder, ReadMe Files folder, and Internet Config folder.
2. **Click and drag the "Consultant Preferences" file from the Preferences folder which is located in the System folder to the trash can**.
3. **Click and drag the "Consultant Registration" file from the Preferences folder which is located in the System folder to the trash can**. Please note that this file contains your registration information. If you delete this file, you will have to contact Chronos for a new registration number.
4. **Click and drag the "Consultant Activities" file from the Extension folder which is located in the System folder to the trash can**. If you did not install the Activity extension then skip this step.
5. **Click and drag the "Consultant Contacts" file from the Extension folder which is located in the System folder to the trash can**. If you did not install the Contact extension then skip this step.

Chapter 3

Get Started

The purpose of this chapter is to show you how to launch and begin to use Consultant. This chapter does assume that you have already installed Consultant and have a basic understanding regarding what Consultant is and can do for you. For information on how to install Consultant see Chapter 2 *Install Consultant* on page 12. For information on what Consultant is, see *Welcome* in Chapter *Introduction* on page 2.

Topics Covered

- **Launch Consultant**. Steps you through the process to launch Consultant.
- **Create A New File**. Steps you through the process to create a new file in which you can store your information.
- **Opening Screen**. Describes the windows that appear on the screen after you launch Consultant and create a new file.
- **Close File**. Steps you through process to close a file once you are done.
- **Lack Of Save And Save As… Commands**. Tells you why Consultant does not have a command to save the file(s) you are working on.

Launch Consultant

At this point, you should have already installed Consultant onto your hard disk. This section describes how to launch Consultant once you have installed it.

1. **Locate and open the folder where you installed Consultant**.
2. **Double-click the "Consultant™" program icon.** Consultant will launch. As Consultant loads in, a splash screen will appear. After a short moment, an Open dialog box will appear so that you can create a new file or open an existing file. If you don't have a registered version of Consultant, a registration reminder dialog box will appear first instead. If you are ready to register, see Chapter 2 *Install Consultant* on page 15 for instructions. If you aren't ready to register, press the "Not Yet" button.

Create A New File

Before you can enter activities or contacts, you need to create a file in which to save them. This section describes the steps to create a new file after you launch Consultant. It also describes how to give other people access to your data.

1. **Click the New button in the Open dialog box**. The New dialog box will appear.
2. **Use the pop-up menu above the file list to choose where you want the file to be saved**.
3. **Type the name of the file you want to create**.
4. **Click the New button**. A dialog box will appear and ask you if you would like to make the new file your Primary File.
5. **Choose if you want the file to be your Primary File**. If you answer in the affirmative, this file will

automatically be opened each time you launch Consultant or MiniConsultant. MiniConsultant, the Activity extension, and the Contact extension require that you specify one of your files as the Primary File. Consultant remembers the Primary File, by saving a reference to it in the Consultant Preference file located within the Preferences Folder in the System Folder. If you use more than one file, you can change which file is your Primary File at any time. When you open a file using "Open File" from the File menu, a radio button in the standard Open dialog box will let you make the file you are opening the Primary File.

6. **Choose if you want Password Protection**. You will next be asked if you would like your file to be password protected. When you create a new file, you become the File Administrator. As the File Administrator, you choose if you want Consultant to ask you for your name and password each time you open your file. Consultant gives you this option in case security is an issue for you. If it isn't, simply answer negatively. If security is an issue, answer in the affirmative. Consultant will prompt you for your name and password. Don't forget your password if you entered one. You can leave the password blank if you want.

   As the File Administrator, you are the only person that can add other users to your file. If you add other users to your file, Password Protection or security is automatically turned on because Consultant must ask for your name and password so it knows who's information to access. For information on adding users to your file see *Users Page* in Chapter *Administration & Proxy Access* on page 204.

   If you chose not to have Password Protection when you created your file, but later either turned on security or added users, Consultant will ask for your name and password the next time you open your file. Since you never entered a name or password you probably have no idea what to enter. Actually, Consultant automatically assigns you the name "User" and a blank password when you create a file with Password Protection off. Once you open your file using the name "User" and no password, you can change your user name. For information on adding users or changing your user name see *Users Page* in Chapter *Administration & Proxy Access* on page 204. For information on turning security on and off see *Environment Preferences* in Chapter *Preferences* on page 185.

Opening Screen

After you successfully create a new file, two windows will appear on the screen.

- **Button Bar**. This is the long and thin horizontal window at the top of the screen. Use the Button Bar to quickly access common program functions.
- **Day View**. The Day View displays a single day of your calendar at a time.

At this point, the manual will not go into any detail on how to use these and other windows. For a quick overview of these and other windows, see Chapter 4 *25 Step Tutorial* on page 21. Once you know how to create a file, close a file and quit the program you will better be able to concentrate on other program features.

Close File

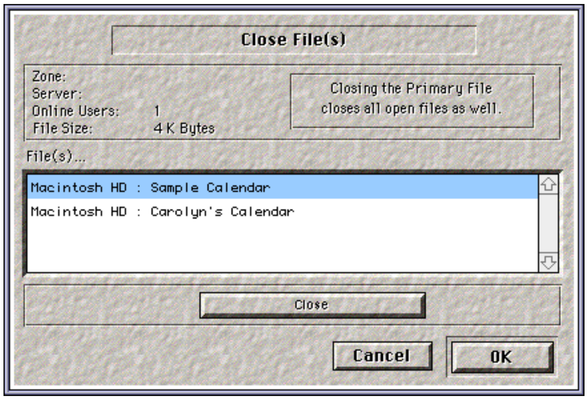
After you finish with a file, there are two ways to close it. This section describes those two ways.

- **Close File Command**. Use the "Close File…" command in the File menu to close a file(s). This command is useful if you wish to continue to use Consultant, but with a different file.
- **Quit Command**. Use the "Quit" command in the File menu to close all open files and immediately quit the program.

Close Command

You may, at any time, close one or more open files.

1. **Choose "Close File…" from the File menu**. The Close dialog box will appear and request which file(s) you want to close.



The Close dialog box will display the names, locations and sizes of all open files. There are two steps to close one or more of these files.

1. **Click the file you want to close**. The file will become highlighted.
2. **Click the Close button**. The file will disappear from the list. Although the file immediately disappears, it will not actually close until you click the OK button.

You can repeat this two step process for each file you wish to close. When only the files you want left open remain in the list, click the OK button. It is only after you click OK that the files are actually closed. This allows you to press the Cancel button to cancel all the files you told it to close at the last minute if you desire.

Quit Command

When you quit Consultant, all open files are automatically closed. To quit Consultant, simply choose "Quit" from the File menu.

Lack Of Save And Save As… Commands

You may have noticed that Consultant does not have a Save or Save As… command in the File menu. This is because Consultant works more like a database in that all activities and contacts are automatically saved as you create and change them. This offers two distinct advantages.

- You needn't save all of your changes at the end of a session since this happens automatically.
- You can work with files that are much larger than the memory in your computer. This is extremely valuable to people with large volumes of data and to people without a lot of memory in their computer. This advantage is particularly valuable to companies with large contact lists that many people share. Consultant can handle large files where other similar types of programs fail.

Chapter 4

25 Step Tutorial

The purpose of this chapter is to help you quickly learn how to use Consultant. The quickest way to learn how to operate a program is to use it. This 25 step tutorial will carefully guide you through many of the program's major features.

Topics Covered

- **Step 1 - Step 25**. Guides you through most of Consultant’s major features. The objective of the tutorial is to learn through practice and example.

The tutorial will first launch Consultant from the Macintosh Finder, so if you have already launched the program, you may want to quit before you proceed. Please note that this tutorial is not meant to be comprehensive, but it will step you through everything you need to know to use the main features of the program.

The tutorial takes approximately half an hour. It is best if you go through the tutorial in the order that it is presented and during a single session. This is important since each step builds on previous steps. Since each new step builds on previous steps, your screen may not appear as shown in the examples if you don't carefully follow the tutorial in sequence. In other words, you may find it less confusing if you avoid too much experimentation during the tutorial.

Step 1. Launch Consultant

In this step, you will launch Consultant. First make sure you are currently in the Macintosh Finder.

1. **Open the folder that contains Consultant**.
2. **Double-click the Consultant program icon to launch Consultant**. The Open dialog box will appear in which you can give your new file a name.

Step 2. Create New File

After you launch Consultant, the Open dialog box appears in which you create a new file or open an existing file. In this step, you will create a new file.

1. **Click the New button in the Open dialog box**. The New dialog box will appear.
2. **Type the name of your new file**.
3. **Click the New button to create the new file**. You will next be prompted as to whether you want this new file to be your Primary File.
4. **Click the Cancel button since you don’t want this to be your Primary File**. You will then be prompted as to whether or not you want Password Protection.
5. **Click the No Password button since you won’t be needing security**.

Step 3. Create An Appointment

Two windows will appear on your screen. The larger window, known as the Day View, displays a single day of your calendar at a time. The long thin horizontal window at the top of the screen is called the Button Bar. The Button Bar lets you quickly access common program functions.

In this step, you will create an Appointment with the assistance of Consultant's built in English translation capability.

1. **Choose "Translate…" from the Calendar Menu.** The Translate dialog box will appear with a blinking cursor in the text region.
2. **Type "Lunch at noon today"**. Now that you have entered an English phrase that describes an activity, you need to tell Consultant to translate the phrase and place the activity on your schedule.
3. **Click the Translate button or press the Return key to inform Consultant you have a phrase to translate.** Consultant will translate the phrase and save the new activity in your file. An entry called "Lunch" will appear selected in the Day View. A new window called the Activity Window will also appear. The Activity Window contains all of the information for the selected activity. It will show you the title of the activity, the time, the date, the priority, the category and who the activity belongs to (you, in this case). The Activity Window also lets you enter notes, view links, set alarms and turn activities into To-Dos or Banners.

Notice how the instruments in the Activity Window represent everything about the activity you just scheduled including the title, time and date. You can change any of these items directly from Activity Window at any time. In this step, you will not change any of these items.

Step 4. Close Activity Window

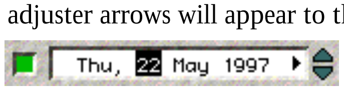
In this step, you will clear the contents of the Activity Window so that you can schedule another activity onto your calendar.

1. **Click in the close box located in the upper left-hand corner of the Activity Window or press Return on the keyboard**. The Activity Window will close and the "Lunch" activity in the Day View will no longer be highlighted.

Step 5. Create A To-Do Activity

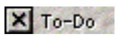
In this step you will create a To-Do without the English translation process.

1. **Double-click in the To-Do/Event Region of the Day View.** The Activity Window will appear and display today's date. A blinking cursor will appear in the Title Region of the Activity Window.
2. **Type "Write memo" in the Title Region of the Activity Window.**
3. **Click the day, month or year elements in the Activity Window's Date Shutter to adjust the date.** For example, click the day component. The day will become selected and a set of up/down adjuster arrows will appear to the right of the Date Shutter.

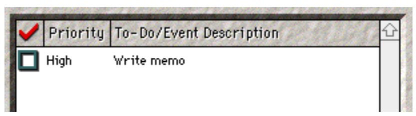


You can click either arrow to adjust the day or you can type the day on the keyboard. You can use the Tab key on your keyboard to move between the day, month and year components of the date. Feel free to play around with the adjustment controls. When you are finished please make sure you adjust the date back to the current day, month and year.

4. **Notice how the To-Do button in the Activity Window is depressed.** The depressed To-Do button indicates that the activity in the Activity Window is a To-Do. You can press this button repeatedly to toggle the activity between an Event activity and a To-Do activity. Note that the Time Shutter in the Activity Window must be closed to make an activity a To-Do.



5. **Click in the close box located in the upper left-hand corner of the Activity Window or press Return on the keyboard**. The Activity Window will close and the To-Do will automatically appear in the To-Do/Event Region of the Day View.



6. **Click and hold the mouse button down on the Uncompleted To-Do mark (green check box) in the To-Do/Event Region of the Day View**. The To-Do pop-up menu will appear from which you can select a To-Do mark.

Step 6. Adjust An Appointment

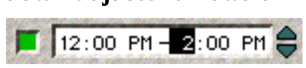
There might be times when you want to change the duration, start time or end time of an activity. This is easy to do in Consultant and you can do this either of two ways. This step will show you both ways from which you may choose either one.

- **Use the Activity Window to adjust times**. Anytime you double-click and thereby select an activity in a View such as the Day View, all of the information that represents that activity automatically appears in the Activity Window.

  1. **Double-click the Lunch activity that you previously created in the Day View**. The Activity Window will appear and change to represent the lunch activity's title, date, time range, etc.

     Suppose that you want your lunch to be a bit longer than one hour.

  2. **Click the end time in the Time Shutter and adjust that time to 2:00 p.m. with the up/ down adjuster arrows or keyboard**.

  3. **Click in the close box located in the upper left-hand corner of the Activity Window or press Return on the keyboard**. The Activity Window will close and the “Lunch” activity will change to an hour longer in the Day View.

- **Use your mouse to adjust times**. You can also use your mouse to adjust the time range of an activity.

  1. **Position your mouse over the end of the Lunch activity currently displayed in the Day View**. The mouse cursor will change from the standard arrow to a set of up/down adjuster arrows.
  2. **With the adjuster arrows visible, click and hold down the mouse button**.
  3. **While holding down the mouse button, move the mouse up or down to adjust the end time**. A horizontal bar will move up and down with the mouse to indicate the new end time.
  4. **Release the mouse button when the horizontal bar is at your desired end time**. The activity

will automatically adjust itself to the new time range and will remain selected.

5. **Click above or below the "Lunch" activity to deselect it**. The activity will no longer be selected.

Step 7. Reschedule An Activity

You may occasionally want to reschedule an already existing activity. This is a very simple task with Consultant. In this step, you will use the Multiday View to reschedule an activity. First, open the Multiday View. You may do this one of two ways.

- **Use the Menu Bar**. Choose "Multiday View" from the Calendar menu.
- **Use the Button Bar**. Locate and click the Multiday View button on the Button Bar.

Now that you have a Multiday View open, you can reschedule the Lunch activity to a different day.

1. **Use one of the two above methods to open the Multiday View**. Your screen should now have the Multiday View opened on top of the Day View.

   Notice how the Lunch activity and Write memo To-Do are automatically displayed in the Multiday View.

2. **Click the Lunch activity in the Multiday View and keep the mouse button held down**.

3. **While holding down the mouse button, move the mouse to the right or left one day**. As you move the mouse, you will notice that an outline of the activity moves with the mouse. Move the outline to a different day.

4. **Release the mouse button**. The activity will move and reschedule to that day.

Step 8. Drag Activities Between Windows

When you reschedule an activity, you are not restricted to a move or reschedule within the same View. In this step, you will use Consultant to move activities between different Views.

1. **Click in the close box located in the upper left-hand corner of the Multiday View window to close the Multiday View**. You should now see the Day View in its entirety again.

2. **Choose "Month View" from the Calendar menu or click the Month View button in the Button Bar to open the Month View**. The Month View will open on top of the Day View.

3. **Click and drag the resize box located at the bottom right-hand corner of the window to resize the Month View to a smaller size**. The Month View was made smaller so that you can see both it and the Day View better at the same time. If most of the Day View is still obscured, move the Month View to the side a bit so that more of the Day View is visible.

   You should see the Lunch activity in the Month View. If the Month View does not display the Lunch activity, use the arrow buttons in the Month View to move forward or backward one month until the Lunch activity comes into view.

   Now that you have located the Lunch activity on the Month View, you will move or reschedule it to the Day View.

4. **Click the Lunch activity and keep the mouse button held down**.

5. **Move the activity until it is directly over the Time Region of the Day View**. As you hover the activity over the Day View, indicator lines will show you where that activity will be placed.
6. **Release the mouse button once the activity is where you want it**. The activity will reschedule. Note how it now appears in the Day View and has moved to a different day in the Month View.

Step 9. Create Categories

An effective way to organize your information is to assign a Category to every activity and contact in your file. For instance, if your lunch appointment is with a longtime friend, you will probably want to assign it to your *Personal* Category as opposed to your *Work* Category.

In this step, you will create a category that you can assign to activities and contacts. Consultant will let you create as many different Categories as you wish, but in this step you will only create one.

1. **Choose "Define Categories…" from the Special menu to create Categories**. The Define Categories dialog box will appear. You will notice in the Category List that you already have one Category called *Standard*. Since you must assign a Category to every activity and contact, you can use the *Standard* Category when you don't want to assign a specific Category of your own. You will now create a Category called *Personal* which will represent anything on your schedule that is personal in nature, i.e. not work related.

1. **Type the name of the Category**.
2. **Type an optional description**.
3. **Click the Save button**. The "Personal" Category will be added to the Category List.
4. **Click OK to exit the Define Category Box**.

Step 10. Use Categories

Now that you have created a new Category, in this step you will assign it to your Lunch activity. Your Month View should still be open.

1. **Locate the Lunch activity in the Month View and double-click it to select it**. The Activity Window will open and show all of the information for the "Lunch" activity. In the upper right-hand corner of the Activity Window is the Category button. This button shows which Category is currently assigned to the Lunch activity. It currently shows that the *Standard* Category is assigned. Since this is a personal lunch appointment, you need to change the Category to *Personal*.
2. **Click and hold the mouse button down on the Category button**. A pop-up menu will appear and list the possible Category choices.
3. **Select the *Personal* Category and release the mouse button**. The Category button will change to indicate that the assigned Category is now Personal.

Step 11. Change Priority

You can assign a different Priority to every activity to indicate its relative importance. The Lunch activity should still be represented in the Activity Window. Just beneath the Category button in the Activity Window is the Priority button.

The Priority button currently indicates that the activity is assigned a *High* Priority. In this step, you will change the *High* Priority to a *Low* Priority.

1. **Click and hold the mouse button down on the Priority button**. A pop-up menu will appear and list the possible Priority choices.
2. **Select the *Low* Priority and release the mouse button**. The Priority button will change to indicate that the assigned Priority is now Low.
3. **Click in the close box located in the upper left-hand corner of the Activity Window or press Return on the keyboard**. The Activity Window will close and the Priority change and previous Category change will be permanently saved. Please note that Consultant is not limited to the three Priorities High, Medium and Low. You can have as many as ten Priorities – each named the way you want. For information on how to define your own Priorities see *Define Priorities* in Chapter *Priorities, Categories and Sets* on page 147.

Step 12. Create A Set

As time passes, your calendar may become crowded with many activities that belong to different Categories. Furthermore, occasions may arise when you only want to view information from a select group of Categories in a given View. Consultant provides a mechanism called a Set to control which Categories are shown in a View at any given time. Every View consequently has its own Set button which you can use to select which Set should filter information for that View.

The Set button in the Month View, which should be open, indicates that the *Show All* Set is currently selected. The *Show All* Set is a special Set that displays information from all Categories. The *Show All* Set, in this case, makes it possible to see the Lunch activity which is assigned the *Personal* Category and the Write memo To-Do which is assigned the *Standard* Category.

Suppose for a moment that you only want to see your *Personal* Categories in the Month View. In this step, you will create a new Set that will filter out all Categories except the *Personal* Category.

1. **Choose “Define Sets…” from the Special menu**. The Define Sets dialog box will appear.
2. **Click the New button to create a new Set**. The New Set dialog box will appear and request from you the name of your new Set. Since you will call your new Set *Home Stuff*, type “Home Stuff” where it says “New Set.”
3. **Click OK after you type the new Set name**. The Define Sets dialog box will now display an empty Category List for the *Home Stuff* Set. You now need to tell Consultant which Category(ies) you want your *Home Stuff* Set to display – all others are filtered out.
4. **Click the Add button to add Categories to a Set**. A dialog box will appear which lists all of the Categories from which you can choose. Check off the Categories you want in your new Set.
5. **Click the “Personal” Category**. A check will appear to its left.
6. **Click OK to exit the dialog box**. The Personal Category will appear in the *Home Stuff* Category List. It is often useful to distinguish Categories with different colors, fonts and styles. Suppose, for instance, that you want all of your Personal information to show up in crimson and an italicized font.
7. **Click the Personal Category to select it**.
8. **Click the Italics button**. The Personal Category will now appear in italics.
9. **Click the Crimson button**. The Personal Category will now appear in crimson italics.
10. **Click OK to exit the Define Sets dialog box**.

Step 13. Use Sets

You are now ready to use the *Home Stuff* Set that you just created. The Month View should still be open. In this step, you will use a Set other than the one currently selected to filter information in the Month View.

1. **Click and hold the mouse button down on the Set button in the Month View**. A pop-up menu will appear and list the possible Set choices.
2. **Choose the *Home Stuff* Set and release the mouse button**. The information in the Month View will change so that only activities that belong to *Home Stuff* Set appears. Since the *Home Stuff* Set only contains the *Personal* Category, only activities that belong to this Category will appear. Notice how only the Lunch activity now appears in the Month View. Also notice how it appears italicized and in crimson color.

Step 14. Set the Default Set

Normally when you open a new View, the View automatically uses the *Show All* Set to filter information. If you would rather have Consultant use a different Set when you first open a View, you will have to alter what is called the *Default Set*. In this step, you will change the Default Set to the new *Home Stuff* Set.

1. **Choose "Default Set" from the Special menu and keep the mouse button held down**. A hierarchical menu will drop-down and list all your Sets. The Set currently designated as the Default Set will have a check mark next to it.
2. **Choose the *Home Stuff* Set in the drop-down hierarchical menu and release the mouse button. You have now changed the Default Set. The next time you open a View, the *Home Stuff* Set, which is not the Default Set, will be used for that View**.
3. **Choose "Multiday View" from the Calendar menu or click the Multiday View button in the Button Bar.** The Multiday View will appear and the Set button in the Multiday View will show the new Default Set: Home Stuff. For the moment, you will not need either the Multiday View or the Month View so you will close them for now.

4. **Click in the close box in the upper left-hand corner of the window to close each**. You should now only have your Day View open. At this point, you will now set the Default Set back to its original setting.
5. **Choose "Default Set" from the Special menu and keep the mouse button held down**. A hierarchical menu will drop-down and list all your Sets. Choose "Show All" from the hierarchical menu.

Step 15. Create A Contact

Up to this point, the tutorial has mainly dealt with activities. The tutorial will now shift its focus to contacts and how they relate to activities. The creation of contacts is always done from the Contact Card View. In this step, you will create a new contact object for an imaginary client named Stephanie Walker.

1. **Choose "Contact Card View" from the Contacts menu or click the Contact Card View button**

in the Button Bar to open the Contact Card View.

The Contact Card View will appear. The Alphabet Tabs at the top of the View control which contacts are listed in the Contact Directory.

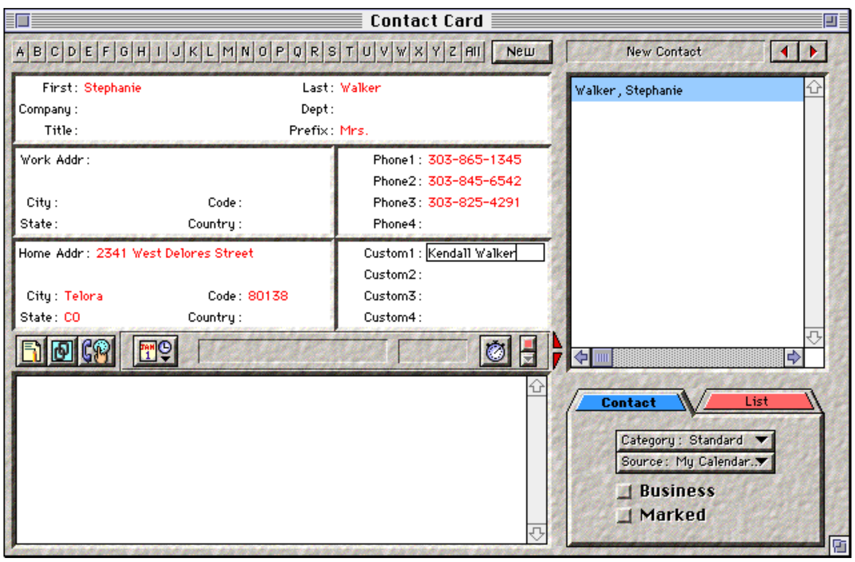
2. **Click the New button adjacent to the Alphabet Tabs.** A blinking text cursor will appear within a box that surround the *First Name* field typing area.

3. **Click slightly to the right of the first field in which you wish to enter information**. A text cursor will appear within a box that surrounds the typing area.

   You will now create a contact named Stephanie Walker.

   Mrs. Stephanie Walker
   2341 West Delores Street
   Telora, CO 80138
   303-865-1345 (Work)
   303-845-6542 (Fax)
   303-825-4291 (Home)
   Spouse: Kendall Walker

4. **Type in the above information so that the Contact Card View looks exactly like the following**:



5. **Click the All button in the Alphabet Tabs to list all the contacts in the Contact Directory (only one in this case)**. Notice how Stephanie's name appears in the Contact Directory.

Step 16. Use Smart-Menus

Consultant provides two tools to help you quickly enter information into the Contact Card View. The first tool is Smart-Menus which displays pop-up menus that list popular field entries. The second tool is SmartType which you will use in Tutorial Step 17. In this step, you will use Smart-Menus to customize field labels.

1. **Click Stephanie Walker in the Contact Directory**. Stephanie’s name will become highlighted in the Contact Directory and her information will appear in the Contact Card View.

2. **Place the mouse pointer over the first phone label.** The mouse pointer will turn into a triangle.

3. **While the mouse pointer is in this triangle form, click and hold down the mouse button**. A pop-up menu will appear and list several different types of phone numbers.
4. **Choose Work from the pop-up menu**. The label Work will replace the current phone label in the Contact Card View.

   Repeat this process for two more phone numbers, so that they display *Fax* and *Home* respectively.

   The name Kendall, Stephanie's spouse, was typed into the first Custom field. You can change each of the custom field labels to say whatever you want. In this case, the *Custom 1* title should say *Spouse*.
5. **Move the mouse pointer over the first custom field label**. The mouse pointer will turn into a triangle.
6. **While the mouse pointer is in this triangle form, click and hold the mouse button down**. A pop-up menu will appear and list custom field labels, if any.
7. **Choose "List…" from the Smart Menu that appears and release the mouse button**. The Define Custom Labels dialog box will appear.
8. **Click the Add button to add *Spouse* to this Smart Menu**. A small dialog box will appear and request from you the name of a new custom label entry.
9. **Type "Spouse"**.
10. **Click OK to exit the small dialog box**. Notice how *Spouse* has been added to the list of Custom Labels.
11. **Click OK to exit the Define Custom Labels dialog box**. Now you will change the first field label to *Spouse*.
12. **Click and hold the mouse down on the first Custom field label.** A Smart Menu will appear that now lists *Spouse*.
13. **Choose "Spouse" from the Smart Menu**. The first Custom label is replaced by *Spouse*.

Step 17. Use SmartType

Another tool that Consultant provides to reduce typing is SmartType. This feature basically completes the word or phrase you type as you type it. It automatically remembers past information you have typed in to help you complete what you're typing. It also uses information from the Smart Menus to help it complete words and phrases. In this step, you will use SmartType to reduce the amount of typing you have to do in the future when you create or edit contact objects.

1. **Place the mouse pointer directly over the *Country* field label while holding down the Command key**. The mouse pointer will turn into a triangle.
2. **While the mouse pointer is in this triangle form, click and hold the mouse down**. A pop-up menu will appear and list countries that you commonly use, if any.
3. **Choose "List…" from the Smart Menu**. The Custom Field dialog box will appear.
4. **Use the Add button to add *Canada, Chili, China* and *USA* to the Country Field List if they don't already exist.**
5. **Click OK to exit this dialog box**.
6. **Click the mouse slightly to the right of the *Country* label so that a text cursor appears in the Country field**.
7. **Slowly type the following sequence of keys on your keyboard and watch what happens as you type**. The *Delete* key refers to the backspace key on your keyboard.

"c", "h", "i", "n", Delete, Delete, Delete, Delete, Delete, "u"

As you can see, Consultant automatically completes the country name as you type. The resulting country should be *USA*.

Step 18. Links

You can create relationships between activities and activities, activities and contacts, as well as contacts and contacts. Relationships are created in Consultant by means of links. Links are exactly what the word *link* implies – a connection, tie or nexus between one or more objects. The simplest way to create a link between two objects is to drag one on top of the other while holding down the Command key.

Suppose that your Lunch appointment is with Stephanie Walker. In this step, you will link Stephanie Walker to your Lunch activity. Since you need to drag Stephanie Walker on top of the Lunch activity, both must be visible in one or more Views.

1. **The Day View and the Contact Card View are open, so simply move the Contact Card View down a bit on your screen so more of the Day View is visible**.
2. **Hold down the Command key on the keyboard**.
3. **While holding down the Command key, click and hold down the mouse button on Stephanie Walker in the Contact Card View's directory**.
4. **Drag the mouse towards the Lunch appointment in the Day View**. As you drag, the mouse pointer will turn into the universal ban symbol shown below. This symbol indicates that the mouse is not over another activity or contact, so to release the mouse button at this point is useless.

   
5. **Move the mouse until it is directly over the Lunch appointment**. The mouse pointer will then turn into a link symbol, which indicates that you may now release the mouse button to perform the link.
6. **Release the mouse button to form a link between Stephanie and the appointment**.
7. **Move the Contact Card View so that it is back fully in view**.
8. **Click Stephanie Walker in the Contact Card View's directory**.
9. **Click the Links button in the Contact Card View to see what is currently linked to Stephanie**. The Lunch appointment link shows up in the region just below the Links button. This region shows all items linked to Stephanie whether they be activities or other contacts.

   Likewise, if you select the Lunch activity in the Day View, you will see that it also has a link. To select the Lunch activity, you first have to make the Day View the top window.
10. **Click anywhere in the Day View window to bring it to the top**.
11. **Double-click and thereby select the Lunch activity**. You will see that a Link Icon appears in the Activity Window.
12. **Click the links in the Activity Window to see what is currently linked to the Lunch activity**. A portion of the Activity Window will grow down to show you any links.
13. **Click in the close box located in the upper left-hand corner of the Activity Window or press Return on the keyboard**. The Activity Window will close.

Step 19. Link Contact Command

You can also use the "Link Contact" command from the Special menu to link contacts to activities. Suppose that you are going to write a memo to Stephanie. Since you already created a Write memo To-Do, you can link Stephanie to the To-Do to handily access all of her information whenever you see the To-Do on your calendar. In this step you will link Stephanie to the Write memo To-Do.

1. **Double-click and thereby select the Write memo activity in the Day View**.
2. **Choose "Link Contact" from the Special menu**. A dialog box will appear and request you to type in the name of the contact you want to link to the activity.
3. **Type in the name of the contact you want to link, which in this case is "Stephanie."** If you only know the last name you can also use it. You may also use both the first and last name. In this case, it is simplest to type "Stephanie".
4. **Click the OK button to automatically link Stephanie to the Write memo To-Do**. A Link Icon will appear in the Activity Window for the Write memo To-Do.
5. **Click the Link Icon in the Activity Window to verify that a link was indeed made**. A portion of the Activity Window will grow down to show you the Stephanie Walker link.
6. **Click in the close box located in the upper left-hand corner of the Activity Window or press Return on the keyboard**. The Activity Window will close.

Step 20. Use The Translate Dialog Box To Create Links

There are many ways to create links between activity and contact objects in Consultant. In this step, you will use the Translate dialog box to automatically create a link between an activity and a contact.

1. **Choose "Translate…" from the Calendar Menu.** The Translate dialog box will appear with a blinking cursor in the text region.
2. **Type "Meet Stephanie today at three for Sales Proposal"**.
3. **Click the Translate button to have Consultant translate and schedule the activity**. Consultant will translate the phrase, recognize that Stephanie is one of your contacts and automatically link her to the activity. When complete, the Activity Window will contain the new activity with a link to Stephanie. You will also notice that the activity appears in the Day View.
4. **Click the links in the Activity Window to verify that a link was indeed made**. A portion of the Activity Window will grow down to show you the Stephanie Walker link.

Step 21. Add Notes

You can add an unlimited amount of notes to any activity or contact. Notes are added, modified and deleted in the same region of the Activity Window where links are listed. Since notes and links are listed in the same region of the Activity Window, use the Notes and Links buttons to toggle between the two. The Notes and Links buttons are located near the bottom of the Activity Window.

In this step, you will use the Notes button to switch to notes in the Activity Window and enter some notes.

1. **Click the Notes button to switch from links to notes**. The Links Region will disappear and the Notes Region will appear.

2. **Click in the Notes Region**. A text cursor will appear. Suppose you want to remind yourself to bring a calculator to the “Meet Stephanie for Sales Proposal” activity you just added to your calendar. The best way to add such a reminder is to type a note to that effect.

3. **Type your note like “Remember to bring a calculator to the meeting**.” Consultant additionally provides several instruments to help you take notes. The first instrument is the Insert Current Date and Time button.

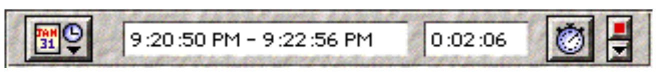
4. **Click the Insert Current Date and Time button to automatically insert the current date and time into your notes**. Consultant also provides a chronograph or timer that you can use for billing purposes. Suppose that you are a marketing consultant and Stephanie is one of your clients. You have arranged this appointment to help Stephanie develop a sales proposal for one of her customers. As a consultant, you bill time to make your money. Before your appointment, Stephanie calls you and requests some advice about some sales figures for the proposal. You want to time the conversation with Stephanie so you can bill her as accurately as possible.

5. **Click the Start/Stop button to start the chronograph at the beginning of the conversation**.

6. **Click the Start/Stop button to stop the chronograph at the end of the conversation**. The Timer will show the start time, end time and elapsed time.

   Now that you have timed the conversation, you may find it useful to enter this information into your permanent notes.

7. **Click the Insert Chronograph button to insert this information into the notes for this activity**. The time range and total elapsed time of the phone conversation is inserted into the notes.

8. **Type a short phrase that describes what the elapsed time refers to like “Talked with Stephanie about some sales figures in preparation for meeting**.”

9. **Click in the close box located in the upper left-hand corner of the Activity Window or press Return on the keyboard**. The Activity Window will close. You will notice a small pencil icon and a link icon next to the meeting with Stephanie. These icons mean that the activity has both notes and links associated with it.

10. **Double-click the Notes Icon to the left of the “Meet Stephanie for Sales Proposal” activity**. The Activity Window will open and the notes for the activity will automatically appear.

11. **Click in the close box located in the upper left-hand corner of the Activity Window or press Return on the keyboard**. The Activity Window will close.

Step 22. Use The List View

The List View is a very useful View to display activities and contacts in. The List View allows you to sort, filter and see your data in many different ways. Although the List View has many features, you will, in this step, only use the View to list all of the activities you have created thus far.

1. **Choose “List View” from the Calendar menu or click the List View button in the Button Bar**

to open the List View.

The List View will open and show all the activities you have created thus far. You can double-click any entry in the List View to open the Day View to that entry.

Step 23. Use The Contact List View

Whereas it is possible to view both activities and contacts in the standard List View, you use the Contact List View exclusively for contacts. The Contact List View is similar in appearance to the List View but also has a set of Alphabet Tabs to ease navigation through your contacts. Although the Contact List View has many features, you will, in this step, only use the View to list the one contact that you have created thus far.

1. **Choose "Contact List View" from the Contacts menu or click the Contact List View button in the Button Bar to open the Contact List View**.

The Contact List View will open and display all the contacts in your file. In this case there is one: Stephanie Walker. You can double-click any contact in the Contact List View to open that contact in the Contact Card View.

Step 24. Use The Gantt View

Use the Gantt View to view you calendar and projects from a time-line perspective. The Gantt View is very useful to determine how the start and end times of one activity might influence the timeliness of another. The Gantt View has many advanced and useful features to design projects. This step will not address these features, but a brief glimpse of the Gantt View might invoke some curiosity.

1. **Choose "Gantt View" from the Calendar menu or click the Gantt View button in the Button Bar to open the Gantt View**.

The Gantt View will open.

Step 25. Quit Consultant

You should now be fairly comfortable with Consultant. There are, of course, many features that have not been covered in this tutorial. Features that let you set alarms, create nonconsecutive activities, import, export and print are all covered in detail in Part II of this manual. In this step, you will quit Consultant. If you would rather experiment with the program some more please feel free to do so since this is the last step in the 25 Step Tutorial.

1. **Choose "Quit" from the File menu to end this tutorial and quit Consultant**.

Chapter 5

The Button Bar

The purpose of this chapter is to acquaint you with the Button Bar which is one of the first windows you will see when you launch Consultant and open a file. The Button Bar plays an active role in almost everything you do in Consultant. You will use the Button Bar to open calendar and contact Views, speak your schedule, print calendars, open text documents, etc. In other words, the Button Bar provides a simple way to tell Consultant what to do.

Topics Covered

- **Invoke A Command**. Describes how to invoke one of the commands on the Button Bar.
- **Add A Command**. Describes how to add a command to a blank button on the Button Bar.
- **Remove A Command**. Describes how to remove a command from the Button Bar.
- **Rearrange Commands**. Describes how you can switch the position of one or more commands on the Button Bar.
- **Add An Application**. Describes how to place one of your favorite applications on the Button Bar.
- **Customize Button Bar**. Describes how to extend or decrease the number of buttons on the Button Bar as well as their size.

The Button Bar is the long thin window at the top of the screen.You can change the position of the Button Bar to the left, top, right, or bottom of the screen. You can also switch between small and large buttons. The Button Bar consists of a series of buttons. Each button can hold one icon that represents a command Consultant understands. For example, you can place a command to open the Month View which is represented by a Month View icon on the Button Bar. When you first create a file, several commands are automatically placed on the Button Bar for you. You will want to add commands you use often to the Button Bar. You can, of course, add, delete, and rearrange commands as you wish.

You may place any of the following commands on the Button Bar. Each command is visually represented by a corresponding icon as shown in TABLE 2. "Button Bar Commands".

TABLE 2. Button Bar Commands

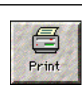
Icon	Command	Description
	Show Preferences	The Preferences dialog box lets you see and alter your personal calendar, contact, and program preferences.
	Print View or Document	The Print dialog box lets you print the top-most calendar View, contact View, or text document.
	Find Activity, Contact, or Phrase	The Find dialog box lets you search for a particular word or phrase in your calendar, contact list, or text document.
	Open Day View	The Day View displays all the activities for a single day.

TABLE 2. Button Bar Commands

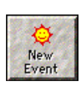
Icon	Command	Description
	Open Multiday View	The Multiday View displays all the activities for a variable range of days.
	Open Week View	The Week View displays a week's worth of activities.
	Open Month View	The Month View displays a month's worth of activities.
	Open Year View	The Year View displays a one year calendar.
	Open List View	The List View displays any subset of your activities and contacts in a customized way.
	Open Gantt View	The Gantt View is for project design and planning. It displays activities in a time-line perspective.
	Open Journal	The Journal lets you keep a journal entry for each day.
	Open Message Pad	The Message Pad provides a place to take phone messages.
	Translate English Phrase	The Translate dialog box lets you schedule an activity by typing in an English phrase that describes the activity.
	New Appointment	The Activity Window appears already set up for a new appointment.
	New To-Do	The Activity Window appears already set up for a new To-Do.
	New Event	The Activity Window appears already set up for a new Event.
	New Banner	The Activity Window appears already set up for a new Banner.
	Show To-Do Statistics	The To-Do Statistics dialog box displays the To-Do mark or goal mark for the entire range of the To-Do.
	Open Jump-To Dialog	The Jump-To dialog lets you quickly jump to different dates in different Views.

TABLE 2. Button Bar Commands

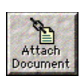
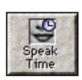
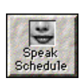
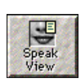
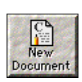
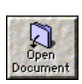
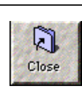
Icon	Command	Description
	Open Contact List View	The Contact List View displays a customized subset of your contacts.
	Open Contact Card View	The Contact Card View displays information for family, friends, clients and associates.
	Dial Phone Number	The Dial dialog appears so you can dial the selected contact's number.
	New Contact	The Contact Card View clears so you can enter information for a new contact.
	Clone Contact	The Contact Card View remembers select fields for the currently selected contact, then creates a new contact using those fields.
	Link Contact	A dialog box appears and asks for you to type the name of the contact you want linked to the selected activity or contact.
	Smart Link Contact	The title of the selected activity will be scanned for a contact's name. If found, the contact will be linked.
	Link Document	A standard file dialog box will appear and let you select the document created by another program that you want linked.
	Speak Time	Consultant will speak the current time and date.
	Speak Schedule	Consultant will speak your schedule for the current date.
	Speak View	Consultant will speak the schedule on the top-most View to you.
	New Document	A New dialog box will appear so you can create a new file.
	Open Document	An Open dialog box will appear so you can open another Consultant file.
	Close View	The current View will be closed.
	Duplicate View	Another copy of the top-most View will be opened.

TABLE 2. Button Bar Commands

Icon	Command	Description
	Stagger Windows	All of the open windows on the screen will be resized and repositioned in a staggered layout.
	Open Consultant Help	Consultant Help provides extensive online documentation for Consultant.

Invoke A Command

Consultant comes with several commands pre-installed on the Button Bar. You may invoke any command currently on the Button Bar.

1. **Click the button that contains the command you wish to invoke**. For example, click the Week View button to open the Week View window. The Week View will immediately open.

Add A Command

In order to add a command to the Button Bar, you must first have a blank button. If you do not have a blank button available, you must first remove a command from the Button Bar. If you do have a blank button available, there are two steps to add a command to the Button Bar.

1. **Click a blank button**. The Button Bar Selector dialog box will appear. This dialog box displays a grid of commands that you can place on the Button Bar. Each command has a corresponding icon and text representation.
2. **Click the button that represents the command you want to place on the blank button**. The icon for the command you click will appear on the Button Bar.

Remove A Command

There are three steps to remove a command from the Button Bar.

1. **Click and hold the mouse button down on the command you wish to remove from the Button Bar**.
2. **While holding down the mouse button, drag the mouse towards the trash can**. When the mouse pointer is directly over the trash can, the trash can will change to a darker color. The dark trash can indicates that you can release the mouse button to remove the command.
3. **Release the mouse button to delete the command**. If you decide at this point that you made a mistake and would rather not remove the command, move the mouse pointer completely off the Button Bar and release the mouse button. Otherwise release the mouse button with the mouse pointer directly over the trash can. The command will be removed from the Button Bar.

Rearrange Commands

Besides the ability to add and delete commands, you may easily rearrange the buttons.

1. **Click and hold the mouse button down on the command you want to move.**
2. **While holding the mouse button, drag the mouse to a new position on the Button Bar.**

3. **Release the mouse button.** If the new position already contains a command, it will be shifted to the left or right to make room for the new command.

Add An Application

Consultant will also let you add external applications such your spreadsheet program or favorite drawing program to the Button Bar for easy access. In order to add an application to the Button Bar, you must first have a blank button. If you do not have a blank button available, you must first remove a command from the Button Bar. If you do have a blank button available, there are two steps to add an application to the Button Bar.

1. **Click a blank button**. The Button Bar Selector dialog box will appear. Near the bottom of this dialog box is a Select Application button.
2. **Click the Select Application button to choose the application you want to place on the Button Bar**. A standard open file dialog box will appear so you can choose the application you want to place on the Button Bar.

Customize Button Bar

Consultant will let you extend or decrease the number of buttons on the Button Bar. If you have a large monitor, you may want to add more buttons. Consultant will also let you change the size of the buttons. There are two sizes: large and small. The large buttons display a short text description below each icon to help you identify the button. You can change both the number of buttons on the Button Bar and the size of the button via the Preferences dialog box. For more information see *Environment Preferences* in Chapter *Preferences* on page 185.

Chapter 6
Online Help

The purpose of this chapter is to acquaint you with Consultant's online help systems. The design goal of Consultant was to build an interface that was intuitive, easy to use, and clutter free so the use of a user manual would be minimized. In addition to an elegant interface design, Consultant uses non-obtrusive help systems to further assist the user.

Consultant currently uses three forms of help: QuickTips, RealHelp™, and Consultant Help. The help facility you use depends upon which is most convenient at the time.

Topics Covered

- **QuickTips**. Describes how the QuickTips help system works each time you open your file.
- **RealHelp™**. Describes how the RealHelp help system works.
- **Consultant Help**. Describes how to use Consultant Help as a reference guide.

QuickTips

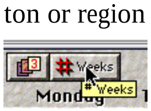
In order to help you quickly learn Consultant, the QuickTips dialog box will appear each time you use the program. The QuickTips dialog box will show you a new tip about how to use Consultant or how to use it more efficiently. Once the dialog box appears and you read the tip, you have three options.

1. **Read the Next Tip**. You can choose to read as many tips as you would like.
2. **Turn off QuickTips**. Click and thereby disable the Show at Start-up button if you no longer want to see the QuickTips.
3. **Dismiss the QuickTips Dialog Box**. Click the OK button to dismiss the QuickTips dialog box.

RealHelp™

RealHelp is a context-sensitive help system that is ever-present. The way RealHelp works is simple. Position the mouse pointer above a button or region of the screen that you don't understand and pause. Two things will happen:

- **A yellow identifier label will appear next to the mouse pointer**. The label tells you what the button or region is called.



- **A help message will appear from the bottom of the screen**. The help message will describe what the button or screen region is and how to use it.

When you are finished reading the help message, move the mouse and the message will disappear. As you can see, RealHelp is quick, easy and convenient. Of course, Consultant gives you several options to customize and control the way RealHelp works. This section will tell you how to quickly see the current time and date, disable RealHelp, and selectively see disabled help messages.

See Current Time And Date

RealHelp allows you to quickly see the current date and time. Follow the step below to see the current time and date.

1. **Move the mouse pointer to the bottom of the screen**. The current time and date will appear at the bottom of the screen. Move the mouse pointer to make the message disappear.

Disable RealHelp

You can disable RealHelp at any time via the Appearance preferences in the Preferences dialog box. When you disable RealHelp you can choose to disable 1) the help messages that automatically appear from the bottom of the screen; 2) the ability to see the current time and date; 3) QuickTips. For more information see *Appearance Preferences* in Chapter *Preferences* on page 185. Please note that when you disable RealHelp, it only disables the automatic nature of messages appearing when you position the mouse pointer over a button or screen region. The following sub-sections will describe how to continue seeing RealHelp messages on a less automatic basis.

You can also disable/enable RealHelp directly from the Help menu in the menu bar.

1. **Choose "Disable RealHelp" from the Help menu in the menu bar**. RealHelp will be disabled. Repeat this step to enable RealHelp.

See Disabled Help Messages

If you disable the display of RealHelp messages, this does not mean that you have to re-enable RealHelp to see messages on a selective basis. Suppose, for example, that you have disabled RealHelp but you don't understand what a particular button does in the Day View. Follow the steps below to see the help message for the button in question:

1. **Hold the Command key down on the keyboard**.
2. **Position the mouse pointer over the button in question**. An identifier label and help message will appear and describe how to use the specified button or screen region.

Consultant Help

Consultant Help is an online help facility that provides comprehensive explanation of Consultant's many features. Use Consultant Help when you have a question about how a specific feature in Consultant works. If you have a question about a button or similar object, you should check if there's a RealHelp message associated with the object. Many times, RealHelp provides enough information to answer your question.

This section will describe how to access and use Consultant Help.

Access Consultant Help

Consultant help is easy to access.

1. **Choose "Consultant Help" from the Help menu in the menu bar**. The Consultant Help window will appear.

The Consultant Help window is divided into two regions:

- **Topics List**. The Topics List displays the list of help topics that are available. They are sorted either by subject or alphabetically, depending on whether you've clicked the Topics button or the Index button.
- **Text Region**. The Text Region displays the help text. If you're simply VIEWING the text, you

should probably set the Layout Type button to “Fit To Window”. The text will expand to the size of your window. If you want to PRINT the help topic, you can change the Layout Type button to “Normal” and adjust the Page Size using the Page Layout button. The help text will print like a regular text document.

Use Consultant Help

You may click and drag the divider between the Topics List and the Text Region. This allows you to adjust the size of each region to your liking.

There are six buttons across the top of the Consultant Help window.

- **Topics**. Click to sort the help by subject. Similar topics will be grouped together.
- **Index**. Click to sort the help alphabetically. The help topics will be listed from ‘A’ to ‘Z’.
- **Expand All**. Click to expand all of the help topics (or index letters).
- **Contract All**. Click to contract all of the help topics (or index letters).
- **Go Back**. Consultant keeps track of which topics you’ve read. If you’ve read more than one topic and want to go back to a previous topic, click the Go Back button. You may click the Go Back button repeatedly to move back up the chain of topics.
- **Go Forward**. If you’ve clicked the Go Back button to view a previous topic, you may then click the Go Forward button to move forward to a more recent topic.

You may search the current help topic or all the help topics for a particular word or phrase. Choose Find from the Edit menu to search the Help file.

Chapter 7

The Activity Window

The purpose of this chapter is to acquaint you with the Activity Window which is one of the most important and most used windows in Consultant. The Activity Window plays an active role in almost everything you do in Consultant where time management is concerned. You will use the Activity Window to schedule activities and work with existing activities.

Topics Covered

- **Purpose And Use Of Activity Window**. Describes the purpose of the Activity Window and when it is used.
- **Schedule An Activity**. Describes how to use the instruments in the Activity Window to schedule activities.
- **Edit An Activity**. Describes how to edit an activity that has already been scheduled using the Activity Window.

Purpose And Use Of Activity Window

The Activity Window is the central mechanism for creating and working with activities. You will always use the Activity Window for one of two purposes:

1. **Use the Activity Window to schedule a new activity**. A blank Activity Window appears to help you create a new activity.
2. **Use the Activity Window to edit or redefine an activity**. Whenever you select an existing activity, the Activity Window appears and shows you all the details about the activity.

When the Activity Window appears for either of these purposes, you will see that it contains an array of tools called *instruments* which let you define the activity. There are, for example, instruments to adjust the time, date, and title of the activity. The Activity Window automatically shows and hides these instruments according to the type of activity you are dealing with. Consultant hides unnecessary instruments to not burden you with instruments that are not applicable to the task at hand. You will not, for instance, see the repeating activity instruments when the activity you are defining only lasts a single day.

Schedule An Activity

This section will describe how to use the Activity Window to schedule a new activity. You may have noticed that the Activity Window is not always visible. It only becomes visible when you schedule an activity or edit an existing one.

When you choose to schedule an activity, there is no exact set or sequence of steps you must take. The basic rule of thumb is to adjust the instruments in the Activity Window until they represent the activity you want to schedule. Once you have all of the instruments adjusted the way you like, close the Activity Window or hit Return to schedule the activity.

Regardless of whether the activity you are about to create is an appointment, a To-Do, a Banner, a Goal, etc., there are at least two items every activity must have.

- **Title**. Every activity must have a title such as “Annual Sales Meeting”, “Family Vacation” or “Mail Proposal.”
- **Date**. Every activity must occur on some date, date range or set of nonconsecutive dates.

The Activity Window's instruments provide a way to enter the title, set the date and customize an activity as you wish.

These instruments and the customization they perform are listed in TABLE 3. “Activity Window Instruments”.

TABLE 3. Activity Window Instruments

Instrument	Description
Title Region	Enter a title that describes your activity. For example “Jenny’s T-Ball Game.”
Single Day Button	Click to specify that the activity occurs on a single day. The Date Shutter will let you specify which day.
Multiday Button	Click to specify that the activity occurs over one or more consecutive days. The Date Shutter will let you specify the range of days.
Repeating Button	Click to specify that the activity repeats over a range of days (e.g. every Monday and Friday). The Date Shutter will let you specify the range of days. Repeating tools will let you specify the pattern of days within the date range.
Date Shutter	Adjust the date or date range of the activity.
Time Shutter	Click to open and adjust the time range of the activity.
To-Do Indicator	Click to designate the activity as a To-Do.
Banner Indicator	Click to designate the activity as a Banner. Note Banners appear as normal activities in all Views except the Month View where they appear as Banners.
Alarm Button	Click to set an alarm for the activity.
Notes Button	Click to reveal the Notes Region and enter an unlimited amount of notes for the activity.
Links Button	Click to reveal the Links Region and see the activity's links.
Category Button	Click to assign a Category to the activity.
Priority Button	Click to assign a Priority to the activity.
Source Button	Click to select which user and file the activity belongs to.

Although there is no real sequence of steps you must follow to adjust the instruments in the Activity Window to describe your activity, this section will recommend a sequence of steps that works well.

Open Activity Window

In order to schedule a new activity, you must have the Activity Window available. There are several ways to open the Activity Window in Consultant to schedule a new activity.

- **Choose “New Appointment” from the Calendar menu**. The Activity Window will appear and the Date Shutter will automatically be set to either the current day or the first day in the top-most View if the current day isn't in the top-most View. The Time Shutter will be open so you can set the time.

- **Choose "New To-Do" from the Calendar menu**. The Activity Window will appear and the Date Shutter will automatically be set. The To-Do Indicator button will automatically be selected. The Time Shutter will be closed since To-Dos do not have a time associated with them.
- **Choose "New Event" from the Calendar menu**. The Activity Window will appear and the Date Shutter will automatically be set. The Time Shutter will be closed since Events do not have a time associated with them.
- **Choose "New Banner" from the Calendar menu**. The Activity Window will appear and the Date Shutter will automatically be set. The Banner Indicator button will automatically be selected. The Time Shutter will be closed.
- **Double-Click the Schedule Region of the Day or Multiday Views**. The Activity Window will appear and the Date Shutter will automatically be set to the day you clicked.
- **Click a Day in the Month or Week Views**. The Activity Window will appear and the Date Shutter will automatically be set to the day you clicked.
- **Drag out a time or date span in the Day, Multiday, or Gantt Views**. The Activity Window will appear and the Date Shutter will automatically be set to the day you clicked. The Time Shutter will be opened and will contain the time range you dragged out.

Now the you have the Activity Window open, you are ready to adjust the instruments in the window to define your activity.

Enter Activity Title

Enter the title for your activity into the Title Region of the Activity Window. Your title should adequately describe the activity so don't be afraid to be verbose. A good example might be, "Meeting with John at the Cafe by the bay just off Washington Lane."

Choose Activity Date Range Type

Consultant supports three basic activity date range types: Single Day, Multiday, and Repeating. A Single Day activity lasts only a single day as its name applies. A Multiday activity occurs over several consecutive days. A vacation is a good example of a Multiday activity. A Repeating activity also lasts over several days but isn't consecutive in nature. An example of a repeating activity is a birthday, a holiday, or a weekly meeting. A birthday or holiday repeats once a year, while a weekly meeting repeats once a week. Consultant supports complex repeating activities so you can schedule almost anything.

Click the Single Day, Multiday, or Repeating buttons to choose which type of activity you are scheduling. The Activity Window's instruments will automatically change depending on your choice as described below.

1. **Click Single Day button**. The Date Shutter will change so you can only select a single day.
2. **Click Multiday button**. The Date Shutter will change so you can only select a range of days.
3. **Click Repeating button**. The Date Shutter will change so you can only select a range of days. Furthermore, the Activity Window will expand downwards and show you a set of tools to let you define how the activity repeats. A description of these tools follows in the next step.

Define Repeat Pattern (if applicable)

If you chose to schedule a Repeating Activity then you will need to define the repeat pattern for your activity using the tools that appeared.

There are three basic patterns that all Repeating activities follow: Annually, Monthly, and Weekly. An Annually Repeating activity repeats on a single day every year. Birthdays, holidays, and anniversaries are good examples. A Monthly Repeating activity repeats on the same day(s) every month. Paychecks and bills are good examples. A Weekly Repeating activity repeats on the same day(s) on some sort of weekly basis (every week, every other week, the first week in the month, the last week in the month, etc.). Meetings, goals, and college classes are good examples.

Select whether your activity repeats annually, monthly, or weekly. Additional tools will appear to help you further define your pattern depending on your choice.

- **Annually**. A pop-up menu will appear from which you can choose how many years the activity will repeat. Choose “Forever” if the activity is a birthday or holiday that repeats indefinitely. The only thing you have left to do is select which date of the year the activity occurs on. Select the date in the Date Shutter. The Date Shutter is described in the next step.
- **Monthly**. Two pop-up menus will appear from which you can choose which day(s) in the month the activity is to repeat on. You are allowed to choose up to two days. This allows you to select, for example, the 1st and 15th of each month if you want to schedule your twice monthly pay checks. You can, of course, only choose one day by setting the second day to “ignore.” The only thing you have left to do is select the date range over which this activity occurs.

  Make sure the date range you select encompasses the days you want included. Suppose, for example, that you buy a new car on credit (3 year loan) and want to schedule a reminder to pay the car loan each month on the 15th. If today is January 1, 1998 then you would want to select a date range of January 15, 1998 to January 15, 2000. You needn’t be so precise. You could also select a date range of January 1, 1998 to January 30, 2000. You just need to make sure the date range encompasses the days you want included in the activity. Select the date range in the Date Shutter. The Date Shutter is described in the next step.

- **Weekly**. Two sets of buttons will appear. Use the first set of buttons to choose which day(s) of the week your activity occurs on. You can select as many days as you would like. If, for instance, you’re scheduling a college history course, you might select Monday, Wednesday, and Friday.

  Use the second set of buttons to choose which week(s) the activity repeats on. You have two options. You can choose a repeat pattern like every week, every other week, every 4th week, etc. Or you can choose or more specific pattern like the first week and last week of the month (you can select more than one week). The option you choose depends on your activity. The only thing you have left to do is select the date range over which this activity occurs.

  Make sure the date range you select encompasses the days you want included. Suppose, for example, that you are taking a university course that is one semester long and starts in January and ends the second week of April. If today is January 1st, 1998 and the course occurs every Tuesday and Thursday evening, you might select a date range beginning with the first Tuesday in January and ending with the Thursday in the second week of April: January 6, 1998 to April 9, 1998. Once again, you needn’t be so precise. You could also select a date range of January 1st, 1998 to April 11, 1998 (the first day of January to the end of the second week of April). You just need to make sure the date range includes the days you want included in the activity. Select the date range in the Date Shutter. The Date Shutter is described in the next step.

Select Date Or Date Range

You will use the Date Shutter to select when your activity begins and ends. If your activity is a Single Day activity, the Date Shutter will show a single date that you can adjust. If your activity is a Multiday or Repeating activity, then the Date Shutter will show a date range (start and end date) that you can adjust. A small Ongoing button represented by an infinity symbol will also appear to the right of the Date Shutter if your activity is a Multiday or Repeating activity. This button lets you set the end date to “forever” which means the activity never ends.

The process to adjust the date or date range of an activity has been made as simple and efficient as possible.

1. **Click the date component you wish to change**. You can click the day, month, or year for either the start or end date. The selected component will become highlighted and a set of up/down adjuster arrows will appear. A small infinity symbol will also appear to the right of the arrows.
2. **Use the mouse to adjust the highlighted date component**. You can click the up/down adjuster arrows to adjust the selected component. Once you have adjusted the selected component, you can click another component for adjustment.
3. **Use the keyboard to adjust the highlighted time component**. You may find it quicker to use the keyboard to adjust the selected time component. Simply type “9” to set the day component in the start date to the 9th or “f” to set the month component to February. Please note that when you use the keyboard to type in the names of months, you needn't spell out the entire month name. For example, since February is the only month name that starts with a “f”, “f” is enough for Consultant to know that you mean February. Also, don't worry about capitalization. Consultant recognizes two special keystrokes when you type date.
   - **Tab**. Advances the selection to the next date component. If you currently have the day component in the start date selected, press the Tab key to advance the selection to the month component.
   - **Shift-Tab**. Moves the selection to the previous date component. If you currently have the day component in the end time selected, press the Tab key with the Shift key depressed to move the selection backward to the year component in the start date.
4. **Click the Ongoing button if you want your activity to continue forever**. If your activity is a Multiday or Repeating, a small ongoing button represented by an infinity symbol will appear to the right of the Date Shutter. Click this button to set the end date of your activity to “forever.” This means your activity never ends. This setting is useful for scheduling holidays, birthdays, etc. which continue year after year without end. Since the MacOS only supports dates up to February 6, 2040, you will see this date when you view activities that last forever in the List View.

Once you have adjusted the date or date range, you needn't do anything else with the Date Shutter. The up/down adjuster arrows will eventually disappear on their own.

Select Time Of Activity

If your activity occurs at a specific time, you will use the Time Shutter to set the start and end times for your activity. If your activity does not occur at a specific time (To-Dos, Events), you will want to make sure the Time Shutter is closed.

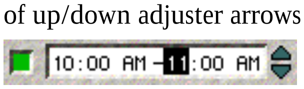
Depending on how you opened the Activity Window, the Time Shutter may or may not be open. If your activity does not have a time associated with it, you want to make sure the shutter is closed. If your activity does occur at a specific time, you will want to make sure it is open. You may open or close a shutter either of two ways.

- **Click the shutter button**. Note, you must always click the shutter button to close a shutter.
- **Click the shutter itself**.

The Time Shutter contains two times separated by a hyphen. The first time is the start time of the activity and the second time is the end time of the activity.

The process to adjust the times of an activity has been made as simple and efficient as possible. Make sure the Time Shutter is open before you attempt to adjust its time.

1. **Click the time component you wish to change**. You can click the hour, minute or a.m./p.m. indicator for either the start or end time. The selected component will become highlighted and a set of up/down adjuster arrows will appear.

2. **Use the mouse to adjust the highlighted time component**. You can click the up/down adjuster

arrows to adjust the selected component. Once you have adjusted the selected component, you can click another component for adjustment.

3. **Use the keyboard to adjust the highlighted time component**. You may find it quicker to use the keyboard to adjust the selected time component. Simply type “9” to set the hour component in the start time to nine o’clock. Consultant recognizes two special keystrokes when you type times.
   - **Tab**. Advances the selection to the next time component. If you currently have the hour component in the start time selected, press the Tab key to advance the selection to the minutes component.
   - **Shift-Tab**. Moves the selection to the previous time component. If you currently have the hour component in the end time selected, press the Tab key with the Shift key depressed to move the selection backward to the a.m./p.m. component in the start time.

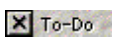
   Once you have adjusted the time, you needn't do anything else with the Time Shutter. The up/down adjuster arrows will eventually disappear on their own.

Make A To-Do

You may specially designate any activity as a To-Do. A To-Do Activity does not have a time associated with it and has special properties that allow you to track its progress and eventual completion.

The Day and Multiday Views display To-Dos in a list format that is separate from Appointments. This makes it easy to keep track of daily and weekly To-Do lists. When a To-Do appears in the Day, Multiday, Week, Month and List Views it has a To-Do icon associated with it for easy identification.

1. **Click the To-Do Indicator button to turn any activity into a To-Do**. The To-Do Indicator button will become depressed to indicate that the activity is now a To-Do.

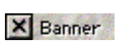


If the Time Shutter is open at the time you depress the To-Do Indicator button, it will automatically close since To-Dos do not have a time associated with them.

Make A Banner

You may specially designate any activity as a Banner.

1. **Click the Banner Indicator button to turn any activity into a Banner**. The Banner Indicator button will become depressed to indicate that the activity is now a Banner.



Banners only appear as Banners in the Month View. Other Views show Banners as normal activities.

Set An Alarm

An Activity may optionally have an alarm associated with it. You can choose to have an audible or visual alarm go off before or after the activity. An alarm is set with the Alarm Button. Once an alarm has been set, the Alarm button will change to indicate this fact. There is a preference in the Preferences dialog box to automatically have an alarm set for each new activity you schedule. For more information on alarm preference see *Activities Preferences* in Chapter *Preferences* on page 187.

To set an alarm for your activity, follow the steps below.

1. **Click the Alarm Button in the Activity Window**. The Activity Alarm dialog box will appear.

2. **Click the Alarm Enabled button**. The Alarm Type tools will become active and the Alarm Timing tools will appear.

3. **Choose the Visual Alarm Type from the Visual pop-up menu**. You must choose either a visual alarm, an audible alarm, or both. If you choose a visual alarm, an alarm dialog box will appear when the alarm goes off.
4. **Choose the Audible Alarm Type from the Audible pop-up menu**. You must choose either a visual alarm, an audible alarm, or both. If you choose an audible alarm, you can choose a particular sound to play or a voice reminder. If you choose a voice reminder, you much have Apple's PlainTalk Speech Manager installed. The voice reminder will call you by name and then remind you of the activity. Consultant uses the name you have entered in the Alarm Preference. For more information see *Environment Preferences* in Chapter *Preferences* on page 185.
5. **Select either a Relative Alarm or Exact Alarm in the Alarm Timing Region**. A Relative Alarm goes off a certain a specified amount of time before or after an activity begins. An Exact Alarm goes off at the precise time you specify. Depending on which you select, additional tools will appear to let you set the relative or exact time of the alarm.
6. **Choose the Relative Period and enter the Relative Time if you chose a Relative Alarm Type**. When you choose the relative period, you choose whether you want the alarm to go off before or after the activity begins. You also choose whether the time you enter is in minutes, hours, or days. The you will enter the number of minutes, hours, or day before or after the activity's start time when you want the alarm to go off.
7. **Choose the Exact Time for the alarm if you chose the Exact Alarm Type**. If you chose Exact, you will be asked to enter the exact time and date when you want the alarm togo off.
8. **Click the OK button to dismiss the Activity Alarm dialog box**. The Alarm button in the Activity Window will change to indicate that an alarm is now set.

For information on what happens when an alarm goes off, see *Alarms* in Chapter *Calendar Management* on page 93.

Enter Notes

Every activity may have an unlimited amount of notes associated with it. Notes are accessible through the Notes Region in the Activity Window.

1. **Click the Notes Button in the Activity Window to make the Notes Region available**. The Activity Window will expand downwards to reveal the Notes Region.

   The Notes Region and the Links Region appear in the same place in the Activity Window. For this reason, there is both a Notes button and a Links button in the Activity Window to toggle between the two.
2. **Click and type in the notes region to enter some notes**.

Consultant provides three instruments to assist you in your note taking.

- The Insert Time/Date instrument
- The Chronograph instruments
- The size box

Insert Time/Date Button

Use the Insert Time/Date Button to easily insert the current time and date into your notes.

1. **Click the Insert Time/Date button**. The current time and date is inserted into your notes at the current cursor position.

Chronograph Instruments

If you bill for time or need to keep exact track of your time, it is very useful to time events. Consultant will not only let you time events, but it will automatically insert the start time, end time and duration of the event directly into your notes via the Chronograph instruments. The Chronograph is controlled by three buttons.

- **Start/Stop Button**. This button starts and stops the chronograph. Once the timer is started, the Chronograph's shutters will open and begin to time the event at hand. When the event is complete, click the Start/Stop button a second time to stop the Chronograph. You can start and stop the Chronograph as many times as you wish – time will simply accumulate.
  
- **Insert Chronograph Button**. Once the Chronograph has been stopped, click this button to have the start, stop and elapsed times inserted into your notes at the current cursor position.
  
- **Reset Button**. Click this button once the Chronograph has stopped to reset the Chronograph. The Chronograph's shutters will close.
  

Size Box

The size box is located at the bottom left-hand corner of the Notes/Link Region. Use the size box to make the Notes/Links Region larger or smaller. This size box works exactly the same as the size box located at the bottom left-hand corner of any Macintosh window. The only difference is that you can only resize the height of the Notes and Links Region.

1. **Click and hold down the mouse button on the size box**.
   
2. **While holding down the mouse button, drag the size box**.
3. **Release the mouse button when the Notes/Links Region is at the height you desire**.

Maintain Links

Every activity can have an unlimited number of contacts, other activities and documents created by other applications linked to it. A list of these links is accessible through the Links Region in the Activity Window. Click the Links button in the Activity Window to make the Links Region visible. The Activity Window will expand downwards to reveal the Links Region.

The Notes Region and the Links Region appear in the same place in the Activity Window. For this reason, there is both a Notes button and a Links button in the Activity Window to toggle between the two

1. **Click the Links button to cause the Links Region to appear**. Listed in the Links Region is all of the activities, contacts, Memos and documents currently linked to the activity in the Activity Window.

Consultant provides several buttons at the top of the Links Region to assist you with links.

- **The Break Link button**. Use this button to remove a link from an activity and not delete the linked item.
- **The Delete Link & Item button**. Use this button to permanently delete a selected linked item as well as the link.
- **The Delete All Links & Items button**. Use this button to permanently delete all the items and links in the Links Region.

Break Link Button

The occasion may arise when you may no longer need a certain item linked to the activity in the Activity Window. A simple way to remove the link and not delete the actual linked item is to use the Break Link button.

1. **Select the link you want to remove from the list**.
2. **Click the Break Link button to remove the selected link from the list**. The link is removed from the list but the item is not deleted. You may alternatively press the Delete key on the keyboard rather than click the Break Link button to remove a selected link from the list.

Delete Link & Item Button

Not only can you remove a link from the list of links but you can also choose to permanently delete a linked item from your file. Use the Delete Link & Item button to permanently delete a link.

1. **Select the link you want to delete**.
2. **Click Delete Link & Item button to permanently delete the selected link from the file**.

Please note that if the selected item is a document, the Delete Link & Item button will not delete the item, but only remove it from the list.

Delete All Links & Items Button

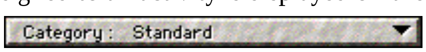
The occasion may present itself when you want to permanently delete all the items linked to the activity in the Activity Window.

1. **Click Delete All Links & Items to permanently delete and remove all the items from the list**.

Please note that the Delete All Links & Items button will not delete any documents in the list of links, rather it will remove them from the list.

Assign A Category

Every activity is assigned a Category to help you keep your data organized. The Category currently assigned to an activity is displayed on the Category button.



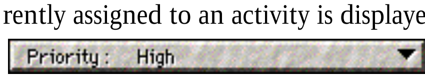
You may change which category is assigned to an activity at any time.

1. **Click and hold the mouse button down on the Category button**. A pop-up menu will appear and list all the Categories you can choose from.
2. **Select the desired Category and release the mouse button**. Your selected Category will appear on the Category button.

For information on how to add, delete or rename Categories see *Define Categories* in Chapter *Priorities, Categories and Sets* on page 148.

Assign A Priority

You must assign a Priority to every activity in order to indicate its relative importance. The Priority currently assigned to an activity is displayed on the Priority button.



1. **Click and hold the mouse button down on the Priority button**. A pop-up menu will appear and list the possible Priority choices.
2. **Select the desired Priority and release the mouse button**. Your selected Priority will appear on

the Priority button.

You are not limited to the three standard Priorities *High*, *Medium* and *Low*. In fact, you may have up to ten Priorities of your own choice. For information on how to define your own Priorities see *Define Priorities* in Chapter *Priorities, Categories and Sets* on page 147.

Select A Source

Consultant allows you to open multiple files at once. Furthermore, each file can contain data for more than one user. The Source button tells Consultant which file and to what user an activity belongs.

Use the Source button to specify where you want to save an activity. Since each file also has a public area in which you can save information, the Source button provides access to this public area as well.

1. **Click and hold the mouse button down on the Source button**. A pop-up menu will appear and list the possible choices for where you want to save your activity.

   Every file has a special user called *Public*. Select this user in the file of your choice if you want to make the activity public to all users who access that file.

2. **Choose the source where you want the activity saved and release the mouse button**. The chosen destination or source of the activity will appear on the Source button.

Save The Activity

After you adjust the instruments in the Activity Window to represent your activity, you will want to close the Activity Window to cause the activity to be scheduled. There are two ways to close the Activity Window.

1. **Click the Close Box in the upper left-hand corner of the Activity Window**. The Activity Window will close and the activity will be scheduled.
2. **Press Return on the keyboard**. The Activity Window will close and the activity will be scheduled.

Edit An Activity

The Activity Window is very powerful in the sense that all of the information that comprises an activity is available for display and editing by means of the various instruments. The Activity Window cannot, however, adequately display calendar data in all of the various formats that you may have grown accustomed to. Consultant therefore provides Views such as the Day, Multiday, Week, Month, Year, Gantt and List Views so that you can view your schedule in different formats. This section shows you how the Activity Window plays a vital role in activity scheduling, even when you view your schedule from one of Consultant’s many Views.

When you open one of these Views, all the activities that fall within the View's time frame will appear in that View. The Week View for February 10th, for instance, shows all the scheduled activities that fall between February 10th and February 16th.

When an activity appears in a View, you will not see every field that comprises that activity. You often will only be able to see the title of the activity, its start time, its end time and the date on which it occurs. There is obviously not enough room to also display notes, links and alarm information. For this reason, Consultant allows you to select an activity so that all of the activity’s information appears in the Activity Window.

1. **Click any activity in any View to *select* it**. When an activity is selected, it becomes highlighted and all of the information for that activity appears in the Activity Window.

The instruments in the Activity Window change to represent the selected activity. This makes it possible for you to make changes to the instruments in the Activity Window and thereby alter the activity. When your changes are complete, all you have to do is close the Activity Window to make the changes permanent.

Remember one thing: The Activity Window always reflects the activity you are working with. This is true if the activity is a new one or an existing one that you have selected.

Chapter 8

The Calendar Views

The purpose of this chapter is to describe the calendar Views which Consultant provides to help you manage your schedule. The information contained in this chapter assumes that you are familiar with the Activity Window since the Activity Window plays an active role in activity scheduling.

Topics Covered

- **Views**. Describes how Views are the means by which you see your schedule in different formats. Also describes tools and characteristics that all calendar Views have in common.
- **Day View**. Details how to use the Day View to schedule and view activities including To-Do and Event type activities.
- **Multiday View**. Details how to use the Multiday View to work with your schedule a variable number of days at a time.
- **Week View**. Details how to use the Week View to work with your schedule a week at a time.
- **Month View**. Details how to use the Month View to schedule activities including Banners.
- **Year View**. Describes how to use the Year View to view a year calendar.
- **List View**. Details how to use the List View and Criteria to build custom sorted lists.
- **Gantt View**. Describes how to use the Gantt View to design and build projects.

Views

Since Consultant is literally your own personal advisor or consultant, you can ask it to show you your schedule in different formats and styles. Consultant will respond and show you the portion of your schedule that you desire by means of one of several different Views.

- **Day View**. Shows you your schedule a day at a time.
- **Multiday View**. Shows you your schedule a variable number of days at a time.
- **Week View**. Shows you your schedule a week at a time.
- **Month View**. Shows you your schedule a month at a time.
- **Year View**. Shows you a year calendar.
- **Gantt View**. Shows you any range of your schedule in a time-line perspective.
- **List View**. Lets you sort, filter and customize your schedule.

Not only do you use Views to see your schedule, but you use Views to schedule activities. You schedule activities in Views by dragging out time ranges or clicking on days. The Activity Window will appear with most of the appropriate information ready for you so all you have to do is type a title and press Return.

You may recall that Consultant allows you to have several files open at once and that each file can contain schedules for several different people. A View can display the schedule of more than one person from more than one file simultaneously. This makes it possible to overlay schedules and work out conflicts.

This may seem a bit odd at first since typical Macintosh applications display each opened file in a separate window. In Consultant, a View window does not represent a file in the traditional sense. Rather, a View is simply a window that you use to work with part or all of one or more files.

Although the different Views that Consultant provides differ in the way they display information and function, most have several features and tools in common. This section begins with a discussion of features and tools that all Views have in common and ends with a description of how to open different calendar Views.

Set Button

All of the calendar Views except the Year View have a Set button. Information from any number of users in any number of files belonging to different categories can appear in a View. Sets filter which categories from which users is actually displayed. Since the Year View doesn't display schedule information, it has no need for a Set button. For information on how to build Sets see *Define Sets* in Chapter *Priorities, Categories and Sets* on page 150.

Use the Set Button to select which Set filters the activities shown in a View.

1. **Click and hold the mouse button down on the Set button**. A pop-up menu will appear and list all the Sets you may choose from.

2. **Choose the desired Set and release the mouse button**. Your chosen Set will appear on the Set button. Only the categories that belong to your chosen Set will be displayed in the View.

Jump Button

The Day, Multiday, Week and Month Views each have a Jump button. Use this button to quickly jump between different dates in different Views. Suppose that the Day View shows your schedule for March 3, 1997 and you want to quickly jump two weeks ahead to add an appointment to your schedule. Perhaps you are not sure exactly what day of the week is best for the appointment, so you decide to view the Week View for the week following March 3, 1997.

1. **Click the Jump button**. The Jump-To dialog box will appear and show a calendar for March 3, 1997.

2. **Select March 17, 1997**. Use any of the controls in the dialog box to adjust the calendar to this date. In this case, since you are already in the appropriate month and year click the 17th.

3. **Choose which View you want to open**. The Jump-To dialog box contains a View button. This button tells the dialog box which calendar View you want Consultant to jump to. When you click and hold the mouse button down on this button, a pop-up menu appears. Choose and release the mouse button on the View of your choice.

   - **Current View**. Choose this item if you don't want a new View window to open. Consultant will simply use the View that you pressed the Jump button from to jump to your desired date.
   - **New Day View**. Choose this item if you want Consultant to open a new Day View at the date displayed in the Jump-To dialog box.
   - **New Multiday View**. Choose this item if you want Consultant to open a new Multiday View at the date displayed in the Jump-To dialog box.
   - **New Week View**. Choose this item if you want Consultant to open a new Week View at the date displayed in the Jump-To dialog box.
   - **New Month View**. Choose this item if you want Consultant to open a new Month View at the date displayed in the Jump-To dialog box.

4. **Click OK**. The View you chose will open and display your schedule beginning with the date you selected. You may optionally click the Today button located at the top of the dialog box to instantly jump to today in the current View.

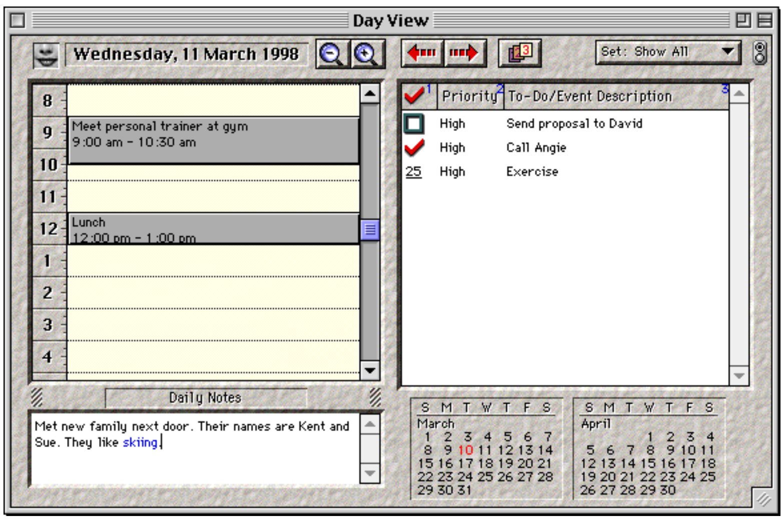
How To Open Calendar Views

There are three ways to open calendar Views in addition to the Jump-To dialog box. Consultant provides more than a single way, so that you can choose a method which suits you best.

- **Use the Calendar menu in the menu bar**. The Calendar menu provides a way to open the Day, Multiday, Week, Month, Year, Gantt and List Views.
- **Use the Button Bar**. You can set up the Button Bar with commands to open calendar Views. For information on how to set up and use the Button Bar see Chapter 6 *The Button Bar* on page 39.

Day View

The Day View displays all the activities on your schedule for a single day.



The Day Heading displays the date that the Day View currently represents. In addition to the Day Heading, the Day View has three major regions.

- **The Schedule Region**. This region displays Appointments. This region also has a sub-region referred to as the Hour Labels Sub-region since this sub-region displays all the hours of the day. You will notice some special shading in the Schedule Region. Certain hours are shaded in a light yellow color, while other hours are shaded in a muted purple color. The light yellow color represents your standard working hours while the muted purple color represents the opposite. These colors are for your convenience only and are designed to help you quickly see the most used portion of your day. You can, of course, change when the working region begins and ends. For information on changing your standard work hours, see *Day/Multiday Preferences* in Chapter *Preferences* on page 188. You will also notice that the current hour is always displayed in a slightly darker shade of yellow to quickly let you know where the current hour is on your schedule.
- **The To-Do Region**. This region displays To-Dos and Events. The To-Do Region is comprised of three columns: a To-Do mark column; a Priority column; and an activity description column.
- **The Daily Notes Region**. This region lets you enter an unlimited amount of notes for the date specified in the Day Heading. This notes region is useful for entering miscellaneous thoughts through-out the day.

This section describes how to use these regions in conjunction with the Activity Window to schedule and work with activities. It begins with a description of how to use some of the various tools in the Day View to control how your information is displayed. The section then describes how to have Consultant speak your schedule aloud and how to enter and export Daily Notes. Finally, this section describes how to use the Day View to schedule activities, reschedule activities, and mark To-Dos. Keep in mind that you can have more than one Day View open and each one can display a different day.

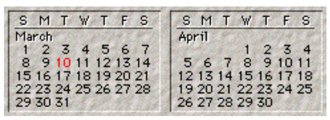
Use Day Forward / Backward Button To Change Days

The Day Forward and Day Backward buttons change the View so that it displays your schedule for a different day.

These two buttons move the View forward or backward one day at a time.

Use Smart Calendars To Change Days

If you need to view a day more than a few days from where you currently are, you can also use the Smart Calendars located in the bottom right-hand corner of the Day View.



1. **Double-click any day in the Smart Calendars to immediately move to that day**. For instance, if October 3, 1997 is currently displayed in the Day View and you want to see October 21, 1997, double-click October 21 in the Smart Calendar. The Day View will change so that October 21, 1997 is displayed.

If you need to view a day that is not within a few weeks of where you currently are, you may want to use the Jump button instead. For information on the Jump button see *Jump Button* in Chapter *The Calendar Views* on page 54.

You may also use the Smart Calendars to quickly open the Week View to the current week.

1. **Double-click any week day heading (S, M, T, W, T, F, S) in the Smart Calendars to immediately open the Week View to the current week**. The Week View will appear and open to the week that contains the current day.

You may also use the Smart Calendars to quickly open the Month View to the current month.

1. **Double-click the month name or year in the Smart Calendars to immediately open the Month View to the current month**. The Month View will appear and open to the month that contains the current day.

Zoom Schedule Region

You can use the Zoom In and Zoom Out buttons to change how big the hours appear in the Schedule Region.

Zooming is useful if you have a small monitor and want to see more hours in the Schedule Region, or if you have a large monitor and want to see less hours in the Schedule region.

Choose Activity Types

The Day View lets you quickly choose which types of activities you want displayed in the To-Do Region. Use the Types button to specify the types of activities you wish to see.

1. **Click and hold the mouse button down on the Types button**. A pop-up menu will appear with several choices.

- **Events & To-Dos**. Choose this option to display both Events and To-Dos.
- **Events**. Choose this option to only display Events.
- **To-Dos**. Choose this option to only display To-Dos.

2. **Select your choice and release the mouse button**. The To-Do Region will change to reflect your choice.

Sort To-Do Region

The To-Do Region is comprised of three columns: a To-Do mark column; a Priority column; and an activity description column. You can sort the activities that appear in the To-Do Region by any of these columns. If, for example, you want the To-Do Region listed alphabetically you would sort on the activity description column. If, on the other hand, you want all your completed To-Dos at the bottom of the list, you would sort on the To-Do mark column.

Consultant actually sorts the To-Do Region on all three columns at once. You can see the sort order of these columns by looking at the little number 1, 2, or 3 displayed in the upper right-hand corner of each column heading. Changing the sort order is easy.

1. **Click the column heading you want to sort on first**. It will become the number one sort column and the other two columns will reorder appropriately.

The sort order of the To-Do mark column is as follows: Not Completed, Underway, Forwarded, Assigned, Assigned/Done, Completed, Deleted, and Goals.

Alter Day View Preferences

Click the Day View Preferences button in the Day View to change the preferences that control how the Day View displays your schedule.

A dialog box will appear that will let you specify the following preferences.

- The default start/end hours of the Schedule Region
- Title word wrapping
- Title Icons
- Schedule Region Printing

For complete information on the various Day View preferences see *Day/Multiday Preferences* in Chapter *Preferences* on page 188.

Speak Schedule

Click the Speak Schedule button in the Day View to cause Consultant to speak aloud the schedule in the Schedule and To-Do Regions. You can stop the speaking at anytime by pressing Command-”.” on the keyboard. You must have Apple’s speech manager, PlainTalk, installed in order for this feature to work. For more information on speech, see Chapter 17 *Speech* on page 156.

Enter Daily Notes

You can use the Daily Notes region of the Day View to enter an unlimited amount of notes for each day. When you change days, the notes, if any, for the new day are automatically displayed in the Daily Notes Region. Notes are automatically saved when you change days in the Day View, close the Day View, bring another View to the foreground, or quit. In other words, you don’t have to take any special steps for your daily notes to be saved. You can, however, force the notes to be saved by choosing “Save Text” from the File menu.

Daily notes are useful for keeping track of expenses, tracking ideas, etc. Notes specific to a particular activity should be entered in the Activity Window for the appropriate activity rather than the Daily Notes Region.

You can use all of Consultant’s text editing facilities in the Daily Notes Region. This includes tools for multiple fonts, text colors, font sizes, etc. For more information on Consultant’s text editing tools see *Tools And Customization* in Chapter *Text Documents* on page 163.

Export Daily Notes

The Daily Note’s Export feature will create a new text document and automatically copy one or more days of Daily Notes into this new document. The purpose of this Export feature is to provide a simple way to extract and combine your Daily Notes from multiple days into a single document that you can use elsewhere.

1. **Choose “Export Daily Notes” from the File menu to export one or more Daily Notes**. The Daily Notes Export dialog box will appear.
2. **Select the date range of the Daily Notes you want to export**. You will need to select a start date and an end date. You needn’t necessarily have Daily Notes on those two dates.
3. **Select the Insert Date button to automatically insert the date of each Daily Notes above each Daily Notes in the export**.
4. **Click the OK button to export the all the Daily Notes found between and including the specified Start/End dates**. A new text window will open. Each Daily Notes, one after another, will be copied into the text window. If the Insert Date button is selected, the date for each Daily Notes will precede each Daily Notes. You may save the text document, cut, copy, paste, or do anything you want with it.

Resize Schedule / Daily Notes Regions

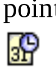
When the Day View first opens, the Schedule and Daily Notes Regions are adjusted to a default sizes. You may want to change the size of the Daily Notes Region to have more room to display your notes. You may also want to decrease the size of the Daily Notes Region so you the Schedule Region can be larger. Follow the steps below to resize the Daily Notes Region and consequently resize the Schedule Region.

1. **Place the mouse pointer between the Schedule Region and Daily Notes Region**. The mouse pointer will turn into a hand cursor.
2. **Click and hold the mouse button down**. The hand cursor will grip the marble space between the two regions.
3. **Move the mouse up or down to resize the Schedule/Daily Notes Regions**. Two gray lines representing the gripped marble space will move up/down as you move the mouse.
4. **Release the mouse button**. The Schedule and Daily Notes Regions will resize as specified.

Schedule Appointments

You can use the Activity Window in conjunction with the Day View to schedule activities. The Day View is particularly helpful when you want to schedule an activity that has a time associated with it.

Appointments include any and all activities that have a time associated with them. This includes activities that span one or more consecutive or nonconsecutive days. Consultant uses icons to help identify different activity types under different situations. For example, there is a special icon that represents Appointment activities.



The above icon appears when Appointments are displayed in certain Views, moved or linked. You can schedule an Appointment from the Day View without the direct use of the Activity Window. Suppose you want to schedule a lunch appointment from 11:30 a.m. to 1:00 p.m. via the Day View.

1. **Click and hold the mouse button down on the line in the Day View's Schedule Region that represents 11:30 a.m**. A horizontal tick mark will appear in the Hour Label Region. This tick mark represents the start time of the activity.
2. **Drag the mouse until you get to 1:00 p.m**. As you drag the mouse, a second tick mark will appear and represent the end time. The area between the two ticks marks is highlighted to mark the duration of the activity.
3. **Release the mouse button to schedule the activity**. The activity will remain selected. As with all selected activities, all of the information that represents the selected activity will appear in the Activity Window. This information appears in the Activity Window so you can change the activity's title, add notes, add links, set alarms, link Memos/documents and make other changes to the Activity Window's instruments.
4. **Change the activity's title to Lunch.** The activity just scheduled was given a default title, “New Entry.” This title appears in both the Activity Window and the Day View. The title is highlighted in the Activity Window so that you may easily change it.
5. **Press the Return key on the keyboard or click the Close Box in the Activity Window to save the title change**.

Schedule Overlapping Appointments

Real life schedules often contain portions of the day when you have more than one activity at a time. Consultant allows you to schedule an unlimited number of activities that overlap to deal with this problem. Overlapping activities appear in the Schedule Region of the Day View.

Consultant does not require you to take special steps to schedule overlapping activities. You may simply use the methods described thus far to schedule overlapping activities. If the activity you schedule overlaps another, Consultant will automatically display the activities in an overlapping manner.

If you already have an activity scheduled from 11:00 a.m. to 2:00 p.m., you may find it difficult to drag out an overlapping activity that starts during this activity. The difficulty arises because you can't click and drag out the new activity without selecting the old one.

Consultant provides a solution to this problem by letting you drag out activities from the Hour Label Sub-region.

1. **Click and drag out the new activity in the Hour Label Sub-region**. Once the drag is complete and you release the mouse button, the newly scheduled activity will appear in the overlapping fashion.

If you have a really busy schedule with many overlapping activities, you may find it difficult to read the entire title of each activity. You may find it necessary to select the activity so that you can read its entire title in the Activity Window.

1. **Click an activity to select it and thereby see its entire title**. The activity will become highlighted and the information that represents that activity will appear in the Activity Window. The complete title is displayed in the Activity Window.

Change An Activity's Time

There are two ways to change the time when an activity starts and ends.

- **Use the Activity Window**. Select the activity, then adjust the Time Shutter instrument in the Activity Window. For information on how to adjust the Time Shutter see *Select Time Of Activity* in Chapter *The Activity Window* on page 46.
- **Use the Day View**. You can drag and thereby adjust the activity's start and end times. Suppose that your lunch appointment has changed and will now begin at 11:00 a.m. instead of 11:30 a.m.

    1. **Place the mouse pointer directly on top of the 11:30 start time**. The mouse pointer will turn into a set of up/down adjuster arrows.
    2. **Click and hold down the mouse button**. The activity will become selected.
    3. **Drag the mouse up until you reach the 11:00 a.m. line**.
    4. **Release the mouse button**. The activity will reschedule to begin at 11:00 a.m. The activity will remain selected and the Time Shutter in the Activity Window will automatically reflect the new time change.

Move An Appointment

Rather than adjust the start and end times to completely reschedule an Appointment, you can simply move it if its duration is to remain the same. Suppose you want to move your lunch appointment to 1:00 p.m., but keep it two hours long.

1. **Click and hold the mouse button down on the activity you want to move**. The activity will become highlighted.
2. **While holding down the mouse button, drag the activity downwards until its start time is at 1:00 p.m**. As you drag, a box that represents the duration of the activity will move with the mouse. Start and end time tick marks will also appear in the Hour Labels Sub-region to indicate where the move will occur.
3. **Release the mouse button**. The activity will reschedule where you released the mouse button.

Schedule Events, To-Dos, And Goals

You can use the Activity Window in conjunction with the Day View to schedule Event, To-Do and Goal activities. These activities appear in the To-Do Region and are distinguished by their type as shown in TABLE 4. “Event, To-Do, and Goal Types”.

TABLE 4. Event, To-Do, and Goal Types

Icon	Type	Description
	Event	An activity that does not have a time associated with it and which has not been designated as a To-Do. Examples of this type of activity include vacations, birthdays, holidays, reminders, etc.
	To-Do	An activity that does not have a time associated with it and which has been designated as a To-Do. Examples of this type of activity include tasks, chores, or anything you want to check off.

TABLE 4. Event, To-Do, and Goal Types

Icon	Type	Description
45	Goal	An activity that does not have a time associated with it and which has been designated as a To-Do but marked with a numeric value. Examples of this type of activity include exercising, reading, timed chores, or anything where you want to assign a value to the completion of the activity.

The Day View provides shortcut method to help you schedule these types of activities so that you don't have to use the Activity Window exclusively. For instance, suppose that your spouse's birthday is a month away on July 11th.

1. **Click in the Day Heading directly above the Schedule Region OR double-click in the empty portion of the To-Do Region**. The Activity Window will appear and the Date Shutter will open to the date in the Day Heading. The Time Shutter will be closed to indicate an activity that does not occur at a specific time.
2. **Enter the title of the activity in the Activity Window**.
3. **Adjust the date in the Date Shutter to July 11th**. For information on how to adjust the date in the Date Shutter see *Select Date Or Date Range* in Chapter *The Activity Window* on page 45.
4. **Click the To-Do button if you want the activity to be a To-Do or Goal**. Make sure the To-Do button in the Activity Window is not selected if you want the activity to be an Event.
5. **Click the Banner button if you want it to appear as a Banner in the Month View**.
6. **Click the Jump button to change the Day View so that July 11th is displayed**. The Jump-To dialog box will appear. Use the dialog box's controls to adjust the date to July 11th.
7. **Click OK**. The Day View will change so that July 11th and the birthday activity appears.

Mark A To-Do Or Goal

To-Dos differ from other activities in that you can mark them in several different ways. TABLE 5. "To-

TABLE 5. To-Do Marks

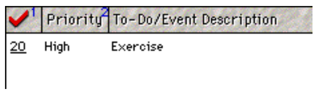
Mark	Description
	Completed
	Forwarded
	Underway
	Deleted
	Assigned
	Assigned/Done

TABLE 5. To-Do Marks

Mark	Description
	Not Completed

Do Marks” shows the various To-Do marks.

There is a special type of To-Do called a *Goal*. Goals are To-Dos which you can check off with a numeric value. Suppose, for example, that you have a To-Do entitled “Exercise.” Rather than simply mark it as completed if you exercise, you can instead type the number of minutes you exercised.



Since Goals are just a special type of To-Do, they are scheduled exactly the same way. The difference between a To-Do and a Goal only manifests itself when you actually mark it. For information on To-Dos and Goals see *To-Dos And Goals* in Chapter *Calendar Management* on page 95.

You can mark To-Dos and Goals directly from the To-Do Region of the Day View. Follow the steps below.

1. **Click and hold the mouse button down on the To-Do mark you want to change**. A pop-up menu will appear and list the different To-Do marks.
2. **Choose your desired To-Do mark and release the mouse button**. The To-Do mark will change next to the To-Do according to your specification. If you chose Goal, a dialog box will appear from which you can enter a numeric value between 0 and 245. The value you enter will appear next to the To-Do.

Change An Appointment To A To-Do And Vice Versa

Besides the ability to move activities within a View and between Views to reschedule activities, Consultant allows you to move activities between the Schedule Region and the To-Do Region. This makes it possible to convert an Event or To-Do into an Appointment and vice versa.

Suppose that you scheduled an activity to write a letter to an old friend. Further suppose that you need to schedule an emergency appointment for the same time. Rather than move the write letter activity to another time, you can simply turn it into a To-Do for the same day. All you have to do is drag the write letter activity from the Schedule Region to the To-Do Region to convert the Appointment into a To-Do.

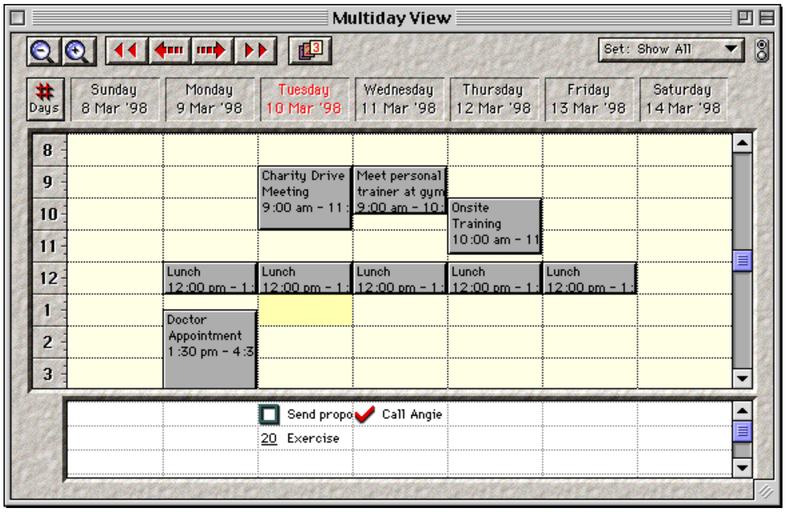
1. **Click and hold the mouse button down on the write letter activity**.
2. **Drag the activity on top of the To-Do Region**.
3. **Release to mouse button**. A To-Do Activity will appear called “Write Letter.”

Please note that you can convert Appointments to Events/To-Dos and vice versa between different Views as well. For example, you can drag an Event from a Day View to the Schedule Region of a Multiday View to convert it to an Appointment. When you convert an Event/To-Do to an Appointment, the Appointment is given a duration of one hour starting at the point where you dropped it.

Multiday View

The Multiday View displays all the activities on your schedule from 1 to 99 days at a time. The Multiday

View works almost exactly like the Day View, with the exception that it displays more than one day at once.



Like the Day View, it has two major regions.

- **The Schedule Region**. This region displays Appointments. This region also has a sub-region referred to as the Hour Labels Sub-region since this sub-region displays all the hours of the day.
- **The To-Do Region**. This region displays To-Dos and Evens. The sort order of the To-Do Region in the Multiday View is the same as the last sort order specified in the Day View.

This section describes how to use these two regions in conjunction with the Activity Window to schedule and work with activities. This section begins with a description of how to change how many days the Multiday View displays at a time and which days to display. It then discusses several ways to control how the Multiday View works and displays activities. Keep in mind that you can have more than one Multiday View open and each one can display a different set of days. This section then covers how to schedule activities in the Multiday View. Finally, this section discusses how to change single-day activities into consecutive multiday activities, how to select activities, and how to move activities.

Change The Number Of Days Displayed

The Multiday View is ideal to gain a visual picture of your schedule over a period of time. The Multiday View can display a variable range of days at a time. The number of days that you can view at a time depends on your monitor size and how much information you want to see per day. You use the # Days button to change the number of days displayed.

1. **Click the # of Days button**. A dialog box will appear and request from you the number of days you want displayed.

2. **Enter the number of days you want to see**.
3. **Click OK or press Return to dismiss the dialog box**. The Multiday View will change according to your request.

Change Which Range Is Displayed

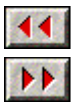
The Multiday View contains four buttons to change which week out of the year is displayed: Day Forward, Day Backward, Range Forward, and Range Backward. In addition to these four buttons, you can also use the Jump button to instantly move to any week on your calendar. For information on the Jump button see *Jump Button* in Chapter *The Calendar Views* on page 54.

Day Forward And Day Backward Buttons

The Day Forward and Day Backward buttons move the Multiday View forward or backward one day at a time.

Range Forward And Range Backward Buttons

The Range Forward and Range Backward buttons move the Multiday View forward or backward one range at a time. A range is the number of days displayed in the Multiday View. In other words, if you click the Range Forward button when ten days are displayed, the Multiday View will move forward ten days at a time.



Zoom Schedule Region

You can use the Zoom In and Zoom Out buttons to change how big the hours appear in the Schedule Region.

Zooming is useful if you have a small monitor and want to see more hours in the Schedule Region, or if you have a large monitor and want to see less hours in the Schedule region.

Alter Multiday View Preferences

Click the Multiday View Preferences button in the Multiday View to change the preferences that control how the Multiday View displays your schedule.

A dialog box will appear that will let you specify the following preferences.

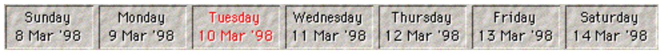
- The default start/end hour of the Schedule region
- Title word wrapping
- Title Icons
- The default number of days for the View
- The start day for the View
- The 5 day business week option
- Schedule Region Printing

For complete information on the various Multiday View preferences see *Day/Multiday Preferences* in Chapter *Preferences* on page 188.

Schedule A Single Day Activity

Activities are scheduled in the Multiday View almost exactly the same way as they are in the Day View. Since the Multiday View displays several days at a time, there are several scheduling techniques which are better suited to the Multiday View and are therefore described under the context of the Multiday View. Any of the techniques discussed in the Multiday View section are equally applicable to the Day View, unless otherwise specified.

Above each day in the Multiday View is a Day Heading that consists of a box with the date inside.



If you click in any Day Heading, the Activity Window will appear and the Date Shutter will open to the day that you clicked on.

This feature is provided to help you quickly schedule a new activity on the day of the Day Heading you clicked. At that point, all you have to do is type in the title of the activity and close the Activity Window or press Return. The Activity Window will close and the activity will appear in any open applicable Views.

Schedule A Consecutive Multiday Activity

The occasion may arise when you need to schedule an activity that spans several consecutive days. Suppose that you are to attend a training conference that runs from May 5 to May 7. The conference lasts from 9:00 a.m. to 11:30 a.m. each day.

1. **Open the Multiday View to May 5th**. You may want to use the Jump button to accomplish this.
2. **Click in the Day Heading for May 5th**. The Activity Window will open with the Date Shutter opened to May 5th.
3. **Type "Training Conference" into the Activity Window**.
4. **Click the Multiday button in the Activity Window**. The Date Shutter will switch from a single date to a date range.
5. **Adjust the date range in the Date Shutter so that it displays May 5 - May 7**. For information how to adjust the Date Shutter see *Select Date Or Date Range* in Chapter *The Activity Window* on page 45.
6. **Open the Time Shutter and set the time range from 9:00 a.m. to 11:30 a.m.** For information on how to open and adjust the Time Shutter see *Select Time Of Activity* in Chapter *The Activity Window* on page 46.
7. **Click the Close Box in the Activity Window or press return to schedule the multiday activity**. The multiday conference will appear in the Multiday View.

You can also perform all of the above steps in the Day View. The Multiday View will show you all three days of the conference at once, while the Day View will only display one of the days at time.

Change A One Day Activity Into A Consecutive Multiday Activity

You can change a single day activity to span more than one consecutive days.

1. **Double-click and thereby select the single day activity**.
2. **Click the Multiday button in the Activity Window**. The Date Shutter will switch from a single day to a date range.
3. **Adjust the date range so that it displays a range of consecutive days**. For information on how to adjust the Date Shutter see *Select Date Or Date Range* in Chapter *The Activity Window* on page 45.
4. **Click the Close Box in the Activity Window or press Return to schedule the multiday activity**.

You can also perform all of the above steps in the Day View. The only difference is that the Multiday View will show you all five days of the lunch activity at once.

Select A Repeating Or Multiday Activity

Just as you can select single day activities, you can likewise select repeating and multiday activities. Suppose, for instance, that you have a conference that spans three days. You can click any of its three occurrences to select the conference. For example, click the middle day and notice how the entire date range of the conference appears in the Activity Window.

Please note that even though only the middle day is highlighted, the entire activity is selected. In other words, even though the conference might appear as three separate activities, one on each day, Consultant considers it a single three-day activity. There are situations when it actually matters which day of the activity you click. For instance, when you move and delete activities, as explained later, the selection of a particular day might be significant.

Reschedule An Activity

You can drag an activity to a different location on the calendar to reschedule it, whether it be one or any number of consecutive or nonconsecutive days. Suppose, for example, that you have scheduled a three day training conference.

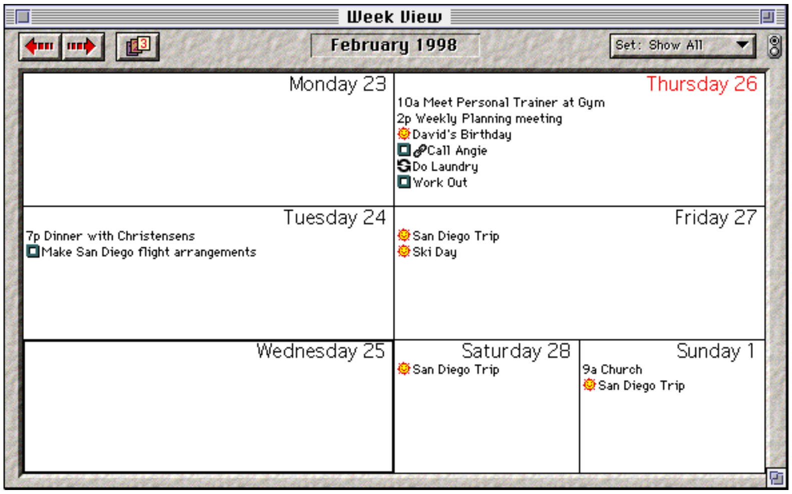
You later find out that the conference has been changed to run from May 7th to May 9th of the same week.

1. **Click and hold the mouse button down on the first day of the conference**. The conference day you click is selected.
2. **Drag the mouse until the activity is positioned at the correct time on May 7th.**
3. **Release the mouse button**. All three days of the conference will move and thus reschedule.

Please note that you needn't click the first day of the activity to drag it elsewhere on your schedule. You can click and drag on any day. Just keep in mind that if you click the second day of the activity, wherever you drag the activity to is where the second day is placed. In other words, the day you click is the day that the entire activity move is referenced from.

Week View

The Week View displays all the activities on your schedule a week at a time. This View is one of the most convenient Views for viewing your schedule since all activity types are displayed in the same region. Like the Day, Multiday, and Month Views, you can use the Week View to schedule, reschedule and view activities. Unlike the other Views, however, the Week View has a few tools unique to it to help you schedule activities.



The Week View uses special icons and identifiers to help you easily identify different record types in this View. These identifying icons are similar to those used in other Views,.

TABLE 6. Activity Types in Week View

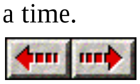
Icon	Activity Type
	Appointment Activity
	Event Activity
	Uncompleted To-Do

When a To-Do has been marked in the standard way or as a Goal, the standard To-Do mark icons are used in the Week View. For information on different activity types see *Activities* in Chapter *Introduction* on page 5. This section begins with a description of how to change which week the Week View displays. It then discusses how change settings that control the Week View. Finally, it covers how to schedule activities from the View.

Change Which Week Is Displayed

Use the Week Forward and Week Backward buttons to change which week out of the year is displayed in the Week View. In addition to these two buttons, you can also use the Jump button to instantaneously move to any week on your calendar. For information on how to use the Jump button see *Jump Button* in Chapter *The Calendar Views* on page 54.

The Week Forward and Week Backward buttons will move the View forward or backward one week at a time.



If you move forward or backward far enough, the year displayed will change accordingly. The month and year are displayed together so that you don't mistakenly move to the wrong year.

Choose Activity Types

The Week View lets you quickly choose which types of activities you want displayed in the View. Use the Types button to specify the types of activities you wish to see.

1. **Click and hold the mouse button down on the Types button**. A pop-up menu will appear with several choices.
    - **All Activities**. Choose this option to display all activity objects including Appointments, Events, and To-Dos.
    - **Appointments and Events**. Choose this option to only display only Appointments and Events.
    - **Appointments**. Choose this option to only display Appointments.
    - **Events**. Choose this option to only display Events.
    - **To-Dos**. Choose this option to only display To-Dos.
2. **Select your choice and release the mouse button**. The Week View will change to reflect your choice.

Alter Week View Preferences

Click the Week View Preferences button in the Week View to change the preferences that control how the Week View displays your schedule.

A dialog box will appear that will let you specify the following preferences.

- Title word wrapping
- Title Icons
- Time format
- The date placement

For complete information on the various Week View preferences see *Week Preferences* in Chapter *Preferences* on page 188.

Schedule An Activity

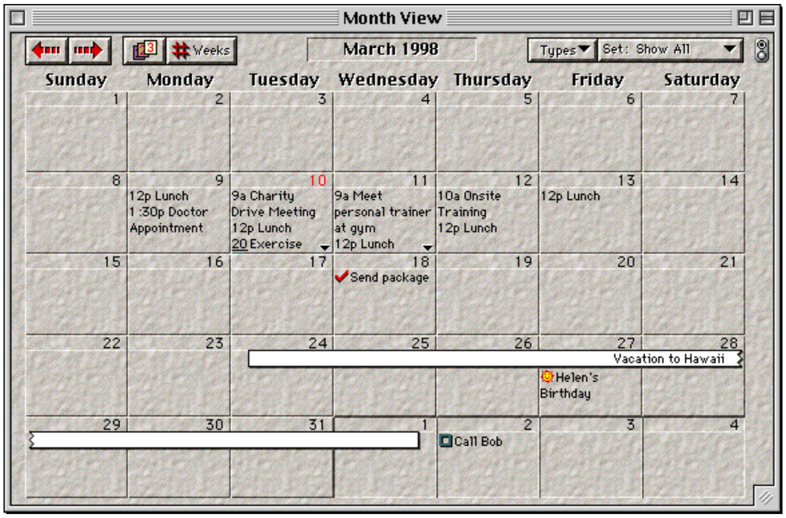
As previously discussed, you can schedule activities directly from the Activity Window regardless of what View(s) is currently open. The Week View does, however, provide several tools that help you schedule activities from the week perspective easier.

The basic idea of scheduling an activity from the Week View is to click a blank region of the day your activity lands on and then fill out the Activity Window accordingly.

1. **Click a blank region of the day your activity starts on in the Week View**. The Activity Window will appear and the Date Shutter will open and represent the day you clicked on.
2. **Enter a title for the activity**.
3. **Click the Close Box or press Return to schedule the activity**. The Activity Window will close and the activity will be scheduled. You will see the activity on the day you clicked on in the Week View.

Month View

The Month View displays all the activities on your schedule a month at a time. Although, called the Month View, this View will actually let you display from one week to six months of your calendar at a time. This makes it extremely useful for planning purposes, since a great number of days are displayed at once in a familiar format. Like the Day, Multiday, and Week Views, you can use the Month View to schedule, reschedule and view activities. Unlike the other Views, however, the Month View has a few tools unique to it to help you schedule activities.



The Month View uses special icons and identifiers to help you easily identify different record types in this View. These identifying icons are similar to those used in other Views, but are smaller.

TABLE 7. Activity Types in Month View

Icon	Activity Type
1:30p	Appointment Activity.
	Event Activity.
	Uncompleted To-Do.

When a To-Do has been marked in the standard way or as a Goal, there are also several small icons to help you identify the status of the To-Do in the Month View.

TABLE 8. To-Do Marks in Month View

Mark	Description
	Completed
	Forwarded
	Underway
	Deleted
	Assigned
	Assigned/Done
	Not Completed

TABLE 8. To-Do Marks in Month View

Mark	Description
45	Goal

For information on different activity types see *Activities* in Chapter *Introduction* on page 5. This section begins with a description of how to change the number of weeks the Month View displays and how to change which month the Month View displays. It then describes the settings you can change to control how the Month View displays information. The section then covers how to schedule activities and in particular how to schedule Banner activities. Finally, this section describes how to move activities from the Month View.

Change The Number Of Weeks Displayed

Although this View is called the Month View, it will actually let you display from one week to six months of your schedule at a time. To change the number of week displayed in the view, do the following:

1. **Click the # Weeks button in the Month View**. The # Weeks dialog box will appear. It contains two calendars. The top calendar shows you the starting week for the current Month View. The bottom calendar show you the ending week for the current Month View. Select the start week by clicking one of the weeks in the top calendar.

2. **Select the month of your ending week**. You can click the up/down arrows next to the ending month title to select which month your ending week lands in.
3. **Select the ending week**. Once the bottom calendar shows the month your ending week lands in, select the ending week.
4. **Click OK to dismiss the dialog box**. The Month View will change to accommodate your new week selections.

Change Which Month Is Displayed

Use the Month Forward and Month Backward buttons to change which month out of the year is displayed in the Month View. In addition to these two buttons, you can also use the Jump button to instantaneously move to any month on your calendar. For information on how to use the Jump button see *Jump Button* in Chapter *The Calendar Views* on page 54.

The Month Forward and Month Backward buttons will move the View forward or backward one month at a time.

If you move forward or backward far enough, the year displayed will change accordingly. The month and year are displayed together so that you don't mistakenly move to the wrong year.

Choose Activity Types

The Month View lets you quickly choose which types of activities you want displayed in the View. Use the Types button to specify the types of activities you wish to see.

1. **Click and hold the mouse button down on the Types button**. A pop-up menu will appear with several choices.

- **All Activities**. Choose this option to display all activity objects including Appointments, Events, and To-Dos.
- **Appointments and Events**. Choose this option to only display Appointments and Events.
- **Appointments**. Choose this option to only display Appointments.
- **Events**. Choose this option to only display Events.
- **To-Dos**. Choose this option to only display To-Dos.

2. **Select your choice and release the mouse button**. The Month View will change to reflect your choice.

Alter Month View Preferences

Click the Month View Preferences button in the Month View to change the preferences that control how the Month View displays your schedule.

A dialog box will appear that will let you specify the following preferences.

- Show weekends option
- Title word wrapping
- Title Icons
- Time format
- The date placement

For complete information on the various Month View preferences see *Month Preferences* in Chapter *Preferences* on page 189.

Use The Day Heading To Schedule Activities

As previously discussed, you can schedule activities directly from the Activity Window regardless of what View(s) is currently open. The Month View does, however, provide several tools that help you schedule activities from the month perspective easier.

Like the Week View, each day in the Month View has a special region called a Day Heading. You can use the Day Headings to quickly schedule activities.

1. **Click and drag in the Day Headings to select which days you want an activity to occur on**.

   The Activity Window will appear and the Date Shutter will open and represent the day(s) you clicked on. For instance, a click in the Day Heading for February 17, 1997 will open the Activity Window to that day.

   Consultant does not, of course, limit that you click a single Day Heading. You can click a Day Heading and while keeping the mouse button held down, drag the mouse over additional days. As you drag the additional days will become depressed to indicate their selection. When you release the mouse button, the Date Shutter will change to represent your date or date range selection.

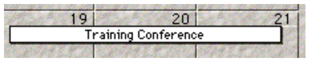
2. **Enter a title for the activity**.

3. **Click the Close Box or press Return to schedule the activity**. The Activity Window will close and the activity will be scheduled. You will see the activity in the Month View.

Schedule A Banner

You can turn any consecutive activity into a Banner in the Month View. Banners are only displayed as

Banners in the Month View.



Other Views will display Banners as normal activities.

Follow the two step process below to change any consecutive Event activity into a Banner. Suppose you have an Event ten day vacation activity on your schedule that you wish to make a Banner.

1. **Double-click and thereby select the vacation activity**. The Activity Window will appear and display the selected vacation.
2. **Click the Banner button in the Activity Window**.
3. **Click the Close Box in the Activity Window or press Return to schedule the activity**. The vacation activity will now appear in Banner form in the Month View.

If you no longer want the vacation activity to appear as a Banner, repeat the above steps but this time deselect the Banner button in the Activity Window.

Banner Limitations

The length of a Banner has no limit so long as the days in the activity are consecutive. You may also have any number of Banners displayed at once in the Month View. The only limitation is that there cannot be more than two Banners that start, end or cross on a given day.

Reschedule An Activity

You can drag an activity to a different day in the Month View to reschedule the activity, whether it be one or fifty consecutive or nonconsecutive days. Suppose, for example, that you have scheduled a three day training conference.

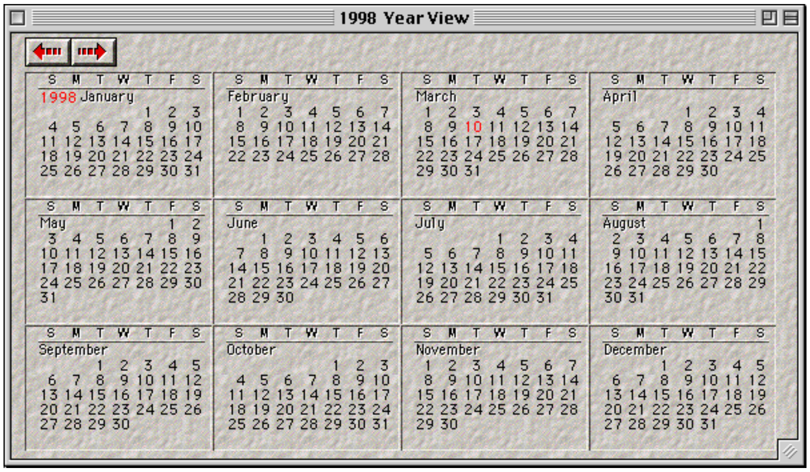
If you later find out that the conference has changed dates during the same month, you can easily drag and thereby reschedule the activity.

1. **Click and hold the mouse button down on the first day of the conference**.
2. **Drag the mouse until the activity is positioned over the new first day of the conference**.
3. **Release the mouse button**. All three days of the conference will move and reschedule.

Please note that you needn't click the first day of the activity to drag it elsewhere on your schedule. You can click and drag on any day. Just keep in mind that if you click the second day of the activity, wherever you drag the activity to is where the second day is placed.

Year View

The Year View differs from the other Views in that it does not display activities. Nor can you schedule activities directly from the View. Its only purpose is to show you a Year calendar, all twelve months at a time.



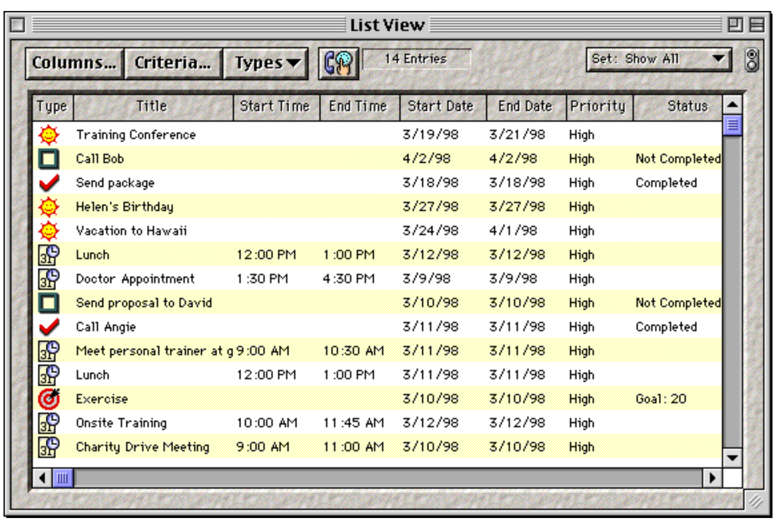
This section describes how to use the Year View to view different years.

Year Forward And Year Backward Buttons

The Year View contains two buttons to change which year is displayed. Click either button to move forward or backward one year at a time.

List View

The List View provides a versatile format in which you view subsets of your calendar and contact data. As the word *list* implies, the List View displays your data in a list format wherein each row of the list represents an activity or contact object. The list is further divided into columns which represent the different fields that comprise activities and contacts.



Although you can add, modify and delete activities and contacts from the List View, the View's primary purpose is to display your data in an easy to read customizable fashion. Hence, the List View provides tools to rearrange, divide and sort objects. One unique feature the List View has is its ability to show you both activity and contact objects in the same list. You can even sort on columns that both have in common. Of course, not all columns will pertain to both activities and contacts. In such cases, columns at non-applicable rows will be left blank.

This section covers how to use the List View to build customized lists. It starts with a description of how to change settings that control how the List View displays data. It continues with a description of each column that can appear in the List View and a description of how to choose which columns you want displayed. This section then describes how to choose which types of object you want to see in the List View. This section then describes how to move and sort columns. It then covers how to use Criteria to further filter which activity and contact objects you want in your list. Finally, this section describes how to select objects in the List View, double-click objects in the List View to open new Views and dial contacts from the List View.

Alter List View Preferences

Click the List View Preferences button in the List View to change the preferences that control how the List View displays your activity and contact objects.

A dialog box will appear that will let you specify the following preferences.

- Column Lines
- Shaded Rows

For complete information on the various List View preferences see *List Preferences* in Chapter *Preferences* on page 189.

Column Descriptions

You can view both activity and contact objects simultaneously in the List View. The following column descriptions point out which columns are shared by both and which are unique to each. Please recall that a column represents a field in an activity and/or contact object.

TABLE 9. List View Columns

Column Title	Use	Description
Type	Both	Displays an icon that represents the record type.
Category	Both	Displays the Category name.
User	Both	Displays the user's name who created and owns the record.
Last Modified	Both	Displays the date and time of when the record was last modified.
Last User	Both	Displays the name of the user who last modified the record.
Notes	Both	Displays the first 255 characters of the notes.
Title	Activities	Displays the title of the activity.
Start Time	Activities	Displays the time when the activity starts.
End Time	Activities	Displays the time when the activity ends.
Start Date	Activities	Displays the date when the activity starts.

TABLE 9. List View Columns

Column Title	Use	Description
End Date	Activities	Displays the date when the activity starts.
Priority	Activities	Displays the Priority assigned to the activity.
Status	Activities	Displays the current status of a single day To-Do or the first To-Do mark of a multiday or repeating To-Do.
Actual Start	Activities	Displays the time/date when the activity actually started, as opposed to when it was scheduled to start. This column applies specifically to the Gantt View. For information see *Use The Actual V.S. Scheduled Time Tool* in Chapter *The Calendar Views* on page 88.
Actual End	Activities	Displays the time/date when the activity actually ended, as opposed to when it was scheduled to end. This column applies specifically to the Gantt View.
Progress	Activities	Displays the percentage of the activity that has currently been completed. This column applies specifically to the Gantt View. For information ssee *Use The Progress Indicator Tool* in Chapter *The Calendar Views* on page 89.
Alarm	Activities	Displays “On” if an alarm has been set and is blank otherwise.
Company	Contacts	Displays the name of the company to which the contact belongs.
Department	Contacts	Displays the department in the company to which the contact belongs.
Position	Contacts	Displays the position within the department to which the contact belongs.
Salutation	Contacts	Displays the contact's salutation such as Mr., Mrs., Miss, etc.
Last Name	Contacts	Displays the contact's last name.
First Name	Contacts	Displays the contact's first name.
1st Address 1	Contacts	Displays the first line of the contact's 1st street address.
1st Address 2	Contacts	Displays the second line of the contact's 1st street address.
1st City	Contacts	Displays the city of the contact's 1st address.
1st State	Contacts	Displays the state of the contact's 1st address.
1st Code	Contacts	Displays the zip/postal code of the contact's 1st address.
1st Country	Contacts	Displays the country of the contact's 1st address.
2nd Address 1	Contacts	Displays the first line of the contact's 2nd street address.

TABLE 9. List View Columns

Column Title	Use	Description
2nd Address 2	Contacts	Displays the second line of the contact's 2nd street address.
2nd City	Contacts	Displays the city of the contact's 2nd address.
2nd State	Contacts	Displays the state of the contact's 2nd address.
2nd Zip	Contacts	Displays the zip/postal code of the contact's 2nd address.
2nd Country	Contacts	Displays the country of the contact's 2nd address.
Phone 1 - 8	Contacts	Displays a work, home, fax, cellular or other phone number of your choice. Consultant allows you to change the phone labels on a contact by contact basis. Because the phone labels can vary from contact to contact, the List View uses the default phone label for the column title. For information see see *Customize Phone Field Labels* in Chapter *Contact Views* on page 112.
Custom 1 - 8	Contacts	Displays the contents of the custom field. Consultant allows you to change the custom field labels on a contact by contact basis. Because the custom labels can vary from contact to contact, the List View uses the default custom label for the column title. For information ssee *Customize Custom Field Labels* in Chapter *Contact Views* on page 113.
Business	Contacts	Displays “Yes” if the contact has been designated as a work related contact and is empty otherwise. For information on this field see *Two Broad Contact Types* in Chapter *Contact Views* on page 104.
Marked	Contacts	Displays “Marked” if the contact has been specially marked and is blank otherwise. For information on this field see *Mark Contacts* in Chapter *Contact Views* on page 120.

If a column is blank on a given row, this implies that either nothing has been entered for that field or the field is not applicable for the object on that row. For instance, the Start Time column will always be blank for a contact since contacts don't have a start time field.

Choose Columns

You can change which columns are displayed to customize a list for your own purposes.

1. **Click the Columns button in the List View to choose which columns you want displayed**.

   The Choose Columns dialog box will appear. This dialog box lets you place a check mark next to the column titles you want displayed.

2. **Place a check mark next to the column titles that you want in your list**. You may do this one of two ways. The first methods let you manually choose the columns as follows.

- **Position the mouse pointer over the desired column title**. The mouse pointer will change into a check mark.
- **Click the mouse button**. A check mark will appear to the left of the column title.

To remove a check mark from a column name, repeat the same process. In other words, if you click a column title that already has a check mark, the check mark will disappear.

The second method for selecting columns is via the Choose Columns dialog box which contains four buttons. These buttons provide shortcut methods to quickly check column titles.

- **Check None Button**. Removes the check marks from any and all checked columns in the list. This button is useful when you don't want any of the checked columns to display and wish to check mark columns from scratch.
- **Check All Button**. Places a check mark next to all the column titles. This button provides a shortcut method to display all the columns in your List View.
- **Check Activities Button**. Places a check mark next to all the columns that are either related to activities or are shared. It also removes all check marks from any strictly contact-related columns. This button is useful when you only want to display Activity related columns.
- **Check Contacts Button**. Places a check mark next to all the columns that are either related to activities or are shared. It also removes all check marks from any strictly contact-related columns. This button is useful when you only want to display Activity related columns.

Move Columns

Not only can you choose which columns to display in the List View, but you can use Drag and Drop to arrange the columns in any order you wish. The following example illustrates how you can move the Priority column so that it immediately follows the Title column.

1. **Click and hold down the mouse button on the Priority column label**.
2. **Drag the mouse pointer to the position immediately following the Title column label**. As you drag, two lines that represent the column width will move with the mouse pointer. You will also see a black caret symbol that indicates the position where the selected column will move when you release the mouse button.
3. **Release the mouse button when the black caret immediately follows the Title column**. The Priority column will move.

Choose Object Types

The List View lets you quickly choose which types of objects you want displayed in the View. You can choose not only between activities and contact, but between the types of activities you want to see. Use the Types button in the List View to specify the types of objects you wish to see.

1. **Click and hold the mouse button down on the Types button**.

   A pop-up menu will appear with six choices.

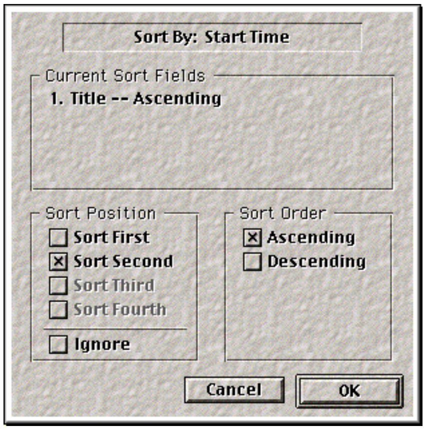
   - **Appointment, Events, To-Dos, Contacts**. Choose this option to display all objects.
   - **Appointments, Event, To-Dos**. Choose this option to only display activity objects.
   - **Appointments**. Choose this option to only display Appointment objects.
   - **Events**. Choose this option to only display Event objects.
   - **To-Dos**. Choose this option to only display To-Do objects.
   - **Contacts**. Choose this option to only display contact objects.

2. **Select your choice and release the mouse button**. The List View will change to reflect your choice.

Sorting

You can sort the objects in the List View on up to four columns at once. Additionally, you may sort each column in either ascending or descending order. This type of sorting power means that you can, for instance, sort all your contacts by state, then by company name, then by last name and finally by first name.

1. **Click the column label that you want to sort**. The Sort Column dialog box will appear.



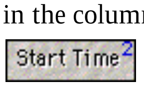
The Sort Column dialog box has four regions.

- **Current Sort Column Title Region**. This region displays the name of the column that you clicked on and therefore wish to add to the columns that the List View sorts on.
- **Current Sort Fields Region**. This region lists up to four columns that the List View is currently sorting on. The sequence of the columns in this list indicates the sequence that sorts proceed in. Next to each column label in this list is the word *Ascending* or *Descending* to indicate whether that column is to be sorted in alphabetical or reverse-alphabetical order.
- **Sort Position Region**. Use this region to specify the sort position of the column that you clicked on. This is the column displayed in the Current Sort Column Title Region. You may choose to have the Current Sort Column sorted first, second, third or fourth in the sort sequence depending on how many columns are listed in the Current Sort Column Region. If you no longer want the List View to sort on the Current Sort Column choose *ignore*.
- **Sort Order**. Use this column to specify the sort order that you want the column you clicked on to be sorted in. This is the column displayed in the Current Sort Column Title Region. You may choose either ascending or descending order.

2. **Choose a sorting position**. You can sort on up to four columns at once. If you are sorting on four columns, the list will first sort on the position one column, followed by the position two column, and so on. The Sort Position Region indicates which sorting position you want the Current Sort Column to have. Your choices are sorting position one, two, three, four or ignore. If you choose sorting position one, the list will first sort on the Current Sort Column followed by the others. If you choose sorting position two, the list will first sort on the position one column, followed by the Current Sort Column, and so on. If you choose *ignore*, the list will no longer sort on that column. The *ignore* choice is provided as a way to change a particular column back to an unsorted state.

3. **Select a sort order**. You may sort the Current Sort Column in ascending or descending order. Choose whichever is appropriate for the task at hand.

4. **Click OK**. The List View will redraw itself and represent the new sort order. Small numbers appear in the column labels to indicate which columns are sorted and their corresponding sort position.



You can repeat the above steps as many times as you wish. You will, however, only be able to assign a column a sorting position between one and four. You can click a column that is already part of the sort sequence if you wish to change its order or change its sequence.

Use Criteria To Filter Objects

The List View is extremely powerful and useful because of it can show you subsets of your calendar and contact objects. Although you can use the Set button and the Types button to show a subset of your objects, this may not always be powerful enough. To remedy this, the List View provides a Build Criteria dialog box which further filters and subdivides your objects.

The Build Criteria dialog box essentially lets you create a set of Criteria which each activity and contact object must meet in order to appear in the List View. Criteria work in addition to Sets and Types. Criteria by definition are comprised of constituent elements called *Criterion*. Each Criterion is defined as the combination of an object field, an operator and an operand where the relation specified by the operator holds between the object field and operand.

Criterion	= <Object Field> <Operator> <Operand>

An example Criterion might represent all objects that have the last name “Anderson.” The following represents such a Criterion in formula form.

Criterion	= <Last Name> <Equals> <Anderson>

Criteria are formed by gluing one or more Criterion together with the boolean conjunctions *And* and *Or*. Suppose, for instance, that you want your list to display all the objects which have “Anderson” as the last name *and* that live in Utah. The Criteria which represents all of these objects consists of two Criterion glued together by the *And* conjunction.

Criterion 1	= <Last Name> <Equals> <Anderson>
Boolean Conjunction	= And
Criterion 2	= <Home State> <Equals> <Utah>

The Build Criteria dialog box lets you glue any number of Criterion together with *And* and *Or* conjunctions to form a conglomerate set of Criteria. Suppose, for example, that you want to list all your contacts that live in California, Washington or Oregon. The Criteria which represents these objects consists of three Criterion glued together by *Or* conjunctions. You should not use the *And* conjunction in this case since that means that a contact has to be from all three states, at the same time, in order for it to be included in the list.

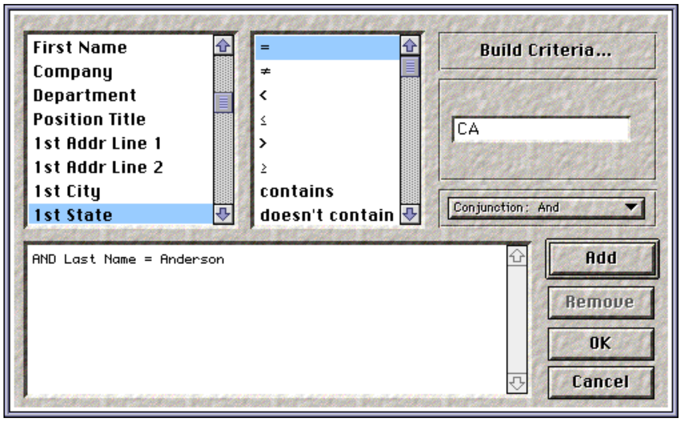
Criterion 1	= <Home State> <Equals> <California>
Boolean Conjunction	= Or
Criterion 2	= <Home State> <Equals> <Washington>
Boolean Conjunction	= Or
Criterion 3	= <Home State> <Equals> <Oregon>

Open Criteria Dialog Box

You construct and glue together Criterion in the Build Criteria dialog box.

1. **Click the Criteria button in the List View to open this dialog box**.

The Build Criteria dialog box has several regions to help you build and define Criteria.



- **Fields Region**. The Fields Region lists all of the fields which make up both activity and contact objects.
- **Operator Region**. The Operator Region lists all of the operations that you can perform on a field which is selected in the Fields Region.
- **Operand Region**. The Operand Region is where you type or specify the operand portion of a Criterion.
- **Criteria List Region**. The Criteria List Region lists all of the Criterion and conjunction that comprise the Criteria which define your list.
- **Boolean Conjunction Button**. The Boolean Conjunction button lets you specify whether the Criterion should be glued with an *And* or an *Or* conjunction.

Use the above regions to add and remove criterion to and from the Criteria for a list. Instruction to add and remove criterion as well as which operator work with which fields follows.

Add A Criterion To The Criteria

There are six steps to add a Criterion to the list of Criteria. The following example will create a Criterion that only accepts contacts whose home zip code is between 84000 and 84999. This example assumes you already have the Build Criteria dialog box open.

1. **Select A Field**. Locate the home zip code in the Field Region and click it.
2. **Select An Operator**. Since the example wants to find zip codes between 84000 and 84999, select the *between* operator.
3. **Define Operand**. When you selected the *between* operator, two operand fields appeared in the Operand Region. Type 84000 into the top field and 84999 into the bottom operand field.
4. **Choose Boolean Conjunction**. Since there will only be one Criterion in the Criteria list, it doesn't matter if you choose the *And* or *Or* boolean conjunction. The default is the *And* conjunction.
5. **Click the Add Button to add the now defined Criterion to the Criteria list**. The new Criterion will display in the Criteria List Region.
6. **Click OK**. The Build Criteria dialog box will close and the List View will redraw itself and only display contacts whose home zip code is between 84000 and 84999.

Remove A Criterion From The Criteria

You can remove a particular Criterion from the list of Criteria at any time. There are two steps to remove a Criterion from the list of Criteria. This example assumes you already have the Build Criteria dialog box open.

1. **Select the Criterion you wish to remove from the Criteria List Region**.

2. **Click the Remove button**. The Criterion is removed and the Criteria List Region is updated.

How Operators Work With Different Fields

The first step to add a Criterion to the Criteria list is to select a field from the Fields Region. Depending on what field you select, one or more operators will become available to help you define your Criterion. A list of these operators and a description of each follows below. Each description also details what types of operands you can associate with each operator.

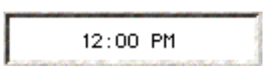
Basic Relational Operators

Basic Relational Operators work with any field which represents a time, a date or text. Examples of each of these three field types include the Start Time, End Date and First Name fields.

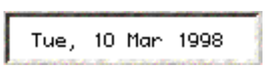
1. **“=”**. The Equals operator includes all objects whose selected field equals a specified operand.
2. **“≠”**. The Not Equals operator includes all objects whose selected field does not equal a specified operand.
3. **“<”**. The Less Than operator includes all objects whose selected field is less than a specified operand.
4. **“≤”**. The Less Than Or Equal operator includes all objects whose selected field is less than or equal to a specified operand.
5. **“>”**. The Greater Than operator includes all objects whose selected field is greater than a specified operand.
6. **“≥”**. The Greater Than Or Equal operator includes all objects whose selected field is greater than or equal to a specified operand.

Depending on the field you select, a basic relational operator will cause one of the following operands to appear.

- **Time Field**.



- **Date Field**.



- **Text Field**.

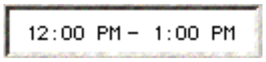
Range Operators

You can use range Operators with any field which represents a time, a date or text. Examples of each of these three field types include the Start Time, End Date and First Name fields.

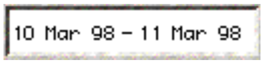
1. **“between”**. The Between operator includes all objects whose selected field falls between the two specified operands. For example, <Home State> <between> <Alabama and Colorado> will include contacts who live in the states Alabama, Alaska, Arizona, Arkansas, California and Colorado.
2. **“not between”**. The Not Between operator includes all objects whose selected field does not fall between the two specified operands. This operand is the complement of Between.

Depending on the field you select, a range operator will cause one of the following operands to appear. Notice how these operands allow you to specify a low and high operand to represent a range of values.

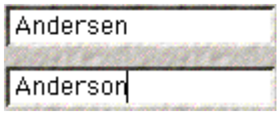
- **Time Field**.



- **Date Field**.



- **Text Field**.



Text Only Related Operators

You can only use Text Only Related Operators with fields which are of type text. Examples of text fields include Title, Company, Home Address, Phone 1 and Custom 1. Basically any field which requires you type a word or phrase is a text field.

1. **“contains”**. The Contains operator includes all objects whose selected field contains the text specified in the operand. For example, <Last Name> <contains> <Mc> will include contacts with last names such as McDougal, McDonald, McGuire, etc.
2. **“doesn't contain”**. The Doesn't Contain operator includes all objects whose selected field doesn't contain the text specified in the operand. This operand is the complement of Contains.

Special Operators

There are two special operators which exhibit unique properties when applied to certain fields.

1. **“not empty”**. The Not Empty operator includes all objects whose selected field is not empty. You will normally use this operator in conjunction with text fields. You can use it, for instance, to include all contacts that have notes typed in. You can also use this operator with the Alarm field to detect if an alarm has been set. Please note that when this operator is selected, a corresponding operand will not appear, since it is unnecessary.
2. **“boolean”**. The Boolean operator includes all objects whose selected field matches yes/no in the operand. The term *boolean* implies a true/false, yes/no relationship. Thus when you select the Boolean operator a yes/no operand appears.

You can only use the Boolean operator with two fields: the Business field and the Marked field. You can only set these two fields to yes or no. For instance, the contact is a business contact (yes) or is not (no). Thus <Business> <Boolean> <Yes> will include all contacts which are designated business contacts.

Select An Object

Click anywhere on the line that represents an activity or contact object to select that object in the List View. If you no longer want an object selected in the List View, click in an empty region in the List View where no objects exist. The selection will disappear.

You will want to select an object in the List View so you can delete it, omit it from the List View, mark it, drag it, etc.

Select Multiple Objects

The List View is the only View in Consultant that allows you to select more than one object at a time. Since only one object can appear at once in the Activity Window, multiple selected objects are not displayed there. To select more than one object, hold down the Shift key on the keyboard as you click objects.

Multiple selections are possible in the List View to help you delete and omit objects. For information on how to delete objects see *Delete Object(s)* in Chapter *Delete Activity And Contact Objects* on page 123. For information on how to omit objects see *Omit Contacts* in Chapter *Contact Views* on page 120.

Double-Click Objects

Rather than just select an object, you can also double-click an object. If you double-click an activity object, the Activity Window will appear and display the activity. If you double-click an activity object while holding down the Command key, a Day View will open up to the day that the activity starts on and will select it in the Day View. If you double-click a contact object, a Contact Card View will open up and select that contact. Double-click activity and contact objects to quickly edit and/or view that object in an appropriate View.

Dial A Phone Number

The List View contains a Dial button which you may use to dial a phone number at any time. If you so happen to have a contact object selected when you click the Dial button, it will let you dial one of the phone numbers for that contact.

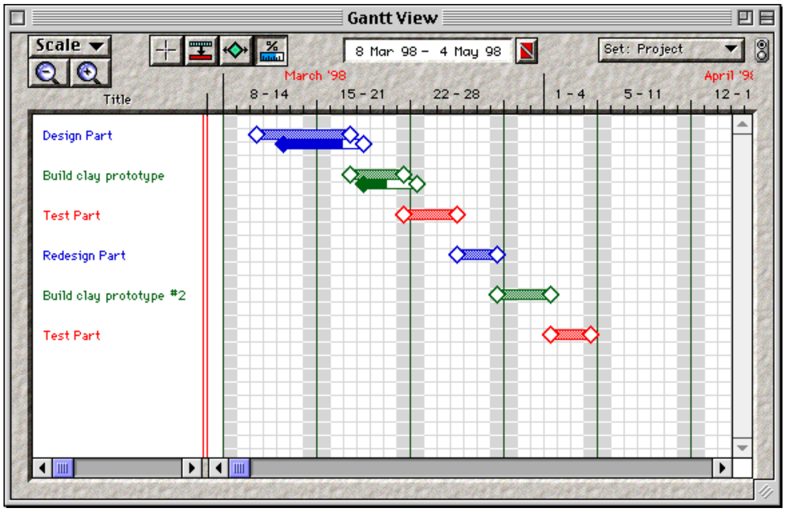
For information on dialing see Chapter 13 *Dialing* on page 135.

Gantt View

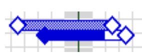
The Gantt View provides you with the means to take your calendar beyond simple personal information management. The Gantt View is based on the Gantt chart concept which is prevalent in project management. Although, Consultant was never intended to be a full-fledge project manager, it certainly crosses that boundary.

The basic idea behind a Gantt chart is to lay out and view your schedule in a time-line format. Gantt charts lets you visually determine how the end time or date of one activity will affect the start of another. Thus, Gantt charts are great when you want to plan projects and foresee conflicts and problems. Not only can you plan projects with Consultant's Gantt View, but you can also use the View to see any time/date range of your personal schedule. This multifaceted flexibility allows the Gantt View to combine both your regular calendar needs and project planning endeavors. This is extremely useful since you can build projects that consist of activities that will show up in the Gantt View as well as the Day, Multiday, Week, Month, Year and List Views. There is nothing worse than having your project schedule in one software package and your daily calendar in another. Unless your project management needs are complex, the Gantt View will eliminate this multiple application dilemma.

Any activity on your calendar can appear in the Gantt View including Single Day, Multiday, and Repeating activities. Besides the ability to display your normal calendar activities, the Gantt View provides several activity enhancements. These enhancements extend activities to give them certain project management characteristics. The below Gantt View shows the Gantt related tools and shows how activities have been enhanced.



- **Actual v.s. Scheduled Time**. When an activity is scheduled, you give it a start and end time/date. This is called the scheduled time. Activities do not always begin and end when you first anticipate they will. For this reason the Gantt View allows you to also specify the actual start and end time of each activity. The Gantt View will show you both the actual and scheduled times for an activity via the Sub-Bar tool described below.
- **Sub-Bars**. The Gantt View uses a horizontal bar to represent the start time and duration of each activity. Because each activity can have both a scheduled and actual time range, it is often useful to use different bars to represent the two time ranges. Thus two horizontal bars represent each activity where one bar is on top of the other. The top bar represents the scheduled time range of the activity. The bottom sub-bar represents the actual time range of the activity.

  
- **Progress Indicator**. When you track or review a project, you will inevitably want to know how much of the project has been accomplished. Each activity has a progress indicator that indicates what percentage of it is complete. The progress indicator appears as a dark thermometer type bar within the actual time sub-bar.

  If the sub-bar is not currently visible, the progress indicator appears as a dark thermometer type bar within the default single bar.

You will use the Gantt Tool Pad to access the extended characteristic tools. Only one tool can be selected at a time. The tool you select determines the mode the Gantt View is in.

- **The Drag Tool**. Use this tool to drag out new activities and modify old ones.
- **The Sub-Bar Tool**. Use this tool to add and remove sub-bars from activities.
- **The Actual v.s. Scheduled Time Tool**. Use this tool to specify the actual time range of a scheduled activity.
- **The Progress Indicator Tool**. Use this tool to specify how much progress has been made on a particular activity or task.

Besides the tools in Gantt Tool Pad, there are tools to let you change the scale, time/date range and zoom factor of the Gantt View. These additional tools customize the Gantt View the way you want. When you work with the Gantt View, there are several important concepts to remember.

- **Activities are sorted by start time**. Activities listed in the Gantt View are ordered by start time/

date. If two activities start at the same time, they are then ordered by end time/date.

- **Although activities can have enhanced characteristics in the Gantt View, the View basically works with activities just like any other View**. This means that the same activities that appear in the Month View can appear in the Gantt View.
- **It is possible to plan a project in the Gantt View in which your normal calendar activities don't show up**. The basic concept for planning such a project is to create some project Categories and assign them to a specially created project Set. For information on how to plan projects in the Gantt View see *Create A Project* in Chapter *The Calendar Views* on page 89.

This section covers how to use the Gantt View to design and build projects as well as view calendar data. This section begins with descriptions of how to set the calendar scale, set the date range, zoom in and out, adjust the title width of activities, and change preferences that control how the Gantt View works and displays activities. This section then covers how to select activities in the Gantt View and use the Drag Tool, Sub-Bar Tool, Actual v.s. Scheduled Time Tool and Progress Indicator Tool. Finally, this section describes techniques to create a project in the Gantt View.

Set The Scale

The Gantt View allows you to view your activities under several different time scales. The scales range from fifteen minute intervals to year intervals. You can change the scale at any time to select a desired level of precision. Consultant will only display the activities that start within the time range for the given scale.

1. **Click and hold the mouse button down on the Scale button**.

   A pop-up menu will appear and list the different scales. You can choose from 15 minute, 1 hour, 1 day, 5 day, 10 day, 1 month, 1 quarter, and 1 year scales.

2. **Choose your desired scale and release the mouse button**. The Gantt View will change to represent the new scale. In the process, some activities which no longer start within the time range for the new scale will disappear from the View. Likewise, other activities which did not previously start within the time range for the scale will now appear in the View.

Set The Date Range

Once you have chosen your desired scale, you may want to adjust the date range currently displayed. The Date Range button indicates how much of your calendar is displayed. Only the activities that start within the specified time range will appear in the Gantt View.

You can change this date range at any time.

1. **Click the Date Range button**. A small dialog box will appear. The dialog box contains a date shutter which you can use to adjust the date range.

2. **Click OK when done**. The Gantt View will remain at the same scale but will adjust itself to the new date range. All activities which fall within the date range will appear in the View.

Zoom In And Zoom Out

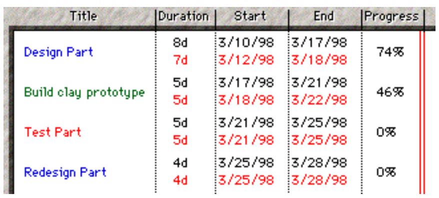
Not only can you specify the scale you want the Gantt View to use, but you can also specify how big or small you want the intervals to be on your screen. This is referred to as the zoom level. The Gantt View contains two zoom buttons to alter the physical size of the scale intervals.

Use the Zoom In button to make the scale interval size larger on the screen. Use the Zoom Out button to make the scale interval size smaller. You can use either button at any time to change the zoom level. These two buttons will not have any effect on which activities are displayed. The Zoom In and Zoom Out buttons are particularly useful when you print the Gantt View on different sizes of paper.

Adjust The Title Width

You can adjust the width of the area in which the activity titles appear in the Gantt View to your suiting. The Title Region actually displays more than the activity title. If you expand the Title Region, you will also see Duration, Start Date, End Date, and Progress columns.

1. **Place the mouse pointer directly over the red double line that separates the titles from the activity bars**. The mouse pointer will change to left/right adjuster arrows.
2. **Click and hold the mouse button down**.
3. **While holding down the mouse button, drag the double lines to your desired position.** As you move the mouse, a set of double lines will move to indicate where you currently are.
4. **Release the mouse button**. The width of the title area will adjust to the new size.



Title	Duration	Start	End	Progress
Design Part	8d 7d	3/10/98 3/12/98	3/17/98 3/18/98	74%
Build clay prototype	5d 5d	3/17/98 3/18/98	3/21/98 3/22/98	46%
Test Part	5d 5d	3/21/98 3/21/98	3/25/98 3/25/98	0%
Redesign Part	4d 4d	3/25/98 3/25/98	3/28/98 3/28/98	0%

You can similarly adjust the width of the Title, Duration, Start Date, End Date, and Progress columns. To adjust the column width, you must position the mouse over the lines that separate the columns adjacent to the titles themselves.

Alter Gantt View Preferences

Click the Gantt View Preferences button in the Gantt View to change the preferences that control how the Gantt View displays your schedule.

A dialog box will appear that will let you specify the following preferences.

- Gantt Bar characteristics
- Title Icons
- Title column characteristics

For complete information on the various Gantt View preferences see *Gantt Preferences* in Chapter *Preferences* on page 189.

Select Activities

As with other Views, you can double-click and thereby select any activity in the Gantt View. Once an activity is selected, all of the information that represents that activity is displayed in the Activity Window so you can make changes to it. To select an activity, you can either double-click the activity title or on the horizontal bar that represents the activity's time and duration. Once an activity is selected, its title becomes highlighted and it appears in the Activity Window.

If you click a horizontal bar to select an activity, you may find it somewhat confusing to match up the horizontal bar with the corresponding title – especially if there are many activities in the View. For this reason, Consultant, places a small triangle to the left of the activity title for the bar the mouse pointer currently hovers over. In the following example, the mouse points to the bar that belongs to the dinner appointment activity. Notice the small triangle which appears to the left of that activity's title.

If you no longer want an activity selected, click in an empty region of the View.

Use The Drag Tool

Use the Drag Tool in the Gantt Tool Pad to drag out and schedule new activities, change the start/end times of existing activities, and completely move existing activities.

Schedule A New Activity

When the Drag Tool is selected in the Gantt Tool Pad, the mouse pointer will change to the Drag Tool. You can now schedule a new activity.

1. **Visually locate the start time/date in the scale at the top of the Gantt View of when you want the activity to begin**.
2. **Click and hold the mouse button down at the start time/date anywhere in the View below the scale**. Don't click the scale since nothing will happen.
3. **While holding down the mouse button, drag out the duration of the activity**. As you drag, a horizontal bar will follow the mouse pointer to indicate the duration.
4. **Release the mouse button to schedule the activity and put it into its proper sequence**. The new activity will also remain selected in the Activity Window so that you can give it a title other than the default.
5. **Type in an activity title and click the Close Box in the Activity Window or press Return**.

Change Activity Start/End Times

When the Drag Tool is selected in the Gantt Tool Pad, you can also change when an activity starts or ends.

1. **Position the mouse pointer directly over the start or end of the duration bar you wish to change**. The mouse pointer will change to left/right adjuster arrows.
2. **Click and hold down the mouse button**. The activity will become selected and the bar will turn white.
3. **While holding down the mouse button, drag the end of the bar to your desired location**. As you drag, the bar will change sizes.
4. **Release the mouse button**. The activity's bar will resize and the activity will remain selected. Please note that the sequence of activities may change depending on how you changed the bar since the activities always remain sorted by start time/date in the Gantt View.

Move Activities

When the Drag Tool is selected in the Gantt Tool Pad, you can completely move or reschedule an activity to a different time while maintaining the same duration.

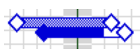
1. **Position the mouse pointer directly over the bar you wish to move**. Don't get too close to the end of the bar or the left/right adjuster arrows will appear. When you are directly over the bar, the mouse pointer will change from the Drag Tool to the standard mouse pointer arrow.
2. **Click and hold down the mouse button**. The activity will become selected.

3. **While holding down the mouse button, drag the bar to its new position**. As you drag, an outline of the entire bar will move with the mouse pointer.
4. **Release the mouse button**. The activity's bar will reschedule to the position where you released it. Please note that the sequence of activities may change depending on where you moved the bar since activities always remain sorted by start time/date in the Gantt View.

Use The Sub-Bar Tool

Use the Sub-Bar Tool in the Gantt Tool Pad to toggle how many bars represent an activity.

An activity can appear as either one or two bars stacked on top of each other. The top bar always represents the scheduled time range of an activity while the bottom bar always represents the actual time range of the activity. A single bar shows the same amount of information as two bars, but you might find two bars easier to read if space is not a consideration.



When the Sub-Bar Tool is selected in the Gantt Tool Pad, the mouse pointer will change to the Sub-Bar Tool. You can now toggle between one and two bars.

1. **Position the mouse pointer directly over the bar(s) you wish to toggle**. When you are directly over the bar(s), the mouse pointer will change to the Sub-Bar Tool.
2. **Click the bar(s)**. If there is currently only one bar, the second sub-bar will be added. If there are currently two bars, the sub-bar will be removed. The activity will remain selected.

Use The Actual V.S. Scheduled Time Tool

Use the Actual v.s. Scheduled Time Tool in the Gantt Tool Pad to record the actual time and duration that an activity took place. This tool is especially useful when you work on projects since many activities and tasks do not occur and last as long as you originally planned. The recording of the actual start and end times of activities allows you to gather statistics as to how accurate your original predictions were. You will also be able to see how an activity that took longer than planned will affect other parts of the project.

As you know, an activity can appear in the Gantt View with either one or two bars stacked on top of each other. The top bar always represents the scheduled time range of an activity, while the bottom bar always represents the actual time range of the activity. Suppose, for instance, that you have planned a fund-raising project in which one of its main tasks is to prepare and send out of invitations. Since this task will involve a fair amount of work, two weeks have been allocated to it starting on October 3rd. The task will appear as one or two bars depending on your preference.

Now further suppose that you were able to start on the task two days earlier than expected, but it took until October 20th to complete. Such a deviation from the original schedule warrants that you set the actual v.s. scheduled time for the activity. To do so, select the Actual v.s. Scheduled Time Tool. When this tool is selected in the Gantt Tool Pad, the mouse pointer will change to the Actual v.s. Scheduled Time Tool only when the mouse pointer is directly over an activity bar. Otherwise it will change to the red ban symbol. You can now set that actual start/end time for the activity.

1. **Position the mouse pointer directly over the left end of the activity bar**. If a sub-bar is displayed, place the mouse pointer directly over the left end of the bottom activity bar. When the mouse pointer is directly over the left end of the bar, the mouse pointer will change to the Actual v.s. Scheduled Time Tool.

2. **Click and hold the mouse button down**. While holding down the mouse button, drag the mouse pointer to actual time when the activity began, which in this example is October 1st. As you drag the mouse, a diamond will move to indicate the new actual time.
3. **Release the mouse button**. The actual start time will now appear where you released the mouse.
4. **Repeat the process on the diamond at the right end of the activity bar**. Doing so will change the actual end time of the activity to October 20th.

Use The Progress Indicator Tool

Use the Progress Indicator Tool in the Gantt Tool Pad to record how much of each activity has been completed. When you analyze or review a project, you will inevitably want to know how much of the project is done. Each activity has a progress indicator that indicates what percentage of it has been completed.

The progress indicator appears as a dark thermometer type bar within the actual time bar or sub-bar. For example, the following activity has been updated to indicate that it is fifty percent done. It is shown below in the two bar version.

When you select the Progress Indicator Tool in the Gantt Tool Pad, the mouse pointer will change to the Progress Indicator Tool when directly over that actual time activity bar. Otherwise it will change to the red ban symbol.

1. **Position the mouse pointer directly over the activity bar**. If a sub-bar is displayed, place the mouse pointer directly over the bottom activity bar. When the mouse pointer is directly over the left end of the bar, the mouse pointer will change to the Progress Indicator Tool. While the mouse pointer is directly over the correct bar, position the pointer at the location on the bar which marks what portion of the activity has been completed. For example, if the activity is half done, place the mouse pointer in the middle of the bar.
2. **Click**. The actual time bar will be filled like a thermometer from its left diamond to the point where you clicked.

There are a couple of items to remember when you mark the completion status of activities.

- **Activities are marked completed as a percentage**. Since activities are marked completed as a percentage from zero to one hundred percent, you cannot mark them with any more precision than this. In other words, you can only mark a one hundred day activity as completed in one day increments. Thus you cannot specify that thirty-four days and six hours are completed.
- **You can only mark activities as accurately as the scale in which they are displayed**. It only stands to reason that if you view a project at a scale of one day per unit, you will not be able to mark it as completed in fifteen minute intervals unless you change the scale.

Create A Project

The activities that appear in the Day, Multiday, Week, Month and List Views will likewise appear in the Gantt View. The capability to view normal calendar information in the Gantt View's time-line format is very handy. It is also very handy to have activities that you create in the Gantt View appear in other Views as well. Because Consultant does not limit activities to certain Views, it makes it easy to view your calendar in a myriad of different formats.

This flexibility works fine until you want to design a project in the Gantt View without the interference of other normal calendar activities in the process. The simplest way to limit what activities are displayed in the Gantt View is to add one or more new Categories that you will use only for a specific project.

Assign each activity you create in the Gantt View to one of the new categories. You will then build a Set which consists of only the project-related Categories. Since Sets work as filters, the Set will filter out any unwanted activities from simultaneous display in the Gantt View. In other words, there is no such thing as a project per se in Consultant. Rather, you define a project when you define a Set which includes only the Categories you want in your project. For information on how to define Categories see *Define Categories* in Chapter *Priorities, Categories and Sets* on page 148. For information on how to define Sets see *Define Sets* in Chapter *Priorities, Categories and Sets* on page 150.

Chapter 9

Calendar Management

The purpose of this chapter is to describe several tools and techniques Consultant provides to help you manage your schedule. The information contained in this chapter assumes that you are familiar with the Activity Window and the calendar Views which were described in previous chapters.

Topics Covered

- **Translate Dialog Box**. Describes how to schedule an activity by entering an English phrase that describes the activity.
- **Message Pad**. Details how to use the Message Pad to take messages for different people.
- **Alarms**. Describes how to set, dismiss and snooze alarms.
- **To-Dos And Goals**. Details the characteristics of To-Dos and Goals, how to use them and special features unique to To-Dos.
- **Conflict Checking**. Describes how Consultant checks for scheduling conflicts and notifies you of such.
- **Move And Duplicate Activities**. Details how you can move activities within the same View or different Views. Also covers how to duplicate activities.
- **Delete Activities**. Describes briefly how to delete an activity.

Translate Dialog Box

The Translate dialog box provides the most intuitive and often the quickest way to schedule activities. The idea behind the Translate dialog box is for you to describe an activity to Consultant in natural English. Consultant will then use its English translation capabilities to extract all of the pertinent activity information from what you typed and schedule the activity appropriately.

The Translate dialog box tries to work for you, rather than have you work for the computer. It is often even smart enough to recognize contact names and automatically link applicable contact information to the activity it schedules. This section will describe how to use the Translate dialog box to enter English activity descriptions. It will then describe how the Translate dialog box automatically links contacts to activities you schedule.

Translate Dialog Box

Scheduling an activity via the Translate dialog box is quick and easy. It is often quicker than opening the Activity Window and adjusting instruments like the Date Shutter.

1. **Choose “Translate…” from the Calendar Menu.** The Translate dialog box will appear with a blinking cursor in the text region.
2. **Type “Lunch at noon today”**. Now that you have entered an English phrase that describes an activity, you need to tell Consultant to translate the phrase and place the activity on your schedule.
3. **Click the Translate button or press the Return key to inform Consultant you have a phrase to translate.** Consultant will translate the phrase and save the new activity in your file. The Activity Window will also appear and contain all of the information for the activity. It will show you the title of the activity, the time, the date, the priority, the category, etc.

Notice how the instruments in the Activity Window represent everything about the activity you just scheduled including the title, time and date. You can change any of these items directly from Activity Window at any time.

For the most part, when you enter an English phrases, you can type the phrase just as you say it in English. You may, however, discover certain nuances which can be corrected in the Activity Window.

Automatic Contact Links

The Translate dialog box can recognize contact names in the English phrases it translates. For example, if you tell the Translate dialog box to translate the phrase “Meet John Washow Friday at 10", it will recognize that John Washow is possibly one of your contacts and will try to look him up. If John Washow is found in your contact list, the Translate dialog box will automatically link his contact information to the Meet John Washow appointment at 10 a.m.

1. **Type “Meet John Washow Friday at 10" into the Translate Dialog Box**.
2. **Press Return on the keyboard or click the Translate button**. Once the translation is complete and assuming John Washow is in the contact list, the Activity Window will appear. Notice the Link Icon in the Activity Window. This Link Icon indicates that the Meet John Washow activity has something linked to it.
3. **Click the Link Button in the Activity Window to see what is linked to the activity**. The Activity Window will grow downwards and display a link to John Washow.
4. **Double-click the John Washow link entry to see all of his information in the Contact Card View**.

Message Pad

The Message Pad provides a simple mechanism by which you can leave phone and/or other types of messages for various open users in a file. A personal assistant or family member can, assuming they have proper access, leave a message for a boss or sibling upon receipt of a phone call from a client or friend. Once a message has been left for a particular person, the message will appear on that person's calendar as a To-Do. This section describes how to leave a message for a particular person.

1. **Choose “Message Pad” from the Calendar menu to open the Message Pad**. The Message Pad dialog box will open. You will notice that it closely resembles a pink phone message slip used in many offices. The Time and Date Shutters in the dialog box will contain the current time and date. These shutters record the time and date the message was taken. Like all time/date shutters, you can adjust their contents if you don't want to record the current time/date as the time when the message was taken.
2. **Choose a recipient**. Use the For button to choose the user to whom the message is intended. You can choose from any user in any file that is currently open. To choose a user, click and hold the mouse button down on the For button. A list of the users currently on-line will pop-up from which you may choose the appropriate recipient.
3. **Choose a Priority**. Since the message that you leave will ultimately show up as a To-Do on the recipient's calendar, you can choose one of the recipient's Priorities that best fits the urgency of the message. To choose the message's Priority click and hold the mouse button down on the Priority button. A list of the recipient's Priorities will appear from which you may choose the appropriate Priority.
4. **Type caller's information**. Type the name, company name and phone number of the person who called or came by to leave a message for the recipient. Consultant will use this information to automatically link the contact information of this person to the To-Do that is created on the recipient's calendar.

5. **Choose the type of message**. You may choose one of six common messages to leave with the recipient.
6. **Type additional message information**. In addition to one of the six common messages, you can leave additional information that gives more detail. Type this additional information into the Message Notes Region.
7. **Click OK to route the message to the specified recipient**. The message will appear on the recipient's calendar as a To-Do. The title of the To-Do will describe the message. Any detailed message information will appear in the Notes Region of the To-Do. Once the recipient has appropriately dealt with the message, the recipient can mark it like any other To-Do.

   If a contact object that matches the name of the person who left the message is found, that contact object will automatically link to the To-Do for the recipient's convenience.

Alarms

You can set an alarm for any activity whether it be an Appointment, an Event, a To-Do or a Goal. In order for an alarm to go off, Consultant must be launched but it need not be the foreground application. In other words, you can work with your word processing application and receive an alarm notification so long as Consultant is launched.

This section will describe the various alarms types, list the steps to set an alarm, describe how visual notification works, and discuss your alarm preference choices.

Alarm Types

When an alarm goes off, it will alert you with a visual or audible alarm or both.

- **Visual Alarm**. A dialog box will appear to notify you as to which alarm is going off. This Visual Alarm dialog box will also give you several options in which you can dismiss the alarm, snooze the alarm or jump to the activity in the Day View that caused the Alarm.
- **Audible Alarm**. A sound of your choice will play through your computer's internal speaker to notify you that an alarm is going off. You also have the choice of having Consultant speak your alarm to you in English.

If Consultant is not the foreground application when an alarm goes off, you will receive at least one of three notifications in the application you are currently working in.

- **Blinking Notification**. The Consultant icon will periodically alternate with the Application menu icon in the top right hand corner of the screen. A click on the Application menu will reveal a diamond-shaped mark next to Consultant in the Application menu.
- **Audible Notification**. If the alarm going off is an audible alarm, the alarm sound you selected will sound.
- **Alert Notification**. If the alarm going off is a visual alarm, a generic alert box will appear.

To find out what alarm is going off while in another application, switch to Consultant by way of the Application menu in the top right-hand corner of the screen. You will then see and/or hear the visual or audible alarm from within Consultant.

When your computer is off and one or more alarms have expired, the next time you turn on your computer and launch Consultant, all of the alarms that previously expired will go off. This feature ensures that no alarm slips through the cracks.

This section discusses how to set alarms in Consultant as well as the different options you have with visual alarm notification. Since audible notification simply consists of a sound played through your computer's speaker and cannot be dismissed, it will not require any special explanation.

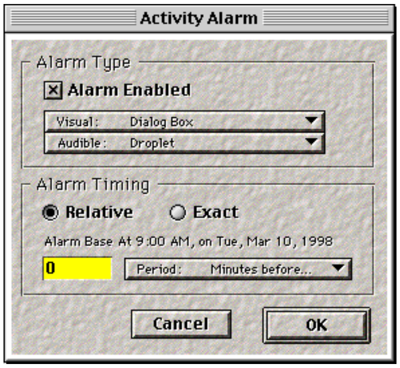
Set An Alarm

The activity you want to set an alarm for must be visible in the Activity Window. The activity in the Activity Window can be one that you previously selected or are just now creating.

1. **Click the Alarm button in the Activity Window**.

   The Alarm dialog box will appear.

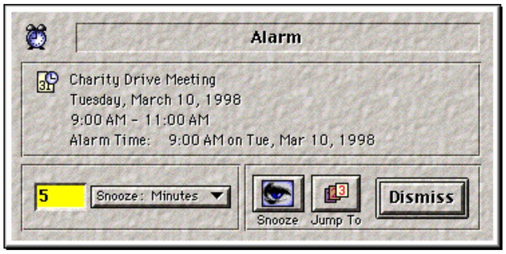
2. **Select the Alarm Enabled button**. Several tools will appear in the dialog box to help you choose the type of alarm you want to go off. If you later decide that you don't want this activity to have an alarm, deselect the Alarm Enabled button.
3. **Choose the Alarm Type**. You may either choose a visual or audible alarm or both.
   - **Click and hold the mouse button down on the Visual button to choose the visual alarm**. Choose "Dialog Box" instead of "None" to select the visual alarm option.
   - **Click and hold the mouse button down on the Audible button to choose the audible alarm**. Choose from any of the listed sounds to select the audible alarm option. This list contains one special choice called "Voice." Choose "Voice" if you would like Consultant to audibly speak the alarm to you in English. You must have Apple's speech manager installed for this option work. For more information on Apple's speech manager see Chapter 17 *Speech* on page 156.

   For maximum effectiveness select both the visual and audible alarms.
4. **Select Alarm Timing**. You can choose to have your alarm go off at a specific time or a relative time. Choose "Exact" if you know exactly when you want the alarm to go off. If you choose "Exact", a Time Shutter and Date Shutter will appear so can set the exact time. Choose "Relative" if you want the alarm to go off at some time relative to the start time of the activity. If you choose "Relative", tools will appear to help you select the relative time. You can set relative alarms to go off before or after an activity starts. If the activity is an Appointment, you can set the alarm to go off any number of minutes, hours or days before/after the activity starts. If the activity is an Event or To-Do, you can only set the alarm to go off any number of days before/after the activity starts. To set the alarm timing, first click and hold the mouse button down on the Period button to choose the appropriate time period. Then type the number of minutes, hours or days.
5. **Click OK to dismiss the Alarm dialog box**. The Alarm button in the Activity Window will change to indicate that an alarm is set.
6. **Click the Close Box in the Activity Window or press Return to save the changes to the activity and make the alarm setting permanent**.

Visual Alarm Notification

Visual alarm notification provides the only way to identify what alarm is going off. When an audible alarm goes off, no indication is given as to which activity caused the alarm. It is therefore most effective to use a visual alarm in conjunction with an audible alarm.

When a visual alarm goes off, a dialog box appears in which you can dismiss the alarm, snooze the alarm or jump to the activity in the Day View that caused the Alarm.



- **Dismiss Button**. Use this button to dismiss an alarm once it has gone off and served it purpose. If the alarm was an exact alarm, the alarm will be permanently dismissed. If the alarm was a relative alarm for a single day activity, the alarm will be permanently dismissed. But if the alarm was a relative alarm for a multiday or repeating activity, the alarm will only be dismissed for the applicable day of the activity. In other words, a relative alarm applies for each day of a multiday or repeating activity.
- **Snooze Button**. Use this button to cause an alarm to go off again after a specified number of minutes, hours or days. If you snooze an Appointment, the snooze may last any number of minutes, hours or days. If you snooze an Event or To-Do, the snooze may only last any number of days. The snooze time starts when you click the snooze button, not when the alarm went off. Before you click the snooze button, you must first set the snooze time if you don’t like the default.

  1. **Choose a minute, hour or day period of time from the Snooze pop-up button**.
  2. **Type the number of minutes, hours or days**.
  3. **Click the Snooze button to invoke the snooze**. The Visual Alarm Notification dialog box will close.

- **Jump Button**. Use this button to dismiss an alarm and open the Day View to the activity that caused the alarm. This button provides a quick way to go to the activity that caused the alarm for further information such as links, notes, etc.

Alarm Preferences

The Preferences dialog box contains two preferences relating to alarms.

- Number of alarm chimes for audible alarms
- Default alarm characteristics for automatic alarms

For complete information on the various Alarm preferences see *Activities Preferences* in Chapter *Preferences* on page 187.

To-Dos And Goals

To-Dos and Goals have several special characteristics which set them apart from other activities. First, To-Dos and Goals do not have a particular time associated with them. Second, you can mark To-Dos and Goals in various ways. Thus they relay information as to their current status. Third, because the status of To-Dos and Goals is permanently recorded, statistical progress is available at anytime.

The difference between To-Dos and Goals goes is minimal. The two are essentially the same and are only distinguished by the way they are marked. You can mark a To-Do in one of several ways.

TABLE 10. To-Do Marks

Icon	Mark	Description
	Completed	This choice indicates that the To-Do has been completed.
	Forwarded	This choice indicates that you will not be able to accomplish the To-Do and desire to reschedule it on the next day.
	Underway	This choice indicates that you have started, but not yet completed the To-Do.
	Deleted	This choice indicates that you no longer want to worry about the To-Do and you want to cancel it. Rather than delete the To-Do permanently from your schedule, use this mark to preserve a history of tasks planned, but later cancelled.
	Assigned	This choice indicates that you will not complete the To-Do yourself since you have assigned it to someone else.
	Assigned/Done	This choice indicates that a To-Do that you assigned to someone else is now completed.
	Not Completed	This choice indicates that the To-Do is not completed, has not been forwarded, has not been deleted and has not been assigned.

A Goal, on the other hand, is marked with a numeric value between zero and two hundred forty. As the following example suggests, numeric value marks are very useful if you want to precisely track your progress.

20 High Exercise

To-Dos and Goals are scheduled in the Activity Window. The Activity Window contains an instrument called the To-Do Indicator which when depressed designates that the activity is a To-Do. For information on how to use the Activity Window to create a To-Do see *Make A To-Do* in Chapter *The Activity Window* on page 47.

This section discusses the various characteristics that make To-Dos and Goals unique from other types of activities. This section starts with a description of where To-Dos and Goals are displayed throughout Consultant, followed by a description of how long they can last. This section then describes how to mark To-Dos as completed, forwarded, deleted, etc. Finally, this section discusses how Consultant automatically forwards uncompleted To-Dos to the current day and how to display To-Do and Goal statistics.

Where To-Dos And Goals Are Displayed

To-Dos and Goals are displayed in the Day, Multiday, Week, Month, List, and Gantt Views. The region in which To-Dos and Goals are displayed is shown below for each of these Views.

Since the Month View displays activities in a smaller text size, the Month View does not use the standard To-Do and Goal identifying icons. Rather, the Month View uses a smaller version of those icons.

To-Do And Goal Durations

Although To-Dos and Goals do not take place at a particular time, they do occur on a particular day and/or set of days. You can schedule a To-Do or Goal on one or more consecutive or nonconsecutive days. Consultant does, however, make a differentiation between single day To-Dos and multiday or repeating To-Dos.

- To-Dos which occur on a single day will automatically forward to the current day if they have not been marked as completed. Multiday and Repeating To-Dos will not automatically forward.

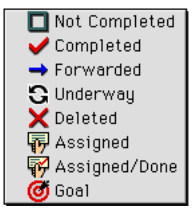
A To-Do which is scheduled on more than one day is called a multiday or repeating To-Do. You can mark each day of the To-Do in its own way. In fact, you can even mark repeating To-Dos with a combination of the standard To-Do symbols and numeric Goal values.

A multiday or repeating To-Do or Goal is extremely useful if you want to keep track of progress made on a particular task over a period of time.

Mark To-Dos

You can mark any To-Do from the Day, Multiday, Week or Month View in which it appears.

1. **Click and hold the mouse button down on the current mark symbol**. A pop-up menu will appear. This menu contains the various ways you can mark To-Dos. The Not Completed choice will initially be highlighted since it is the default.



2. **Choose the mark selection of your choice and release the mouse button**. The selection you chose will replace the current mark symbol.

Mark Goals

When you mark a To-Do, you may have noticed that the mark symbol pop-up menu contains a choice entitled “Goal.” Choose this choice when it is appropriate to have the To-Do marked with a numeric value. Suppose, for instance, that you have a To-Do to exercise every week day. You can mark it as Completed each day you exercise or you can enter the number of minutes you exercised and thereby mark it as a Goal. If you want to track your exercise performance, it might be better to mark the To-Do as a Goal.

1. **Click and hold the mouse button down on the current mark symbol**. A pop-up menu will appear that contains the various ways you can mark a To-Do.
2. **Choose the Goal mark choice**. A small dialog box will appear and request you to enter in a value. The value you enter must be between zero and two hundred forty. In the case of this example, the value entered represents the number of minutes exercised.
3. **Click the OK button once you enter the value of your Goal**. The value of the Goal will appear in place of the mark symbol. In the case of the Month View, there is not enough space to display the entire Goal value, so a “#” symbol is shown instead.

Automatic To-Do Forwarding

Ambitious To-Do lists do not always get accomplished accordingly. Sometimes there is just not enough hours in the day or unexpected events arise. When such situations arise, simply mark the uncompleted

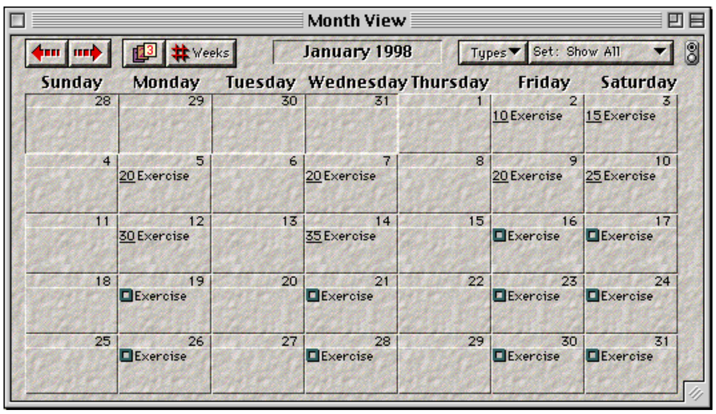
To-Dos with the Forwarded symbol.

The To-Do will remain marked as forwarded until the next day where it will appear as Not Completed. Likewise, a To-Do which remains marked as Not Completed will automatically forward to the current day. Only single day To-Dos will automatically forward. If you have a multiday or repeating To-Do and mark one of the days as forwarded, nothing further will happen. The marked day will simply remain in its forwarded state.

There is a preference in the Preferences dialog box to turn off Automatic To-Do Forwarding. For more information see *Activities Preferences* in Chapter *Preferences* on page 187.

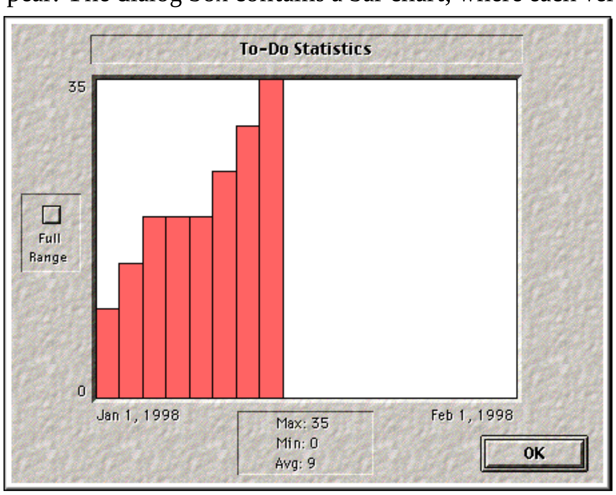
To-Do And Goal Statistics

Consultant provides progress statistics to help you track To-Do and Goal progress. Suppose you have a New Year's resolution to jog thirty minutes a day, four times a week. You create a To-Do for January on those days. Every time you exercise that month, you treat the To-Do as a Goal and enter the number of minutes you jogged.



Part way through the month, you want to see how successful you have been with your New Year's resolution. In other words, you want to see the statistics for your To-Do or Goal.

1. **Select the To-Do or Goal from any View**.
2. **Choose "To-Do Statistics" from the Calendar Menu**. The To-Do Statistics dialog box will appear. The dialog box contains a bar chart, where each vertical bar represents one day of the To-Do.



As this bar chart indicates, the number of minutes jogged steadily increased as endurance increased throughout the month. Since the month in this example is not yet over, the last part of the month has no bars.

The bar chart has an X and a Y axis. The X axis represents each day of the To-Do and is labeled with the start and end dates of the To-Do. In this example, the X axis starts with January 1st and ends with January 31st. Though, the To-Do spans thirty-one days, it consists of only eighteen days – hence only eighteen bars are represented. The Y axis represents the range of values recorded for each day of the To-Do and is labeled from zero to two hundred forty.

To the left of the bar chart is a box which contains some basic statistics such as the minimum, maximum and average values contained in the chart. There is also a depressed button entitled *Full Range*. This button controls the range of values on the Y axis. When depressed, the Y axis ranges from zero to two hundred forty. When the button is not depressed, the Y axis ranges from the minimum to the maximum statistical value. This effectively zooms in on the statistics without loosing pertinent information.

3. **Click OK when done**.

You may view statistics for both To-Dos and Goals. If you view statistics for a To-Do in which you have not used numeric values, the Y axis will use the labels Completed and Not Completed.

Only the mark symbols Completed and Assigned/Done will count as a completed To-Do for that day. All other mark symbols are considered Not Completed.

As you know, it is possible to mark a repeating To-Do with both standard mark symbols and numerical Goal values. If a repeating To-Do contains even a single numeric value, the To-Do Statistics dialog box will treat it as a Goal. Thus the Y axis will by default range from zero to two hundred forty. The To-Do Statistics dialog box will then assign a numeric value to the standard To-Do mark symbols.

TABLE 11. To-Do Mark Value For To-Do Statistics

Mark	Value
Completed	Assigned the maximum statistical value.
Forwarded	Assigned zero.
Underway	Assigned zero.
Deleted	Assigned zero.
Assigned	Assigned zero.
Assigned/Done	Assigned the maximum statistical value.
Not Completed	Assigned zero.

To-Do Preferences

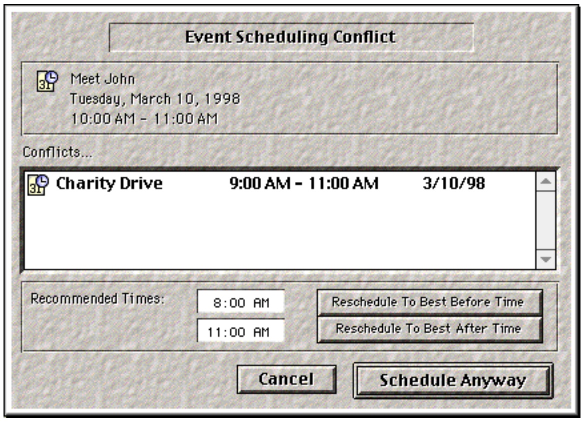
The Preferences dialog box contains one preferences relating to To-Dos.

- Enable/Disable Automatic To-Do Forwarding

For complete information on the To-Do preference see *Activities Preferences* in Chapter *Preferences* on page 187.

Conflict Checking

While it is not uncommon to have more than one activity occur at the same time, you may find it down-right frustrating when you discover that you accidentally scheduled two appointments for the same time. Consultant uses Conflict Catching to constantly watch for such conflicts. Conflict Checking alerts you when you schedule an activity that starts or ends during one or more already scheduled activities. If you schedule an activity that occurs over several days, it will even check each day of the activity to make sure that there is not a conflict. Conflict Checking only applies to activities that have a time associated with them. When such a conflict does happen, whether it was intended or not, a dialog box will appear to alert you.



The Conflict Checking dialog box gives you three choices as to how you can handle the conflict. Each of these choices and how to invoke each is described in the following dialog box description.

- **Activity Conflict List**. This list displays all of the activities that are in conflict with the activity that you attempted to schedule. The dates and times for each activity are also displayed.
- **Reschedule To Best Earlier Time Button**. Consultant will examine the times of all of the activities that conflict with the one that you attempted to schedule and will determine the best earlier time that you can schedule the activity without conflict. The recommended earlier time is shown to the left of this button. If you aren't completely satisfied with the best earlier time Consultant suggests, you can adjust the time to your suiting before you click this button. Once the time is to your liking, click this button to schedule the activity.
- **Reschedule To Best Later Time Button**. This button works like the afore mentioned button, but schedules the activity to the best later time that does not conflict with any activities.
- **Schedule Anyway Button.** Click this button to go ahead and schedule the activity anyway. Use this option of you are aware of the scheduling conflict and have no choice but to deal with the overlapping activities.

Conflict Checking Preferences

The Preferences dialog box contains one preferences relating to Conflict Checking.

- Enable/Disable Conflict Checking

For complete information on the Conflict Checking preference see *Activities Preferences* in Chapter *Preferences* on page 187.

Move And Duplicate Activities

It is not uncommon that you need to reschedule an activity for a different time or date. There are two methods to reschedule an activity.

- **Select the activity and then adjust its time and date in the Activity Window**.
- **Use the mouse to drag or move the activity directly to its new time or date**. Consultant allows

you to click and drag an activity from any View to any other View. You can move an activity to a different time or date within the same View as well.

The latter method is often more convenient and quicker. This section describes the latter method with respect to moving an activity within the same View as well as between Views. This section also describes how to duplicate an activity.

Move An Activity Within The Same View

The following steps move or reschedule an activity to a different time and/or date within the same View.

1. **Select and hold the mouse button down on the activity**.
2. **Drag the activity to its new time/date**. An outline that represents the duration of the activity will indicate where the activity will reschedule as you move the mouse.
3. **Release the mouse button when the activity is at the new time/date**.

Move An Activity Between Views

Not only can you move an activity within the same View, you can also move activities between Views. This is extremely useful when you need to reschedule an appointment on a day not currently displayed in the top-most View. You can, of course, select the appointment and change its date in the Activity Window, but it might be quicker to reschedule it with only the mouse.

Suppose that you have a lunch appointment on May 5th which has just been postponed a week. Further suppose that you already have the Day View open with your lunch appointment displayed. The following steps move the lunch appointment one week forward.

1. **Open the Month View**. You can also choose to open another View such as the Day View, Multiday View, Week View or Gantt View. Whatever View you open, adjust it so that May 12th is displayed.
2. **Click the Day View to make it the top-most View**.
3. **Position the Day View so that May 12th in the underlying Month View is visible**.
4. **Click and hold the mouse button down on the lunch appointment**. The activity will become selected.
5. **While holding down the mouse button, drag the lunch appointment until it hovers over May 12th in the Month View**. As you drag, the mouse pointer will turn into the icon that represents Appointments. If you drag another activity type, the icon that represents that activity type will appear instead. The date that the mouse hovers over will become depressed in the Month View to indicate where the activity will reschedule to.
6. **Release the mouse button**. The lunch appointment will reschedule to May 12th and thus disappear from the Day View.

It doesn't matter what type of activities you move. It also doesn't matter which Views you move activities to and from. For example, you can move an activity from the List View to the Week View. The following is a list of useful tips to keep in mind when you move activities.

- **The mouse pointer will temporarily turn into the red ban symbol to signify that you can't move the activity to the position where the mouse pointer currently is**. If you see this symbol continue to move the mouse pointer to a valid position within a View at which point the symbol will disappear. If you release the mouse button when the mouse pointer is the ban symbol nothing will happen.

  
- **When you move an Appointment to the Day, Multiday, Week and Gantt Views, a box outline of the activity's duration will appear in the View**. Tick marks in the Hour Labels or Scale will

also indicate the time range where the activity will move to.

- **If you move an Appointment to the To-Do Region of the Day or Multiday View, it will turn into a To-Do Activity**.
- **If an Event or To-Do is moved to the Appointment Region of the Day or Multiday View, it will turn into an Appointment with a duration of one hour**.

Duplicate Activities

The occasion may arise when you want to move an activity to a different time or date and keep the original activity in place – in other words duplicate the activity. The process to duplicate an activity is similar to the process to move an activity. The only difference is that if you hold down the Option key as you move the activity, the activity will duplicate itself where you release the mouse button. When you move an activity with the Option key held down, the mouse pointer will turn into a camera. The camera symbolizes that a duplicate of the activity will be made where you release the mouse button.

In actuality, you need only hold down the Option key just prior to when you release the mouse button when you move an activity.

Delete Activities

Appointments get cancelled and plans are put permanently on hold all the time. Consultant lets you permanently delete one or more activities from your schedule to allow for these and other types of cancellations. There are two ways to delete an activity.

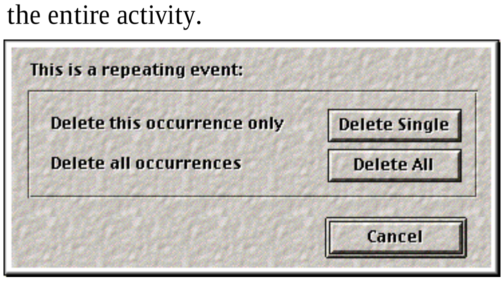
- **Drag an activity to the trash can in the Activity Window**.
- **Select the activity and press Command-D on the keyboard**.

This section does not go into further detail regarding the two methods to delete activities since an entire chapter is dedicated to this topic. For information on how to delete activities see Chapter 12 *Delete Activity And Contact Objects* on page 125. Rather, this section describes a peculiarity related to the deletion of repeating and multiday activities.

Delete Repeating And Multiday Activities

You can delete repeating and multiday activities in the same manner as a single day activity. You can use either of the two methods described above. There is one difference, however. Consultant cannot know whether you want each and every day of the entire activity deleted or just the day of the activity you clicked selected. Suppose, for instance, that you scheduled a three day training conference and just found out that the second day of the conference had been cancelled. Since the second day has been cancelled, you will want to delete it from your schedule.

1. **Click the middle or second day of the conference and drag it to the trash can in the Activity Window**. Since Consultant is unsure of whether you want the entire conference deleted or just the second day, a dialog box will appear and let you delete just the day you dragged to the trash can or the entire activity.



2. **Click the Delete Single Occurrence button since in this case you only want to delete the second day**. Only the second day of the conference is deleted. If you want all three days of the conference deleted, click the Delete All Occurrences button.

Chapter 10

Contact Views

The purpose of this chapter is to describe the facilities that are available to help you manage your contacts which may include family, friends, associates, business clients, etc.

Topics Covered

- **Two Broad Contact Types**. Describes how all contacts are assigned a broad distinction of a business contact or non-business contact. Also describes the ramifications of these two broad contact types.
- **Contact Card View**. Details how to use the Contact Card View to create and work with contacts.
- **Contact List View**. Details how to use the Contact List View and Criteria to build customized sorted lists that you can use to print envelopes, labels and lists.
- **Drag And Drop Contacts On The Calendar**. Describes how Consultant automatically creates an activity when you drag a contact onto your calendar.

Consultant provides a complete contact management solution in which pertinent contact information is permanently recorded and linked to other contacts and/or activities. All of the information for a given contact is contained on a single card called the Contact Card View. Once you have saved information for several contacts, Consultant allows you to sort and filter contacts based on any of the fields that comprise a contact. Thus Consultant is able to generate and print customized mailing lists, labels and envelopes. There are two Views which are specially dedicated to contacts.

- **Contact Card View**. Use the Contact Card View to enter and view all the pertinent information that defines or describes a contact.
- **Contact List View**. Use the Contact List View to generate lists of contacts. You may sort the Contact List View on up to four fields at once and filter which contacts are included in the list based on any number of Criteria.

You can link contacts to activities that appear in any other calendar View in addition to these two Views. For information on how to link objects see Chapter 14 *Links* on page 140. Also, you can use the List View to view contact objects simultaneously with activity objects.

Two Broad Contact Types

This section discusses the two broad contact types that Consultant allows you to assign to each contact. It also describes why this distinction is important to other aspects of contact management.

- **Business Contacts**. Business contacts are contacts that you conduct business with such as clients, suppliers, distributors, etc. If you use Consultant at your employment, you will probably want to designate most of your contacts as business contacts. Business contacts are identified throughout Consultant with the building icon.

  
- **Non-business Contacts**. Non-business contacts are contacts that you do not do business with. Examples of non-business contacts include family, friends and acquaintances. If you use Consultant for personal or home use, you will probably designate most of your contacts as non-business contacts. Non-business Contacts are identified throughout Consultant with a familiar contact icon.

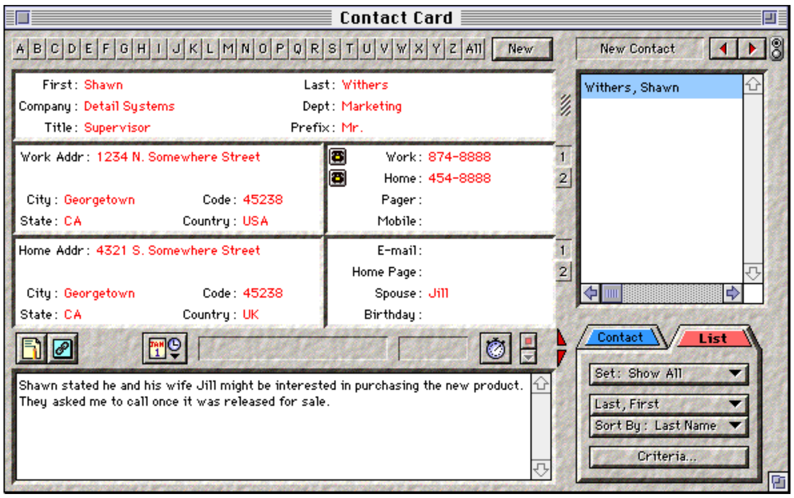
  

You might wonder why Consultant supports these two broad contact types since you can assign contacts to different Categories in order to differentiate them? There are several good reasons. First of all, these two broad contact types transcend Categories. Thus it is possible to build a list of business contacts regardless of the Category each contact is assigned to. This makes it easy to separate personal contacts from business associates. Furthermore, it allows you to categorize your business contacts. Second, when you work with non-business contacts, it is not always important to have a non-business contact's company name displayed. For example, when Consultant displays linked contacts, it will show a non-business contact's first and last names, but not the company name. Third, the identifying icons for these two broad contact types make it easy to differentiate your business contacts.

Contact Card View

Use the Contact Card View to enter and view all the pertinent information that defines a contact. You will quickly become acquainted with this View since it is at the heart of contact management in Consultant.

This section describes how to use the Contact Card View to create new contacts and work with existing contacts. It begins with a description of each part, region and button that comprises the Contact Card View. This section then describes how to create, select, edit and delete contacts. It then describes how to customize phone field labels, custom field labels, and address field labels. The section continues by describing how automatic formatting works, how to dial a number, and how Internet integration works. This section will then describe how to use SmartType Lists and Clone Contact to reduce typing and standardize input formatting. Finally, this section describes how to change the preferences that control the Contact Card View.



Contact And List Folders

The Contact and List folders are located in the lower right-hand corner of the Contact Card View. These two folders contains tools to help you manage contacts. You can switch between these two folders at any time by clicking the folder tab where the “Contact” or “List” title is located.

The Contact folder contains tools that pertain to the currently selected contact. Each of these tools is discussed in its own sub-section below.

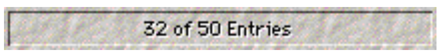
The List folder contains tools which control the Contact Directory. These tools are discussed in the Contact Directory sub-section below.

Contact Directory

The Contact Directory is located in the Contact Card View to help you locate contacts, build simple contact lists and work with contacts in general. Furthermore, you can print contact lists, envelopes and labels from the contacts currently displayed in the Contact Directory. The Contact Directory may or may not contain a complete listing of all the contacts in your file or files. When you first open the Contact Card View, only the contacts that belong to current Set appear in the Contact Directory. You may, of course, like any other View, change which Set the View uses.

To be more accurate, when you first open the Contact Card View the Contact Directory will be empty. This is because the Contact Directory is controlled by the Alphabet Tabs in addition to the current Set. The Alphabet Tabs tell the Contact Directory which letter of the alphabet to list contacts for. For example, click the “A” Alphabet Tab to list all the contacts with last names that start with “A”. You can also click the “All” Alphabet Tab to list all the contact in the current Set. For information on how to use the Alphabet Tabs see *Alphabet Tabs* in Chapter *Contact Views* on page 108.

Directly above the Contact Directory you will find a box in which the number of contacts in the Contact Directory is displayed for your convenience. If one of the contacts in the Contact Directory is selected, this box will also indicate the number of the contact in the list. You will, for example, see that contact “32 of 50” is selected which means there are 50 contacts in the list and the 32nd contact is selected.



Contact Directory Forward / Backward Buttons

The Contact Forward and Contact Backward buttons are located directly above the Contact Directory. Use the Contact Forward button to select the next contact in the list and the Contact Backward button to select the previous contact in the list.

List Folder Tools

As previously mentioned, the Contact Directory is conveniently located to help you locate and access your contacts as well as build lists of contacts for printing. The List Folder in the lower right-hand corner of the screen contains four buttons to let you customize the Contact Directory.

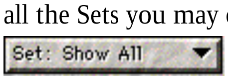
- **Set Button**. Use this button to choose which Set you want displayed in the Contact Directory.
- **Directory Format Button**. Use this button to choose from several common display formats for contacts in the Contact Directory. Each format offers a display of pertinent contact fields in various orders.
- **Sort Button**. Use this button to choose whether you want contacts sorted by last name, company name, or first name.
- **Criteria Button**. Use this button to set up complex Criteria to filter out unnecessary contacts. For example, you can set up Criteria to list only those contacts that live in Texas.

Set Button

Information from any number of users in any number of files belonging to different categories can appear in the Contact Card View. Sets filter which categories from which users is actually displayed. For information on how to build Sets see *Define Sets* in Chapter *Priorities, Categories and Sets* on page 150.

Use the Set Button to select which Set filters the contacts shown in a View.

1. **Click and hold the mouse button down on the Set button**. A pop-up menu will appear and list all the Sets you may choose from.



2. **Choose the desired Set and release the mouse button**. Your chosen Set will appear on the Set button. Only the categories that belong to your chosen Set will be displayed in the Contact Directory.

Directory Format Button

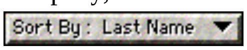
Use the Directory Format Button to choose the format in which contacts will appear in the Contact Directory.

1. **Click and hold the mouse button down on Directory Format button**. The Directory Format pop-up menu will appear. The pop-up menu is divided into two halves. The upper half represents choices in which the company name is displayed first. These choices are often useful when you work with business contacts. The lower half represents choices in which the contact's first or last name is displayed first. These choices are often useful when you work with non-business contacts.

Your selection in the Directory Format button will not affect the sort order of the contacts in the Contact Directory. This button merely lets you select how you would like each contact displayed.

Sort Button

Use the Sort Button to choose whether you want contacts in the Contact Directory sorted by last name, company, or first name.



1. **Click and hold the mouse button down on this button**. The Sort pop-up menu will appear.
2. **Choose your preferred sort method from the pop-up menu and release the mouse button**. The Contact Directory will be sorted according to your selection.

If you work primarily with business contacts, you may prefer to sort by company name. If you work primarily with non-business contacts, you may find it more useful to sort by last name.

There is a direct correlation between the Sort Button and the Alphabet Tabs. That is, the selection of the Sort Button also indicates what contact field a depressed Alphabet Tab refers to. For example, if you depress the “C” Alphabet Tab and choose to sort by last name, then all the contacts with a last name that start with “C” will appear sorted by last name in the Contact Directory. If you depress the “C” Alphabet Tab but have instead chosen to sort by company name, then all the contacts with a company name that starts with “C” will appear sorted by company name in the Contact Directory. In other words, the Sort Button not only chooses which field to sort by but it also chooses which field the Alphabet Tab applies to.

Criteria Button

Use the Criteria Button to set up complex Criteria to filter the contacts shown in the Contact Directory.

For example, if you are working on a special sales project targeted towards clients in Texas, you may want to set up some Criteria that will filter out all contacts that don’t live in Texas.

1. **Click the Criteria button**. The standard Build Criteria dialog box will appear. If an Alphabet Tab is depressed, you may notice that a grayed out Criterion is already listed in the dialog box. This grayed out Criterion represents the Criterion which filter contacts that belong to that particular letter of the alphabet. For information on how to use the Build Criteria dialog box see *Use Criteria To Filter Objects* in Chapter *The Calendar Views* on page 79.

Alphabet Tabs

The Alphabet Tabs tell the Contact Directory which contacts to list.

If you have many contacts, you might discover that it is cumbersome to scroll through all of them at once. The Alphabet Tabs generate a listing of only the contacts that have a last name, company name, or first name that begins with the letter in the Alphabet Tabs you depress.

As you can see, the Alphabet Tabs consist of tabs for the twenty-six letters of the alphabet plus an “All” tab and a New tab. The Alphabet Tabs work in conjunction with the Sort Button.

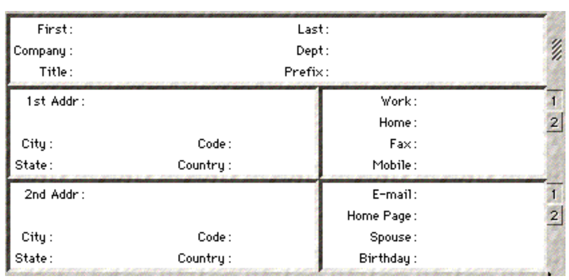
If the Sort Button has Last Name displayed on it, a depressed “D” Alphabet Tab will list all of the contacts with a last name that starts with “D” in the Contact Directory. If the Sort Button has Company displayed on it, a depressed “D” Alphabet Tab will list all of the contacts with a company name that starts with “D” in the Contact Directory. Thus the Alphabet Tabs in conjunction with the Sort Button filter and sort on either last names, company names, or first names.

Use the “All” tab to display all the contacts in the current Set in the Contact Directory.

Use the “New” tab to create a new contact. When you click the New tab, the Contact Card View will clear so you can type in information for a new contact. The New tab will not remain depressed after it is clicked. For information on how to use the New tab to create contacts see *Create A New Contact* in Chapter *Contact Views* on page 110.

Contact Card Region

The Contact Card Region contains all the fields that you will use to enter and view information about a single contact.



This sub-section will describe the various fields and how they are used. This sub-section will also describe some tools available to expand the size of the Contact Card Region.

The fields in the Contact Card Region are divided into five quadrants. The fields in each quadrant relate to one another. The fields in the five quadrants are not the only fields that define or describe a contact. In addition to these, the Contact Folder in the lower right-hand corner of the screen let you specify a source, category, contact type, mark designation, and favorite designation for each contact. Additionally, the Notes and Links Region in the lower left-hand corner of the Contact Card View provides space for unlimited notes and links.

Personal Info Quadrant

This quadrant contains the First Name, Last Name, Company Name, Department, Title, and Prefix fields. Most of these fields are self-explanatory. The Department field refers to a particular department within a company that an individual works in. Example departments might be marketing, sales, manufacturing, etc. The Title field refers to the job title or position the contact might have within a company. Example titles might be Manager, Assistant Manager, CEO, Financial Clerk, etc. The Prefix field refers to the pre-name or salutation an individual might have. Example prefixes might be Mr., Mrs., Ms., Dr., Prince, etc.

1st & 2nd Address Quadrants

These quadrants contains street address, city, state, country and zip codes fields. Consultant will let you label the address quadrants something other than 1st or 2nd Address on a contact by contact basis. If, for example, you type a home address into the 1st Address Quadrant, Consultant will let you label that quadrant "Home Address" to help you remember what location the address refers to. For more information on labelling address quadrants see *Customize 1st & 2nd Addresses* in Chapter *Contact Views* on page 114.

Each address quadrant contains two fields for the street address. The second street address field or line is provided for international addresses that often exceed one line.

Phone Quadrant

This quadrant contains fields for up to eight phone numbers. Although, you can enter up to eight phone numbers, only four numbers are visible at a time. Consultant provides two buttons located along the right-hand side of the Phone Quadrant to let you switch between the first four phone numbers and the last four phone numbers.

Consultant will let you label the phone fields in the Phone Quadrants on a contact by contact basis. If, for example, you type a fax number into the first phone field, Consultant will let you label that phone field "Fax" to help you remember what type of phone number you entered. Consultant lets you change the phone label on a contact by contact basis since some contacts may have four home phone numbers while another contact may have two pager numbers, a cell phone number, a work number, and a home number. For information on how to label phone fields see *Customize Phone Field Labels* in Chapter *Contact Views* on page 112.

Custom Quadrant

This quadrant contains fields for up to eight custom pieces of information. Although, you can enter up to eight custom fields, only four fields are visible at a time. Consultant provides two buttons located along the right-hand side of the Custom Quadrant to let you switch between the first four custom fields and the last four custom fields.

Custom fields are useful for storing miscellaneous information on a contact such as a spouse's name, a birthday, an e-mail address, a web address, etc.

Consultant will let you label the custom fields in the Custom Quadrants on a contact by contact basis. If, for example, you type a birthdate into the first custom field, Consultant will let you label that field "Birthday" to help you remember what type of custom information you entered. Consultant lets you change the custom label on a contact by contact basis since you may want to store different types of information for different contacts. For information on how to label custom fields see *Customize Custom Field Labels* in Chapter *Contact Views* on page 113.

Expansion Areas

The Contact Card Region contains two built-in expansion areas so you can increase the size of its various parts:

- The divider between the address fields and the phone/custom fields.
- The divider to the right of the Last Name field.

There are four steps to expand any of these regions.

1. **Position the mouse pointer over the marble region of the expansion**. The mouse pointer will turn into a hand so you can expand the applicable region.
2. **Click and hold the mouse button down to expand the region**. The hand mouse pointer will grip the expansion bar.

3. **Drag the mouse pointer to your desired location**.
4. **Release the mouse button**. The Contact Card Region will expand accordingly.

Notes And Links Region

The Notes and Links Region contains instruments that let you enter and View notes and links associated with the contact currently displayed in the Contact Card View. The instruments in this region are exact duplicates of the notes and links instruments found in the Activity Window. For information on how to use these instruments see *Enter Notes* in Chapter *The Activity Window* on page 48 and see *Maintain Links* in Chapter *The Activity Window* on page 49.

Business Button

Use the Business button to place a special business designation on the contact currently displayed in the Contact Card View.

A depressed Business button, signifies that the contact will be treated as a business contact. Otherwise, the contact will be treated as a non-business contact. For an explanation of the difference between business and non-business contacts see *Two Broad Contact Types* in Chapter *Contact Views* on page 104.

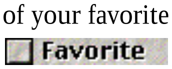
Marked Button

Consultant allows you to place a special mark on any number of contacts. Use the Marked Button to place this special mark on the contact currently displayed in the Contact Card View.

These special marks provide a quick way to uniquely group contacts. Suppose, for example, that you want to inform only a handful of your sixty clients about a company golf tournament. To do so, you need to print out some envelopes for just those few clients. To accomplish this, you will want to have only those select clients in the Contact Directory of the Contact Card View. Since it is probably impossible to use Categories, Sets and Criteria alone to single out just those clients, an alternative method is to place a special mark on those clients. Once this special mark has been placed, you can tell the Contact Card View to only display the contacts in the Contact Directory that have this special mark. For information on how to generate a specialized list of marked contacts in the List, Contact List and Contact Card Views see *Generate A List of Marked Contacts* in Chapter *Contact Views* on page 121.

Favorite Button

Use the Favorite button to specify that the contact currently displayed in the Contact Card View is one of your favorite contacts.



The Contact extension automatically displays the first 20 of your favorite contacts in the menu bar. This is the only purpose of the Favorite button. For more information on the Contact extension see *Use The Contact Extension* in Chapter *Activity & Contact Extensions* on page 221.

Create A New Contact

The creation of a new contact is simple: fill-in the fields in the various quadrants of the Contact Card View. The new contact will automatically be saved when you click one of the Alphabet Tabs, select another contact, click a blank region of the Contact Directory, close the Contact Card View, switch to another View, etc.

There are eight steps to create a new contact.

1. **Click the “New” Alphabet Tab to clear the Contact Card View so you can enter new contact**

information. The Contact Card View will clear and any contacts listed in the Contact Directory for a selected Alphabet tab will disappear. The heading above the Contact Directory will display “New Contact” to indicate that the Contact Directory is now listing the new contact. The first line in the Contact Card View will become selected. This selected line will change to represent the new contact as you fill in information. A text cursor will appear in the First Name field so you can begin typing.

2. **Fill in the appropriate fields**. You can now enter contact data in the various Contact Card Region fields. Click in the space just to the right of the field's label to type information into a new field. A box with a text cursor will appear in the space where you clicked. When you finish typing a field, press the Return key, the Tab key, the Shift-Tab key, or the arrow keys on the keyboard.
   - **Return Key**. Press the Return key to cause the text box and cursor to disappear from the field. The text you typed will be left in place. To enter information in another field repeat this process – click in the space just to the right of the next field in which you wish to enter information.
   - **Tab Key**. Press the Tab key to advance the text box and cursor to the next field. The Tab key provides a quick way to move through the various fields.
   - **Shift-Tab Key**. Press the Tab key while holding down the Shift key to move the text box and cursor backward to the previous field. The Shift-Tab key combination provides a quick way to move backward through the various fields.
   - **Up/Down/Left/Right Arrow Keys**. Press any of the arrow keys to move accordingly from field to field. If you are currently editing text in a field and you press either the left or right arrow keys, the text editing box will not move left or right. Instead, the text cursor will move left or right one character within the field as expected.
3. **Enter notes**. If you have any notes for your new contact, enter them into the Notes Region. You may have to click the Notes Button if the Links Region is currently visible.

   You can then directly type into the Notes Region. For information how to enter notes and use the other notes instruments see *Enter Notes* in Chapter *The Activity Window* on page 48.
4. **Use the Business button**. If the contact is a business contact, click the Business Button. A depressed Business indicates the contact is a business type contact. If the contact is a non-business contact do not click the Business Button. For information on the difference between business and non-business contacts see *Two Broad Contact Types* in Chapter *Contact Views* on page 104.
5. **Use Marked button**. Click the Marked button if you wish to specially mark your new contact. For information on the Marked Button see *Marked Button* in Chapter *Contact Views* on page 110.
6. **Use Favorite button**. Click the Favorite button if you wish to specially mark your new contact as one of your favorite contacts for use with the Contact extension. For information on the Favorite Button see *Favorite Button* in Chapter *Contact Views* on page 110.
7. **Assign a Category using the Category button**. Just as each activity is assigned to a Category, contacts are as well.
8. **Choose a Source**. Just as you can save activities to any user in any open file, the same applies to contacts. Use the Source Button in the Activity Window to choose the proper file and user that the contact belongs to. For information on the Source Button see *Select A Source* in Chapter *The Activity Window* on page 51.

Select A Contact

The Contact Directory provides a convenient list of contacts. You can click and select any of the contacts in the Contact Directory. When a contact is selected, his/her name becomes highlighted in the Contact Directory and all of the information for that contact including notes and links is displayed in the Contact Card View. The Business, Marked, and Favorite buttons also change to represent whether the contact is designated as a business contact and whether it is specially marked.

Make Changes To An Existing Contact

You may make changes to any existing contact at any time.

1. **Click the Alphabet Tab where the contact belongs**.
2. **Select the contact in the Contact Directory**. The contact's information will appear in the Contact Card Region.
3. **Make any necessary changes**. Click the various fields to add, change, or delete information.

If you make changes to contact, Consultant will automatically save your changes. The changes will be saved when you:

- Select another contact in the Contact Directory.
- Click a blank region of the Contact Directory.
- Click any of the Alphabet Tabs.
- Close the Contact Card View.
- Switch to a different View or another application.

In other words, Consultant will automatically save your changes as soon as it has to.

Delete A Contact

Contacts that you once associated with move and change. Consequently, with time, you may want to permanently delete one or more contacts. There are three ways to delete a contact. These three methods apply to both the Contact Directory in the Contact Card View and the List/Contact List Views.

- Click and drag the contact to the trash can on the Button Bar.
- Select the contact and press Command-D on the keyboard.
- Select the contact and choose "Delete" from the Edit menu.

For more information on the various methods and options on how to delete contacts see Chapter 12 *Delete Activity And Contact Objects* on page 125.

Customize Phone Field Labels

Today's world is a world in which many people no longer have just one phone number. In fact, in today's world people have home, work, fax, mobile, modem and other phone numbers.

Thus Consultant provides space for up to eight phone numbers per contact. When you first open the Contact Card View you will see the first four of these eight phone numbers. You can click the two small buttons located along the right-hand side of the Phone Quadrant to switch between first four phone numbers and the last four phone numbers.

You can customize the field labels for these eight phone numbers to accurately describe the type of number in the phone field.

Each contact can have his/her own customized phone field labels. In other words Mary's contact information may label the first phone field *Home* while Susan's contact information may label the first phone field *Fax*. Before you actually assign labels to phone fields, you must first define some phone labels. Consultant will even let you select default labels for each phone field. Each user in a Consultant file can define his/her own phone labels.

Define Phone Labels

1. **Position the mouse pointer directly over any of the phone field labels**. The mouse pointer will

turn into an upside-down triangle. If you want to set the default label for one of the phone labels, then position the mouse pointer over that label.

2. **Click and hold the mouse button down**. A pop-up menu will appear and list the current phone field labels.
3. **Choose "List…" from the pop-up menu and release the mouse button**. The Define Custom Labels dialog box will appear. The title for this dialog box will be the phone label that you positioned the mouse pointer over in the Contact Card Region to open this dialog box. The dialog box will list the phone field labels that you can rename.
4. **Select the label you want to rename**. The label will become highlighted.
5. **Click the Rename button to rename the phone field label**. A small dialog box will appear. Type in a phone label such as "Home" and press Return to exit the small dialog box.
6. **Choose a field type for the selected label from the Type pop-up menu**. Consultant lets you choose what type of information you will be entering into fields with the selected label. Consultant will provide additional functionality based on the type of field you select. For example, Consultant will automatically format phone fields and provide a dial button for phone type fields. Or Consultant will automatically provide an e-mail button next to fields that are assigned the e-mail address type. It is therefore important to assign a field type to each label.
7. **Select the label you want to be the default label for the field in the dialog box's title bar**. Consultant lets you choose a default label for each of the eight phone fields. The default label is automatically used each time you create a contact, or when you import contacts. You can only set the default label for the phone field listed in the Define Custom Labels dialog box's title bar.
8. **Click the Default Label button at the bottom of the dialog box to make this label the default label**.
9. **Click the OK button to exit the Define Custom Labels dialog box**.

Choose Phone Label

Now that you have defined your phone labels, you can assign these labels to the various phone fields for the current contact.

1. **Position the mouse pointer directly over the desired phone field label**. The mouse pointer will turn into an upside-down triangle.
2. **Click and hold the mouse button down**. A pop-up menu will appear that lists the phone labels.
3. **Choose the desired label from those listed in the pop-up menu and release the mouse button**. The label you chose will replace the phone field label in the Contact Card View for the current contact.

Customize Custom Field Labels

You may have additional information that you want to record for certain contacts. For example, you may want to record or remember additional phone numbers, internet addresses, spouse's names, birthdays, etc. Consultant provides eight custom fields which you can use for any purpose. When you first open the Contact Card View you will see the first four of these eight custom fields. You can click the two small buttons located along the right-hand side of the Custom Quadrant to switch between first four custom fields and the last four.

You can customize the field labels for these four custom labels to accurately describe the type of information that you wish to record in the field. Each contact can have his/her own custom field labels. In other words Mary's contact information may label the first custom field as *Birthday* while Susan's contact information may label the first custom field *Spouse*.

You customize the custom field labels exactly the same way you custom phone field labels. For information on customizing phone field labels see *Customize Phone Field Labels* in Chapter *Contact Views* on page 112.

Customize 1st & 2nd Addresses

Consultant provides two address quadrants so you can enter up to two addresses for each contact. The address in the 1st Address Quadrant is especially important because Consultant automatically uses the address in this quadrant when printing envelopes, labels, etc. In other words, the address in the 1st Address Quadrant is the default address Consultant uses whenever it must provide an address.

Consultant will let you label the address quadrants something other than 1st or 2nd Address on a contact by contact basis. If, for example, you type a home address into the 1st Address Quadrant, Consultant will let you label that quadrant “Home Address” to help you remember what location the address refers to.

Before you actually assign labels to address, you must first define some address labels. Each user in a Consultant file can define his/her own address labels as well as the default label to use for new contacts.

Define Address Labels

1. **Position the mouse pointer directly over either of the address field labels**. The mouse pointer will turn into an upside-down triangle. If you want to set the default label for one of the address labels, then position the mouse pointer over that label.
2. **Click and hold the mouse button down**. A pop-up menu will appear and list the current address labels.
3. **Choose “List…” from the pop-up menu and release the mouse button**. The Define Custom Labels dialog box will appear. The title for this dialog box will be the address label that you positioned the mouse pointer over in the Contact Card Region to open this dialog box. The dialog box will list the address labels that you can rename.
4. **Select the label you want to rename**. The label will become highlighted.
5. **Click the Rename button to rename the address label**. A small dialog box will appear. Type in an address label such as “Cabin Addr” and press Return to exit the small dialog box.
6. **Select the label you want to be the default label for the address in the dialog box’s title bar**. Consultant lets you choose a default label for each address. The default label is automatically used each time you create a contact, or when you import contacts. You can only set the default label for the address listed in the Define Custom Labels dialog box’s title bar.
7. **Click the Default Label button at the bottom of the dialog box to make this label the default label**.
8. **Click the OK button to exit the Define Custom Labels dialog box**.

Choose Address Label

Now that you have defined your address labels, you can assign these labels to the various addresses for the current contact.

1. **Position the mouse pointer directly over the desired address label**. The mouse pointer will turn into an upside-down triangle.
2. **Click and hold the mouse button down**. A pop-up menu will appear that lists the address labels.
3. **Choose the desired label from those listed in the pop-up menu and release the mouse button**. The label you chose will replace the address label in the Contact Card View for the current contact.

Automatic Formatting

Consultant will automatically format phone numbers and capitalize the first letter of fields to help save you time. You can, for example, type in the phone number “7565633450” and once you press Return or move to the next field, Consultant will change it to “(756) 563-3450”.

Consultant has a preference to let you turn AutoFormat on or off and define up to three auto-format patterns for it to recognize. For more information on this preference see *Contacts Preferences* in Chapter *Preferences* on page 187.

Dial Phone Number

Consultant places a small dial button next to any phone fields in the Contact Card Region that have a number typed in.

1. **Click the small dial button next to a phone field to dial that number**. The Dial dialog box will appear with the phone number selected.
2. **Click the Dial button to dial the phone number**. A log for the phone call will be recorded in the Notes Region for the contact. You can turn phone call logging on and off via Contact Preferences. For more information see *Contacts Preferences* in Chapter *Preferences* on page 187.

For detailed information on dialing numbers see Chapter 13 *Dialing* on page 135.

Internet Integration

Consultant places a small Internet button next to phone and custom fields in the Contact Card Region that have data typed into an e-mail address type field or a web address type field.

1. **Click the small Internet button next to a phone or custom field that contains an e-mail or web address to launch your e-mail program or web browser**. If the field is an e-mail address, Consultant will launch your e-mail program and address a new e-mail to the corresponding e-mail address. If the field is a web address, Consultant will launch your web browser and go to the corresponding web address. A log for the internet interaction will be recorded in the Notes Region for the contact. You can turn Internet logging on and off via Contact Preferences. For more information see *Contacts Preferences* in Chapter *Preferences* on page 187.

Consultant uses the Internet Config application to find out what e-mail program and web browser you use. You must, therefore, have the Internet Config installed on your system and setup. For more information on Internet Config see *Installation Contents* in Chapter *Install Consultant* on page 12.

SmartType Lists

If you enter information for a large number of contacts, you may find that you type certain words or phrases over and over again. You may also find that you want to standardize which words and phrases you type into certain fields to make searches easier. Such words or phrases might include city names, states, countries, companies, departments, titles, salutations, etc. Consultant doesn't want you to type more than you have to, so it provides a mechanism by which you can build lists of words and phrases that you assign to a field. Once one of these SmartType Lists is assigned to a field, you can insert a word or phrase from the list into the field with the mouse pointer. There are several fields in the Contact Card View to which you can assign a SmartType Lists.

- **Salutation**. SmartType Lists will let you quickly enter common salutations such as Mr., Mrs., Ms., Dr., etc.
- **Title**. SmartType Lists will let you quickly enter common job titles such as President, Vice-President, Manager, Executive Secretary, etc.
- **Department**. SmartType Lists will let you quickly enter common company departments such as Sales, Marketing, Human Resource, Research and Development, etc.

- **Company**. SmartType Lists will let you quickly enter the names companies with whom you have many contacts and clients.
- **City**. SmartType Lists will let you quickly enter the names of cities if you have many contacts that live or work in the same city.
- **State**. SmartType Lists will let you quickly enter the names of states if you have many contacts that live or work in the same state.
- **Zip Code.** SmartType Lists will let you quickly enter the zip code if you have many contacts that live or work within the same zip code.
- **Country**. SmartType Lists will let you quickly enter the names of countries if you have many contacts that live or work in the same country.

Build A SmartType List

The first step to use SmartType Lists is to determine common words or phrases for a particular field. This list of words or phrases may not be evident at first, but with time it will surely grow. You can, of course, add and remove entries from a SmartType List at any time. Suppose you are a dentist that practices in Salt Lake City, Utah. Since most of your clientele will come from Salt Lake City and other neighboring cities it might be handy to build a SmartType List that contains just these cities. That way your assistant will not have to type each city name in its entirety. Rather, the assistant can use the mouse to pick the city name from a pop-up list.

1. **Press and hold the Command key down on the keyboard**.
2. **Position the mouse pointer directly over the field label for which you want to build a list while holding down the Command key**. The mouse pointer will turn into an upside-down triangle.
3. **Click and hold the mouse button down**. A pop-up menu will appear that lists word and phrases for that field.
4. **Choose "List…" from the pop-up menu and release the mouse button**. The SmartType List dialog box will appear. Use this dialog box to build a list of common words and phrases for the field at hand.
5. **Click the Add button to add several words or phrases to the list**. A small dialog box will appear. In this example, type "Salt Lake City" and then press the OK button. If you wish to remove an entry from the list, select it and click the Remove button. Repeat step 4 until all of the cities neighboring Salt Lake City have been entered.
6. **Click the OK button to exit the SmartType List dialog box**.

Auto-Build A SmartType List

You needn't use the SmartType List dialog box to manually add entries to the SmartType lists for different fields. Consultant will automatically remember and add to the SmartType lists whatever you type into the Salutation, Title, Department, Company, City, State, Zip and Country fields. In other words, Consultant will automatically build these lists for you as you enter information.

Why then would you want to use the SmartType List dialog box to add entries to a SmartType List? Two reasons. First, the dialog box provides a way to control standardized input from the start. Second, the dialog box lets you manage your entries so you can delete or rename mistakes.

Use A SmartType List

Once a SmartType List is constructed, you can use it at anytime in the Contact Card View to reduce typing and standardize field entry.

1. **Press and hold the Command key down on the keyboard**.
2. **Position the mouse pointer directly over the desired field label while holding down the Com-**

mand key. The mouse pointer will turn into an upside-down triangle.

3. **Click and hold the mouse button down**. A pop-up menu that lists word and phrase for the desired field will appear.
4. **Choose the desired word or phrase from those listed in the pop-up menu**.
5. **Release the mouse button**. The word or phrase you chose will insert into the field.

SmartType

SmartType Lists are a great way to reduce the number of times you have to type certain key words and phrases. They do, however, require that you take your hands off the keyboard to choose a word or phrase from a fields's pop-up list. For those who would rather keep their fingers on the keyboard as much as possible, you may prefer to use SmartType in its simplest form instead. SmartType uses the words and phrases in a SmartType List to predict and complete what it thinks you might type next. Suppose, for example, that you are an international horse broker and you frequently buy horses from Denmark, England, Spain, Sweden and Switzerland. Since many of your clients live in these countries, you probably already have a SmartType List that contains those countries.

Rather than use the mouse to choose one of these countries from the above SmartType List, you choose to use SmartType to automatically complete the country field with the country you are typing. To use SmartType you must first have a SmartType List that contains one or more entries. Thereafter, you need not do anything special beyond typing.

1. **Click, Tab or Shift-Tab to the field you want to type in**. In the horse broker example, this will be the Work Country field. A text box and cursor will appear in the field.
2. **Begin to type**. As you type SmartType will compare what you have typed to the entries in the SmartType List for that field. If it finds what might be a match, it will automatically type or complete the entire word or phrase for you. Otherwise, it will do nothing. If it happens to complete a word or phrase that does not correspond to what you had in mind, simply continue to type. As you type each letter, SmartType will constantly monitor every key stroke and search for a possible match. If you type a “D” into the Work Country field, the horse broker scenario will automatically completed the field with “Denmark.”

   Lets suppose instead that you intend to type in the country Switzerland. Watch what happens as you type its first few letters. Type “S”. As you can see, with just an “S” typed, SmartType does not know if you mean Spain, Sweden or Switzerland so it picks the one that comes first alphabetically – Spain. Next type “w”. Once again, with only two letters “Sw”, SmartType cannot determine if you mean Sweden or Switzerland so it picks Sweden which comes first alphabetically. Next type “i”. At this point, SmartType can uniquely determine that Switzerland is the intended country.
3. **Press Return, Tab or Shift-Tab when done to make the entry complete**.

SmartType does not care if you type in upper or lower case letters. However, when it finds a possible match to what you are typing, it will display that match exactly how it was typed into the SmartType List. It is therefore imperative that you capitalize words correctly when you build SmartType Lists. For information on how to build SmartType Lists see *SmartType Lists* in Chapter *Contact Views* on page 115.

Clone Contact

Use the Clone Contact command when entering a new contact that shares similar contact information with an existing contact (same company, address, etc.). Rather than type the same information twice, you can use the Clone Contact command to make a copy or clone of the original contact. Then all you need to do is alter those fields that are different. Suppose, for example, that you want to add two business clients that work for the same company. Rather than enter all the company information twice, create the first client then follow the steps below to clone that contact.

1. **Select the contact you want to clone in the Contact Directory region of the Contact Card View**. The contact will become highlighted and his/her information will appear in the Contact Card Region.
2. **Choose “Clone Contact” from the Contact menu**. A new contact will be created. The text cursor will appear in the First Name field so you can name the new contact. The last name field will contain the word “CLONE” to remind you to change the last name. All of the remaining fields in the Personal Info Quadrant, 1st and 2nd Address Quadrants, Phone Quadrant, and Custom Quadrant will contain the exact same information that the original contact had. The notes and links from the original contact will not be cloned.
3. **Enter a new first and last name and make changes to any of the other fields that may not apply**. You may, for example, need to change the phone number or e-mail address. Your clone is now complete.

Copy Contact

Consultant will let you copy a contact to the clipboard so you can paste the contact into the text region of another application. Suppose you want to send the name and address of a client to one of your co-workers in an e-mail.

1. **Select the Contact in the Contact Card View, Contact List View, or List View**.
2. **Choose “Copy Contact” from the Edit menu**. Consultant will copy the contact as text to the Clipboard so you can paste it into the text region of any other program including Consultant. Consultant copies the contact to the clipboard in the form that you would address a letter.
3. **Switch to the program where you want to paste the contact**. In our example, you would switch to your e-mail program.
4. **Click the text region where you want to paste the contact and choose “Paste” from the Edit menu**. The contact will be pasted into the text region in the typical format that one would address a letter.

Alter Contact Preferences

Click the Contact Preferences button in the Contact Card View to change the preferences that control how the Contact Card View manages your contacts.

A dialog box will appear that will let you specify the following preferences.

- SmartType status
- Title for dragging and dropping contacts to a calendar View
- Dialing port (Printer or Modem)
- AutoFormat status
- Phone number formats
- Phone/Internet Logging status

For complete information on the various Contact Card View preferences see *Contacts Preferences* in Chapter *Preferences* on page 187.

Contact List View

The Contact List View is a special adaptation of the standard List View. It works almost exactly like the List View except for a few notable exceptions and additions.

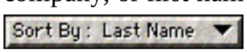
- **The Contact List View is designed for exclusive use with contacts**. Activity objects cannot appear in the Contact List View.
- **Alphabet Tabs exist in the Contact List View to help you quickly locate contacts by last, company, or first name**.
- **Contact-related columns automatically appear when the Contact List View is opened**.
- **A Dial Button exist in the View for to let you quickly dial a selected contact**. For information on dialing see Chapter 13 *Dialing* on page 135.
- **The Contact List View constructs lists to help you print envelopes and labels**. For information on how to use the Contact List View for printing see *Generate A Document From A Template* in Chapter *Text Documents* on page 181.
- **You can temporarily omit contacts from the Contact List View on a contact by contact basis**. When you omit a contact from the Contact List View, the contact is not deleted. This feature provides a way to easily customize a list of contacts for printing.
- **You can easily mark contacts in the Contact List View on a contact by contact basis**. Marking contacts provides an easy way to construct a list of contacts for printing purposes. For information on how to mark contacts see *Marked Button* in Chapter *Contact Views* on page 110.

Since the Contact List View is a glorified List View for contact use, its basic functionality is not described here. Thus, for basic information on how to use the List View and thus the Contact List View see *List View* in Chapter *The Calendar Views* on page 73.

This section describes how to use the Contact List View to work with contacts. It begins with a description of the Sort Button and Alphabet Tabs and then describes how to omit and mark contacts in the list. Finally, this section describes how to build a list of marked contacts.

Sort Button

Use the Sort Button to choose whether you want contacts in the Contact List View sorted by last name, company, or first name.



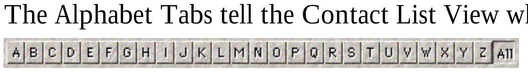
1. **Click and hold the mouse button down on the Sort button**. The Sort pop-up menu will appear.
2. **Choose your preferred sort method from the pop-up menu and release the mouse button**. The Contact List View will be sorted according to your selection. You will notice that small blue one, “1”, will appear in the column heading of the field you selected. This “1” indicates the primary sort field.

If you work primarily with business contacts, you may prefer to sort by company name. If you work primarily with non-business contacts, you may find it more useful to sort by last name.

There is a direct correlation between the Sort Button and the Alphabet Tabs. That is, the selection of the Sort Button also indicates what contact field a depressed Alphabet Tab refers to. For example, if you depress the “C” Alphabet Tab and choose to sort by last name, then all the contacts with a last name that start with “C” will appear sorted by last name in the Contact List View. If you depress the “C” Alphabet Tab but have instead chosen to sort by company name, then all the contacts with a company name that starts with “C” will appear sorted by company name in the Contact List View. In other words, the Sort Button not only chooses which field to sort by but it also chooses which field the Alphabet Tab applies to.

Alphabet Tabs

The Alphabet Tabs tell the Contact List View which contacts to list.



If you have many contacts, you might discover that it is cumbersome to scroll through all of them at once. The Alphabet Tabs generate a listing of only the contacts that have a last name, company name, or first name that begins with the letter in the Alphabet Tabs you depress.

As you can see, the Alphabet Tabs consist of tabs for the twenty-six letters of the alphabet plus an "All" tab. The Alphabet Tabs work in conjunction with the Sort Button.

If the Sort Button has Last Name displayed on it, a depressed "D" Alphabet Tab will list all of the contacts with a last name that starts with "D" in the Contact List View. If the Sort Button has Company displayed on it, a depressed "D" Alphabet Tab will list all of the contacts with a company name that starts with "D" in the Contact List View. Thus the Alphabet Tabs in conjunction with the Sort Button filter and sort on either last names, company names, or first names.

Use the "All" tab to display all the contacts in the current Set in the Contact Directory.

Omit Contacts

Sets and Criteria filter which contacts appear in the Contact List View. These two mechanisms alone, however, may not always be enough to get the exact list of contacts you have in mind. Suppose, for example, you need to print some envelopes for six out of the ten contacts you currently have in your List View. Since you don't want to waste envelopes and you are unable to use Criteria to eliminate the extra four contacts, you may want to temporarily omit them instead. Omitting a contact from the Contact List View is not the same as deleting the contact. The deletion of a contact is a permanent action. When you omit a contact, the contact simply disappears from the View.

You may omit one or more contacts from the Contact List View.

1. **Select the contacts you want to omit.** If you wish to omit more than one contact be sure to hold down the Shift key on the keyboard as you select each contact.
2. **Choose "Omit Selected" from the Contacts menu**. The four selected contacts will disappear from the list. If you instead choose "Omit Deselected" from the Contacts menu, the six contacts which were not selected will be omitted instead. The "Omit Deselected" option is useful when you want to omit the majority of the contacts in a list. All you have to do is click the few you want to remain before you choose "Omit Deselected" from the Contacts menu.

Mark Contacts

Consultant allows you to place a special mark on specified contacts in order to differentiate a single group of contacts from all others. You can then use this special mark to generate at any time a specialized list of contacts which have this mark. You can generate such a list in the using Criteria in the Contact List and Contact Card Views. You may also use the Contact Card View to give a contact this special mark. For information on how to use the Contact Card View to mark contacts see *Marked Button* in Chapter *Contact Views* on page 110.

The Contact List View provides a much quicker way than the Contact Card View to mark one or more contacts.

1. **Select the contacts**. If you intend to mark more than one contact, hold down the Shift key on the keyboard as you select each contact.
2. **Choose "Mark Selected" from the Contacts menu**. The four selected contacts will be marked in the list. The mark appears in the Marked column. If your Contact List View is not currently displaying the Marked column, click the Columns button in the Contact List View to select the Marked column.

If you want to remove the special mark from one or more contacts, follow the above steps but choose "Un-Mark Selected" from the Contacts menu instead. Once you mark several contacts, you can build a list of just those marked contacts using the Criteria button in the List, Contact List, or Contact Card Views.

Generate A List of Marked Contacts

The basic purpose behind marking contacts is to differentiate a group of contacts from all others. The reason you want to differentiate certain contacts from others is to build a list of contacts for a specialized purpose such as printing. It is true that Categories, Sets and Criteria help define and build such lists, but it is not always easy if there is no concrete field or fields on which to filter the list. It is also true that you can build such a list and omit contacts from the Contact List View until only the contacts you want remain. But you can't omit contacts from the List and Contact Card Views. Also, to omit contacts from a list is a temporary solution – it only lasts as long as the list is open. Marking contacts, on the other hand, lasts until you unmark the contacts. For information on how to mark contacts see *Marked Button* in Chapter *Contact Views* on page 110.

Once you mark one or more contacts, you can build a list of those contacts in the List, Contact List and Contact Card Views. The following steps to build a list of marked contacts applies equally to each of the three Views.

1. **Click the View's Criteria button**. If you are working in the Contact Card View and are unable to see the Criteria button, click the List folder tab in the lower right-hand corner of the View. After you click the Criteria button, the Build Criteria dialog box will appear. Its contents may vary slightly from View to View.
2. **Add a Criterion**. Now you need to add a Criterion to tell the View to only show contacts that are marked. Click the Marked field at the bottom of the Fields Region. Then click the *Boolean* operator at the bottom of the Operator Region. Then choose "Yes" from the pop-up button in the Operand Region. Make sure the Boolean Conjunction button shows *And*.
3. **Click the Add Button to add the Criterion to the Criteria List Region**.
4. **Click the OK Button to exit the Build Criteria dialog box**. The View will now contain only those contacts which belong to the current Set and which are marked.

Once a list of marked contacts is built, you may use it for your own specialized purposes such as printing. For information on printing envelopes and labels from the Contact List and Contact Card Views see *Generate A Document From A Template* in Chapter *Text Documents* on page 181.

Drag And Drop Contacts On The Calendar

There is a very simple way to schedule a meeting or appointment with a contact without ever typing a thing. You can drag and drop a contact object directly from the List View, Contact List View or Contact Card View to the Day, Multiday, Week, Month or Gantt Views to create an activity to which the contact is automatically linked. This method provides one of the quickest ways to create an activity with a link to a contact at the same time. Depending on which View you drag the contact to, you can schedule the activity for an exact time if you desire.

1. **Open a calendar View**. If the appointment you intend to schedule occurs at a specific time, open the Day or Multiday View. Otherwise, you will schedule the appointment as an Event or To-Do.
2. **Locate the contact in the List, Contact List or Contact Card View**.
3. **Position the calendar and contact Views so that the contact and the time and/or date of the activity you intend to schedule is visible**. Make sure the contact View is the top-most View.
4. **Click and hold down the mouse button on the contact to drag the contact to the calendar View**.
5. **While holding down the mouse button, drag the contact towards the calendar View**. As you drag, the mouse pointer will turn into one of three icons: the red ban icon, the contact icon or the business contact icon. The red ban icon indicates that the mouse pointer is not currently over the

calendar View.

The contact or business icon will appear when the mouse pointer is directly over the calendar View. At this point you will also notice an outline that represents the duration of the activity that will appear as you move the mouse. The default duration is one hour. If you drag the contact to the Week or Month View, you will not see an outline of the duration, but you will see that the day of the month becomes depressed that the contact hovers over.

6. **Release the mouse button to drop the contact when the contact is positioned at the correct time and/or date**. An activity will be created where you dropped the contact. The contact will automatically be linked to the activity.
7. **Select the new activity and click the Link Button in the Activity Window to verify that the contact was automatically linked to the activity**.

By default, the title given to the new activity is the word “Call” followed by the contact's name. If you wish to change this title, select the activity and change the title in the Activity Window. You can also change the default title wording from “Call” to “Meet” or “E-mail”. To change the default title wording see *Contacts Preferences* in Chapter *Preferences* on page 187.

Chapter 11

Delete Activity And Contact Objects

The purpose of this chapter is to describe how to delete activity and contact objects as well as describe what happens when you delete these objects. Of particular importance, this chapter addresses the various options you have when you delete an object that has other objects linked to it.

Topics Covered

- **Delete Object(s)**. Describes two methods that you can use to delete one or more objects from any View.
- **Delete Object Dialog Box**. Describes the various options you have regarding linked objects when you confirm the deletion of a particular object.

Appointments are cancelled and plans are put permanently on hold. Contacts that you once had an association with move or change. Consultant lets you permanently delete one or more activity or contact objects from your file to help you deal with these and other types of daily life occurrences.

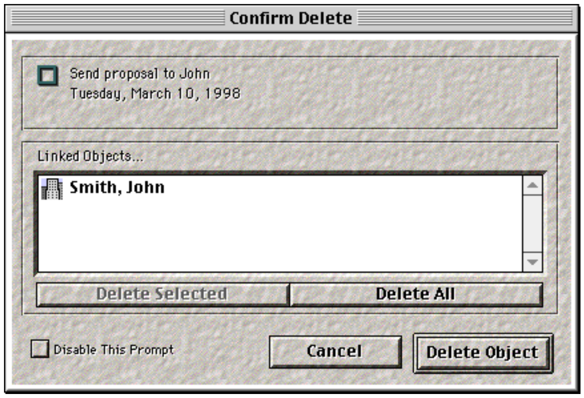
Delete Object(s)

The first step to delete an object from your schedule or address book is to locate that object in any of Consultant's Views. Once you locate the object, you may delete it in either of two ways. The latter method provides a way to delete more than one object at once from the List and Contact List Views.

- **Drag the object to the trash can on the Button Bar**.
  1. **Click and hold down the mouse button on the object you wish to delete.**
  2. **While holding down the mouse button, drag the object to the trash can icon located on the Button Bar.** The trash can will turn to a darker color when the object is directly over it.
  3. **Release the mouse button**. A Delete Object dialog box will appear to confirm if you really want to delete the object.
  4. **Click the Delete Object button to delete the object**. The object will be deleted and removed from any Views that it currently appears in.
- **Select the object and press Command-D**. You can also use Command-D to delete more than one object at a time when you work in either the List or Contact List Views.
  1. **Select the object(s) you want to delete.** If you are in the List or Contact List Views, you can select more than one object by holding down the Shift key as you select objects.
  2. **Press Command-D on the keyboard**. The object(s) will be deleted and removed from any Views that they currently appear in.

Delete Object Dialog Box

The Delete Object dialog box is displayed when an activity or contact object is deleted. The purpose of this dialog box is to confirm that you really want to delete the activity or contact object. It also lets you permanently delete any objects linked to the object being deleted. Keep in mind, however, that whether or not you delete any linked objects, all links are automatically broke once the deletion is complete. When you attempt to delete an object, the Delete Object dialog box appears.



This section describes the Delete Object Dialog Box and the options it gives you when you confirm the pending delete. This section will also describe the preference that controls the confirmation of deletes.

- **Linked Objects List**. This region of the dialog box contains a list of every object that is currently linked to the object being deleted. Depending on the nature of the object being deleted, you can permanently delete each of these linked objects as well. Use the Delete Selected and Delete All buttons described below to delete one or more linked objects. Please note that if you choose to delete one or more linked objects, the Delete Object dialog box will not appear to confirm each of those deletions. Also, any objects which in turn are linked to those deleted linked objects will not be deleted. In other words, you can only delete linked objects one level deep.
- **Delete Selected button**. Use this button to delete a linked object which is selected in the Linked Objects List. Once you select a linked object and click this button, the object will disappear from the Linked Objects List. The linked object is not yet deleted. It will only be deleted if you click the dialog box's Delete Object button. Click the Cancel button if you afterwards decide you don't want to delete the linked object.
- **Delete All button**. Use this button to delete all of the linked objects in the Linked Objects List. Once you click this button, all of the linked objects will disappear from the Linked Objects List. The disappearance of all the linked objects does not indicate that they have yet been deleted. It merely indicates that they will be deleted once you click the dialog box's Delete Object button. Click the Cancel button if you afterwards decide you don't want to delete the linked objects.
- **Cancel Button**. Use this button if you decide that you don't want the object being deleted to be deleted. You may also click this button if you specified that one or more linked objects should be deleted, but have changed your mind to the contrary.
- **Delete Object Button**. Click this button to delete the activity or contact object that was dragged to the trash can or selected and deleted with Command-D. This button will also delete any linked objects that you specified.
- **Disable This Prompt Button**. Click this button if you no longer want to confirm the deletion of objects. If you choose to disable the confirmation of deleted objects, the Preference that controls this option will be altered.

Delete Object Preference

The Environment Preferences page contains a preference which determines if Consultant will confirm the deletion of activity and contact objects. Disable this preference if you don’t want to Consultant to confirm deletes. For more information on this preference see *Environment Preferences* in Chapter *Preferences* on page 185.

Chapter 12
Dialing

The purpose of this chapter is to detail Consultant's powerful dialing features and teach you how to use them. Consultant's dialing features go beyond what most programs support so that you can automate as much of the dialing process as possible. This means that you spend less time looking up phone numbers, dialing proper long distance extensions and in general dialing the number correctly. Furthermore, Consultant's dialing features let you automate the dialing process for any number of locations that you commonly dial from. For instance, if you use Consultant on your portable computer at both home and work, Consultant lets you to teach it how to properly dial numbers from both locations. You can actually teach Consultant to recognize different area codes and exchange codes so that it can automatically add special dialing prefixes and suffixes to the phone number at hand. This is extremely useful for those who travel and/or work from several different locations. One of the chief benefits is that you can enter phone numbers in standardized phone formats and have Consultant add the necessary prefixes and suffixes for whatever location you dial from.

Consultant dials phone numbers through an attached or built-in modem. You can dial the phone number for any contact from the List, Contact List and Contact Card Views. Consultant will also let you directly dial a phone number that doesn't necessarily belong to any of your contacts.

Topics Covered

- **Phone Number Formatting**. Describes how to type phone numbers into the Contact Card View's phone number fields. Explains why it is important to adhere to phone number format guidelines and the benefits derived therefrom.
- **Dialing Options**. Describes how to set up dialing options which includes how to teach Consultant about different dialing locations, how to set up your modem so that it will dial, how to define different long distance carriers that you use, and how to define international dialing information.
- **Dial A Number**. Describes how to dial a phone number for a contact from different Views throughout Consultant. Also describes how to dial a phone number even if it doesn't belong to a contact.

Phone Number Formatting

Consultant will ultimately let you enter phone numbers in any format that you desire. There is, however, a standard format, that when followed, will give you many benefits. Also, many of Consultant's dialing features assume that you follow this standard format. There are thus four benefits to gain when you adhere to Consultant's phone number format.

- **Consistency**. If you follow this format, all phone numbers will be entered the same way. Consistency pays off later on when you want to search for a particular phone number since you will know exactly how you entered it.
- **Automatic Formatting**. Consultant has a preference whereby you can choose to have Consultant automatically format phone numbers when you type them in. Consultant will even insert hyphens to separate the different components of a phone number. For more information see *Contacts Preferences* in Chapter *Preferences* on page 187.
- **Transportability**. If you follow the standard format, Consultant will be able to dial the same phone number correctly no matter where you dial it from. For instance, at work you might have to dial a "9" to get an outside line before you dial a phone number, while at home you can dial the phone

number directly. If you were to include the "9" when you enter the phone number, you would not be able to dial from home.

- **Flexibility**. PBX systems change, area codes change, and long distance companies change. Rather than tie yourself down to a particular system or long distance company, standardized phone numbers will permit you to be flexible without having to reenter all your phone numbers.

It should be apparent that there are many benefits when you standardize the format that you use to enter phone numbers. There are, by the way, virtually no disadvantages. This section will describe the components that make up a phone number and will also describe Consultant's standard phone number format.

This section will describe the components that comprise phone numbers, describe the standard phone number formats, and describe how automatic number formatting works.

Phone Number Components

The phone number descriptions in this section describe the components that comprise phone numbers in the United States, Canada and other similar systems. Each phone number in these systems is comprised of three parts. Our sample phone number for this section is 801-249-8523.

- **Area Code**. The area code is always unique and consists of exactly three digits. The middle or second digit is usually a "0" or a "1". In our example, "801" is the area code.
- **Exchange Code**. The exchange code is unique within its accompanying area code and consists of exactly three digits. An exchange code cannot contain "0" or a "1" as its middle or second digit. In our example, "249" is the exchange code.
- **Base Code**. The base code is unique within its accompanying exchange code and consists of exactly four digits. In our example, "8523" is the base code.

Every phone number has all three of these parts. Many times, however, when you dial a local phone number that has the same area code as your own, you can leave off the area code component. For example, if you live a block away from your sister and her phone number is 801-249-8523 you probably only have to dial 249-8523. From here on out, this manual will refer to 801-249-8523 as the *Long Version* of a phone number and 249-8523 as the *Short Version* of the same phone number. The Long Version of a phone number is more accurate than the Short Version since it provides more information. A general school of thought is that Long Version numbers represent long distance numbers while Short Version numbers represent local numbers. Although this is not always true, Consultant can accommodate this general assumption and will let you teach it any exceptions to this school of thought.

Standard Phone Number Format

Consultant actually has two standard phone number formats. The first phone number format is for Long Version phone numbers and the second format is for Short Version phone numbers.

Long Version Format:	aaa-eee-bbbb
Short Version Format:	eee-bbbb

Where *aaa* is the three digit area code, *eee* is the three digit exchange code and *bbbb* is the three digit base code. Consultant will, by default, use hyphens to separate these components.

You needn't precede long distance phone numbers with a "1" as in 1-411-527-4544. You will learn later on how to teach Consultant that area code 411 is long distance. If you have the automatic phone number formatting preference turned on, Consultant will automatically ensure that the phone numbers you enter adhere to the standard formats.

Automatic Phone Number Formatting

Consultant contains a preference to automatically format phone numbers. The purpose of phone number formatting is two-fold. First, phone number formatting helps ensure that numbers are entered in a correct format. Second, phone number formatting saves key strokes when typing in the numbers.

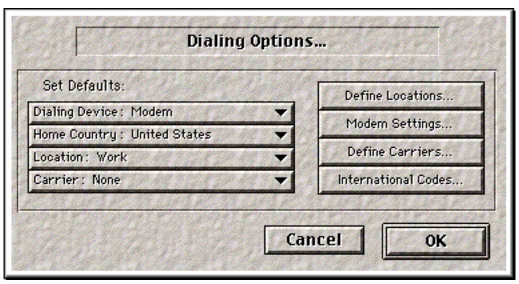
The AutoFormat preference is located on the Contact Preferences page in the Preferences dialog box. When this preference is enabled, Consultant will automatically format phone numbers to one of three custom phone number formats also located on the Contact Preferences page. For more information on the AutoFormat preference and the three phone number formats see *Contacts Preferences* in Chapter *Preferences* on page 187.

If AutoFormat is enabled, Consultant will only automatically format a phone number the first time you enter a number into of the phone number fields. The reason Consultant won't automatically format subsequent edits to a phone number is because Consultant wants to give you control over minor deviations you may need to make. You may, for example, need to add an extension or other special dialing codes that can't be accommodated by Consultant's built-in facilities for phone number prefixes, suffixes, long distance codes, etc.

Dialing Options

Consultant provides you with several dialing options to help it dial phone numbers correctly. All of these dialing options are accessible through the Dialing Options dialog box.

1. **Choose "Dialing Options…" from the Contacts menu**. The Dialing Options dialog box will appear.



The Dialing Options dialog box contains four buttons that let you set your default dialing output, your default home country, your default dialing location and your default long distance carrier. These four buttons will have more significance as you continue to read.

- **Dialing Output Button**. Use this button to specify which device Consultant should use to dial phone numbers. The only current choice is via your modem. Your modem can be built-in or plugged into either the modem or printer port on the back of your computer. You can change which port Consultant should use on the Contact Preferences page in the Preferences dialog box. For more information on this preference see *Contacts Preferences* in Chapter *Preferences* on page 187.
- **Home Country Button**. Use this button to specify your home country.
- **Local Button**. Use this button to specify which location Consultant should use when it dials phone numbers. Since you can define many locations, you need to tell Consultant which location to use. If you change locations, you will want to use this button to change the location Consultant currently uses.
- **Carrier Button**. Use this button to specify which carrier you currently use for long distance service. You may use different carriers for different locations so you may have to use this button to change the carrier when you change locations.

The Dialing Options dialog box also contains four buttons that present other dialing options.

- **Define Locals Button**. Use this button to teach Consultant how to dial phone numbers from different dialing locations. You will teach Consultant which numbers are long distance and which are local for each location that you create. Consultant will then attach dialing prefixes, suffixes and credit card numbers accordingly.

- **Modem Settings Button**. Use this button to properly setup your modem to dial phone numbers.
- **Define Carriers Button**. Use this button to add, delete and update long distance service carriers. For each carrier you can specify special dialing codes and credit card numbers that Consultant uses when it dials long distance numbers.
- **International Codes Button**. Use this button to add, delete and update international dialing codes for different countries. Consultant uses this information to dial contacts that live or work abroad.

Each of the above four buttons is discussed in detail below. After you learn how each works, make sure that you use the previous four buttons to specify the default dialing out, default home country, default location and default long distance carrier. Because you can have many different dialing locations and long distance carriers, it is important to remember to specify these defaults.

Define Dialing Locations

Dialing locations is perhaps the most important aspect of dialing in Consultant. A dialing location in its simplest form is merely a location that you use your computer to dial phone numbers from. This might be home, work, summer cabin, production plant A, production plant B, etc. As you know, different locations may have different dialing characteristics. For example, your home in New York has a different area code than your summer cabin in Rhode Island. This means that a call to your next door neighbor from your home is a local call while a call to your next door neighbor from your summer cabin is long distance. There are also other dialing characteristics that may vary from location to location. For instance, when you dial a phone number from your work's PBX system you dial a "9" to get an outside line before you dial. From home you can simply pick up the phone and directly dial a number without requesting an outside line.

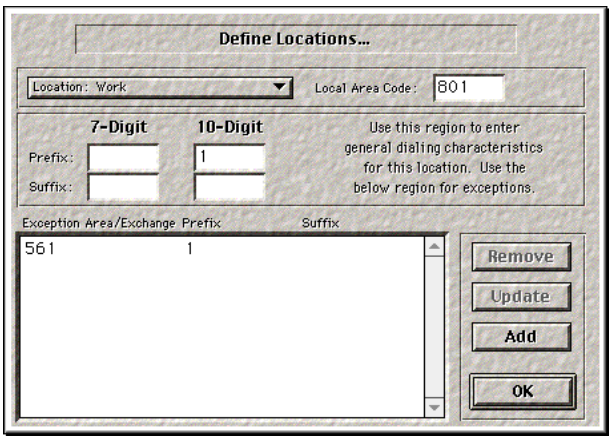
Consultant will let you define as many different dialing locations as you wish. Each location can have its own dialing characteristics that are unique to it. Each dialing location consists of five parts.

- **Name**. Use a name that appropriately describes the location such as Home, Work, San Jose Campus, New York Office, etc.
- **Local Area Code**. Use the area code of the phone number for this location. The area code is automatically stripped off of all Long Version numbers that have the Local Area Code as their area code when you dial. If you don't want the area code of any number to be automatically stripped off then don't enter the Local Area Code.
- **General Prefix**. For each dialing location, you can specify a prefix to dial before Long Version phone numbers and Short Version phone numbers. A typical Long Version prefix to use for a PBX system is "9,1" where "9" gets an outside line, the "," is a one second pause and the "1" specifies the number is a long distance. A typical Short Version prefix to use for a PBX system is "9," where "9" gets an outside line and the "," is a one second pause.
- **General Suffix**. For each dialing location you can also specify a suffix to dial after Long Version phone numbers and Short version phone numbers. Some companies require that a special authorization code follow all long distance and/or outside phone calls. Use the General Suffix to specify such security codes.
- **Exception List**. The General Prefix and General Suffix for a location usually suffice to correctly dial phone numbers. There may be situations, however, when they don't suffice. You can thus build a list of exceptions in which you teach Consultant how to dial different phone numbers that contain a particular area code or exchange code. For instance, suppose a certain number, "801-249-8523", in your Local Area Code, "801", is long distance. Since Consultant strips the Local Area Code, "801" from all numbers it dials if you specify a Local Area Code, a Short Version number results – "249-8523". If Consultant applies the General Prefix "9," for Short Version numbers it will dial "9,249-8523". The call will not work since it is long distance and the telephone company expects a "1" before all long distance numbers. You can thus teach Consultant that exchange code "249" is an exception to the General Prefix rule for Short Version numbers. You can instruct Consultant to dial "9,1" or "9,1801" before any phone number that contains exchange code "249".

As you can see, properly dialing phone numbers can become somewhat complex if some Short Version numbers are long distance while others are local and so on. In most cases, however, the General Prefix and General Suffix will suffice to properly dial phone numbers. If you aren't so fortunate check your phone book or you local phone company for a list of exchange codes local to your area. Such lists are readily available. That way all you have to do is assume all calls are long distance and then add an exception for each exchange code that is local to your area. Consultant will take care of the rest.

You must first open the Define Locals dialog box in order to add, rename, delete or define a dialing location.

1. **Click the Define Locals button in the Dialing Options dialog box**. The Define Locals dialog box will appear.



The Define Locals dialog box has five parts and regions.

- **Local button**. This button indicates the current location displayed in the dialog box. You can also use this button to add, rename and delete locations.
- **Local Area Code Region**. This region contains the area code for current location.
- **General Prefix Region**. This region contains the General Prefix for Long and Short Version phone numbers for the current location.
- **General Suffix Region**. This region contains the General Suffix for the Long and Short Version phone numbers for the current location.
- **Exception List Region**. This region displays the list of exceptions to the General Prefix and General Suffix. This region also contains buttons to add, change and remove exceptions.

Consultant comes predefined with one location called *Work*. You may add other locations if you will be using Consultant on your computer from more than one location. You may also rename and delete locations. Once you have a dialing location you need to define the Local Area Code, General Prefix, General Suffix and Exception List for the location.

Add, Rename And Delete Dialing Locations

You may add, rename and delete dialing locations at any time. You use the Local button for all three.

1. **Click and hold down the mouse button on the Local button**. A pop-up menu will appear and list all of the current locations. At the bottom of the pop-up menu is an entry entitled "Location List…"

2. **While holding down the mouse button, choose "Location List…" from the menu**. A dialog box will appear from which you may add, rename and delete dialing locations.

3. **Click the Add button to add a new location OR**.

4. **Click a location and then click the Rename button to rename a location OR**.

5. **Click a location and then click the Remove button to remove a location**. Please note that when you remove a location you remove all the information for that location including the Local Area

Code, General Prefix, General Suffix and Exception List.

6. **Click OK when you have sufficient locations**. You will return to the Define Locals dialog box.

Define A Dialing Location

Once you have a dialing location you need to define how it should dial phone numbers. Consultant assumes that these phone numbers are in either the standard Long Version or Short Version format. Since you can have more than one location, you must first switch to the location that you wish to define.

1. **Click and hold down the mouse button on the Local button**. A pop-up menu will appear and list all of the current locations.
2. **While holding down the mouse button, choose the dialing location that you wish to define from the menu**. The Define Locals dialog box will change to reflect the dialing characteristics for the location that you choose. The name of the location you chose will appear on the Local button to indicate that it is the current location.

You can now fill in the various parts and regions that comprise the Define Locals dialog box.

1. **Enter the area code for the location into the Local Area Code field**. Consultant will strip the Local Area Code from all phone numbers that it dials. This is handy if you type the area code for local phone numbers as well as long distance phone numbers. You don't have to specify the Local Area Code if you don't want.
2. **Enter the General Prefix for both 10 digit or Long Version phone numbers and 7 digit or Short Version phone numbers**. If this location uses a PBX you may want to enter something similar to "9,1" for the Long Version and "9," for the Short Version. This assumes that Long Version phone numbers are long distance and Short Version phone numbers are local. Consultant translates a comma, ",", into a one second pause. Most PBX's require this. If this location does not use a PBX you may want to enter something similar to "1" for the Long Version and nothing for the Short Version.
3. **Enter the General Suffix for both 10 digit or Long Version phone numbers and 7 digit or Short Version phone numbers**. In most instances, a suffix is some sort of security code. You can thus specify a security code for long distance and local calls if you assume that Long Version calls will be long distance and Short Version calls local.
4. **Click the Add, Change or Remove button to add, change or remove exceptions respectively from the Exception List**. When you click the Add button, a small dialog box will appear in which you can enter either an area or exchange code. You can also enter a corresponding prefix and suffix that Consultant will apply whenever it encounters that particular area or exchange code you enter.

   Before you click the Change button, you must first select an exception from the Exception List that you wish to change. Once you select an exception and click the Change button the same small dialog box that appeared for the Add button will appear for the Change button. You may change any of the fields in the dialog box to change the exception.

   Before you click the Remove button, you must first select the exception in the Exception List that you wish to remove. Once you select an exception and click the Remove button it will promptly be removed.

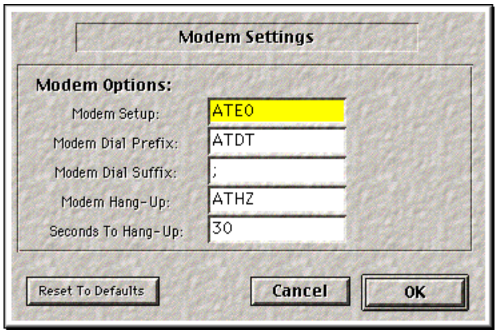
Modem Settings

When Consultant dials a phone number via your modem, it must issue special commands to your modem to tell it what to do. These commands are usually the same for most modems sold nowadays since most modems adhere to industry standards. If you experience problems dialing, then you may want to consult your modem's manual to find out if any of these commands is different for your modem.

You must first open the Modem Settings dialog box in order to change any of the commands or values

Consultant uses to dial numbers.

1. **Click the Modem Settings button in the Dialing Options dialog box**. The Modem Settings dialog box will appear.



This dialog box contains the following commands and values.

- **Modem Setup**. This command initializes your modem and puts it in a state where it will accept commands.
- **Modem Dial Prefix**. This command tells your modem to dial a number.
- **Modem Dial Suffix**. This command tells your modem that you are done issuing the phone number.
- **Modem Hang-Up**. This command tells your modem to hang-up or put the phone on hook.
- **Seconds To Hang-Up**. Enter the number of seconds you want Consultant to wait before it automatically hangs up the phone line after it dials a number. If you don't pick up your phone before this time expires, the modem will hang-up. If you do pick up the phone before this time expires, the modem will still hang-up but it won't interrupt your conversation since your phone is off the hook.

If you make a mistake or want to reset any these commands or value to their defaults, follow the step below.

1. **Click the Reset To Defaults button**. The Modem settings will return to their default values.

The following is the sequence of events that occurs when a number is dialed. Please note that the sequence that follows is of technical nature and is listed here so those having problems can have as much information as possible.

1. Consultant issues the Modem Setup command.
2. Consultant issues the Modem Dial Prefix command.
3. Consultant issues the phone number digits including all prefixes, long distance codes, credit card numbers, and suffixes.
4. Consultant issues the Modem Suffix command.
5. Consultant waits the specified number of seconds before hanging up. Please note that when you dial a number, Consultant presents you with a dialog box that lets you issue the hang-up command earlier than the specified number of seconds. If your phone receiver is lifted when you hang-up the modem using this dialog box or automatically, your modem will hang-up but your conversation won't be disconnected since the modem is hung-up not the phone line.
6. Consultant issues the Modem Hang-up command.

Long Distance Carriers

Consultant lets you setup special dialing information for the various long distance carriers you might use. For each long distance carrier, Consultant will let you specify a name, an access code, and a credit card number. Consultant will automatically insert the long distance carrier information into all long distance phone numbers it dials. Since you can have more than one long distance carrier, Consultant will use the default carrier which you specify in the Dialing Options dialog box.

Add A Carrier

1. **Click the Define Carriers button in the Dialing Options dialog box**. The Define Carriers dialog box will appear and list all the long distance carriers you currently have.
2. **Click the Add button to add a carrier**. The Add Carrier dialog box will appear.
3. **Enter a carrier name, access code, and credit card number as appropriate**.
4. **Click OK to exit the Add Carrier dialog box**. The new carrier will be added to the carrier list.

Update A Carrier

1. **Click the Define Carriers button in the Dialing Options dialog box**. The Define Carriers dialog box will appear and list all the long distance carriers you currently have.
2. **Select the carrier you wish to update**.
3. **Click the Update button to update a carrier**. The Update Carrier dialog box will appear.
4. **Change the carrier name, access code, and credit card number as appropriate**.
5. **Click OK to exit the Update Carrier dialog box**. The updated carrier will appear in the carrier list.

Delete A Carrier

1. **Click the Define Carriers button in the Dialing Options dialog box**. The Define Carriers dialog box will appear and list all the long distance carriers you currently have.
2. **Select the carrier you wish to delete**.
3. **Click the Delete button to delete the selected carrier**. The selected carrier will be deleted.

International Codes

When Consultant dials a phone number for a contact that has a Primary address in a country other than the country specified in the home country setting in the Dialing Options dialog box, Consultant will automatically dial a country code before dialing the phone number. Consultant will let you define the country codes that must be dialed when dialing out of your country.

Add An International Code

1. **Click the International Codes button in the Dialing Options dialog box**. The International Codes dialog box will appear and list all the international codes currently defined.
2. **Click the Add button to add a code**. The Add International Code dialog box will appear.
3. **Enter a country name and code**.
4. **Click OK to exit the Add International Code dialog box**. The new code will be added to the list.

Update An International Code

1. **Click the International Codes button in the Dialing Options dialog box**. The International Codes dialog box will appear and list all the international codes currently defined.
2. **Select the code you wish to update**.
3. **Click the Update button to update the code**. The Update International code dialog box will appear.

4. **Change the country name and code as appropriate**.
5. **Click OK to exit the Update International Code dialog box**. The updated code will appear in the list.

Delete An International Code

1. **Click the International Codes button in the Dialing Options dialog box**. The International Codes dialog box will appear and list all the international codes currently defined.
2. **Select the code you wish to delete**.
3. **Click the Delete button to delete the selected code**. The selected code will be deleted.

Dial A Number

Once you have performed the necessary dialing setup via the Dialing Options dialog box, dialing is a breeze. Consultant will automatically dial all the necessary prefixes, long distance codes, credit card numbers, area codes, and suffixes. There are really only two basic steps to dial a phone number in Consultant. First, select the contact you want to dial. Second, invoke the dial command. You can, of course, also issue the dial command without selecting a contact, but then you will be responsible for entering the number you want to dial. If you successfully dial a number for a selected contact, Consultant will automatically log the phone call in the contact's notes.

Select The Contact

In order to dial the phone number of one of your contacts, you must first select the contact. There are three places where you can select a contact in Consultant.

- **Contact Card View**. Select the contact in the Contact Directory region of the Contact Card View. The contact will appear in the Contact Card Region. You may additionally click the field of the phone number you want to dial. The field will become selected.
- **Contact List View**. Select any contact in the View.
- **List View**. Select any contact in the View.

Invoke The Dial Command

After you have selected a contact, there are several places in Consultant where you can invoke the Dial command. Your location choice should depend on convenience.

- **Contact Menu in menu bar**. Choose "Dial" from the Contact menu in the menu bar to invoke the Dial command.
- **Button Bar**. Click the "Dial" button on the Button Bar to invoke the Dial command.
- **Contact Card View**. Click the small Dial buttons in the Phone/Custom Quadrants of the Contact Card View to invoke the Dial command. Please note that the small Dial buttons only appear if a phone number has been entered into a phone type field. Also, each small Dial button corresponds to the phone number that it is adjacent to. This means Consultant will, by default, dial the corresponding number.
- **Contact List View**. Click the Dial button located at the top of the Contact List View to invoke the Dial command.
- **List View**. Click the Dial button located at the top of the List View to invoke the Dial command.

Once you invoke the Dial command, the Dial dialog box will appear. The purpose of the Dial dialog box is three-fold. First, it will show you the complete number including prefixes, long distance access codes, etc. that it will dial. Second, if you have a selected contact, the Dial dialog box will show you all of the phone numbers for that contact you so can choose which one you want to dial. Third, the Dial dialog box will let you change last minute settings such as the location you are dialing from and the long distance carrier you are using.

To actually dial a phone number from the Dial dialog box, follow the below steps.

1. **Select the phone number you want to dial from Phone Number List Region**. The top number will automatically be highlighted. If you invoked the Dial command from the Contact Card View via one of the small Dial buttons, the corresponding phone number will be highlighted instead. If you did not select a contact before invoking the Dial command, then there won't be any phone numbers listed in the Phone Number List Region. The Dial Text Box will automatically reflect the number you select.
2. **Choose the location you are dialing from in the Location pop-up menu**. The Dial Text Box will automatically reflect the number Consultant plans to dial from the selected location.
3. **Choose the long distance carrier you are using from the Carrier pop-up menu**. Consultant won't, of course, use a long distance carrier if the number is local. The Dial Text Box will automatically contain the long distance access code if applicable.
4. **Edit the number in the Dial Text Box if necessary**. The Dial Text Box contains the number exactly as Consultant plans to dial it. Before you click the Dial button, Consultant will let you make any last minute changes you want. If you didn't select a contact before invoking the Dial command, then you will want to enter the number you want to dial.
5. **Click the Dial button to dial the number**. Consultant will immediately dial the number. Once it has dialed the number, a Lift Receiver dialog box will appear. This means that it is now safe (won't interrupt the dialing) to lift the telephone receiver and listen for a dial tone.
6. **Click the OK button when the party you are calling answers**. Consultant will tell your modem to hang-up since Consultant is finished with your modem. You may hear a soft click, but don't be alarmed – just keep talking. The conversation won't be terminated since your receiver is off hook. If you don't lift your receiver or don't press the OK button, Consultant will automatically hang-up the modem after the displayed number of seconds has elapsed.

Automatic Phone Call Log

After you successfully dial a number for a selected contact, Consultant will automatically place a phone call log entry in the selected contact's notes. The log entry will contain the date, time and number called. As you talk to the contact, feel free to type additional notes about the conversation under the log entry. You can also enter whether or not the contact was available, if the line was busy, etc.

Consultant has a preference on the Contact Preferences page in the Preferences dialog box to specify if you want Phone/Internet logging on or off. For more information about this preference see *Contacts Preferences* in Chapter *Preferences* on page 187.

Chapter 13

Links

The purpose of this chapter is to provide you with an understanding of links and how to use them. One of Consultant's strongest suits is its ability to form relationships between activity and contact objects via linking. An object can have an unlimited number of links between it and other objects. All links are two way connections. That is to say, if object A is linked to object B then object B is also linked to object A. In addition, Consultant also allows you to link Memos created by Consultant and documents created by other applications. For example, you can link a personal history text document to a family member's contact object. Or you can link a grocery shopping list Memo to a grocery shopping To-Do. Once links are formed between objects, double-click the links to quickly navigate through them. If the link happens to be a document and you double-click it, the application that created it will launch and the document will open. If the link happens to be a Memo, the Memo View will open to that Memo.

Topics Covered

- **View Links**. Describes how you can see what objects are linked to a particular activity or contact object.
- **Navigate Through Links**. Describes how to jump or navigate between links to quickly access different pieces of information.
- **Break And Delete Links**. Details how to remove one or more links from an object as well as how to remove and permanently delete one or more links and corresponding objects.
- **Add Links**. Describes the different ways that you can form links between objects.

View Links

This section lists the steps to view which objects are linked to a particular object.

1. **Select the activity/contact object for which you want to see the objects linked to it**. You may select an activity object from any View. If you select an activity object, you may have to double-click it to bring up the Activity Window. You may select a contact object from only the Contact Card View if you want to view its links.

2. **Click the Links Button in the Activity Window/Contact Card View**. If you have selected an activity object, the Activity Window will expand downwards and show any and all links in the Links Region. If you have selected a contact object, the Links Region of the Contact Card View will display any and all links.

Navigate Through Links

Links are only useful if you can quickly navigate through them. This section will show you how to quickly jump or navigate your way from one link to another. Remember that links are two-way connections between objects so if you jump forward a link you can return back to where you started. The only exception to this is if you click a Memo Link or an external document link. In these two cases, you won't be able to access the return link.

Double-Click Links

Double-click a linked object in the Links Region of either the Activity Window or Contact Card View to navigate your way between links in Consultant. Suppose, for example, that you are a chiropractor and you have an appointment scheduled with Roger Willow in which he is linked to the appointment. A few minutes before the appointment you wish to review your notes on him. Double-click the Roger Willow linked object in the Links Region of the Activity Window. The Contact Card View that contains his information will automatically open up. Notice how Roger Willow also has a link to the appointment. Double-click the appointment link in the Links Region of the Contact Card View to open up the Day View to the day of the appointment.

In summary, if you double-click an activity link, the Day View will open and display that activity. If you double-click a contact link, the Contact Card View will open and display that contact.

Double-Click A Memo

If you double-click a link that is a Memo, the Memo View will open and display the Memo.

Double-Click A Document

If you double-click a link that is a document created by an outside application such as a word processor or spreadsheet, the application that created the document will automatically launch and the document will open. The only exceptions to this is if there is not enough memory to launch the other application or if the document cannot be found. If there is not enough memory to launch the other application, try to close one or more open applications to free some memory. If the document no longer exists you should probably remove the link.

Break And Delete Links

You can break a link from an object at anytime by means of the instruments provided in the Activity Window and Contact Card View. Not only can you break links from an object, but you can also permanently delete linked objects. For information on how to break and delete links from an object in the Activity Window and Contact Card View see *Maintain Links* in Chapter *The Activity Window* on page 49.

Please note that if you delete an object that has links to other objects, all of those links will automatically break.

Add Links

Consultant provides many ways in which you may add or form links between objects.

- **Translate dialog box**. When you use the Translate dialog box to schedule activities, it can extract contact names from English phrases. It will then attempt to locate a contact that matches the name you typed in. If it finds such a contact, that contact object will automatically be linked to the activity object. For information on the Translate dialog box see *Translate Dialog Box* in Chapter *Calendar Management* on page 91.
- **Link Contact Command**. The Link Contact command in the Special menu quickly links a contact to an activity or contact object.
- **Smart-Link Contact Command**. The Smart-Link Contact command in the Special menu quickly links a contact to an activity object. This command uses Consultant's English translating capabilities to extract the contact name from the activity title.
- **Link Memo Command**. The Link Memo command in the Special menu quickly links a Memo to

an activity or contact object.

- **Link Document Command**. The Link Document command in the Special menu quickly links a document that was created by an outside application to an activity or contact object.
- **Drag and Drop**. Drag and drop one object on top of one another while holding down the Command key to quickly and easily link objects to each other. The objects needn't be in the same View.
- **Drag Contacts To The Calendar**. You may drag a contact object directly to the Day, Multiday, Week, Month or Gantt Views to create an activity to which the contact is automatically linked. This method of linking provides one of the quickest ways to create an activity with a link to a contact at the same time. For information on how to drag contacts to the calendar see *Drag And Drop Contacts On The Calendar* in Chapter *Contact Views* on page 121.

You can link any number of objects, Memos, and documents to an object. Although there are many ways to add links, this section concentrates on the Link Contact command, the Smart-Link Contact command, the Link Memo command, the Link Document command and linking via drag and drop since these topics aren't covered elsewhere.

The Link Contact Command

The Link Contact command quickly links a contact to an activity or contact object.

1. **Select an activity or contact object in any View**.
2. **Choose "Link Contact" from the Special menu**. The Link Contact dialog box will appear.
3. **Type the contact's name**. Type the name of the contact you want to link to the currently selected object. You may type up to two names that will uniquely identify the contact such as a first name followed by a last name. If you don't know the person's last name, only type a first name. Use a space to separate the first and last names.
4. **Click the OK button**. Once you have typed in the contact's name as best you can, click the OK button. Consultant will search through all of your contacts in an attempt to find one that matches the name you typed. If it finds several matches for the same name, a dialog box will appear and request that you to choose which contact you had in mind. The contact will automatically be linked to the selected object.

The Smart-Link Contact Command

The Smart-Link Contact command uses Consultant's English translation capabilities to extract a contact name from the title of an already-existing activity object. The purpose of this command is to provide a way to link a contact to an Appointment that you manually dragged out in the Day or Multiday View. You may also use this command to link a contact to an activity that you created when the contact was unknown. Suppose, for example, that you have a lease contract meeting with one of the managers from a firm you do a lot of business with on May 15th at noon. Since you haven't been told who exactly you will meet with, you schedule a generic lease contract meeting on your calendar.

Three days before the meeting they call and tell you that you will meet with Jim, so you decide to change the title of the activity to "Lease Contract Meeting with Jim." Since you want to review some of Jim's hobbies that you previously typed in to his contract record, you decide that you want to link him to the meeting. The quickest way to do this is to use the Smart-Link Contact command which will extract the name "Jim" from the activity's title and automatically link him.

1. **Select the activity object in any View**. Make sure the activity title has the name of the contact in it.
2. **Choose "Smart-Link Contact" from the Special menu**. Consultant will do its best to extract Jim's name from the activity's title. Consultant will then search through all of your contacts in an attempt to find one that matches the name it extracted. If it finds more than one match, a dialog box will appear and request that you choose the contact you had in mind. The contact will automatically be linked to the selected activity.

The Link Memo Command

The Link Memo command quickly links a Memo to an activity or contact object.

1. **Select an activity or contact object in any View**.
2. **Choose "Link Memo" from the Special menu**. The Link Memo dialog box will appear and list all of your memos.
3. **Select the Memo you want to link**.
4. **Press the OK button**. The selected Memo will be linked to the selected activity or contact object.

The Link Document Command

The Link Document command quickly links a document created by an outside application to an activity or contact object.

1. **Select an activity or contact object in any View**.
2. **Choose "Link Document" from the Special menu**. The Open dialog box will appear.
3. **Choose a document**. From the Open dialog box, locate and choose the document that you want to link to the selected object.
4. **Click the Open button**. Once you choose a document, click the Open button in the Open dialog box. Consultant will automatically link the document to the selected object.

Links Via Drag And Drop

Perhaps the quickest and easiest way to link activity and contact objects to one another is by means of drag and drop with the mouse. You can link an object A in any View to an object B in any other View or the same View. To do so, drag and drop the object A on top of object B while holding down the Command key. For a precise explanation of this process, the following steps illustrate how object A, a Sales Appointment, is linked to object B, Stephanie Walter.

1. **Hold down the Command key**. The Command key on the keyboard must be held down in order form a link with drag and drop. If you don't hold down the Command key and you drag an activity object, the activity object will move or reschedule instead. If you don't hold down the Command key and you drag a contact object to a calendar View, an activity will be created.
2. **Position the View(s)**. In order to drag object A to object B, both objects must be visible in their respective Views. This may require that you resize and/or reposition the two Views so that the View that contains object A is the top-most View.
3. **Click and hold the mouse button down on object A**.
4. **Drag object A towards object B**. As you drag object A, the mouse pointer will turn into one of two symbols: a red ban symbol or a Link symbol. The mouse pointer will be a ban symbol if it currently hovers over an area on the screen where there is not either an activity or contact object. This symbol indicates that if you release the mouse button, no link will form.

   The mouse pointer will be a Link symbol if it currently hovers over either an activity or contact object. In addition, the object the mouse pointer hovers over will become selected. The Link mouse pointer indicates that a link will form between the two objects if you release the mouse button.
5. **Drop object A on object B**. When object A directly hovers over object B, release the mouse button. Object A will drop onto object B and cause a link to form between the two objects.

When you link objects with drag and drop, please remember that you can form links between any combination of activity and contact objects. Furthermore, you can create drag and drop links between any two Views or within the same View. This implies that you can use the Day, Multiday, Week, Month, Gantt, List, Contact List and Contact Card Views. The only View that you cannot use is the Year View since it doesn't contain activity or contact objects.

Chapter 14

Searches

The purpose of this chapter is to teach you how to quickly find information that you have entered into Consultant. Consultant can search through all of your activities, contacts, Daily Notes, Journal entries, and Memos. Consultant can even search a text document.

Topics Covered

- **Invoke Find Command**. Describes how to invoke the Find command and the effect the top window has on the Find command.
- **Search Activity/Contact Objects**. Details how to use the Find command to search activity and/or contact objects.
- **Search Daily Notes**. Details how to use the Find command to search Daily notes.
- **Search Journal Entries**. Details how to use the Find command to search Journal entries.
- **Search Memos**. Details how to use the Find command to search Memos.
- **Search Text Document**. Details how to use the Find command to search a text document.

Invoke Find Command

As you place more and more information into Consultant, you may start to experience information overflow in which it becomes difficult to find little pieces of information that you know are in there, somewhere. Although, the preceding statement may seem a little extreme, it is helpful to have a way to quickly find the information you're looking for. Consultant provides a mechanism that searches for information by means of the “Find” command in the Edit menu.

The Find command works differently depending on what type of window is on top. The Find command actually performs five different types of searches based on the top-most window. If you invoke the Find command and the top window is a:

- **Activity or Contact View**. Consultant will search your activity and/or contact objects for a particular word or phrase.
- **Day View**. Consultant will search your daily notes if the text cursor is blinking in the Daily Notes Region.
- **Journal View**. Consultant will search your journal entry(s) for a particular word or phrase.
- **Memo View**. Consultant will search your memo(s) for a particular word or phrase.
- **Text Window**. Consultant will search the text document for a particular word or phrase.

If no views are open, Consultant will search activities & contacts.

There are two ways to invoke the Find command.

- **Choose “Find” from the Edit menu**. The Find dialog box will appear.
- **Click the “Find” button on the Button Bar**. The Find dialog box will appear

The Find dialog box that appears depends on the top-most View when the Find command is invoked. The remainder of this chapter will describe in detail the Find dialog boxes that appear for each type of search.

Search Activity/Contact Objects

If the top window is an Activity or Contact View when the Find command is invoked, a Find dialog box will appear that searches activity and/or contact objects. This section will describe this dialog box and the options it presents. If the top window is the Day View and the text cursor is blinking in the Daily Notes Region, then the Daily Notes will be searched instead.

The Find dialog box lets you search for a particular word or phrase in all the activity/contact objects throughout all of the open files to which you have access. If that word or phrase is found in any of the fields that comprise an activity or contact object, those objects will appear in a List View.

1. **Make sure an activity or contact View is the top-most window**.
2. **Choose "Find" from the Edit menu**. The Find dialog box will appear.

3. **Enter the word or phrase you want to search for**.
4. **Use the Contains Button**. Click the Contains button to find objects that have fields which contain the word or phrase you typed in. In General, the Contains operator will find all the objects the Equals operator will find plus, in most cases, several additional. The contains operator is also well-suited when you want to search for a word or phrase that you typed into an object's notes. Do not use the Equals operator, in this case, since the entire notes must then contain the exact word or phrase that you're looking for.
5. **Use the Equals Button**. Click the Equals button to find objects that have fields which exactly match the word or phrase you typed in.
6. **Use the Activities and Contacts Buttons**. Click the Activities button if you want to search activity objects. Click the Contacts button if you want to search contact objects. When you search for a word or phrase, you can select whether you want to search activity objects, contact objects or both. In other words, you may select both buttons.
7. **Use the Case Sensitive Button**. Click this button to indicate that the capitalization of words must match in order to find a match.
8. **Use the Search All Fields Button**. Click this button if you want all of the fields that comprise activity/contact objects to be included in the search including the Notes field. There are many fields that comprise activity and contact objects. For a complete listing of the fields that comprise activities and contacts see *Column Descriptions* in Chapter *The Calendar Views* on page 74. When searching, however, you may or may not want to search each and every field. If you want to search all of the fields, select this button. If you don't depress this button then only the Title field for activities and First Name, Last Name and Company Name fields for contacts will be searched.
9. **Click OK to perform the search**. Once the search is complete, a List View will open that contains a list of all the objects that were found. If no objects were found during the search, nothing will happen.

Search Daily Notes

If the top window is a Day View and the text cursor is blinking in the Daily Notes Region when the Find command is invoked, a Find dialog box will appear that searches Daily Notes. This section will describe this dialog box and the options it presents.

The Find dialog box lets you search for a particular word or phrase in all of your Daily Notes. If that word or phrase is found in any of your Daily Notes, Consultant will jump to that entry and highlight the word or phrase.

1. **Make sure the Day View is the top-most window and the text cursor is blinking the Daily Notes Region**.
2. **Choose "Find" from the Edit menu**. The Find dialog box will appear.

3. **Enter the word or phrase you want to search for**.
4. **Use the Contains Button**. Click the Contains button to find Daily Notes which contain your word or phrase anywhere in the entry without regard to word boundaries. In other words, "John" would be found in the word "Johnson" since "Johnson" contains the phrase "John"
5. **Use the Equals Button**. Click the Equals button to find an exact match of your word or phrase in Daily Notes while recognizing word boundaries. In other words, "John" would not be found in "Johnson" since the word "John" is not exactly equal to the word "Johnson."
6. **Use the Case Sensitive Button**. Click this button to indicate that the capitalization of words must match in order to find a match.
7. **Use the Multiple Entries Button**. Consultant lets you search the current Daily Notes for your word or phrase, or multiple Daily Notes. Click the Multiple Entries button if you want Consultant to search more than the current Daily Notes. When you click the Multiple Entries button, two new tools will appear: 1) a Search Backwards button; and 2) a Start Date Shutter. Consultant will search either forwards or backwards from the date selected in the Start Date Shutter. Click the Search Backwards button if you want Consultant to search backwards from the date in the Start Date Shutter. Otherwise, Consultant will search forward from that date.
8. **Click OK to perform the search**. If you are only searching the current Daily Notes, Consultant will highlight the word or phrase you are looking for if it finds it. If you are searching multiple Daily Notes, Consultant will start at the date in the Start Date Shutter and search forward/backwards. Consultant will display the Daily Notes containing the first occurrence of the word or phrase it finds and highlight it.
9. **Choose "Find Next" from the Edit menu to find subsequent matches**.

Search Journal Entries

If the top window is a Journal View when the Find command is invoked, a Find dialog box will appear that searches Journals. This section will describe this dialog box and the options it presents.

The Find dialog box lets you search for a particular word or phrase in all of your Journal entries. If that word or phrase is found in any of your Journal entries, Consultant will jump to that entry and highlight the word or phrase.

1. **Make sure the Journal View is the top-most window**.
2. **Choose “Find” from the Edit menu**. The Find dialog box will appear.

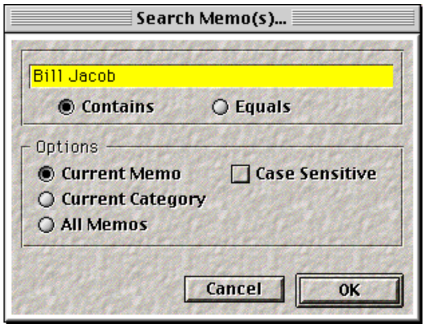
3. **Enter the word or phrase you want to search for**.
4. **Use the Contains Button**. Click the Contains button to find Journal entries which contain your word or phrase anywhere in the entry without regard to word boundaries. In other words, “John” would be found in the word “Johnson” since “Johnson” contains the phrase “John”
5. **Use the Equals Button**. Click the Equals button to find an exact match of your word or phrase in Journal entries while recognizing word boundaries. In other words, “John” would not be found in “Johnson” since the word “John” is not exactly equal to the word “Johnson.”
6. **Use the Case Sensitive Button**. Click this button to indicate that the capitalization of words must match in order to find a match.
7. **Use the Multiple Entries Button**. Consultant lets you search the current Journal entry for your word or phrase, or multiple Journal entries. Click the Multiple Entries button if you want Consultant to search more than the current entry. When you click the Multiple Entries button, two new tools will appear: 1) a Search Backwards button; and 2) a Start Date Shutter. Consultant will search either forwards or backwards from the date selected in the Start Date Shutter. Click the Search Backwards button if you want Consultant to search backwards from the date in the Start Date Shutter. Otherwise, Consultant will search forward from that date.
8. **Click OK to perform the search**. If you are only searching the current Journal entry, Consultant will highlight the word or phrase you are looking for if it finds it. If you are searching multiple Journal entries, Consultant will start at the date in the Start Date Shutter and search forward/backwards. Consultant will display the Journal entry containing the first occurrence of the word or phrase it finds and highlight it.
9. **Choose “Find Next” from the Edit menu to find subsequent matches**.

Search Memos

If the top window is a Memo View when the Find command is invoked, a Find dialog box will appear that searches Memos. This section will describe this dialog box and the options it presents.

The Find dialog box lets you search for a particular word or phrase in all of your Memos. If that word or phrase is found in any of your Memos, Consultant will jump to that Memo and highlight the word or phrase.

1. **Make sure the Memo View is the top-most window**.
2. **Choose "Find" from the Edit menu**. The Find dialog box will appear.



3. **Enter the word or phrase you want to search for**.
4. **Use the Contains Button**. Click the Contains button to find Memos which contain your word or phrase anywhere in the Memo without regard to word boundaries. In other words, "John" would be found in the word "Johnson" since "Johnson" contains the phrase "John"
5. **Use the Equals Button**. Click the Equals button to find an exact match of your word or phrase in Memos while recognizing word boundaries. In other words, "John" would not be found in "Johnson" since the word "John" is not exactly equal to the word "Johnson."
6. **Use the Case Sensitive Button**. Click this button to indicate that the capitalization of words must match in order to find a match.
7. **Use the Current Memo Button**. Click this button if you want to limit the search to the currently selected Memo.
8. **Use the Current Category Button**. Click this button if you want to limit the search to all of your Memos that belong to the same Category as the currently selected Memo.
9. **Use the All Memos Button**. Click this button if you want to search all of your Memos.
10. **Click OK to perform the search**. If you are only searching the current Memo, Consultant will highlight the word or phrase you are looking for if it finds it. If you are searching multiple Memos, Consultant will display the Memo containing the first occurrence of the word or phrase it finds and highlight it.
11. **Choose "Find Next" from the Edit menu to find subsequent matches**.

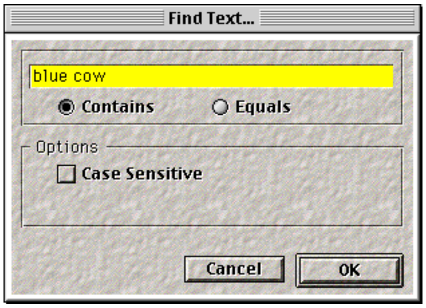
Search Text Document

If the top window is a text document when the Find command is invoked, a Find dialog box will appear that searches the document. This section will describe this dialog box and the options it presents.

The Find dialog box lets you search for a particular word or phrase in the current text document.

1. **Make sure a text document is the top-most window**.

2. **Choose “Find” from the Edit menu**. The Find dialog box will appear.



3. **Enter the word or phrase you want to search for**.
4. **Use the Contains Button**. Click the Contains button to find your word or phrase anywhere in the document without regard to word boundaries. In other words, “John” would be found in the word “Johnson” since “Johnson” contains the phrase “John”
5. **Use the Equals Button**. Click the Equals button to find an exact match of your word or phrase in the document while recognizing word boundaries. In other words, “John” would not be found in “Johnson” since the word “John” is not exactly equal to the word “Johnson.”
6. **Use the Case Sensitive Button**. Click this button to indicate that the capitalization of words must match in order to find a match.
7. **Click OK to perform the search**. Consultant will highlight the word or phrase you are looking for if it finds it.
8. **Choose “Find Next” from the Edit menu to find subsequent matches**.

Chapter 15

Priorities, Categories and Sets

The purpose of this chapter is to help you use Priorities, Categories and Sets to organize your data. You can assign a Priority such as high, medium, low or 1, 2, 3 to every activity to specify its relative importance. You can assign a Category such as Personal, Work, Civic or Church to every activity, contact, and Memo to appropriately describe what area of your life it relates to. And finally, you can use a Set of Categories to filter which Categories you wish to view in your calendar View, contact View, or Memo View.

Topics Covered

- **Primary User**. Describes what a Primary User is. Also describes the importance of the Primary User with regard to Priorities, Categories and Sets.
- **Define Priorities**. Describes how to add, rename and delete Priorities.
- **Define Categories**. Describes how to add, change and delete Categories.
- **Define Sets**. Describes how to define, change, rename, delete and use Sets.
- **Default Set**. Describes what the Default Set is and its significance.

As you know by now, a file created by Consultant can contain information for many users. Consultant therefore allows each user in the file to define his/her own customized Priorities, Categories and Sets. This includes the Public User which has its own Priorities, Categories and Sets.

Primary User

Regardless of whether one or ten users are currently open, Consultant always designates one of these users as the Primary User. This Primary User is always the first user that was opened in the first opened file. In most cases it is advantageous for you, the Primary User, to first open the user that represents you when you open a file. The purpose and significance of the Primary User will become apparent as you continue to read below.

Since you can open information from several users at once and each user has its own Priorities, Categories and Sets, the question then arises as to who's Priorities, Categories and Sets Consultant uses. You will soon see that in the case of Priorities and Categories, the Source button in the Activity Window controls whose Priorities and Categories are used. In the case of Sets, you will soon see that it is always the Primary User's Sets that are used.

- **Priorities and Categories**. When you create a new activity/contact object or when you select an existing object, the Activity Window contains a Source button which tells you to what user in what file the object belongs.

  Depending on whether the object is an activity or contact, the Activity Window also displays Priority and Category buttons which list the currently chosen user's Priorities and Categories, respectively.

  Click and hold the mouse button down on the Source button to change the user that the current object belongs to at any time. A pop-up menu will appear and list all the open users in all the open files. When you change to a different user, the Priority and Category buttons will also change to reflect the newly selected user's Priorities and Categories.

- **Sets**. Each View in Consultant has a Set button which you can use to select which Set filters information. When you hold this button down, a list of Sets pops up.

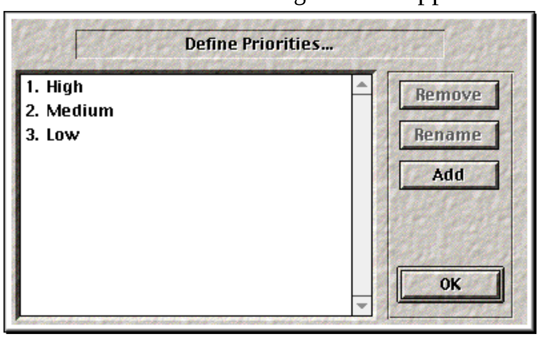
All of the listed Sets belong to the Primary User. The Primary User's Sets are always used everywhere in Consultant. This makes sense since the Primary User is supposed to represent the person actually using Consultant. Therefore, you want your Sets to filter your own information and other's information.

Not only does each user in a file have his/her own Priorities, Categories and Sets, but each user has his/her own Preferences, Phone Labels, Custom Labels, SmartType Lists, and dialing information. Like Sets, Consultant always uses the Primary User's versions of these.

Define Priorities

Consultant lets you assign a Priority on a scale of one to ten to each activity. Rather than just have numeric Priorities, Consultant allows you to define a descriptive word or phrase for each of the Priority levels. Each user in a file can define his/her own Priorities. However, only the Primary User is able to define his/her own Priorities during a session with Consultant. In other words, you can only add, rename and delete your own Priorities. Although there are ten Priority levels, you needn't define all ten. You need only define the number of Priorities you plan to use (you must have at least one priority).

1. **Choose "Define Priorities…" from the Special menu to define the Primary User's Priorities**. The Define Priorities dialog box will appear.



This section describes how to add, rename and delete Priorities from this dialog box.

Add A Priority

You may add or define up to ten Priorities. Each Priority that you add will append to the list of Priorities.

1. **Click the Add button to add a Priority to the end of the Priority list**. A small dialog box will appear.
2. **Define the Priority**. Type a word or phrase that describes the Priority you wish to add.
3. **Click the OK button to add the Priority**.

Rename A Priority

The following steps describe how to change the wording of a Priority that you have already defined.

1. **Select the Priority that you wish to rename**.
2. **Click the Rename button to rename the selected Priority**. A small dialog box will appear in which you can rename the selected Priority.
3. **Type the new name of the Priority**.

4. **Click the OK button to rename the Priority**.

Delete A Priority

If you no longer want as many Priority levels as you have defined, you can delete Priorities from the bottom of the Priority list. You may only delete Priorities from the bottom of the list in order to preserve the Priority levels currently assigned to activities. If Consultant allowed you to delete Priorities from the middle of the list, a Priority that was once labeled *Medium* might change to *Low*. This will most likely cause confusion.

1. **Select the Priority at the end of the list**.
2. **Click the Delete button to delete the selected Priority**.

If you have activities that were assigned to the level of the Priority you deleted, they will automatically be reassigned.

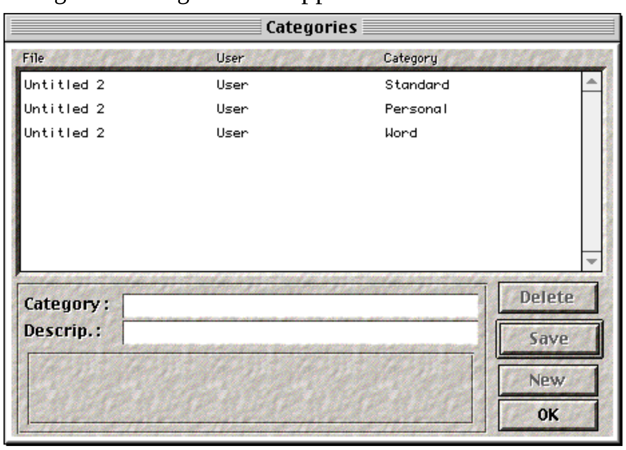
Define Categories

To help you organize your information, Consultant lets you assign a Category of your choice to each activity and contact. Each user in a file can have his/her own list of Categories to choose from. By default, each user starts out with only one Category which is named *Standard*. You cannot delete the *Standard* Category since each user must have at least one Category. You can, however, rename it. A Category consists of two fields.

- **Name**. Each Category has a name which is a word or short phrase that describes it. Example names might include Personal, School, Work, Civic, Church, etc.
- **Description**. You can also give each Category an optional and longer description that further describes the Category.

The first step to define your own categories is to open the Define Categories dialog box.

1. **Choose “Define Categories…” from the Special menu to define your Categories**. The Define Categories dialog box will appear.



It has the following parts.

- **Category List**. The Category List displays all of the Primary User's Categories. The file and user name to which each Category belongs is listed along with the Category name.
- **Delete Button**. Use the Delete button to permanently delete the selected Category. When you delete a Category, all of the user's objects that belong to that Category will also be deleted.
- **Save Button**. Use the Save button to add a new Category and/or save changes made to an already existing Category.

- **New Button**. Use the New button to remove any selections from the Category List in preparation of a new Category.
- **OK Button**. Use the OK button to exit the dialog box when done.
- **Name Field**. The Name Field is where you may type the name of a new Category and is also where the name of a selected Category is displayed.
- **Description Field**. The Description Field is where you may type the description for a new Category and is also where the description for a selected Category is displayed.

This section describes how to add, change and delete Categories from this dialog box.

Add A Category

The Define Category dialog box has been specially designed so that you can add many Categories very quickly. The quickest way to add a new Category is to type the name and description of the Category and then click the Save button.

1. **Type the Category Name and Description**.
2. **Click the Save button or press the Return key on the keyboard**. The Category will be added to the Category List and the Category Name and Description fields will be cleared in case you wish to quickly add another Category.

The Category Name and Description fields are automatically cleared so that you can immediately begin to type the name and description of the next Category you want to add.

You may select Categories in the Category List in order to delete or change them. When a Category is selected, the Name and Description fields are filled with the selected Category's name and description.

This may present a problem if you want to add a new Category at that point. In order to add a Category, you must first cause the selection to disappear from the Category List. You may do this in one of two ways.

- **Click anywhere in the Category List where a Category is not listed**.
- **Click the New button**. The New button does nothing more than cause any selection to disappear from the Category List.

Once there is no longer a selection in the Category List, you may type the name and description of the new Category followed by a click on the Save button to add a new Category.

Change A Category

The following steps describe how to change the Name or Description of a Category at anytime.

1. **Select the Category in the Category List that you wish to change**. The Name and Description of the Category will appear in the Name and Description Fields.
2. **Make any necessary changes**.
3. **Click the Save button or the Return key on keyboard to save the changes to the Category and clear the Name and Description fields**.

Please note that you may change the Name and Description of the default *Standard* Category but you may not delete it.

Delete A Category

You may permanently delete a Category at anytime. When a Category is deleted, all of the activity, contact and Memo objects that belong to that Category are likewise deleted. In other words, delete Categories with care.

1. **Select the desired Category in the Category List that you wish to delete**. The Name and De-

scription of the Category will appear in the Name and Description Fields.

2. **Click the Delete button**. An alert box will appear and warn you of the effects of the pending deletion.

3. **Click the alert box's OK Button if you are sure that you want the selected Category and all of the objects assigned to it deleted**. Otherwise, click the Cancel button. If you click the OK button, a Progress dialog box will appear and indicate the percentage of objects left to delete.

Objects linked to any of the deleted objects will not be deleted. The links will break, but the linked objects will not be deleted.

Define Sets

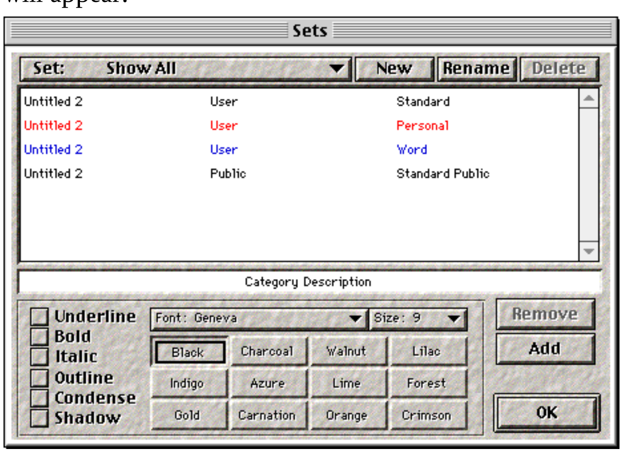
Once you divide your information into Categories, you can define Sets that filter which Categories are displayed in a View. Each user in a file can define as many Sets as he or she wishes. Each Set is given a name to identify it. Simply put, a Set is a collection of Categories.

XYZ Inc. Set
Sales Dept. Category
Management Category
Company Softball Category

The Day, Multiday, Week, Month, Gantt, List, Contact List, Contact Card View, and Memo View has a Set button which you may use to select which Set filters information shown in that View. In other words, a Set tells a View which Categories to display. Only the activity/contact objects and Memos that belong to those Categories will appear. Of course, each open View can use a different Set to display different collections of Categories.

Sets are particularly useful since they limit how much information is shown in a View at time. For example, although, you may have Personal, Family and Work Categories, you may only want to display Family activities in your Month View at certain times. When you define a Set, you may assign a special style, font, font size and color to each Category in the Set. These special attributes identify different Categories. For example, you can choose to have all your personal information show up in red, while your work related information will show up in blue.

1. **Choose "Define Sets…" from the Special menu to define your Sets**. The Define Sets dialog box will appear.



It contains the following parts.

- **Current Set Button**. This button displays the name of the current Set. You may also use this button to switch to a different Set.

- **Add Set Button**. Use this button to create or add a new Set.
- **Rename Set Button**. Use this button to change the name assigned to a Set.
- **Delete Set Button**. Use this button to permanently delete a Set.
- **Category List**. The Category List displays all of the Categories that belong to the current Set. Note that Categories may belong to any user in any file to which you have access.
- **Category Description Box**. When you select a Category in the Category List, the description for that Category is displayed in the Category Description Box.
- **Attribute Box**. Use the Attribute Box to select a style, font, font size, and color for the Category currently selected in the Category List.
- **Remove Button**. Use this button to Remove the Category currently selected in the Category List.
- **Add Button**. Use this button to Add one or more Categories to a Set.
- **OK Button**. Use this button to exit from the dialog box when done.

This section describes how to switch, add, change, rename and delete Sets from this dialog box. This section begins with a description of the Show All Set which is a special Set that does not filter out any categories.

Show All Set

Every user in a file has by default a *Show All* Set that you cannot delete. The *Show All* Set is a collection of all the Categories from all the currently open users in all open files. You cannot add or delete Categories from this Set since it must always represent all Categories. You can, however, change the style, font and color attributes for any of the Categories in this Set.

Switch Sets

A user can have any number of Sets. Each Set can have its own unique collection of Categories with special style, color and font attributes. The Define Set dialog box allows you to work on any of the Primary User's Sets at a given time and switch between them. The Current Set button always displays the Set that you are currently working on.

You may also use the current Set button to switch to a different Set.

1. **Click and hold the mouse button down on the Current Set button**. A pop-up menu will appear and list all of the Primary User's Sets.
2. **Choose the Set you wish to work on and release the mouse button**. The name of the Set you chose will appear on the Current Set button and the Categories that belong to that Set will appear in the Category List.

Define A New Set

As previously mentioned, you may define as many Sets as you wish. Each Set can represent a different collection of Categories. There are three steps to defining a new Set.

1. **Add or create the Set**.
2. **Add Categories to the Set**.
3. **Assign attributes to the Categories**.

Add A Set

The following steps describe how to add a new Set to the Primary User's list of Sets.

1. **Click the Add Button**. A small dialog box will appear in which you can name the new Set.
2. **Type the name of the Set**.

3. **Click the small dialog box's OK button to add the Set**. The Set's name will appear on the Current Set button.

Add Categories To A Set

You may add any number of Categories at any time to a Set. The following steps describe how to add one or more Categories to the Set currently displayed on the Current Set button.

1. **Click the Add button**. The Add Category dialog box will appear and list all of the Categories that belong to all open users in all open files. If a Category in the list already belongs to the current Set, it will appear grayed out in the list so you can't add it twice.
2. **Check off desired Categories**. Use the mouse to place a check mark to the left of each Category name that you wish to add to the current Set. Click anywhere on the Category name line to place a check mark for that Category.

   The Add Category dialog box also provides two buttons that let you quickly add check marks and remove check marks from all of the Categories in the list.

   Click the Check All button to check all of the Categories in the list that aren't grayed out.

   Click the Check None button to remove any and all check marks from the Categories in the list.
3. **Click the Add Category dialog box's OK button to add all of the checked Categories to the current Set**.

Assign Attributes To Categories

You can assign style, font, font size and color attributes to each Category in each Set. These attributes make it possible to identify different Categories on your calendar and contact lists.

1. **Switch to the desired Set**. The same Category may appear in several Sets. Since each Set can assign unique attributes to a Category, make sure that you are working with the Set that you wish to change.
2. **Select the Category in the Category List that you wish to assign attributes to**. When you select a Category in the Category List, the attribute controls in the Attribute Box will change to represent the attributes currently set for the selected Category. That is, the style, font, font size and color controls will change to the style, font and color currently assigned to the selected Category.
3. **Assign attributes in the Attribute Box**. Click the Underline, Bold, Italic, Outline, Condense and Shadow buttons to assign attributes to the selected Category. Click any of the twelve color buttons to assign a color attribute. Click and hold the mouse button down on the Font button to assign a font attribute. A pop-up menu will appear and list all of the possible font choices. Click and hold the mouse button down on the Font Size button to assign a font size attribute. A pop-up menu will appear and list all of the possible font size choices. As you assign attributes, the selected Category in the Category List will change to represent those changes.

The selected Category will remain selected until you select another Category, click an empty line in the Category List, switch Sets or exit the dialog box.

Change A Set

You may add or remove Categories from a Set at anytime. You can also change a Category's attributes at any time. The first step to alter a Set is to make sure that the Set you wish to alter is the current Set.

Add Categories To A Set

You can add Categories to a Set at anytime. The process to add Categories to an older Set is the same as the process to add Categories to a new Set. For information on how to add Categories to a Set see *Add Categories To A Set* in Chapter *Priorities, Categories and Sets* on page 152.

Remove Categories From A Set

The following steps describe how to remove one or more Categories from a Set at anytime.

1. **Select the Category that you wish to remove from the current Set**.
2. **Click the Remove button to remove the selected Category from the Set's collection of Categories**.

Rename Sets

The Current Set button always displays the name of the Set currently displayed. The following steps describe how to rename the current Set at anytime.

1. **Click the Rename button**. The Rename Set dialog box will appear in which you can type the new name that you want to give the Set.
2. **Type the new name and click OK to rename the Set**. The new name will appear on the Current Set Button.

Delete Sets

The Current Set button always displays the name of the Set currently displayed. The following steps describe how to delete the current Set at anytime.

1. **Click the Delete Button**. An alert box will appear to confirm the deletion.
2. **Click the OK Button to permanently delete the Set**.

Default Set

When Consultant opens a new View, it cannot know which Set you want to use to filter information. To solve this problem, Consultant lets you choose a Default Set that it automatically uses when you first open a new View. This section describes how to select the Default Set.

1. **Choose "Select Default Set" in the Special Menu**. A pop-up hierarchical menu will appear and list all of the Primary User's Sets. A check mark appears to left of the Set which is the currently designated Default Set.
2. **Choose the Set in the hierarchical menu that you wish to become the designated Default Set**.

The next time you open a View, the Default Set's name will appear on the Set button in that View.

Chapter 16

Speech

The purpose of this chapter is to explain how to use the speech features in Consultant to hear your schedule read aloud to you. This chapter will also detail the system components required to make speech happen. Consultant's speech features are very handy because they permits you to do other things while you listen to your schedule.

Topics Covered

- **Speak Time/Date**. Describes how to have Consultant speak the current time and date to you.
- **Speak Schedule**. Describes how to have Consultant speak your schedule for the current day to you.
- **Speak View**. Describes how to have Consultant speak the schedule in the current View to you.
- **Speech System Requirements**. Describes the system requirements for speech.
- **Alter Speech Preferences**. Describes how to change the preferences that control speech.

Speak Time/Date

Consultant can speak the current time and date to you. While Consultant is speaking, your computer is free to perform other tasks. There are two ways to invoke the Speak Time command.

- **Choose "Speak Time" from the Special menu**.
- **Click the "Speak Time" button on the Button Bar**. You may have to add this command to the Button Bar if it isn't already there. For information on adding a command to the Button Bar see *Add A Command* in Chapter *The Button Bar* on page 37.

You can interrupt and stop the speaking at any time by choosing "Stop Speaking" from the Special menu or pressing the Command-"." key combination.

Speak Schedule

Consultant can speak your schedule for the current day to you. While Consultant is speaking, your computer is free to perform other tasks. There are three ways to invoke the Speak Schedule command.

- **Choose "Speak Today's Schedule" from the Special menu**.
- **Click the "Speak Schedule" button on the Button Bar**. You may have to add this command to the Button Bar if it isn't already there. For information on adding a command to the Button Bar see *Add A Command* in Chapter *The Button Bar* on page 37.
- **Click the "Speak Schedule" button in the Day View**. Rather than speaking the schedule for the current day, Consultant will speak the schedule for the day shown in the Day View.

You can interrupt and stop the speaking at any time by choosing "Stop Speaking" from the Special menu or pressing the Command-"." key combination.

Speak View

Consultant can speak the schedule displayed in the current calendar View. While Consultant is speaking, your computer is free to perform other tasks. There are two ways to invoke the Speak View command.

- **Choose “Speak Current View” from the Special menu**.
- **Click the “Speak View” button on the Button Bar**. You may have to add this command to the Button Bar if it isn’t already there. For information on adding a command to the Button Bar see *Add A Command* in Chapter *The Button Bar* on page 37.

You can interrupt and stop the speaking at any time by choosing “Stop Speaking” from the Special menu or pressing the Command-”.” key combination.

Speech System Requirements

Consultant uses the MacOS’s built-in speech facilities to speak aloud to you. You need to make sure these speech components are installed on your system if you want Consultant’s speech features to work. If these components are not installed, you will not hear anything when you invoke a speech command.

Apple Inc.’s “English Text-to-Speech” or “Spanish Text-to-Speech” speech managers must be installed on your system. These speech managers are available on your system installation disk(s) and Apple’s web site at www.apple.com.

Alter Speech Preferences

Consultant lets you set two preferences to control its speech features via the Preferences dialog box.

- The voice it uses
- Your spoken name

For complete information on the various speech preferences see *Environment Preferences* in Chapter *Preferences* on page 185.

Chapter 17

Journal & Memo Views

The purpose of this chapter is to describe the Journal View and Memo View. These two Views use Consultant's text processing capabilities to help you organize journal entries, notes, and memos. Both of these Views use all of Consultant's standard text processing features. The Journal View tracks journal entries on a daily basis, while the Memo View lets you organize memos by Category.

Topics Covered

- **Journal View**. Describes the purpose of the Journal View and how to use it.
- **Memo View**. Describes the purpose of the Memo View and how to use it.

Journal View

Use the Journal View to enter a diary or journal entry for each calendar day. You may use all of Consultant's standard text tools in your journal entry. For information on Consultant's text tools and features see *Tools And Customization* in Chapter *Text Documents* on page 163. The Journal View organizes your entries by date so you can quickly jump to any journal entry.

This section will describe how to open the Journal View, create a journal entry, navigate among your journal entries, search journal entries, and export journal entries.

Open Journal View

There are two ways to open the Journal View.

- **Choose "Journal" from the Calendar menu in the menu bar**. The Journal View will open.
- **Click the "Journal" button on the Button Bar**. The Journal View will open. You may have to add this command to the Button Bar if it isn't already there. For information on adding a command to the Button Bar see *Add A Command* in Chapter *The Button Bar* on page 37.

The Journal View looks very similar to Consultant's text documents. In addition to the standard text tools, you will see some additional tools across the top of the window. These tools include a Date Indicator, a Day Backward button, a Day Forward button, a Previous Entry button, a Next Entry button, and a Jump button. Each of these tools will be explained throughout this chapter.

Create Journal Entry

Creating or adding a journal entry is an easy two step process.

1. **Navigate to the date for which you want to add a journal entry**. You may use the Day Backward button, Day Forward button, Previous Entry button, Next Entry button, and Jump button to navigate to your desired date. These buttons are explained in the next sub-section. The date you are currently on is displayed in the Date Indicator pane in the upper left-hand corner of the Journal View.
2. **Enter your journal entry into the text region of the Journal View**. You may use any of the text tools to format and/or stylize your journal entry.

You journal entry will automatically be saved when you close the Journal View, move to another journal entry, or quit Consultant. You may also choose "Save Text" from the File menu to force your journal entry to be saved.

Navigate Journal Entries

The Date Indicator pane in the upper-left hand corner of the Journal View displays the date of the current journal entry. The Journal View provides several tools to help you switch or move to a journal entry on a different date: the Day Backward button, Day Forward button, Previous Entry button, Next Entry button, and Jump button. Note that Consultant automatically saves changes to the current journal entry when you switch to another entry.

Day Backward Button

1. **Click the Day Backward button to move to the journal entry one day backward from the date in the Date Indicator**. The current journal entry will automatically be saved and the new journal entry will appear if there is one.

Day Forward Button

1. **Click the Day Forward button to move to the journal entry one day ahead from the date in the Date Indicator**. The current journal entry will automatically be saved and the new journal entry will appear if there is one.

Previous Entry Button

1. **Click the Previous Entry button to move backward to the first date that has a journal entry**. The current journal entry will automatically be saved and the new journal entry will appear.

Next Entry Button

1. **Click the Next Entry button to move forward to the first date that has a journal entry**. The current journal entry will automatically be saved and the new journal entry will appear.

Jump Button

1. **Click the Jump button to quickly jump to the journal entry for any date**. The Jump dialog box will appear.
2. **Choose the date you want to jump to**. Use the Year, Month, and calendar buttons to select the date you want to jump to.
3. **Click the OK button to jump to the selected date**. The current journal entry will automatically be saved and the new journal entry will appear.
4. **OR click the Today button to jump to today's journal entry**. The current journal entry will automatically be saved and the new journal entry will appear.

Search Journal Entries

You can search the current journal entry or multiple journal entries for a particular word or phrase. For information on searching journal entries see *Search Journal Entries* in Chapter *Searches* on page 143.

Export Journal Entries

The Journal View's Export feature will create a new text document and automatically copy one or more of your journal entries into this new document. The purpose of this Export feature is to provide a simple way to extract and combine your journal entries into a single document that you can use elsewhere.

1. **Choose "Export Journal" from the File menu to export one or more journal entries**. The Jour-

nal Export dialog box will appear.

2. **Select the date range of the journal entries you want to export**. You will need to select a start date and an end date. You needn't necessarily have a journal entry on those two dates.
3. **Select the Insert Date button to automatically insert the date of each journal entry above each journal entry in the export**.
4. **Click the OK button to export the all the journal entries found between and including the specified Start/End dates**. A new text window will open. Each journal entry, one after another, will be copied into the text window. If the Insert Date button is selected, the date for each journal entry will precede each journal entry. You may save the text document, cut, copy, paste, or do anything you want with it.

Memo View

Use the Memo View to create and organize memos. Memos are text documents that you can use to store personal information, grocery lists, anything. You may use all of Consultant's standard text tools when you create a memo. For information on Consultant's text tools and features see *Tools And Customization* in Chapter *Text Documents* on page 163. Memos have three unique characteristics.

- **Memos are assigned a Category**. Every memo is assigned a category (just like activities and contacts). The Memo View has a Set button so you can choose which categories you want displayed in the View.
- **Memos can be linked to activities and contacts**. Linked memos show up along with other links in the Links Region of the Activity Window and Contact Card View.
- **Memos have title**. You assign a title to a memo to help you distinguish it from other memos at a glance.

This section will describe how to open the Memo View, create a memo, navigate among your memos, search memos, and link memos.

Open Memo View

There are two ways to open the Memo View.

- **Choose "Memo View" from the Text menu in the menu bar**. The Memo View will open.
- **Click the "Memo View" button on the Button Bar**. The Memo View will open. You may have to add this command to the Button Bar if it isn't already there. For information on adding a command to the Button Bar see *Add A Command* in Chapter *The Button Bar* on page 37.

You will notice that the Memo View looks very similar to Consultant's text documents. In addition to the standard text tools, you will see a series of tools across the top of the Memo View: a Set button, a New Memo button, a Title Text Region, a Category button, and a Source button. Each of these tools will be explained throughout this chapter.

You will also see a Memo List along the left-hand side of the Memo View. The Memo List displays all the Categories and memos in the currently selected Set. The Memo List is a two level hierarchical list. The first level list Categories. The second level lists the memos that belong to each Category under the applicable Category. You can show or hide the memos listed under each Category by clicking the Triangle icon to the left of each Category.

Create A Memo

A memo provides space to enter miscellaneous information such as proposals, outlines, meeting notes, etc. Each Memo is assigned a Category and belongs to a User in one of your open files.

1. **Click the New Memo button to create a new memo**. The text region of the Memo View will clear and the text cursor will appear in the Title Text Region at the top of the View.
2. **Enter a title for your memo in the Title Text Region**. Every memo must have a title.
3. **Choose the User that this memo will belong to using the Source button**.
4. **Choose the Category you want to assign to this memo using the Category button**.
5. **Enter your memo into the text region of the Memo View**. You may use any of the text tools to format and/or stylize your memo.

Your memo entry will automatically be saved when you close the Memo View, select another memo in the Memo List, deselect the memo, or quit Consultant. You may also choose “Save Text” from the File menu to force your memo to be saved.

Once your memo is saved, it will appear in the Memo List under its Category. This assumes, of course, that the assigned Category is included in the currently selected Set.

Navigate Memos

The Memo List along the left-hand side of the screen lists all the Categories and memos in the currently selected Set. The memos that belong to each Category are listed beneath that Category. Each Category has a Triangle icon on its left side to show or hide its memos.

Set Button

Use the Set button to select the Set of Categories you want displayed in the Memo List.

1. **Click and hold the mouse button down on the Set button**. A list of Sets will pop-up.
2. **Select your desired Set and release the mouse button**. The Categories and their corresponding memos will appear in the Memo List. Each Category and its memos will be displayed in the font, color, style, and font size as specified in the Set.

Expand / Shrink Category

A small Triangle icon is located to the left of each Category in the Memo List. The purpose of this icon is to expand or shrink the list by showing or hiding the memos that belong to that Category.

1. **Click the Triangle icon to expand a shrunk Category**. The Triangle icon will turn and the memos that belong to that category will be listed.
2. **OR click the Triangle icon to shrink an expanded Category**. The Triangle icon will turn and all memos belonging to that Category will hide.

Select Memo

The Memo List displays all the memos in the currently selected Set. You may have to expand a Category to see all of the memos for that Category. You can, at any time, see the full contents of a memo by selecting it. Once selected, you can edit the memo, change its title, change its category, delete it, etc.

1. **Click a memo in the Memo List to select it**. The memo will become highlighted in the Memo List, the title for the memo will appear in the Title Text Region, and the memo will appear in the main text region.

Deselect Memo

1. **Click in the empty region past the listed memos in the Memo List to deselect a memo**. The selected memo will be saved if changes have been made and will become deselected.

Search Memos

You can search the currently selected memo or multiple memos for a particular word or phrase. For information on searching memos see *Search Memos* in Chapter *Searches* on page 143.

Link Memos

Memos, like activities, contacts, and external documents can be linked to one or more activities or contacts. You may, for example, want to link a memo containing a meeting outline to your meeting activity.

1. **Select the activity or contact you want to link your memo to in any open calendar or contact View**.
2. **Choose "Link Memo" from the Special menu**. A Link Memo dialog box will appear and list all the memos you can link to the selected activity or contact.
3. **Select the memo you want to link to the selected activity or contact**.
4. **Click the OK button to link the memo to the selected activity or contact**. The Memo will appear like all other links in the Links Region of the Activity Window or Contact Card View.

Chapter 18

Text Documents

Consultant has a built-in text processor to help you quickly produce correspondence, fax covers, address books, reports, mail-merge letters, etc. Though, Consultant's text processor probably won't replace your main word processor, its tight integration with Consultant's time and contact managers make it very powerful.

The following is a quick run-down of the text processor's major features:

- **Opens and Saves standard TEXT files which make it compatible with Apple's SimpleText editor and all major word processors**. A TEXT file is a standard document type created by Apple and is assigned the TEXT file type. TEXT documents can contain a body of text that can be formatted using left, center, and right justification. They also support different fonts, font styles, and font sizes. TEXT documents can be open by any word processor or text editor, but cannot be larger than 32K in size. Consultant's text processor can open and save standard TEXT files, but it extends the formatting capabilities of TEXT files by adding many new features and capabilities. Because Consultant's text processor offers more extensive formatting capabilities, you may lose some of the special formatting if you open a Consultant text file in SimpleText or another word processor.
- **Supports multiple fonts, font sizes, and styles**.
- **Supports customized page sizes**.
- **Supports colored text**.
- **Supports different text alignments**. These include left, center, right, justified, and various forms of indentation and bulleted lists.
- **Supports several types of line spacing**. These include single, one and one-half, and double.
- **Supports imbedded graphics and sounds**.
- **Supports Internet integration**. You can embed e-mail address and web address as hot links.
- **Supports Templates**. Consultant can generate mail-merges, custom reports, fax covers, address books, envelopes, labels, etc., from Templates.
- **Supports files of unlimited size**.

Topics Covered

- **Create A New Document**. Describes how to create a new text document and get started.
- **Open An Existing Document**. Describes how to open an existing document whether or not it was created using Consultant's text processor.
- **Save A Document**. Describes how to save a document and describes what type of document Consultant's text processor saves.
- **Revert A Document**. Describes how to discard your changes and revert a document back to a previous version.
- **Tools And Customization**. Describes the whereabouts, layout, and functionality of the tools that the text processor uses.
- **Ruler Tools**. Describes the use of the ruler and its corresponding tools.
- **Layout Tools**. Describes the use of each Layout tool.
- **Font Tools**. Describes the use of the Font Tools.
- **Indent Tools**. Describes the use of the indentation tools.
- **Insert Tools**. Describes the use of the insertion tools and how they provide very powerful functionality.
- **Template Tools**. Describes how to use the Template tools to create a Template document.
- **Generate A Document From A Template**. Describes how to generate a new document from a

Template.

Create A New Document

This section describes how to create a new document using Consultant's text processor.

1. **Choose "New Text" from the File menu**. A new text document window will appear. A blinking text cursor will appear in the main text region.
2. **OR click the "New Document" button on the Button Bar**. A new text document window will appear. A blinking text cursor will appear in the main text region.
3. **Enter the text of your document**. You can use any of the text tools described in the remaining sections of this chapter to format your document.

Once the document window is visible you can begin typing, editing, formatting, etc. similar to how you would in your main word processor or text editor. Explicit instructions for Consultant's text tools follow in the coming sections of this chapter.

Keep in mind that the text processor can open any standard TEXT document so you can use Consultant to view documents created by other applications. However, there are advantages to creating text documents using Consultant.

- **Consultant's text processor extends the formatting capabilities of normal TEXT documents**. For example, Consultant's text documents let you include special indentation formatting, Internet integration, colored text, graphics, sounds, template support, etc. Other text processors, including Apple's Simple Text, can open documents created by Consultant's text processor, but they won't show the special formatting. Please note that if you edit a Consultant text document with a different text editor your special formatting may be lost or strange results may appear.
- **You can double-click documents you created in Consultant's text processor to launch Consultant and edit them**.
- **Consultant's text documents do not have the 32K limitation many text processors such as SimpleText have**. This, of course, means that you won't be able to open a large word processing document in an application that has the 32K limit.

Open An Existing Document

This section describes how to open a text document created by Consultant or a TEXT document created by another application. Follow the steps below to open an existing document.

1. **Choose "Open Text" from the File menu**. A standard Open dialog box will appear and list all files of type TEXT. This means all Consultant text documents and TEXT files created by other application will be listed.
2. **Select the file you want to open**.
3. **Click the Open button**. A new text document window will appear with the selected document's contents.

Save A Document

This section describes how to save a text document. It also describes the type of document the text processor saves. Follow the steps below to save the document in the top-most text document on the screen.

1. **Choose “Save Text” or “Save Text As” from the File menu**. If the document hasn't been previously saved or if you chose “Save Text File As”, a standard Save dialog box will appear so you can name your document. Otherwise your document will be immediately saved.
2. **If applicable, name your document and press the Save button**. Your document will be saved.

Revert A Document

This section describes how to discard the changes you have made to the current document, and restore the document to the last saved version. If you have made changes to a document that you previously saved, you can at any time discard the changes you have made by reverting back to the last saved version of the document. You could, of course, close the document, choose not to save it, then re-open the document to achieve the same effect. But why work so hard? Instead, follow the steps below to revert the document to the last saved version.

1. **Choose “Revert Text” from the File menu**. A prompt will appear to ask you if you are sure that you want to discard your changes.
2. **Click the OK button**. Your changes will be lost and the last saved version of the document will appear in the document window.

Tools And Customization

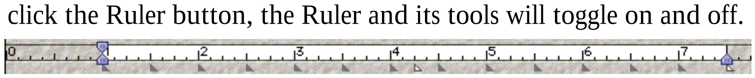
This section describes the whereabouts, layout, and functionality of the tools that the text processor uses. Many of the same tools are available from multiple locations so you can use whatever set of tools is most convenient. The text tools are located in three locations:

- **Text Document Window**. At the top of each text document window is a row of buttons labeled Ruler, Layout, Font, Indent, Insert, and Template. Clicking each button reveals a set of tools for modifying your text document. The Journal View and Memo View include similar sets of tools. The tools for each button will be explained in following sections.
- **The Text Tools Floating Palette**. Choose “Text Tools” from the Text menu in the menu bar. A floating palette of tools will appear with Layout, Font, Indent, and Insert buttons. These buttons are similar to those in the text document window. The Text Tools palette is particularly convenient when you’re entering activity or contact notes or when you’re typing text into the Daily Notes region of the Day View. Rather than constantly going to the menu bar to change fonts, styles, etc., you may use the Text Tools to format your text. The tools for each button will be explained in following sections.
- **The Text menu in the menu bar**. The Text menu contains hierarchical menus that let you change the font, font style, font size, text color, and alignment. These menu tools are available any time you are editing text whether it be in a text document, a journal entry, a memo, an activity note, a contact note.

Ruler Tools

This section describes what the Ruler tools are and how to use them. The Ruler Tools are available in any text document, the Journal View, and the Memo View.

1. **Click the Ruler button to show or hide the Ruler and its accompanying tools**. Each time you click the Ruler button, the Ruler and its tools will toggle on and off.



The Ruler and its accompanying tools provides several functions.

- **The Ruler shows the width of your paper**. The paper that holds your document is located directly below the Ruler. The left edge of the paper is at the left edge of the screen below the zero mark on the ruler. If you scroll to the right using the scroll bar at the bottom of the window, you will encounter the right edge of the paper. You can use the Ruler to see just how wide the paper is.
- **The Ruler shows your left and right margins with respect to the paper width**. The left and right margins have a marble background on the Ruler. The region between the margins on the Ruler has a white background.
- **The Ruler shows the current left and right indentation positions**. There are two upward pointing purple indentation markers on the ruler. These markers, the *Left Indent Marker* and the *Right Indent Marker*, indicate the current left and right indentation positions.
- **The Ruler shows the current first line of paragraph indentation position**. There is one downward pointing purple indentation marker on the ruler. This marker, the *Paragraph Indent Marker*, indicates the left indent position for the first line of the current paragraph.
- **The Ruler shows tab stops**. The tab stops are located directly below the ruler as a series of dark triangles. Each triangle represents a tab stop.
- **The Ruler shows shift-tab stops**.The shift-tab stops are located directly below the ruler as a series of white triangles. The shift-tab stops work exactly the same as normal tab stops. They simply provide an extra set of independent tabs stops. Consultant uses shift-tab stops so you can have tab stops within shift-tab stops. Shift-tab stops are useful for formatting labels.

The remainder of this section will describe how to set left and right margins, set the left/right indentation positions. set tab stops, set shift-tab stops, use tab stops, and use shift-tab stops.

Set The Left And Right Indentation Positions

There are two Indent Markers on the Ruler for adjusting the indentation of your text. To adjust the Left or Right Indentation of your text, do the following:

1. **Position the text cursor in your document at the point where you want to adjust the indentation**.
2. **OR select the body of text whose indentation you want to adjust**.
3. **Click and hold the mouse button down on the Left or Right Indent Marker on the Ruler**. A vertical line will appear throughout the text region of your document to indicate the current indentation position.
4. **Drag the Left or Right Indent Marker to its new position while holding down the mouse button**. The vertical line will move as you drag.
5. **Release the mouse button**. If you did not select any text, the indentation change will affect all the text from the cursor to the end of the document. If you did select a body of text, only the selected lines will be affected.

Set The First Line Of Paragraph Indentation Position

Use the Paragraph Indent Marker to change the indentation of the first line of your paragraphs. If a paragraph has more than one line, the remaining lines will be unaffected.

1. **Position the text cursor in your document at the point where you want to adjust the indentation**.
2. **OR select the body of text whose indentation you want to adjust**.
3. **Click and hold the mouse button down on the Paragraph Indent Marker in the Ruler**. A vertical line will appear throughout the text region of your document to indicate the current indentation position.

4. **Drag the Left or Right Indent Marker to its new position while holding down the mouse button**. The vertical line will move as you drag.
5. **Release the mouse button**. f you did not select any text, the indentation change will affect all the text from the cursor to the end of the document. If you did select a body of text, only the selected lines will be affected.

Set Tab Stops

You may set up to 100 tab stops anywhere you would like along the Ruler. Each tab stop must be set on a 1/16 inch scale. Not only can you add a tab stop, but you can change the position of a current tab stop and delete a tab stop.

Add A Tab Stop

1. **Position the mouse pointer along the bottom side of the ruler where the tab stops are located**. The mouse pointer will turn into a dark triangle to indicate you can set a tab stop.
2. **Click at the position where you would like to set a tab stop**. A new tab stop will be added.

Reposition A Tab Stop

1. **Position the mouse pointer on top of the tab stop you would like to reposition**. The mouse pointer will turn into a dark triangle with a pair of left/right arrows under the triangle.
2. **Click and hold the mouse button down to select the tab stop**. A vertical line will appear throughout the document to indicate the selected tab stop position.
3. **Drag the tab stop to its new location**. The vertical line will move as you drag.
4. **Release the mouse button**. The selected tab stop will move to its new location.

Delete A Tab Stop

1. **Position the mouse pointer on top of the tab stop you would like to delete**. The mouse pointer will turn into a dark triangle with a pair of left/right arrows under the triangle.
2. **Click and hold the mouse button down to select the tab stop**. A vertical line will appear throughout the document to indicate the selected tab stop position.
3. **Drag the tab stop left or right until you are past the edge of the window**. The vertical line will move as you drag and will disappear once you are past the edge of the window.
4. **Release the mouse button**. The selected tab stop be deleted.

Set Shift-Tab Stops

Shift-tab stops work exactly the same way as normal tab stops with two exceptions.

- Shift-tab stops show up as white triangles instead of dark triangles.
- You must hold down the shift key on the keyboard as click to add a new shift-tab stop.

Use Tab Stops

Once you have the tab stops you want in place, using the tab stops to align text is easy.

1. **Press the Tab key on the keyboard to advance the text cursor to the position of the next tab stop**.

Use Shift-Tab Stops

Once you have the shift-tab stops you want in place, using shift-tab stops to align text is easy.

1. **Press the Tab key on the keyboard while holding down the Shift key to advance the text cursor to the position of the next shift-tab stop**. Please note that when you press Shift-Tab, the text cursor will skip past any normal tab stops to the next shift-tab stop.

Layout Tools

This section describes what the Layout tools are and how to use them. The Layout Tools are available in any text document, the Journal View, and the Memo View. They are also available from the Text Tools floating palette.

1. **Click the Layout button to show or hide the Layout tools**. Four Layout tools will appear: 1) the Type button; 2) the Page Layout button; 3) the Align button; and 4) the Line Spacing button. Each time you click the Layout button the Layout tools will toggle on and off.

Before you use the Layout tools, you will want to understand the four layouts types that Consultant supports. The layout type you choose depends upon the objective for the document.

- **Normal**. Choose the Normal layout type if your document consists of fixed size pages. The Normal layout gives you a document that consists of one or more pages and has left, right, top, and bottom margins. This is the most common format and resembles a typical word processing document.
- **Fit To Window**. Choose the Fit To Window layout type if your document does not have page boundaries and does not have margins. The Fit To Window layout is useful for looking at documents where page boundaries aren't important. The width of the document will self-adjust to the width of the window instead of a specified page width. You will typically only choose this Layout for documents that you won't be printing.
- **Envelope**. Choose the Envelope layout type if you want to print one or more envelopes.
- **Labels**. Choose the Label layout type if you want to print one or more labels.

Please note that the Journal View and the Memo View only offer the Normal and Fit To Window layout types.

The remainder of this section will describe how to choose a layout type for your document, set the layout characteristics for the type you choose, set the alignment for text, set the line spacing for text, choose a standard envelope size, and choose a standard label format.

The Type Button

Use the Type button to choose the layout type for your document.

1. **Click and hold the mouse button down on the Type button to see the layout types**. A pop-up menu will appear and list the four layout types: 1) Normal; 2) Fit To Window; 3) Envelope; and 4) Labels. Please note that the Journal View and the Memo View only offer the Normal and Fit To Window layout types.

2. **Choose a layout type and release the mouse button**. Your document will change to reflect the selected layout type.

   If you choose the Envelope layout type, an Envelope Sizes button will appear as the last Layout tool. The Envelope Size button is explained later in this section. The body of the document will also change to the size of an envelope.

   If you choose the Labels layout type, an Avery Labels button will appear as the last Layout tool. The Avery Labels button is explained later in this section. The body of the document will change to represent a single label.

The Page Layout Button

Use the Page Layout button to set the characteristics for your chosen layout type. The characteristics you may set include page size, margins, tab widths, and label settings.

1. **Click the Page Layout button to set the layout characteristics for the current layout type**. If the current layout type is Normal, the Normal Page Layout dialog box will appear. If the current layout type is Fit To Window, the Fit To Window Page Layout dialog box will appear. If the current layout type is Envelope, the Envelope Page Layout dialog box will appear. If the current layout type is Labels, the Labels Page Layout dialog box will appear.
2. **Set the page layout characteristics in the Page Layout dialog box that appears**.
3. **Click the OK button to make your settings effective**.

The page layout dialog box for each layout type is explained below.

Normal Page Layout Dialog Box

Use the Normal Page Layout dialog box to control how your document will look on the screen and print. You have several characteristics that you may change.

- **Page Size**. Enter the width and height of your document's page.
- **Margins**. Enter the left, right, top, and bottom margin sizes.
- **Tab Width**. Enter the tab width you wish to have repeated starting from the left margin. If you change the value in this field, all current tab stops will be removed and new ones will be added according to your the field width. If you don't change the value in this field, all current tab stops will remain intact. In other words, use this setting to quickly add a series of evenly spaced tab stops. There is also a similar setting for shift-tab stops.

Fit To Window Page Layout Dialog Box

Use the Fit To Window Layout dialog box to control how your document will look on the screen. You have one characteristic that you may change.

- **Tab Width**. Enter the tab width you wish to have repeated starting from the left margin. If you change the value in this field, all current tab stops will be removed and new ones will be added according to your the field width. If you don't change the value in this field, all current tab stops will remain intact. In other words, use this setting to quickly add a series of evenly spaced tab stops. There is also a similar setting for shift-tab stops.

Envelope Page Layout Dialog Box

Use the Envelope Page Layout dialog box to control how envelopes will print. You have several characteristics that you may change.

- **Envelope Size**. Enter the width and height of your envelope.
- **Margins**. Enter the left, right, top, and bottom margin sizes for your envelope.
- **Tab Width**. Enter the tab width you wish to have repeated starting from the left margin. If you change the value in this field, all current tab stops will be removed and new ones will be added according to your the field width. If you don't change the value in this field, all current tab stops will remain intact. In other words, use this setting to quickly add a series of evenly spaced tab stops. There is also a similar setting for shift-tab stops.

Labels Page Layout Dialog Box

Use the Labels Page Layout dialog box to control how labels will print. You have several characteristics that you may change.

- **Page Size**. Enter the width and height of the page containing the labels.
- **Margins**. Enter the left, right, top, and bottom margin sizes for the page.
- **Label Size**. Enter the width and height of each individual label.
- **Label Layout**. Enter the number of rows of labels and the number of columns of labels on a page. You may also specify which label on the page you would like to start from.
- **Tab Width**. Enter the tab width you wish to have repeated starting from the left margin. If you change the value in this field, all current tab stops will be removed and new ones will be added according to your the field width. If you don't change the value in this field, all current tab stops will remain intact. In other words, use this setting to quickly add a series of evenly spaced tab stops.

  You will not be able to enter the tab width for the shift-tab stops since Consultant uses shift-tab stops to separate labels. Please also note that tabs work a little differently for labels. First, all tab stops start over at the left edge of each label rather than at the left margin of the paper. Second, you can't drag tabs in the Ruler to move them. This means all tab stops must be set here in the Labels Page Layout dialog box.

The Align Button

Use the Align button to change the alignment of your text. If you want to change the alignment for existing text, select it first.

1. **Click and hold the mouse button down on the Align button**. A pop-up menu will appear and list the your alignment options.
2. **Choose an alignment from the menu and release the mouse button**. Choose "Default" if you want the text processor to automatically select the default alignment for your script system. Most Roman scripts, for example, are left aligned by default. The Hebrew script, on the other hand, is right aligned by default. If you have text selected, the selected text will reflect the new alignment. If you don't have any selected text, all newly typed text at the current text cursor position will be aligned according to your choice.

The Line Spacing Button

Use the Line Spacing button to choose the amount of spacing you would like between lines. You can choose between single spacing, one and one-half spacing, or double-spacing. If you want to change the line spacing for existing text, select it first.

1. **Click and hold the mouse button down on the Line Spacing button**. A pop-up menu will appear and list the your spacing options.
2. **Choose a line spacing amount from the menu and release the mouse button**. If you have text selected, the selected text will reflect the new line spacing amount. If you don't have any selected text, all newly typed text at the current text cursor position will be line spaced according to your choice.

The Envelope Sizes Button

If the current layout type is Envelope, the Envelope Size button will appear as the last Layout tool. Use the Envelope Size button to choose the size of the envelope. Several standard sizes are available, as well as custom sizes.

1. **Click and hold the mouse button down on the Envelope Size button**. A pop-up menu will appear and list several standard envelope sizes.
2. **Choose your desired envelope size from the menu and release the mouse button**. The envelope on the screen will change to reflect your choice. Choose "Custom" if you want to specify an envelope size that is not listed. For custom envelope sizes you will need to specify the size of the envelope and its margins.

The Avery Labels Button

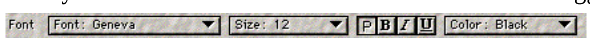
If the current layout type is Labels, the Avery Labels button will appear as the last Layout tool. Use the Avery Labels button to choose the type of labels you will be printing. Several standard sizes are available, as well as custom sizes.

1. **Click and hold the mouse button down on the Avery Labels button**. A pop-up menu will appear and list several standard label types.
2. **Choose your desired label type from the menu and release the mouse button**. The label on the screen will change to reflect the size of the label you chose. Choose "Custom" if you want to define your own label type. For custom labels you will need to specify a page size, the number of rows of labels, the number of columns of labels, the page margins, and the start label.

Font Tools

This section describes what the Font tools are and how to use them. The Font Tools are available in any text document, the Journal View, and the Memo View. They are also available from the Text Tools floating palette.

1. **Click the Font button to show or hide the Font tools**. Four Font tools will appear: 1) the Font button; 2) the Font Size button; 3) the Font Style buttons; and 4) the Font Color button. Each time you click the Font button the Font tools will toggle on and off.



The Font tools provide a quick and easy way to change the font, font size, font style, and font color of text. Each of the Font tools is explained below.

The Font Button

Use the Font button to change the font. All newly typed text will appear in the font displayed on the Font button. If you want to change the font of existing text, select it first.

1. **Click and hold the mouse button down on the Font button**. A pop-up menu will appear and list all fonts installed on your system.
2. **Choose a font from the menu and release the mouse button**. The font you chose will appear on the Font button. If you have text selected, the selected text will reflect the new font. If you don't have any selected text, all newly typed text at the current text cursor position will be in your selected font.

The Font Size Button

Use the Font Size button to change the font size. All newly typed text will appear in the font size displayed on the Font Size button. If you want to change the font size of existing text, select it first.

1. **Click and hold the mouse button down on the Font Size button**. A pop-up menu will appear and list all several standard font sizes.
2. **Choose a font size from the menu and release the mouse button**. If the font size you want is not listed, choose "Other." You can then enter the font size you want. The font size you choose will appear on the Font Size button. If you have text selected, the selected text will reflect the new font size. If you don't have any selected text, all newly typed text at the current text cursor position will be in your selected font size.

The Font Style Buttons

Use the Font Style buttons to change the font style. Consultant supports four font styles: 1) Plain denoted by the “P” button; 2) Bold denoted by the “B” button; 3) Italic denoted by the “I” button; and 4) Underline denoted by the “U” button. All newly typed text will appear in the selected font styles. If you want to change the font style of existing text, select it first.

1. **Select the font styles you want**. You can select more than one font style at a time except for the Plain button. When you select the Plain button the other three buttons, if selected, will become deselected. If you have text selected, the selected text will reflect the selected font styles. If you don’t have any selected text, all newly typed text at the current text cursor position will be in your selected font styles.

The Font Color Button

Use the Font Color button to change the font color. All newly typed text will appear in the font color displayed on the Font Color button. If you want to change the font color of existing text, select it first.

1. **Click and hold the mouse button down on the Font Color button**. A pop-up menu will appear and list all several standard font colors.
2. **Choose a font color from the menu and release the mouse button**. If the font color you want is not listed, choose “Other.” You can then select the exact font color you want using the standard Color Picker. The font color you choose will appear on the Font Color button. If you have text selected, the selected text will reflect the new font color. If you don’t have any selected text, all newly typed text at the current text cursor position will be in your selected font color.

Indent Tools

This section describes what the Indent tools are and how to use them. The Indent Tools are available in any text document, the Journal View, and the Memo View. They are also available from the Text Tools floating palette.

1. **Click the Indent button to show or hide the Indent tools**. Seven Indent tools will appear: 1) the None button; 2) the Indent In button; 3) the Indent Out button; 4) the Block Indent In button; 5) the Block Indent Out button; 6) the Bullet Indent In button; and 7) the Bullet Indent Out button. Each time you click the Indent button the Indent tools will toggle on and off.

The Indent tools provide a way to quickly indent text. Each of the Indent tools is explained below.

The None Button

Use the None button to remove all indentation from text. All newly typed text will appear without indentation. If you want to change the indentation of existing text, select it first.

1. **Click the None button to remove all indentation from text**. If you have text selected, the selected text will no longer be indented. If you don’t have any selected text, all newly typed text at the current text cursor position will be without indentation.

The Indent In / Indent Out Buttons

Use the Indent In button to indent the left edge of the text right one tab stop. Use the Indent Out button to indent the left edge of the text left one tab stop. All newly typed text will reflect the indentation. If you want to change the indentation of existing text, select it first.

1. **Click the Indent In button or Indent Out button to indent the text**. If you have text selected, the selected text will be accordingly indented. If you don't have any selected text, all newly typed text at the current text cursor position will be indented accordingly.

The Block Indent In / Block Indent Out Buttons

Use the Block Indent In button to indent both the left and right edges of the text in one tab stop. Use the Block Indent Out button to indent both the left and right edges of the text out one tab stop. All newly typed text will reflect the indentation. If you want to change the indentation of existing text, select it first.

1. **Click the Block Indent In button or Block Indent Out button to indent the text**. If you have text selected, the selected text will be accordingly indented. If you don't have any selected text, all newly typed text at the current text cursor position will be indented accordingly.

The Bullet Indent In / Bullet Indent Out Button

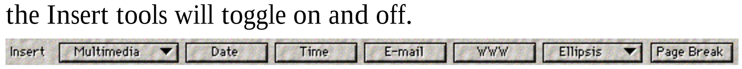
Use the Bullet Indent In button to indent the left edge of the text in one tab stop and add a bullet to the first line of the paragraph. Use the Bullet Indent Out button to indent the left edge of the text out one tab stop and add a bullet to the first line of the paragraph. When the Bullet Indent Out reaches the left margin, the bullet will disappear since there is no longer any indentation. All newly typed text will reflect the indentation. If you want to change the indentation of existing text, select it first.

1. **Click the Indent In button or Indent Out button to indent the text**. If you have text selected, the selected text will be accordingly indented. If you don't have any selected text, all newly typed text at the current text cursor position will be indented accordingly.

Insert Tools

This section describes what the Insert tools are and how to use them. The Insert Tools are available in any text document, the Journal View, and the Memo View. They are also available from the Text Tools floating palette.

1. **Click the Indent button to show or hide the Indent tools**. Seven Insert tools will appear: 1) the Multimedia button; 2) the Date button; 3) the Time button; 4) the E-mail button; 5) the WWW button; 6) the Ellipsis button; and 7) the Page Break button. Each time you click the Insert button the Insert tools will toggle on and off.



The Insert tools provide a way to insert special objects into a text document. They allow, for example, pictures, sounds, files, e-mail addresses, web addresses, page breaks, etc., to be inserted into the text document. Each of the Insert tools is explained below.

The Multimedia Button

Use the Multimedia button to insert a picture, sound or file object into the text document. The picture, sound, or file object will be inserted at the current text cursor position.

1. **Click and hold the mouse button down on the Multimedia button**. A pop-up menu will appear and list the multimedia objects you can insert.
2. **Choose a multimedia object from the menu and release the mouse button**. The multimedia object you chose will be inserted at the current text cursor position.

   If you choose "Picture", a standard open dialog box will appear to let you select the picture you want to insert. The picture you select must be a 'PICT' file. The picture will be inserted into the text document.

If you choose “Sound”, a standard open dialog box will appear to let you select the sound you want to insert. The sound you select must be a standard sound file. An icon representing the sound will be inserted into the text document. You may double-click the sound icon to listen to the sound directly from the text document.

If you choose “File”, a standard open dialog box will appear to let you select the file you want to insert. You can select any type of document or application file. An icon representing the file you choose will be inserted into the text document. You may double-click the file icon to open the file if it is a document, or launch the file if it is an application directly from the text document.

The Date Button

1. **Click the Date button to insert the current date into the text**. The date will be inserted at the current text cursor position. The format of the date is determined from the Date & Time control panel.

The Time Button

1. **Click the Time button to insert the current time into the text**. The time will be inserted at the current text cursor position. The format of the time is determined from the Date & Time control panel.

The E-Mail Button

Use the E-mail button to insert an e-mail address into the text. An e-mail address that is inserted using this button will provide a hot link to your e-mail program. This means you can double-click the e-mail address in the text document while holding down the Command key to have Consultant automatically launch your e-mail program and create a new e-mail for the e-mail address.

1. **Click the E-mail button to insert a new e-mail address into the text**. The phrase “<mail to:>” will be inserted at the current text cursor position. The text cursor will be placed directly after “mail to:” so you can enter an e-mail address.
2. **Type an e-mail address**. The entire e-mail address between the angle brackets will appear in blue to indicate it is a hot link and should look something like “<mailto:support@chronosnet.com>”.

The WWW Button

Use the WWW button to insert a world wide web address or URL (Uniform Resource Locator) into the text. A web address that is inserted using this button will provide a hot link to your web browser. This means you can double-click the web address in the text document while holding down the Command key to have Consultant automatically launch your web browser and display the web address.

1. **Click the WWW button to insert a new web address into the text**. The phrase “<http://>” will be inserted at the current text cursor position. The text cursor will be placed directly after “http://” so you can enter a web address.
2. **Type a web address**. The entire web address between the angle brackets will appear in blue to indicate it is a hot link and should look something like “<http://www.chronosnet.com>”.

The Ellipsis Button

Use the Ellipsis button to insert tabs or shift-tabs with a dot as the leader character. Normally when you press Tab on the keyboard, the text cursor jumps to the next Tab position leaving a trail of blank spaces behind it. Use the Ellipsis button to leave a trail of dots or periods instead.

1. **Click and hold the mouse button down on the Ellipsis button**. A pop-up menu will appear and list two choices: 1) Ellipsis Tab; and 2) Ellipsis Shift-Tab.
2. **Choose the type of ellipsis tab you would like to insert from the menu and release the mouse button**. The selected tab will be inserted in the text document at the current text cursor position.

You needn't select an ellipsis tab from the Ellipsis button. You can, instead, press Option-Tab or Option-Shift-Tab on the keyboard.

The Page Break Button

Use the Page Break button to insert a page break into the text document at the current text cursor position. This type of page break is known as a *hard* page break since it was forced by the user. While normal page breaks, known as *soft* page breaks, appear as a single horizontal line, hard page breaks appear as a double horizontal line. Hard page breaks are useful when you want some text to start at the top of a page.

1. **Click the Page Break button to insert a hard page break into the text**. A double horizontal line will appear at the current text cursor position to indicate a new page break.

Template Tools

This section describes what the Template tools are and how to use them. The Template Tools are only available in a text document.

1. **Click the Template button to show or hide the Template tools**. Five Template tools will appear: 1) the Activity Fields button; 2) the Contact Fields button; 3) the Phone/Custom Fields button; 4) the My Info button; and 5) the Other Fields button. Each time you click the Template button the Template tools will toggle on and off.

The Template tools provide the means to insert or embed fields into a text document which can later be filled in by Consultant. Text documents that have embedded fields are called *Templates*. Although, Templates have a special name, they are nothing more than text documents.

The purpose of Templates is to construct a document that you can later generate personalized reports from with information from activities or contacts stored in Consultant. Suppose, for example, that you wish to send a personalized letter to ten contacts. You could type the letter, copy it ten times, and then change the name/address in each of the ten letters. This does, of course, sound like unnecessary work. Instead, you could write the letter and embed name and address fields. In other words, you could create a Template. Once you have created the Template, you can tell Consultant to automatically generate ten personalized letters from a select list of ten contacts. Consultant will create ten letters with each letter filled in with the name and address fields from one of the ten contacts.

Consultant comes standard with Templates for activity reports, address books, fax cover sheets, envelopes, labels, etc. Consultant will generate a filled in text document from a Template by using information from a list of activity or contact objects. A Template can only contain activity related or contact related fields, but not both. The activity or contact list can come from a calendar View, contact View, or can be specified when you generate a document from the Template.

When you insert or embed a field into a text document, the name of the field appears between brackets. The activity title field would, for example, appear as "[Activity Title]".

This section will explain how to use the Template tools to insert or embed fields (including the special repeat fields) into a text document and thus create a Template. It will start by describing each of the Template fields, and end by describing a unique prefix/suffix feature that many Template fields have.

The Activity Fields Button

Use the Activity Fields button to insert activity related fields into a text document. Please note that if you insert an activity related field, you shouldn't insert any contact related fields into the same document.

1. **Click and hold the mouse button down on the Activity Fields button**. A pop-up menu will appear and list all the fields that comprise an activity object that you can insert.
2. **Choose a field from the menu and release the mouse button**. The selected field will be inserted in the text document at the current text cursor position.

TABLE 12. "Template Activity Fields" lists all the fields that comprise an activity object that you can insert into a text document.

TABLE 12. Template Activity Fields

Field	Example When Filled In
Activity Title	Draft proposal for ABC Inc.
Activity Date	March 16, 1998 - March 20, 1998
Activity Time	1:30 PM - 5:15 PM
Start Date	Monday, 16 March 1998
End Date	Monday, 16 March 1998
Start Time	1:30 PM
End Time	5:15 PM
Banner	Banner
Priority	High
To-Do Status	Completed
Alarm Time	1:25 AM

The Contact Fields Button

Use the Contact Fields button to insert contact related fields into a text document. Please note that if you insert a contact related field, you shouldn't insert any activity related fields into the same document.

1. **Click and hold the mouse button down on the Contact Fields button**. A pop-up menu will appear and list all the fields that comprise a contact object that you can insert.
2. **Choose a field from the menu and release the mouse button**. The selected field will be inserted in the text document at the current text cursor position.

TABLE 13. "Template Contact Fields" lists all the fields that comprise a contact object that you can insert into a text document.

TABLE 13. Template Contact Fields

Field	Example When Filled In
Prefix	Mr.

TABLE 13. Template Contact Fields

Field	Example When Filled In
First Name	John
Last Name	Smith
Company	ABC Inc.
Department	Sales
Position Title	Manager
1st Address Line 1	53rd Jefferson Lane
1st Address Line 2	Suite 200
1st City	San Diego
1st State	CA
1st Zip Code	64032
1st Country	U.S.A.
2nd Address Line 1	400 North 22 West
2nd Address Line 2	Suite 101
2nd City	Sandy
2nd State	Utah
2nd Zip Code	84092
2nd Country	U.S.A.

The Phone / Custom Fields Button

Use the Phone/Custom Fields button to insert the phone/custom fields into a text document. The phone/custom fields are contact/related fields. Please note that if you insert a contact related field, you shouldn't insert any activity related fields into the same document.

1. **Click and hold the mouse button down on the Phone/Custom Fields button**. A pop-up menu will appear and list all the phone/custom fields in a contact object that you can insert.
2. **Choose a field from the menu and release the mouse button**. The selected field will be inserted in the text document at the current text cursor position.

TABLE 14. "Template Phone/Custom Fields" lists all the phone/custom fields in a contact object that you can insert into a text document.

TABLE 14. Template Phone / Custom Fields

Field	Example When Filled In
Phone 1 to 8	801-957-1774
Custom 1 to 8	chronos@chronosnet.com

TABLE 14. Template Phone / Custom Fields

Field	Example When Filled In
Fax	801-957-1FAX Please Note: The Fax field will use the first phone number it finds that is of type “Phone (Fax).”

The My Info Button

Use the My Info button to insert your personal information into a text document. Your personal information is found on the Personal Information Preferences page in the Preferences dialog box. For more information on this preference see *Personal Info Preferences* in Chapter *Preferences* on page 187. The most common use for these personal information fields is to insert your return address when you create an envelope Template.

1. **Click and hold the mouse button down on the My Info button**. A pop-up menu will appear and list all the fields in your personal information.
2. **Choose a field from the menu and release the mouse button**. The selected field will be inserted in the text document at the current text cursor position.

TABLE 15. “Template Personal Information Fields” lists all the fields that comprise a contact object that you can insert into a text document.

TABLE 15. Template Personal Information Fields

Field	Example When Filled In
Prefix	Mrs.
First Name	Jane
Last Name	Smith
Company	Chronos L.C.
Position Title	Vice President
Address Line 1	1092 Fir Avenue
Address Line 2	Suite 100
City	Provo
State	Utah
Zip Code	84604
Country	U.S.A.
Phone	801-957-1774
Fax	801-957-2FAX

The Other Fields Button

Use the Other Fields button to insert a variety of miscellaneous fields into a text document. These other fields have a variety of purposes and functions which differ somewhat from other Template fields.

1. **Click and hold the mouse button down on the Other Fields button**. A pop-up menu will appear and list all the other fields that you can insert.
2. **Choose a field from the menu and release the mouse button**. The selected field will be inserted in the text document at the current text cursor position.

The Other Fields list is divided into related fields. This sub-section will describe the purpose and/or function of each field within its related group of fields.

- **Other Activity/Contact Fields**. Includes Icon, Category, User, Notes, and Links fields.
- **Other Link Fields**. Includes Links Start, Links End, Activity Link Start, Activity Link End, Contact Link Start, and Contact Link End fields.
- **Other Repeat Fields**. Includes Repeat Start, Repeat End, New Object, and X Columns fields.
- **Other Page Fields**. Includes Page Top, Page Break, and Offset 0.0 fields.
- **Other Indent Fields**. Includes Indent 0.0, Indent End, Bullet Indent 0.0/0.0, and Bullet Indent End fields.
- **Other Time/Date Fields**. Includes Current Time and Current Date fields.

Other Activity/Contact Fields

The Icon, Category, User, Notes, and Links fields are common to both activity and contact objects. You may therefore use these fields in both activity and contact Templates.

TABLE 16. "Template Other Activity/Contact Fields" describes these fields.

TABLE 16. Template Other Activity/Contact Fields

Field	Example When Filled In
Icon	
Category	Standard
User	John
Notes	Note: Notes appear in their entirety and formatted.
Links	Henry Malcolm • ABC Inc. • 355-9685 Write proposal • Tuesday, 10 March 1998 Note: The Links field is a short-cut for a series of other link related fields that more precisely control links in Templates. Consultant internally substitutes these other link related fields for the Links field. The Links field is equivalent to the following fields and text: [Links Start] [Activity Link Start] [Activity Title] • [Activity Date] • [Activity Time] [Activity Link End] [Contact Link Start] [First] [Last] • [Company] • [Ph1] [Contact Link End] [Links End] If you don't like the way the Links field displays Links, you can use the more precise link related fields to get exactly what you want.

Other Link Fields

Use the Link fields to precisely control how you want linked objects displayed. Templates currently only let you use linked activity and contact objects. This means linked documents and Memos won't show up in documents generated by Templates. As you know, every activity or contact object can have many activity or contact objects linked to it. The Link fields let you loop through each link and display it. The Other Link fields are common to both activity and contact objects. You may therefore use these fields in both activity and contact Templates.

TABLE 17. "Template Other Link Fields" describes how to use each of the Other Link fields.

TABLE 17. Template Other Link Fields

Field	How To Use
Links Start	Use this field to indicate that you wish to loop through every linked activity or contact object. Whenever you insert a Links Start field, there must be a corresponding Links End field. The block of text between the Links Start and Links End fields will be repeated for each linked object
Links End	Use this field to indicate where the block of text you want to repeat for each link ends.
Activity Link Start	Use this field to indicate the beginning of the block of text you want displayed for each activity link. This field must have a corresponding Activity Link End field. The block of text between these two fields will be used for each linked activity.
Activity Link End	Use this field to indicate where the block of text you want used for each activity object ends.
Contact Link Start	Use this field to indicate the beginning of the block of text you want displayed for each contact link. This field must have a corresponding Contact Link End field. The block of text between these two fields will be used for each linked contact.
Contact Link End	Use this field to indicate where the block of text you want used for each contact object ends.

Other Repeat Fields

Use the Repeat fields to create a Multi-Object Template. The Repeat Fields let you repeat a block of text for each activity or contact object in the list. There are four Repeat fields. These fields are not actually filled in with information from an activity or contact object. Their purpose is solely to specify the block of text that you want to repeat for each activity or contact object in your list. You may use Repeat fields for both activity and contact Templates. TABLE 18. "Template Other Repeat Fields" describes how to use each of the Repeat fields.

TABLE 18. Template Other Repeat Fields

Field	How To Use
Repeat Start	Use this field to indicate the beginning of the block of text that you want to repeat. Whenever you insert a Repeat Start field, there must be a corresponding Repeat End field to specify where the block of text ends.
Repeat End	Use this field to indicate where the block of text you want to repeat ends.

TABLE 18. Template Other Repeat Fields

Field	How To Use
New Object	Use this field to indicate that the Template should use the next activity or contact object in the list. The New Object field must always be used between a Repeat Start field and a Repeat End field. You will, in almost all cases, insert the New Object field immediately after the Repeat Start field. If your Template contains more than one column, you will use the New Object field at the top of each column.
X Columns	Use this field to specify the number of columns of activity or contact objects in a repeated list. When you insert this field, you will need to change the “X” to a numerical value between 2 and 9. You will always insert the X Column field immediately preceding the Repeat Start Field. The typical format for a columnar list is as follows: [3 Columns] [Repeat Start] [New Object]<Shift-Tab>[New Object]<Shift-Tab>[[New Object] [Last]<Shift-Tab>[[Last]<Shift-Tab>[[Last] [Repeat End] Each line between the Repeat Start and Repeat End fields will have a Shift-Tab to separate the columns.

Other Page Fields

Use the Page fields to force the text that follows the Page field to start at the top of a new page. You may use Page fields for both activity and contact Templates. TABLE 19. “Template Other Page Fields” describes how to use each of the Page fields.

TABLE 19. Template Other Page Fields

Field	How To Use
Page Top	Use this field to have the Template insert a series of blank lines until the top of the next page is reached. The next line of text following the Page Top field will appear at the top of the new page.
Page Break	Use this field to have the Template perform an actual hard page break. The next line of text following the Page Break field will appear at the top of a new page.
Offset 0.0	Use this field to have the Template do a vertical tab downwards the specified distance from the top margin. You will need to change the “0.0” to the distance from the top margin in inches (2.5 inches). This field was specifically designed for labels and probably will not be useful elsewhere.

Other Indent Fields

Use the Indent fields to indent a block of text within the Template. You may Indent Page fields for both activity and contact Templates. TABLE 20. “Template Other Indent Fields” describes how to use each of the Indent fields.

TABLE 20. Template Other Indent Fields

Field	How To Use
Indent 0.0	Use this field to indicate the start of a block of text that you want to indent. You must use a corresponding Indent End to indicate the end of the block of text. You will need to change the “0.0” to specify how far from the left margin in inches you want to indent (0.5 inches).
Indent End	Use this field to indicate the end of a block of text that you want indented.
Bullet Indent 0.0/0.0	Use this field to indicate the start of a block of text that you want to bullet indent. You must use a corresponding Bullet Indent End to indicate the end of the block of text. You will need to change the first “0.0” to specify how far from the left margin you want the bullet to be (0.5 inches). You will need to change the second “0.0” to specify how far from the left margin you want the body of the block to be (1.0 inches).
Bullet Indent End	Use this field to indicate the end of a block of text that you want bullet indented.

Other Time / Date Fields

The Other Time/Date fields may be used for both activity and contact Templates. The Current Time field will be filled in with the current time when you generate the Template. The Current Date field will be filled in with the current date when you generate the Template.

TABLE 21. “Template Other Time/Date Fields” describes these fields.

TABLE 21. Template Other Time / Date Fields

Field	Example When Filled In
Current Time	March 12, 1998
Current Date	5:12 PM

Template Field Prefix / Suffix

When you insert a Template field into a text document it inserts the name of the field in between brackets. The company name field for a contact would thus appear as:

[Company]

When you later generate a document based on the Template, the [Company] field will be replaced by an actual contact’s company name. If the contact does not have the company name field filled in, then the [Company] field will be replaced with nothing as expected.

Suppose you have created a simple Template to generate a list of contacts. Further suppose that you want your list to include each contact’s company name, last name, and first name. Your template might therefore look something like the following:

[Repeat Start]
[New Object]
[Company] - [Last], [First]

[Repeat End]

When you generate a document based on this Template, you may not get the results you desired if some of your contacts do not have a company name typed in. The example list below shows what you might see.

XYZ Inc. - Smith, John
 - Dunsworth, Sue
Brand Marketing - Jones,

Notice how Sue Dunsworth does not have a company name which results in a space, a hyphen, and space, “ **-** “, preceding her name. Notice also how Jones from Brand Marketing does not have a first name which results in an extra comma and space, “, “, following the last name. In most cases, it would probably be better to not have these extraneous characters if the company name or first name is empty.

Consultant allows you embed a prefix and/or suffix in a field that will only be used if the field has something typed in. You specify a prefix or suffix by placing a phrase within quotes before or after the bracketed field name. In our example, we want to use a suffix in the company name field and a prefix in the first name field. The new company Template field would become [Company” **-** “]. The new first name Template field would become [“, “First]. Our new and improved Template would now appear as follows:

[Repeat Start]
[New Object]
[Company” - “][Last][“, “First]
[Repeat End]

A list generated from this new Template would look like:

XYZ Inc. - Smith, John
Dunsworth, Sue
Brand Marketing - Jones

The new list looks a lot cleaner. You can use both a prefix and a suffix for a field simultaneously. Make sure, however, that you don’t leave any extra spaces between brackets and quotes, or between quotes and field names. Also, remember that you can’t use a quote within a prefix or suffix since quotes indicate where the prefix/suffix begins and ends.

Generate A Document From A Template

This section will describe how to generate a document from a Template. Consultant can produce very powerful reports via Templates. Templates are text documents that contain embedded fields that Consultant can fill in. You can, for example, have a Letter Template that contains the body of a letter which you wish to send to a list of people. Rather than typing the name and address of the recipients at the top of the Letter, a Letter Template will contain embedded name and address fields. Consultant can then use the Letter Template to generate a series of personalized letters to your list of contacts.

Consultant comes with Templates for Activity Reports, Phone/Address Books, Contact Reports, Envelopes, Labels, Fax Covers, and Letters. Plus you can create your own custom Templates. This section will not describe how to make Templates. For information on how to create Templates see *The Other Fields Button* in Chapter *Text Documents* on page 176. This section will only describe how to generate a document from an existing Template.

There are two things you need to generate a document from a Template.

- **A Template**. You can use either a Template that came with Consultant or one that you created yourself. The Templates that came with Consultant are located in the Templates Folder which is located in the same folder that your Consultant application resides in. Consultant automatically lists all of the Templates in the Templates Folder under the "Text Templates" menu item in the File menu. You can place Templates that you create yourself anywhere on your hard disk(s) or within the Templates Folder. If you place a Template that you created in the Templates folder, it will automatically show up in the "Text Templates" menu the next time you launch Consultant.

- **A List of Activities Or Contacts**. As previously mentioned, a Template is a text document that contains embedded fields. When Consultant generates a document based on a Template, it will fill in those embedded fields with the information in an activity or contact object. You must, therefore, provide Consultant with the list of activity or contact objects that you want it to use to fill in these embedded fields.

  For example, suppose you have a Letter Template and a list of ten contacts. When you generate a document based on the Letter Template, the resulting document will contain ten copies of the letter – one personalized for each contact.

  Templates can use activities or contacts from any open calendar or contact View. If you try to generate a document using a Template from a View that contains both activity and contact objects, Consultant will only use those objects that are applicable to the Template.

There are two ways to generate a document from a Template.

- **Use the Text Template Menu.** You will probably use this method most often. You can use this method if the Template you intend to use is saved in the Templates folder.
- **Use the Template Wizard Button.** You must use this method if you've created your own template file and saved it outside of the Templates folder.

Text Template Menu

Consultant includes a number of predefined templates for creating activity lists, contact lists, letters, envelopes, address labels, fax covers, etc. These Templates are located in the Templates folder and can be accessed via the Text Template sub-menu which is found in the File menu.

To generate a document using a Template from the Text Template menu, do the following:

1. **Open a calendar or contact View.** Consultant can use the activity or contact objects currently showing in any View to fill in a Template. It will use the topmost View, so make sure that the View you want to use is the top window.
2. **Choose a Template from the Text Template sub-menu in the File menu.** Consultant will ask you if you want to fill in the Template with activities/contacts from the View you left open.
3. **Click the Yes button.** Consultant will open a new document window and generate the text by filling in the Template with information from the calendar/contact View. This process may take some time if the Template is big or if there are a lot of activity or contact objects in the View. Once complete, you may either save or print the newly generated document.

Template Wizard Button

If you create your own Template and save it outside of the Templates folder, it will not appear in the Text Template menu. In this case, you will use the Template Wizard button to generate a document from your Template.

The Template Wizard button is found in the upper right corner of every text document window. Since a Template is simply a text document that contains embedded Template fields, you may use the Template Wizard button with any document that contains embedded fields.

To generate a document using the Template Wizard button, do the following:

1. **Open a calendar or contact View.** Consultant can use the activity or contact objects currently showing in any View to fill in a Template. It will use the topmost View, so make sure that the View you want to use is the top window

2. **Open your Template file.**
3. **Click the Template Wizard button in the Template Window.**

   Consultant will ask you if you want to fill in the Template with activities/contacts from the View you left open.
4. **Click the Yes button.** Consultant will open a new document window and generate the text by filling in the Template with information from the calendar/contact View. This process may take some time if the Template is big or if there are a lot of activity or contact objects in the View. Once complete, you may either save or print the newly generated document.

Select A Single Activity Or Contact

If you only want to use a single activity or contact to fill in a Template, you should select the activity/contact in the open View before invoking the Template. Consultant will ask you whether you only want to use the selected object to fill in the Template.

This is particularly convenient when working with contacts. For example, you may want to create a Fax Cover sheet for one of your contacts. In this case, you would select the contact in the Contact Card View, then choose the Fax Cover template from the Text Template menu. A single fax cover sheet will be generated for the selected contact.

Select Activities Or Contacts Manually

If you choose to not use a calendar or contact View as the source of Template information, you will have to select your activities or contacts manually. This will be necessary if you do not open a calendar or contact View before invoking the Template, or if you click the No button when Consultant asks you if you want to fill in the Template with activities/contacts from the View you left open.

If you are filling in an activity Template, Consultant will display an activity selector dialog. This dialog allows you to choose the date range, the type of activities (Appointments, Events, To-Dos), and the Set. Consultant will use this information to build a list of activities, which it will use when filling in the Template.

If you are filling in a contact Template, Consultant will display a contact selector dialog. This dialog contains a Last Name button and a Company Name button. It also has a space to enter a “Match String”. If the Last Name button is selected, Consultant will compare your Match String to the first letters of the last name of every contact in your data file. If it finds a match, it will include that contact when it fills in the Template. For example, if your Match String is “Sm”, the last names “Smith”, “Smoot”, “Smally”, and “Smart” would all match. “DeSmoot” would NOT match. It uses the same process with company names if the Company Name button is selected. If you leave the Match String blank, Consultant will include ALL of your contacts.

Contact Templates

Contact Templates differ in one way from Activity Templates. Immediately before generating the new document from the contact Template, Consultant will display the list of contacts that it plans to use when filling in the Template. You may then refine the list by checking or unchecking certain contacts.

For example, suppose you have five contact records for individuals working at a certain company, but you only want to send letters to three of those individuals. Using the Contact List View, you create a list of everyone working at the company. Then you select the Letter Template from the Text Template menu. Consultant will add all five individuals to its list of contacts to use when filling in the Template. It will then show you the list and you can check only the three individuals who are to receive the letter.

Chapter 19
Preferences

The purpose of this chapter is to describe the Preferences dialog box which is the central location from which you can change settings that: 1) control the way information is displayed in calendar and contact Views; 2) customize Consultant to work the way you want it to.

SPECIAL NOTE: Each user in a file has his/her own preferences. Preferences for each user are stored in the file itself along with the user's activities and contacts. The Preferences dialog box always shows the preferences for you, the Primary User. In other words, you can’t change someone else’s preferences.

Topics Covered

- **Open The Preferences Dialog Box**. Explains the various ways you can access the Preferences dialog box.
- **Preferences Dialog Box Settings**. Details the settings in Preferences dialog box.

Open The Preferences Dialog Box

There are three ways to bring up the Preferences dialog box. The method you choose depends on which will be more convenient for you at the time.

- **Click the Preferences button on the Button Bar**. The main Preferences dialog box will appear. Note: there may or may not be a preferences button on the Button Bar depending upon how you've customized it.
- **Choose the Preferences menu item from the File menu**. The main Preferences dialog box will appear.
- **Click the Preferences short-cut button located in many of the calendar and contact Views**. In this case the main Preferences dialog box will not appear. Instead, only the Preferences page applicable to the current View will appear.

Preferences Dialog Box Settings

Consultant contains so many preferences that they have been divided into related categories. The main Preferences dialog box contains a button to quickly access preferences by category. Simply click the category button of the preferences you are interested in to see those preferences. If you access the Preferences dialog box via the short-cut Preferences button in a calendar or contact View, you will bypass the main Preferences window and directly see the preferences for the applicable category. There are many preferences categories.

- **Environment**. These preferences control such things as the Button Bar, security, window handling, and speech.
- **Appearance**. These preferences control settings such as the background texture, the help system, etc.
- **Database**. These preferences control how much of your memory will be used to hold your file in memory and how often Consultant will check for changes made by others to your file.
- **Personal Info**. These preferences hold your personal information which you can use in Templates for envelope printing, etc.

- **Activities**. These preferences let you control how Consultant manages your schedule.
- **Contacts**. These preferences let you control settings related to contact management.
- **Day/Multiday**. These preferences control the display of activities in the Day and Multiday Views.
- **Week**. These preferences control how activities are displayed in the Week View.
- **Month**. These preferences control how activities are displayed in the Month View.
- **List**. These preferences control how the List View is drawn.
- **Gantt**. These preferences control how activities are displayed in the Gantt View.
- **Text**. These preferences control the default characteristics of text documents you create and activity/contact/daily notes.
- **Fonts**. These preferences control the fonts and font style of text used throughout Consultant's Views.

Each of the above categories will be detailed in the following sub-sections.

Environment Preferences

These preferences control such things as the Button Bar, security, window handling, and speech.

- **Button Bar**. Use these preferences to control the number of buttons visible on the screen, the size of the buttons, and the position of the Button Bar on the Screen. There are two button sizes you may choose from: big and small. The advantage of the big buttons is the addition of a title at the bottom of each button. The advantage of the small buttons is that you can display more of them on the screen at once.
- **Delete Prompt**. Use this preference to choose if you want Consultant to display a confirmation message when you delete an activity or contact.
- **Password**. Use this preference to choose if you want Consultant to prompt you for a password each time you open your file. Please note that this preference only takes effect if there is only one user in the file. If there is more than one user, security is automatically turned on since Consultant must prompt for a user name to know who you are. If you are the only user in the file and you chose not to enter a name and password when you first created the file, then you are automatically assigned the name "User" with no password. This is important to know if you later turn on this preference and receive the name/password prompt.
- **Activity Window Reset**. Use this preference to choose to have the Activity Window collapse its expanded region each time it is closed, Selecting this preference is useful if you want to leave, for example, the Notes Region always open in the Activity Window. If you don't select this preference, the Activity Window will collapse to its smallest size each time it is closed.
- **Open Views**. Use this preference to choose how Consultant opens new Views. You have three choices. You can choose to have Consultant allow only one View open at a time. Under this setting, Consultant will automatically close other Views when you open a new View which reduces screen clutter. Or you can choose to have Consultant let you open as many Views as you want. Or you can choose to have Consultant only let you keep one View of each type open. Under this setting, for example, Consultant will only let you have one Day View, Month View, etc. open at a time. In other words, you couldn't have two Day Views open simultaneously.
- **Voice**. Use this preference to choose which voice Consultant should use when speaking our schedule, the current date/time, etc. You may choose from any of the voices installed in your System Folder. You may also enter the name Consultant uses to address you when speaking. If Consultant mispronounces your name, feel free to spell your name here phonetically. The speech manager must be installed on your system for the speech functions to work. Please also note that the speech manager automatically speaks some spellings as abbreviated words. In English, for example, the speech manager speaks the name "Jan" as "January." If this happens to you, try a different spelling such as "Jann."

Appearance Preferences

These preferences control settings such as the background texture, the help system, etc.

- **Window Texture**. Use this preference to choose which background texture Consultant should use to display Views and dialog boxes on the screen. Consultant comes standard with several textures to help you give Consultant a look and feel representative of your tastes. This type of customization is important for a program like Consultant because you will probably use it on a daily basis. Additional textures can be placed in the "Textures" folder which must be located in the same folder as the Consultant application. Additional textures can be obtained from Chronos L.C.'s website or you may create your own.

  If you decide to create your own textures, you will need to create three different variations of each texture: a light, medium, and dark variation. Consultant uses these three variations to create a 3D illusion on the screen. Each of the three textures needs to be a 64 by 64 pixel PICT. If a PICT is not this size, Consultant will resize it appropriately; however, each of the three PICTs should be the same size. These three PICTs should be named "Light", "Medium", and "Dark." The three PICTs should then be placed in a folder that is given the name of the texture. That folder is then placed in the "Textures" folder. Newly added textures will only be available for use once Consultant is relaunched.

- **Dynamic Buttons**. Use this preference to select a dynamic style of buttons for Consultant to use throughout its various Views and dialog boxes. The dynamic button automatically changes its 3D appearance when the mouse pointer hovers above it.
- **RealHelp**. Use this setting to select Consultant's RealHelp system and control how it works. When activated, RealHelp displays a help message at the bottom of the screen whenever you position the mouse over a button or region. A small pop-up label will also appear in yellow next to the button or region. If you disable RealHelp, but momentarily want to see a particular help message for a button or region, you can hold down the Command key as your mouse pointer hovers over the button or region.

  Select the Time and Date preference to have the current time and date displayed at the bottom of the screen whenever you position the mouse at the bottom of the screen.

  Finally, you can activate QuickTips to see a new tip on how to more effectively use Consultant every time you open your file.

Database Preferences

These preferences control how much of your memory will be used to hold your file in memory and how often Consultant will check for changes made by others to your file.

- **Record Cache**. Use this preference to set how much of your file Consultant can keep in memory. The portion of memory Consultant holds your file in is called the *cache*. Consultant is capable of working with files much larger than the amount of memory allocated to Consultant. There is, of course, a speed penalty if Consultant can not hold the entire file in memory because Consultant will have to read from your hard disk more often. And as most know, hard disks are slower than memory.

  The goal, therefore, is to hold as much as your file in the cache as possible. This preference will tell you much memory was originally available when Consultant first launched. It will also tell you much free memory is currently being used. Keep in mind that Consultant uses more memory each time you open a View or window. The most important figure Consultant tells you is how big the current cache is and how much of the cache is being used. You should try and set the cache size to be at least as large as your file for optimum performance. If you aren't able to make the cache size as big as you would like, you may have to increase the memory partition you assign to Consultant. For information on increasing the partition size assigned to an application, see your computer's owner manual.

- **Database Polling**. Use this setting to choose how often Consultant checks your file for changes made by others. Consultant allows multiple people to access the same file simultaneously. Another user may make changes that pertain to you. This preference lets you specify how often Consultant checks for such changes. There is a delicate balance going on here because there is a certain amount of processing and network time involved in checking for changes, so you don't want to check too often. On the other hand, you want Consultant to check often enough to keep your calendar and contacts up to date on your screen. Every fifteen to thirty minutes is probably suitable for most.

- **Backup & Compact**. Use this setting to have Consultant automatically backup and compact your file every time you quit Consultant. Crashes and other mishaps on your computer can corrupt or damage files. It is therefore always a good idea to keep a backup of your data. When Consultant backs up your file, it also compacts it which means it removes unused space from it. Unused space develops in a file when a record is deleted and the space it once occupied is later filled in by a smaller record. When this preference is enabled, Consultant will automatically produce a backup file named after your original file in the same folder as your original file. If you original file is called "My Calendar", the backup will be called "My CalendarBackup."

  For the technically inquisitive, Consultant performs two steps when it backups and compacts a file. First, Consultant backups and compacts the "Original" file into a file called "OriginalBackup." Then Consultant switches the two file's filenames so the "Original" file is now called "OriginalBackup" and the "OriginalBackup" file is now called "Original." This means the original file will be compacted the next time you use it and the backup file will contain the file before it was compacted. Why does Consultant do this? Two reasons. First, Consultant wants you to use the compacted file. Second, the backup file always represents your file before it was messed with by the compacting process and is thus a true backup.

Personal Info Preferences

These preferences hold your personal information which Consultant can use when it generates Templates for letters, envelopes, etc. For more information on how this personal information is used see *The My Info Button* in Chapter *Text Documents* on page 176.

Activities Preferences

These preferences let you control how Consultant manages your schedule.

- **To-Do Forwarding**. Use this preference to select if you want Consultant to automatically forward your uncompleted To-Dos to the current day. Please note that only single-day To-Dos are forwarded.
- **Conflict Scheduling**. Use this preference to select if you want Consultant to watch for conflicts on your schedule. If this setting is selected and a scheduling conflict occurs (one or more Appointments at the same time), a warning dialog box will appear. The warning dialog box will show you all the activities in conflict and will recommend the best earliest and latest times that you might want to reschedule the activity to. You will, of course, also be given the option to schedule the activity in spite of the conflict.
- **Alarms**. Use this preference to set how many times in a row audible alarms should sound when an alarm goes off.
- **Default Alarm**. Use this preference to select if every newly created activity should automatically have an alarm assigned to it. If you select this option, you can also set whether you want the alarm to be visual, audible, or both. You can also set how many minutes before the activity you want the alarm to be invoked.

Contacts Preferences

These preferences let you control settings related to contact management. In particular, many of these preference let you enable tools which will help you enter your information quicker.

- **SmartType**. Use this preference to enable SmartType. When SmartType is enabled, Consultant remembers what you have previously typed into select fields such as Last Name, Company Name, Country, etc., and will try to automatically complete the field based on what it remembers as you type. This feature can be a great time-saver since it reduces the amount you have to type.

- **Contact Drag & Drop**. Use this preference to select which title Consultant should use when you drag a contact to a calendar View and thereby create a new activity.
- **Dialing Port**. Use this preference to select which port your modem is connected to.
- **AutoFormat**. Use this preference to enable auto-formatting of names and phone numbers. When AutoFormat is enable, Consultant will automatically capitalize the first letter of Names, and will automatically format phone numbers according to standard formats. Please note that AutoFormat only works the first time you enter information into a field. If you later go back and edit a formatted field, Consultant will not perform auto-formatting a second time. Why? There may be instances when you temporarily don't want auto-formatting to occur. For example, sometimes the first letter of certain names isn't capitalized. Or you may have a phone number that doesn't fit a standard format. In these cases, you can simply go back and edit the field, rather than turn this preference off, edit your change, and turn it back on again.
- **Telephone Format**. Use this preference to define up to three phone number formats for your area. If you have the AutoFormat preference enabled, Consultant will try and match phone numbers you enter to one of the three formats. Consultant makes matches by comparing the number of numbers you enter with the number of number positions in the format. Number positions are denoted by a "#" symbol in the format. If Consultant finds a match, it will format the raw numbers into the appropriate format.
- **Phone/Internet Logging**. Use this preference to enable phone call and internet logging for contacts. When enabled, Consultant will place an entry in the contact's notes whenever you dial the contact's phone number, e-mail the contact, or go to the contact's web address.

Day / Multiday Preferences

These preferences control the display of activities in the Day and Multiday Views.

- **Start/End Hour**. Use this preference to set the range of hours in the Schedule region of the Day/ Multiday Views. These Views will begin displaying your schedule at the start time and will display as much of our Schedule Region as space permits. Furthermore, the range of hours you specify here will be displayed in a different background color so you can easily see your preferred work day.
- **Word Wrap**. Use this preference to enable word wrapping within the Schedule Region of the Day/ Multiday Views. When word wrapping is enabled Consultant will wrap long activity titles to the next line if space permits. Otherwise, the text will be cut off at the end of one line.
- **Title Icons**. Use this preference to have Consultant display the Notes, Links, and Alarm icons next to the activity title in the Day and Multiday Views if applicable.
- **Multiday View**. Use these preferences to set the default number of days the Multiday View displays and which day of the week the View starts with.
- **Business Week**. Use this preference to display a business week in the Multiday View. A business week is Monday through Friday (the weekends won't be shown).
- **Printing**. Use this preference to have Consultant print the gray background in the Schedule Region of the Day and Multiday Views.

Week Preferences

These preferences control how activities are displayed in the Week View.

- **Word Wrap**. Use this preference to enable word wrapping. When enabled, long activity titles will be wrapped to the next line. Otherwise as much of the title as possible will be displayed on a single line.
- **Title Icons**. Use this preference to have Consultant display the Notes, Links, and Alarm icons next to the activity title if applicable.
- **Time Format**. Use these preference to control how Appointments are displayed. There are two elements you can control. You can choose if you want the start time, end time, or both to be dis-

played. You can also choose how you want the am/pm indicator displayed.
- **Date Placement**. Use this preference to choose which corner of the day box you want the date to appear in.

Month Preferences

These preferences control how activities are displayed in the Month View.

- **Calendar**. Use this preference to enable or disable the display of weekends. This setting let's you see your month on a business week basis.
- **Word Wrap**. Use this preference to enable word wrapping. When enabled, long activity titles will be wrapped to the next line. Otherwise as much of the title as possible will be displayed on a single line.
- **Title Icons**. Use this preference to have Consultant display the Notes, Links, and Alarm icons next to the activity title if applicable.
- **Time Format**. Use these preference to control how Appointments are displayed. There are two elements you can control. You can choose if you want the start time, end time, or both to be displayed. You can also choose how you want the am/pm indicator displayed.
- **Date Placement**. Use this preference to choose which corner of the day box you want the date to appear in.

List Preferences

These preferences control how the List View is drawn.

- **Column Lines**. Use this preference to enable vertical line drawing between columns.
- **Shaded Rows**. Use this preference to enable shading on every other row to increase readability.

Gantt Preferences

These preferences control how activities are displayed in the Gantt View.

- **Gantt Bars**. Use these preferences to define how the horizontal bars that represent activities are displayed. You can choose if you want diamonds attached to the endpoints of each bar. You can also choose if you want the vertical space between bars condensed. Condensing the space allows more bars to fit on the screen.
- **Title Icons**. Use this preference to have Consultant display the Notes, Links, and Alarm icons next to the activity title if applicable.
- **Columns**. Use these preferences to control what information you see for each activity. The Title Region of the Gantt View contains up to five columns of information that you can choose to display. Use this preference to choose what appears in each column. You also can choose whether you want to see both the actual and projected times for each activity in which case two rows of information will be shown for each activity.

Text Preferences

These preferences control the default characteristics of text documents you create and activity/contact/daily notes.

- **Document Font**. Use these preferences to choose the default font and size for new text documents.
- **Notes Font**. Use these preferences to choose the default font and size for activity, contact, and daily notes.
- **Default Document Layout**. Use these preferences to set the default page size, margins, and tab stops for new text documents. Text documents have two types of tab stops: tab and shift-tab. This preference lets you set the two shift-tab stops. For more information on tab-stops see *Set Tab Stops* in Chapter *Text Documents* on page 165.
- **Paper Alignment (for printing)**. Use this preference to set the paper alignment position for print-

ing envelopes. Some printers expect the envelope to be left aligned, while others expect the envelope to be center or right aligned. You will have to consult your printer manual to determine the correct setting for your printer.

- **Fractional Widths**. Use this preference to enable fractional character widths for printing. Sometimes when you print a view or document, the printed version appears slightly different from what you see on screen. The reason for this phenomenon is because most printers operate at a higher resolution than a screen. A printer might have a resolution of 600 dots per inch (dpi), while a screen has a resolution of 72 dpi. This means the computer can more accurately adjust the space between the characters in a word on the printer than on the screen. When this setting is disabled, documents print exactly as they appear on the screen (at 72 dpi). When enabled, characters are placed more accurately for better looking text (slightly different than the screen).
- **Smart Quotes**. Use this preference to enable curved left and right quotation marks. When you normally type the quotation mark key, a straight quotation mark is used. Enable this setting if you would prefer to have Consultant automatically use curved left and right quotation marks.

Font Preferences

These preferences control the fonts and font style of text used throughout Consultant's Views. These are the fonts Consultant uses to display the dates, titles, and numbers it must display in various Views. These are not the fonts used to display activities and contacts. Sets control how activities and contacts are displayed.

You must exercise caution when choosing fonts and font sizes in these preferences. Many of Consultant's Views have limited space and if you choose a font that is too large, you may experience undesirable effects such as jumbled text, invisible text in the Contact Card View, garbage, etc. The main reason Consultant allows users to specify these preferences is so international users can choose a font appropriate to their script system.

Consultant lets you set the font, font size, and font styles for different text items in many different Views. This page contains a button for each text item that you can change. Simply click the button you want to change and a font chooser will appear from which you can select the font, font size, and font styles.

This page also lets you choose a color and font style for the current date and weekend dates that are found throughout Consultant's calendar Views.

- **Current Date**. Use this preference to set the font and color for the current date. The current date will be displayed in this font and color in the various calendar Views.
- **Weekend Dates**. Use this preference to set the font and color for weekend dates (Saturday and Sunday). The weekend dates will be displayed in this font and color in the various calendar Views.

Chapter 20

Printing

The purpose of this chapter is to describe Consultant's printing features and how to use them. Consultant can print your calendar, contact and text processing data in different formats. The format you choose depends on your purpose. Consultant supports two format types: 1) View Format; and 2) Text Processing Format.

- **View Formats**
  - Day View
  - Multiday View
  - Week View
  - Month View
  - Year View
  - Gantt View
  - List View
  - Contact List View
- **Text Processing Format**
  - Text Documents
  - Activity Report Templates
  - Phone/Address Books Templates
  - Contact Report Templates
  - Envelope Templates
  - Label Templates
  - Fax Cover Templates
  - Letter Templates
  - Custom Templates
  - Journal View
  - Memo View

Topics Covered

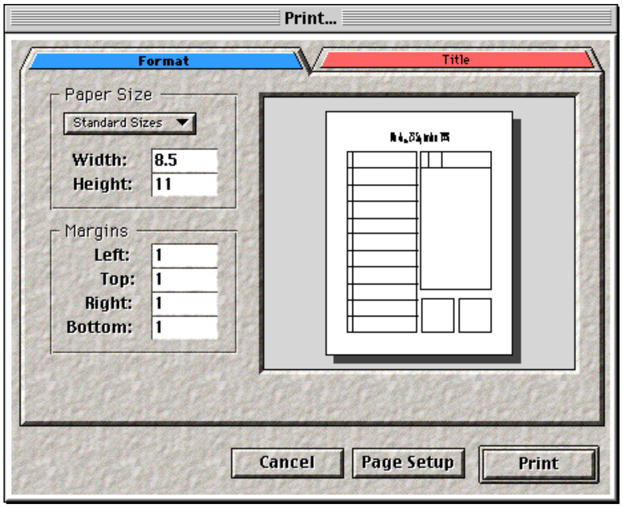
- **View Printouts**. Describes the various View Formats and how to print them.
- **Text Document Printouts**. Describes the various Text Processing Formats and how to print them.

View Printouts

This section will describe the various View printouts and how to print them. Consultant can directly print the Day, Multiday, Week, Month, Year, Gantt, List, and Contact List Views.

1. **Make sure the View you want to print is the top View**. If you have more than one View or window open, you may have to click and thereby bring to the front the View you want to print.

2. **Choose “Print” from the File menu**. The Print View dialog box will appear.



   This dialog box contains two pages: 1) The Format page; 2) The Title page. The Format page is used to set the paper size and margins. The Format page also shows a simple rendering of what the printed page will look like. The only purpose of the rendering is to show the View being printed, its paper orientation, its size, and a rough idea of how the margins will look. The Title page is used to specify any titles you want to print.

3. **Click the Format page folder tab to make sure the Format page is selected**. If the Format page is already shown, skip this step.

4. **Click the Page Setup button**. The standard Page Setup dialog box for your printer will appear. Make any necessary page setup changes such as paper orientation. If you change the paper orientation, the View rendering on the Format page will reflect your change. Exit the Page Setup dialog box when done.

5. **Choose a Paper Size from the Paper Size pop-up button**. If you don’t find the paper size you want, you may manually enter the paper size. The paper size you choose will be reflected in the View rendering as accurately as possible.

6. **Enter the margins for your paper size**. You can change the left, right, top and bottom margins. The selected View will be printed within these margins. You margin sizes will be reflected in the View rendering as accurately as possible. Make sure the margin sizes you choose are not too small for your printer. Most laser printers, for example, require at least a one-half inch top margin.

7. **Click the Title page folder tab to switch to that page**. Consultant lets you specify a left, center and right title to be printed at the top of the page. The Title page is where you specify what you want these titles to be.

8. **Click the type of title you want for the left, center, and right title positions**. You can specify one of four title types: 1) A custom title that you type in; 2) The default title; 3) The current time; 4) The current date. The default title for a View varies from View to View. The Month View for example will print the name of the month and the year as the default title.

9. **Choose the font, font size, and font style for each title position**.

10. **Click the Print button to print the View**. The standard Print dialog box for your printer will appear so you can specify a page range and the number of copies.

11. **Click the Print button**. The View will be printed.

Text Document Printouts

This section will describe the various text document printouts and how to print them. Consultant prints text documents directly from the window or View where they originate. There are three windows or Views in Consultant where text documents originate.

- **Text Document Window**. The Text Document Window is used for both normal text documents and documents generated from Templates. For more information on generating a text document from a Template see *Generate A Document From A Template* in Chapter *Text Documents* on page 181.
- **Journal View**.
- **Memo View**.

Printing a text document in Consultant is very simple.

1. **Make sure the window or View you want to print is the top View**. If you have more than one View or window open, you may have to click and thereby bring to the front the View you want to print.
2. **Make sure the Journal View is on the day you want to print or make sure the Memo View has the memo you want to print selected**.
3. **Choose “Print” from the File menu**. The standard Print dialog box for your printer will appear so you can specify a page range and the number of copies.
4. **Click the Print button**. Your document, Journal entry, or Memo will be printed.

Chapter 21

Windows

The purpose of this chapter is to describe how to manage the windows on your screen as you use Consultant.

Topics Covered

- **Button Bar**. Describes how to show and hide the Button Bar.
- **Duplicate View**. Describes how to open another View exactly like the current View.
- **Stagger Windows**. Describes how to have Consultant stagger all the open windows.
- **Tile Windows**. Describes how to have Consultant tile all the open windows.
- **Switch Between Windows**. Describes how to instantly bring one of your open windows to the top via the menu bar.

Button Bar

The Button Bar is normally visible on screen. You can, however, choose if you want it to be visible or hidden.

1. **Choose “Button Bar” from the Window menu to show/hide the Button Bar**. A check mark next to the “Button Bar” menu item indicates if it is currently visible.

Duplicate View

The Duplicate View command will open a new View that matches the type of the top-most View. Suppose, for example, that you currently have a Day View open and it is the top-most View. Further suppose that you want to open another Day View. You will use the Duplicate View command to open another Day View.

1. **Choose “Duplicate View” from the Window menu**. A new View will open that is of the same type as the current top-most View. Please note that the new View will open up to the current day.

You may wonder why you can’t just open another Day View by choosing “Day View” from the Calendar menu or clicking the “Day View” button on the Button Bar. The answer is that sometimes this would work, and sometimes it won’t. It all depends on the Open Views preference on the Environment page in the Preferences dialog box. If this preference is set to “1 View only” or “1 View of each type” the only way to open more than one Day View, for example, is via the Duplicate View command.

Stagger Windows

If you have more than one View open, use the Stagger Windows command to rearrange the windows on the screen one top of the other in a downward and to the right staggered position scheme. The Windows will also be resized so they are all the same size.

1. **Choose “Stagger Windows” from the Window menu**. The windows will reposition and resize in a staggered formation. The windows will remain in their current back to front order.

Tile Windows

If you have more than one View open, use the Tile Windows command to rearrange the windows from the left of the screen to the right of the screen so that each window is entirely visible. Each window will be resized to make room for all open windows.

1. **Choose "Tile Windows" from the Window menu**. The windows will reposition and resize in a tile formation. The windows will be ordered from left to right in their original back to front order.

Switch Between Windows

The last section of the Window menu in the menu bar lists all of the current open window. The windows are ordered from the back-most window to the front-most window. This means the top window is always at the bottom of the list. You will notice that a small check mark is placed next to the top View to indicate that it is the View you are currently working in.

This ordered list of windows is provided for two reasons. First, so you can see all the Views that are currently open. This is very useful since you may have a View that is hidden behind other Views. Second, so you can quickly bring any View forward and make it the top View. This is probably the easiest way to bring a View that is hidden behind others to the top.

Follow the below steps to select which of your open Views you want to be on top.

1. **Click and hold the mouse button down on the Window menu in the menu bar**. The Window menu will appear. The bottom section of this menu will list all the open windows. The current top window will have a check mark next to it.
2. **Choose the View that you want to become the top window on the screen**.
3. **Release the mouse button**. The selected View will appear on top of all the other open Views.

Chapter 22

Import, Export and Archive

The purpose of this chapter is to explain how to share information between Consultant and other programs. This chapter is especially useful if you have data from another program that you would like to import into Consultant or if you have data in Consultant that you would like to export for use in another program.

Topics Covered

- **Import**. Describes the process to import data from another application into Consultant.
- **Export**. Describes the process to export data from Consultant for use by another program.
- **Standard "TEXT" Files**. Describes the standard "TEXT" file that most programs use to share data.
- **Field Formats**. Lists the various fields and their corresponding formats that Consultant imports, exports and archives.

Consultant allows you to share information with other programs through its import/export facilities. These facilities are especially useful if you want to move time and contact information that you previously created in one or more other applications to Consultant. Besides the ability to share information, an archive facility lets you export old portions of your calendar data to decrease the amount of data in your files. Reducing the amount of data in your files will increase certain performance aspects of Consultant.

Consultant uses and creates standard Tab-delimited and Comma-delimited text files to import and export information. Tab and Comma delimited text files are a common way in the computer community to share information that was created by different programs. The basic idea behind these types of files is to place a Tab or Comma character between each separate piece of information.

Suppose, for example, that you want to share some simple address book information that consists of seven fields: first name, last name, street address, city, state, zip and phone number. To create a standard Tab-delimited text file that contains this information, type the information for each contact on its own line. For each contact on a line, separate the seven fields of information with the Tab key on the keyboard between each field and the Return key immediately after the last field. In the following two contact examples, <Tab> represents the Tab key on the keyboard and <Return> represents the Return key on the keyboard

> John<Tab>Smith<Tab>5632 N. Deco Way<Tab>Winson<Tab>UT<Tab>80293<Tab>801-343-2397<Return>
> Angie<Tab>McKibben<Tab>452 Florentine Drive<Tab>Telington<Tab>UT<Tab><Tab>801-987-2675<Return>

If you have a field that does not contain anything, you must still press the Tab key after the empty field unless it is the last field in which case you should press the Return key. Such is the case with Angie McKibben where her zip code is unknown and so one Tab immediately follows another Tab. The rule of thumb is that there should be one less Tab than there are fields, followed by a Return at the end of the line. All Tab or Comma delimited files should be saved as standard text files. For information on standard text files see *Standard "TEXT" Files* in Chapter *Import, Export and Archive* on page 199.

Most information management programs, including Consultant, can automatically create and read Tab and Comma delimited files. The only difference between Tab and Comma delimited files is the character that delimits the fields on each line. You must, however, be careful when you use Comma delimited files since they preclude the existence of commas in the field data. For example, the address "5632 N. Deco Way, #21" will not work in a Comma-delimited file since there is a comma character in the address.

There are some subtle differences in the ways that different programs read and write different fields. For example, one program may represent dates in the form “5/21/97” while another uses the form “May 21, 1997." Consultant recognizes several different formats for various fields. For a complete listing of the field formats that Consultant supports see *Field Formats* in Chapter *Import, Export and Archive* on page 200. Please note that not every field that Consultant has is available for export. Also note that Consultant may not have a corresponding field for every field that another program supports and vice versa. Thus, to exchange information between programs, you need to choose fields that are common to both programs.

You create and use Tab and Comma delimited files when you import and export. To use these standard delimited files, it helps greatly to understand their format as explained above. In particular, when you import and export information between programs, you need to know the delimiter so that you can match it up between the two programs that are to share data. In other words, you must ask yourself is the file Tab or Comma delimited? You also need to know which fields appear on a line and their sequence. One last note, a Tab or Comma delimited file can contain either calendar or contact data, but not both at the same time. This only makes sense since the two have very few fields in common and none that can uniquely distinguish the two.

Import

If you have calendar or contact data from another program that you want to transfer or move into Consultant, this means you want to import the data. To import data into Consultant, you must first create a Tab or Comma delimited file in the other program that has the data. For information on how to create such a file in your other software package you may have to refer to its user manual or call the company for help. Once you have a Tab or Comma delimited file that contains the data you want to import into Consultant, make an ordered list of the fields that comprise each line of the file. The following example illustrates the sequence of an example import file.

1. Activity Title
2. Start Time
3. End Time
4. Start Date
5. End Date

This section describes how to import the data from the file you have prepared.

1. **Choose “Import…” from the File menu to open the Import dialog box**. The Import dialog box will appear.
2. **Choose the Import Type.** Click the Activities button if you will be importing activities or the Contact button if you will be importing contacts. The All Fields List will gray out the fields that do not apply to your selection.
3. **Choose a Delimiter.** Click the Tab button if the delimiter in the file you are importing is a Tab. Click the Comma button if the delimiter in the file you are importing is a Comma.
4. **Click the Choose File button.** The Standard Open file dialog box will appear and list all ‘TEXT’ files. Use the familiar controls in that dialog box to locate the file you wish to import. If you are unable to locate the desired file and you know that it exists, verify that the file is a “TEXT” file. For information on “TEXT” files see *Standard “TEXT” Files* in Chapter *Import, Export and Archive* on page 199.

   Once you locate the file, click the dialog box's Open button to choose that file. The fields from the first line or record in your selected import file will appear in the Record Fields List. Consultant displays these fields to help you figure out what fields are in the import file and their sequence. The Import dialog box will even let you move forward to see the next record, backward to see the previous record. Click the Next Record and Previous Record buttons to view other records in the Record Fields List.

5. **Click the Skip First Record button if necessary**. Some import/export files contain the field names in the first record of the file. This is done so you can easily see what fields comprise each line of the file. You don't, of course, want to import this line so the Import dialog box gives you the option of skipping the first record.
6. **Specify the fields and their sequence**. You need to tell the Import dialog box what fields you plan to import and their sequence. These fields are specified in the Selected Fields List. You can use the information in the Record Fields List to help you determine what fields you need to add to the Selected Fields List.

   You will use the All Fields List, Selected Fields List, Insert button, Remove Button, Insert All button, and Remove All button to add fields to the Selected Fields List.

   - **All Fields List**. The All Fields List displays a list of the fields that you can import into Consultant. Depending on whether you are importing activities or contacts, some fields in this list will appear grayed out. Select a field in this list that you want to move over to the Selected Fields List. To quickly move a field from this list to the end of the Selected Fields List, double-click it. If your import file contains a field that Consultant does not support, use the Ignore Field at the top of the All Fields List.
   - **Selected Fields List**. The Selected Fields List displays a list of fields in the order they will be imported into Consultant.
   - **Insert Button**. Select a field in the All Fields List and the use this button to insert that field at the end of the Selected Fields List. If you prefer to insert the field at a position other than the end of the Selected Fields List, select the desired insert position in the Selected Fields List before you click the Insert button.
   - **Remove Button**. Click this button to remove a selected field from the Selected Fields List.
   - **Insert All Button**. Click this button to insert all the fields that aren't grayed out in the All Fields List into the Selected Fields List. This button provides a quick way to insert many fields at once into the Selected Fields List.
   - **Remove All Button**. Click this button to remove all the fields from the Selected Fields List. This button provides a quick way to start over.
7. **Click the Import button to import the file**. Consultant will begin by performing a pre-check of the file. It will check the file for records that contain the wrong number of fields. If it encounters a record that does not contain the proper number of fields it will ask if you want to skip that record. It will also ask if you want to skip all such records that contain the wrong number of fields.

   Once the pre-check is complete, Consultant will actually start importing the file. As the import progresses a Progress dialog box will indicate what percentage of the import has transpired.

   Once the import is complete, the Import dialog box will disappear. The activities or contacts that you imported will appear on your calendar or contact list. The import will use the standard or default Category unless a different Category is explicitly stated as one of the fields that comprise the import. If you are unable to locate the data you imported, switch to the Show All Set to make sure all categories are displayed.

Export

You can transfer any of the calendar or contact data that you have in Consultant to other programs by way of standard Tab or Comma delimited text files. This section describes how to export or transfer data from Consultant to a standard Tab or Comma delimited text file.

1. **Choose "Export…" from the File menu to open the Export dialog box**. The Export dialog box

appears as follows:

2. **Choose the Export Type.** Click the Activities button if you will be exporting activities or the Contact button if you will be exporting contacts. The All Fields List will gray out the fields that do not apply to your selection.
3. **Choose a Delimiter.** Click the Tab button if you want to use a Tab delimiter. Click the Comma button if you want to use a Comma delimiter.
4. **Select a Set**. You needn't export all of the calendar and contact data that you currently have open. You can select a Set to filter the exact set of activities or contacts you want to export. Click and hold the mouse button down on the Set button. A pop-up menu will appear and list all of the Primary User's Sets.
5. **Click the Insert Field Titles button to save the field titles as the first record.** Saving the field title as the first record is useful for the program that will import the file since that program can display the field titles and their sequence. You don't, of course, have to select this option.
6. **Click the Delete Records After Export button if you want Consultant to delete all of the records it exports.** As time passes, old activities will remain in your file that no longer apply to your present life. These old activities take up disk space and slow down some of Consultant's operations. They may also clutter and get in the way of some Views such as the List View. Consultant does not recommend that you delete old activities, since these past activities are in essence a history of the activities of your life and dealings with others. Rather than delete old calendar data, you can export it. Click the Delete Records After Export button to delete these records after they are exported. Please use this button with caution, however, since the records are permanently deleted.
7. **Click and thereby open the Date Range Shutter to specify the date range of the activities you want to export in the selected Set.** If the Date Range Shutter is closed, all activity objects in the current Set will be exported. If the Date Range Shutter is open, only the records that fall within the specified Date Range Shutter will be exported. Make sure you specify the proper date range if you select the Delete Records After Export button.
8. **Specify which fields you want to export and their order in the Selected Fields List**. Make sure the other program that will import the file supports the fields you decided on. Use the All Fields List, Insert button, Remove button, Insert All button and Remove All button to specify the fields and their order in the Selected Fields List.
9. **Click the Export button to create the export file**. The Save dialog box will appear. Use the familiar controls in that dialog box to specify the name and destination location of the export file. Once you have done this, click the Save button to proceed with the export. A Progress dialog box will indicate what percentage of the export has transpired.

   You will be alerted if an error occurs. Once the export is complete, the Export dialog box will disappear. An export file will be created at the location you specified in the Save dialog box. Although the export file uses Consultant's special export icon in the Macintosh Finder, it is a standard text file that any program that reads text files can read. For information on standard text files see *Standard "TEXT" Files* in Chapter *Import, Export and Archive* on page 199.

Standard "TEXT" Files

Every file that is created under the Mac OS has two file attributes. This section describes those two attributes and why the second attribute in particular is relevant to importing, exporting and archiving.

- **Creator Attribute**. Every file has a four byte identifier that represents the application that created the file. Apple Computer Inc. maintains a list of recognized creator identifiers. The Mac OS uses this identifier to display the correct icon for each file. It also uses this identifier to launch the correct application when you double-click a file that is not an application in the Finder.

- **Type Attribute**. Every file has a four byte identifier that represents what type of file it is. Apple Computer Inc. maintains a list of recognized file types. You might be familiar with the following three popular file types.
  - **“APPL”**. Identifies that the file is an application.
  - **“PICT”**. Identifies that the file is a standard picture.
  - **“TEXT”**. Identifies that the file contains only text.

  There are, of course, many other file types. Word processing programs, spreadsheets and drawing programs each have their own file type. In addition to their own file type, most of these programs also support one or more of the above three and other generic file types. Of particular interest to Consultant is the “TEXT” file type. When Consultant creates an export or archive file, it creates it as a “TEXT” file type so that other programs that support this type can use it. The “TEXT” file type is supported by almost all programs including most personal information managers, Newton import/export utilities, word processors, text editors, etc.

Consultant likewise expects that files it imports are of the “TEXT” file type. If they are not, Consultant will not attempt to import it. In fact, non-”TEXT” type files will not even appear in the Open dialog box when you do an import.

Field Formats

There are different ways to write out dates such as “5/21/97” or “May 21, 1997.” Different programs, including Consultant, may have different conventions and formats that each uses to import and export data. This can present a problem between two programs if they do not recognize the same format. Consultant tries to be fairly flexible in the formats it supports, especially where times and dates are concerned.

This section contains a list of each field that Consultant will import and export. It also describes the format Consultant uses to import/export each field.

Please note that a *String* is a sequence of no more than 255 characters.

TABLE 22. Import/Export Field Formats

Field Name	Format
Title	String
Start Time End Time	All Time Formats supported by MacOS for the current Script System as specified in the Date & Time Control Panel. U.S. Examples: 12:34 pm, 14:34
Start Date End Date	All Date Formats supported by MacOS for the current Script System as specified in the Date & Time Control Panel. U.S. Examples: 2/1/90, and Tuesday, January 2, 1990, and Tue, Jan 2, 1990
Status	String: Completed, Not Completed, Forwarded, Underway, Deleted, Assigned, Assigned/Done, 55 (must be between 1 and 240 for goals)
Priority	String: Must match one of your priorities

TABLE 22. Import/Export Field Formats

Field Name	Format
Actual Start Actual End Last Modified	Any Time/Date combination recognized by the MacOS for the current Script System as specified in the Date & Time Control Panel.
Progress	x% where x is between 0 and 100
Category	String: Must match one of your categories
User Last User	String: Must match one of the users in your file
Salutation Last Name First Name Company Department Position Title	Any String
1st Address Line 1 1st Address Line 2 1st City 1st State 1st Zip 1st Country	Any String
2nd Address Line 1 2nd Address Line 2 2nd City 2nd State 2nd Zip 2nd Country	Any String
Phone 1 Phone 2 Phone 3 Phone 4 Phone 5 Phone 6 Phone 7 Phone 8	Any String

TABLE 22. Import/Export Field Formats

Field Name	Format
Custom 1 Custom 2 Custom 3 Custom 4 Custom 5 Custom 6 Custom 7 Custom 8	Any String
Business Marked	True or False
Notes	Notes cannot exceed 32K length in size and cannot contain the delimiter character. Consultant automatically converts characters that may create problems when it exports notes. Newlines/returns become paragraph symbols (¶), tabs become "Δ", and commas become "¬". These symbols are converted back when Consultant imports notes containing these characters.

Chapter 23

Administration & Proxy Access

The purpose of this chapter is to describe how the File Administrator, or owner of a file, manages the users and public aspects of a file. This chapter also describes how to access another user's data via the proxy access.

Topics Covered

- **Administration Dialog Box**. Describes how to use the Administration dialog box to define public Categories, define public Priorities, and add/change/delete Users.
- **Proxy Logon**. Describes how to access another user's calendar and contact data.

Consultant allows you to store information for multiple Users in the same file. There is also a special user called the *Public User* which provides space in the file for public information which can be shared by all users in a file.

The user who first creates a file is called the *File Administrator*. The File Administrator owns the file and is thus responsible for certain house keeping tasks such as defining public Categories, defining public Priorities, and adding/changing/deleting Users from e file. The File Administrator is the only person who can perform these tasks. There is one exception to this rule, however. An individual user may change his/her passwords at any time in the Administration dialog box.

Anyone, on the other hand, can access another User's data in the file if they have the proper password. Accessing another User's data is called *proxy access*. You must have the proxy access password for a user to access his/her data.

Administration Dialog Box

The Administration dialog box allows the File Administrator to define public Categories, define public Priorities, and add/change/delete Users. The Administration dialog box also allows any User to change his/her passwords.

WARNING: The File Administrator should only use the Administration dialog box when there is no chance that another user is simultaneously accessing the file. It would be bad for example to delete a User if that User is currently accessing the file.

Follow the step below to open the Administration dialog box.

1. **Choose "Administration" from the File menu**. The Administration dialog box will open.

You will notice that the Administration dialog box has two folder tabs. The first tab is labeled "General" and the second tab is labeled "Users." The General page is where you will define public Categories and Priorities. The Users page is where you will add, change, and delete Users.

1. **Click the General folder tab or the Users folder tab to switch to that page**.

General Page

Use the General page to define public Categories and Priorities.

Define Public Categories

1. **Click the Define Public Categories button to add, rename, or delete public Category**. The Define Categories dialog box will appear. This is the same dialog box a User uses to define his/her own Categories. For more information on how to use this dialog box see *Define Categories* in Chapter *Priorities, Categories and Sets* on page 148.

Define Public Priorities

1. **Click the Define Public Priorities button to add, rename, or remove public Priorities**. The Define Priorities dialog box will appear. This is the same dialog box a User uses to define his/her own Priorities. For more information on how to use this dialog box see *Define Priorities* in Chapter *Priorities, Categories and Sets* on page 147.

Users Page

Use the Users page to add, delete, or rename users. The Users Page will list all of the Users currently in the file. The first User in the list will be you, the File Administrator.

Each User has three pertinent pieces of information: 1) a Name; 2) a Password; 3) a Proxy Password. The Name is the name the user will use each time he/she opens this file and logs on. The Password will be used in conjunction with the Name at logon time. You may leave the Password blank if you don't want the User to enter a password. The Proxy Password is the password other Users will have to know in order to access this User's data.

Add User

The File Administrator may add an unlimited number of Users to the file. If a file has more than one User, security is automatically enabled since each user must identify him/herself when they open the file. Please note that all newly added Users automatically have proxy access disabled. Use the Rename User button to add proxy access or let the user do this on their own.

1. **Click the Add button to add a new User to the file**. The Add User dialog box will appear.
2. **Enter the User's new name**. Make sure you enter a unique name.
3. **Enter the User's new password**. You may choose to leave the password blank so the User can choose his/her own password.
4. **Click the OK button**. The a new User will be added to the file.

Delete User

The File Administrator may delete a User permanently from the file. When a User is deleted from a file, all of the records for that User are also deleted. This includes all activities and contacts that belong to that User. In other words, deleting a User from the file has permanent consequences.

1. **Select the User in the list that you wish to delete**. The User will become highlighted.
2. **Click the Delete button**. A warning will appear to confirm your action.
3. **Click OK to proceed with the deletion**. The User and all of its records will be permanently deleted from the file.

Rename User

The File Administrator may rename a User that has already been created. Any User may also rename him/herself. The renaming process lets one change the Name, Password, and Proxy Password (if applicable).

1. **Select the User in the list that you wish to rename**. The User will become highlighted.

2. **Click the Rename button**. The Rename dialog box will appear.
3. **Enter a new Name**. You may change the name if you wish.
4. **Enter a new Password**. You may change the password if you wish. The new password will become effective the next time the user logs onto the file.
5. **Select the Proxy Access button**. You can choose whether the user can be accessed by others via proxy access. If you enable proxy access, you may enter a Proxy Access Password which other Users will use to access this User's data.
6. **Enter a new Proxy Access Password if applicable**. You must enter a Proxy Access Password if you enabled proxy access.
7. **Click OK to rename the user**. The new User information will be saved.

Proxy Logon

The occasion may arise when you want to access another user's calendar or contact data. A personal assistant, for example, may need to schedule an appointment on his/her boss's calendar. Consultant uses a feature called *proxy access* to let you access another User's data. When you proxy access another User's data, you will be able to add, update, and delete any of their activities or contacts.

In order for proxy access to work, the User whose data you want to access must allow proxy access to their data. A User gives permission to have their data proxy accessed via the Rename User feature on the Users page of the Administration dialog box. For more information on enabling proxy access see *Rename User* in Chapter *Administration & Proxy Access* on page 204. When a User enables proxy access to his/her data they must specify a proxy access password. You will need this password to access that User's data via proxy access.

There are a couple of other prerequisites to proxy access another User's data.

- You can only proxy access a User in a file in which you are also a User.
- You must already have that file open and be logged in under your User Name.

Follow the below steps to proxy access another User's data after you have met the above prerequisites.

1. **Choose "Proxy Logon" from the File menu**. A Proxy Login dialog box will appear and list all of the file you currently have open and are logged in to.
2. **Select the file that contains the User you wish to proxy access**. The file will become highlighted.
3. **Click the OK button to choose the selected file**. The Proxy Login dialog box will close. An Open Proxy User dialog box will appear.
4. **Enter the name of the User you wish to proxy access**.
5. **Enter the proxy password for the User you wish to access**.
6. **Click the OK button to proxy access the specified User**. You will now have proxy access to the User's data. The User's name will now be listed in the Source button in the Activity Window and Contact Card View. The Show All Set will include the User's data and thus all open Views will reflect the User's data along with your data.

Chapter 24

Networking

The purpose of this chapter is to describe how the File Administrator, or owner of a file, should set up and use Consultant in a networking environment. It also describes how an ordinary user uses Consultant in a multi-user environment. Consultant is a multi-user application. This means three things as far as Consultant is concerned.

- **Consultant can store calendar and contact information for more than one user in the same file**.
- **Multiple users can access the same file simultaneously**.
- **Every file has a public calendar and contact space that can be accessed by every user in the file**.

Because Consultant allows simultaneous access to a shared file, it has no need for built-in networking support. Instead, it works directly with the MacOS and your underlying network protocol to communicate over your network. This means that you won't have to do any complicated network setup or software configuration.

Topics Covered

- **Multi-User Setup**. Describes how the File Administrator sets up Consultant for use in a multi-user environment.
- **Use Consultant In A Multi-User Environment**. Describes how a user uses Consultant in a multi-user environment.

Multi-User Setup

Consultant allows you to store information for multiple Users in the same file. There is also a special user called the *Public User* which provides space in the file for public calendar and contact information which can be shared by all users in a file.

There are several simple steps to get Consultant up and running in a multi-user environment.

1. Install Consultant on each applicable computer on your network.
2. Create a new Consultant data file.
3. Add users to the new Consultant file.
4. Add public Categories.
5. Add public Priorities.
6. Add public custom labels.
7. Quit Consultant.

Install Consultant On Each Applicable Computer On Your Network

A registered copy of Consultant needs to be installed on every computer of your network that you want to run Consultant on. For information on installing Consultant see Chapter 3 *Install Consultant* on page 18.

Consultant will not work properly if you install a single copy of it on a central server and have users run it from there.

Create A New Consultant Data File

A single Consultant data file can store calendar and contact information for multiple users. In this step you will create such a file on a central computer that can be accessed by everyone. The person who initially creates a file is called the *File Administrator*. The File Administrator is in charge of the file and has the duty of adding/deleting users to/from the file, adding public categories, changing public priorities, and adding custom fields. Since you will be creating the file, this means you are the File Administrator.

Before you create a new file, you need to decide where you want to create it. You will want to create it on a computer on your network that is accessible by everyone (possibly a file server if you have one). You will want to choose a computer that is as fast as possible.

Once the File Administrator has decided where to create the file, he/she will need to actually create the file. For information on creating a file see *Create A New File* in Chapter *Get Started* on page 18.

Add Users To The New Consultant File

Once you have created a file, the File Administrator will need to add user accounts to the file so others can access the file. The File Administrator should not add, delete, or rename Users while other Users may be accessing the file. For information on adding Users to a file see *Users Page* in Chapter *Administration & Proxy Access* on page 204.

Add Public Categories

Once you have created a file, the File Administrator needs to define Categories that can be assigned to public activities and contacts. The File Administrator should not define Categories while others Users may be accessing the file. For information on defining public Categories see *General Page* in Chapter *Administration & Proxy Access* on page 203.

Add Public Priorities

Once you have created a file, the File Administrator needs to define the Priorities that can be assigned to public activities. The File Administrator should not define Priorities while others Users may be accessing the file. For information on defining public Priorities see *General Page* in Chapter *Administration & Proxy Access* on page 203.

Add Public Custom Contact Labels

This feature is not available at this time.

Quit Consultant

Once the File Administrator has created a file, added Users to the file, added public Categories, added Public Priorities, and added Custom Contact Labels, the File Administrator should quit Consultant or close the newly created file before users begin to access the file. The File Administrator can, of course, reopen the file and begin accessing his/her own data.

Use Consultant In A Multi-User Environment

Using Consultant in a multi-user environment is not much different that using Consultant on a single computer. You'll soon see that the only difference is that your Consultant data file is located on a shared computer other than your own. You will also notice that the only person who can add users, change public Categories/Priorities/Custom Contact Fields in the File Administrator.

The basic idea to remember is that when you create an activity or contact, use the Source button in the Activity Window or Contact Card View to specify which user in your file it will belong to. Choose the Public User if you want the activity or contact to be saved in the user space which is accessible by everyone.

Chapter 25

MiniConsultant

The purpose of this chapter is to acquaint you with MiniConsultant and describe how to use it. MiniConsultant is a simplified version of Consultant which uses less than half the memory. MiniConsultant provides a quick and simple way to access your information without launching Consultant. Use MiniConsultant to schedule an appointment, look up a phone number, or make a note. MiniConsultant's simple, one window layout can handle numerous simple tasks with just a few clicks.

Topics Covered

- **Get Started**. Describes how to get started and launch MiniConsultant.
- **Schedule View**. Describes how to use the Schedule View to view your schedule.
- **Contacts View**. Describes how a use the Contacts View to view your contacts.
- **Translate View**. Describes how to use the Translate View to schedule an activity by translating an English phrase that describes the activity.
- **New Activity View**. Describes how to use the New Activity View to schedule a new activity or edit an existing activity.
- **New Contact View**. Describes how to use the New Contact View to create a new contact or edit an existing contact.

Get Started

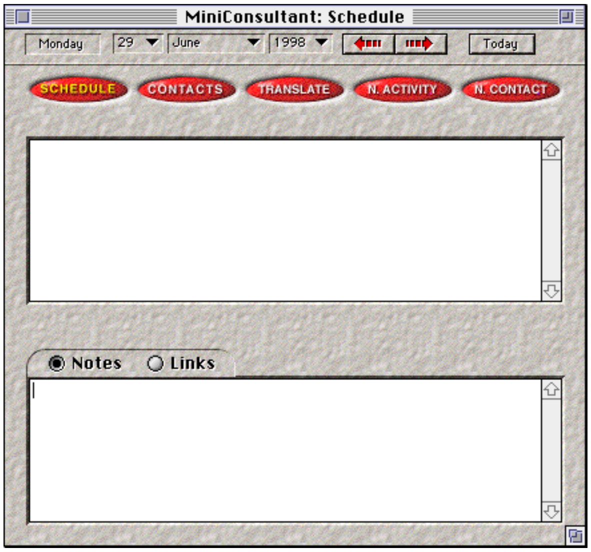
MiniConsultant consists of a single application. The MiniConsultant application is installed as part of the normal Consultant installation. For information on the installation process see Chapter 3 *Install Consultant* on page 18.

Before you can begin using MiniConsultant you must first create a Primary File via Consultant. The only file MiniConsultant can open and use is the Primary File which is why it must exist before you launch MiniConsultant. For information on creating a Primary File using Consultant see Chapter 3 *Get Started* on page 18.

Launch MiniConsultant

1. **Locate and open the folder where you installed Consultant and MiniConsultant**. MiniConsultant is located in the same folder as Consultant.
2. **Double-click the "MiniConsultant™" program icon**. MiniConsultant will launch. After a short

moment, the main window will appear.



Layout Of MiniConsultant

The MiniConsultant window is divided in four sections.

- **The Date Bar**. Use to select which date of your schedule you want to view.
- **Five View Buttons**. Use to switch between the various Views which include a Schedule View, a Contacts View, Translate Activity View, a New Activity View, and a New Contact View.
- **The List/Detail Region**. Displays your schedule for the day selected in the Date Bar.
- **The Notes/Links Region**. Displays any notes or links associated with a selected activity or contact.

The Date Bar

The Date Bar is located at the top of the window.

Its purpose is to provide a simple way to choose the Day, Month and Year of your schedule you wish to view. The Date Bar also provides Day Forward/Backward buttons to quickly move forward or backward a day, and a Today Button to quickly move to today's date. These tools make accessing any date's information easy.

1. **Click the Day, Month or Year button to select the day/month/year you want to view**. The List/Detail Region will display your schedule for the selected day.
2. **OR click the Day Forward button to move forward a day**. The List/Detail Region will display your schedule for the selected day.
3. **OR click the Day Backward button to move backward a day**. The List/Detail Region will display your schedule for the selected day.
4. **OR click the Today button to move to the current day**. The List/Detail Region will display your schedule for the selected day.

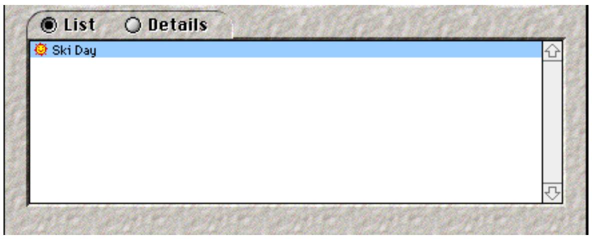
The View Buttons

The View Buttons are the five red oval buttons located under the Date Bar.

Select one of the five View Buttons to indicate which View you wish to work with. The View name for the currently selected View appears in yellow in the red oval button. The name of the current View also appears in the window's title bar. The complete functionality for each of the five views will be explained later in detail.

The List/Detail Region

The List/Detail Region is the white area directly below the View Buttons.

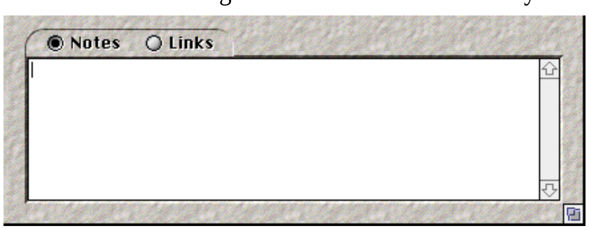


This region is a dynamic area which will display the tools or information for the currently selected View. The List/Detail Region supports two modes: 1) the List mode which shows all the contacts or Activities for a specific day; and 2) the Detail mode which shows the specific information for a selected activity or contact. The contents of the List/Detail region are described below for each selected View.

- **Schedule View**. The List/Detail Region displays your schedule for the current day. Once an activity in the schedule has been selected, the option of switching between List mode and Detail mode is available by using the tab that appears at the top of the List/Detail Region. You may also double-click the activity to go to Detail mode. The Detail mode allows you to edit the selected activity.
- **Contacts View**. The List/Detail Region lists all your contacts. Once a contact has been selected, the option of switching between the List mode and Detail mode is available by using the tab that appears at the top of the List/Detail Region. You may also double-click the contact to go to Detail mode. The Detail mode allows you to edit the selected contact.
- **Translate View**. The List/Detail Region displays the translation box where you can enter an English phrase that describes an activity in order to schedule the activity.
- **New Activity View**. The List/Detail Region displays the tools necessary to create a new activity.
- **New Contact View**. The List/Detail Region displays the tools necessary to create a new contact.

Notes/Links Region

The Notes/Links Region is the white area directly below the List/Detail Region.



Notes and/or Links are available in each of the Views. Consequently, the Notes/Links Region is always available to display any notes or links that accompany an activity or contact selection.

1. **Click the Notes button or the Links button to switch between notes and links**. Since you cannot display both note and links at the same time, use the Notes and Links button to select which you want to see.

In Notes mode, you may view and enter notes for a selected activity or contact. When an activity or contact contains notes, a small pencil icon will appear next to the activity title or contact name in the List Region. When you are entering text, you may use the text formatting commands found in the Text menu.

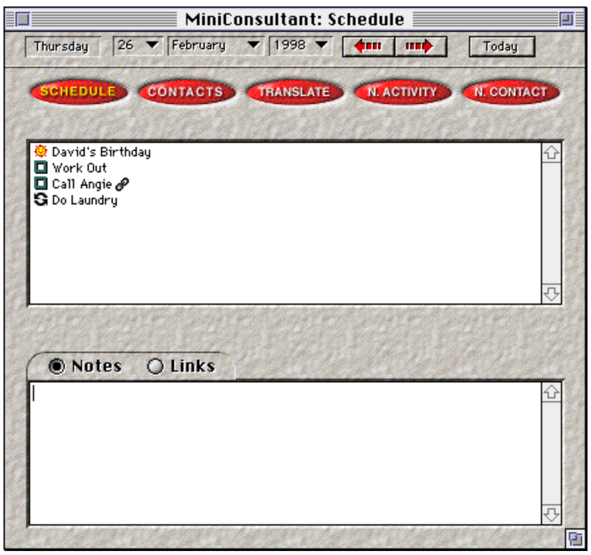
In Links mode, you may view the links for a selected activity or contact. When an activity or contact contains links, a small chain icon will appear next to the activity title or contact name in the List Region. You cannot create links in MiniConsultant. Links can only be created in Consultant. You can, however, jump to a linked activity or contact by double-clicking the link. MiniConsultant will display the linked activity or contact.

Schedule View

The purpose of the Schedule View is to provide a quick list of the activities scheduled for a specific date. Once the Schedule View is open, you can view a list of scheduled activities, alter a scheduled activity, delete a scheduled activity, or mark a To-Do.

Open The Schedule View

1. **Select the Schedule View button**. Your schedule for the date in the Date Bar will appear in the List/Details Region.



The Schedule View is the default view for MiniConsultant. When you first launch MiniConsultant it automatically displays your current schedule for the current date.

2. **Use the Date Bar to change which day's schedule you want to view**.

Select An Activity

1. **Select the activity you wish to work with**. The activity will be highlighted and the List/Details Tab will appear at the top of the List/Details Region. If the selected activity has any notes or links accompanying it, they will appear in the Notes/Links Region.

2. **Click the Details button to view more information about this activity**.

Alter An Activity

1. **Select the activity you wish to alter**. The activity will be highlighted and the List/Details Tab will appear at the top of the List/Details Region.

2. **Double-click the activity or click the Details button to view complete information about the activity**. Several Tools will appear in the Details Region, including a Time Shutter, a Date Shutter, a To-Do button, a Category button, and a Priority button. Use these tools to alter the activity. For more information on how to use these tool see *New Activity View* in Chapter *MiniConsultant* on

page 216.

3. **Click the Save button to make your changes permanent**. Your changes will be saved and MiniConsultant will return to the Schedule View.

Delete Activity

1. **Select the activity you wish to delete**. The activity will be highlighted and the List/Details Tab will appear at the top of the List/Details Region.
2. **Double-click the activity or click the Details button to view complete information about the activity**. Several Tools will appear in the Details Region.
3. **Click the Delete button**. The activity will be permanently deleted and MiniConsultant will return to the Schedule View.

Mark A To-Do

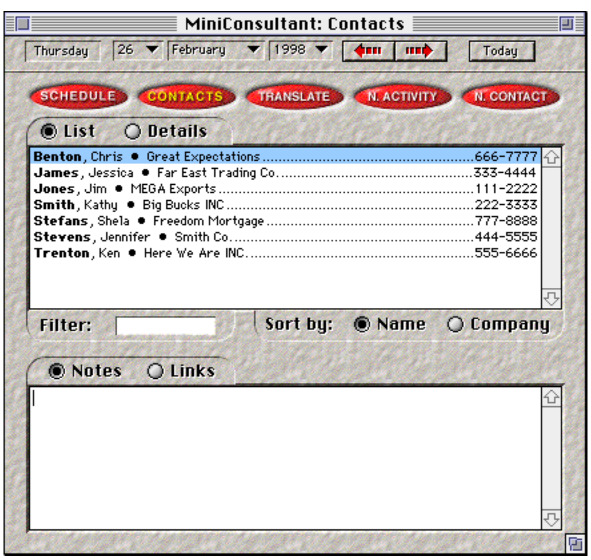
1. **Click and hold down the mouse button on the To-Do icon directly to the left of a To-Do**. A pop-down menu will display your To-Do mark choices.
2. **While holding down the mouse button, choose your desired To-Do mark**.
3. **Release the mouse button**. The new To-Do mark will replace the old in the Schedule View.

Contacts View

The purpose of the Contacts View is to place at your fingertips a quick list of all your contacts. You can sort and filter the list of contacts. These two options greatly increase the ease and speed of finding a specific contact. This section will describe the Contacts View and how to open it. It will also describe how to sort the contact list, filter the contact list, select a contact, alter a contact, delete a contact, and dial a contact.

Open The Contacts View

1. **Select the Contacts View button**. Your contacts will appear in the List/Detail Region.



The first contact in the list will be highlighted and the List/Details Tab will appear at the top of the List/Details Region. If the selected contact has any notes or links accompanying it, they will appear in the Notes/Links Region.

Sort Contacts

1. **Click the Sort By Name or Sort By Company button to choose how you want the contact list displayed**. The list of contacts will change to reflect your choice. Depending on your choice, each contact's last name or company name will appear in bold.

Filter Contacts

1. **Click the Filter text box**. A text cursor will appear in the Filter text box. Filtering works on the currently selected sort field.
2. **Type the first few letters of the last name or company name you wish to find**. As you type, the list of contacts will narrow based upon a last name or company name match. If you no longer want to filer the contact list, remove any text from the Filter text box.

Select A Contact

1. **Select the contact you wish to work with**. The selected contact will be highlighted and the List/Details Tab will appear above the List/Details Region. The Notes/Links Region will display any notes or links associated with the selected contact.
2. **Double-click the contact or click the Details button to view the selected contact's complete information**. The List/Detail Region will be filled in with all of the specific information.
3. **Click the List button to return to the list of contacts**. The List/Detail Region will display the contacts in list form.

Alter A Contact

1. **Select the contact you wish to alter**. The selected contact will be highlighted and the List/Details Tab will appear above the List/Details Region. The Notes/Links Region will display any notes or links associated with the selected contact.
2. **Double-click the contact or click the Details button to bring to view the selected contact's complete information**. Several tools will appear including the Name Quadrant, Address Quadrant, Phone Quadrant, Category button, Dial button, and Save/Delete Buttons.
3. **Use these tools to alter the contact**. For more information on how to use these tools see *New Contact View* in Chapter *MiniConsultant* on page 216.
4. **Click the Save button to make your changes permanent**. Your changes will be saved and MiniConsultant will return to the Contacts List View.

Delete A Contact

1. **Select the contact you wish to delete**. The selected contact will be highlighted and the List/Details Tab will appear above the List/Details Region. The Notes/Links Region will display any notes or links associated with the selected contact.
2. **Double-click the contact or click the Details button to bring up the detail view of the contact**.
3. **Click the Delete button**. The contact will be permanently deleted and MiniConsultant will return to the Contacts List View.

Dial A Contact

1. **Select the contact you wish to Dial**. The selected contact will be highlighted.

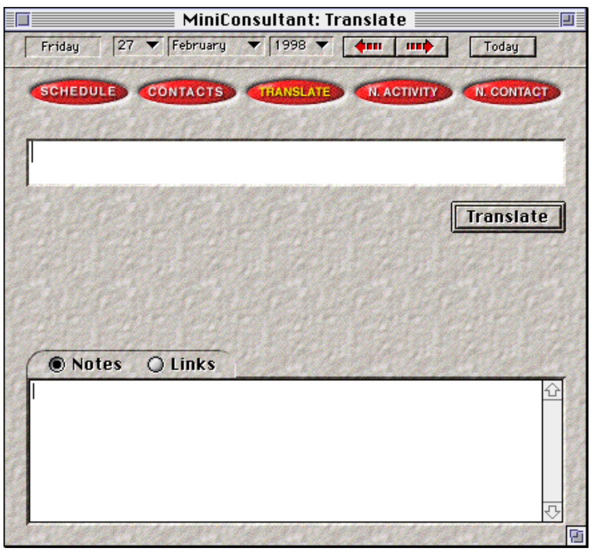
2. **Double-click the contact or click the Details button to bring up the detail view of the contact**. The Detail View includes a the Phone Number Quadrant located on the right hand side.
3. **Select the phone number you want to dial from the Phone Number Quadrant**. The selected phone number will automatically be placed in the Dial Box.
4. **Move the cursor to the Dial Box to type in any necessary changes**. You can manually type an area code, extension, etc.
5. **Click the Dial Button**. The phone number will be dialed. MiniConsultant uses the same settings as Consultant for dialing. For more information on dialing see Chapter 13 *Dialing* on page 135.

Translate View

Use the Translate View to schedule an activity based upon a simple English phrase typed into the translate window. This section describes how to open the Translate View and schedule new activities.

Open The Translate View

1. **Select the Translate View button**. The Translate View will appear.



Translate And Schedule An Activity

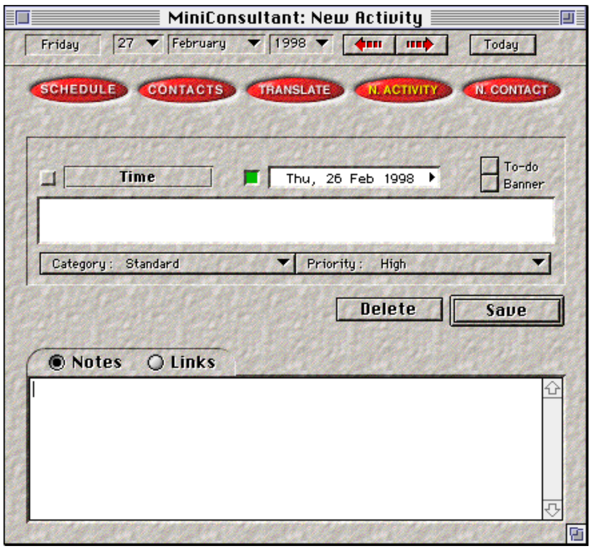
1. **Enter an English phrase that describes the activity into the text box**. For complete information on the type of phrases you can enter see *Translate Dialog Box* in Chapter *Calendar Management* on page 91.
2. **Click the Translate button**. Consultant will translate the phrase and schedule the activity. If MiniConsultant detects a contact name in the phrase, it will link that contact to the activity. The Detail Region will appear with the new activity.
3. **Use the tools to make any last minute changes to the activity**.
4. **Click Save to make any of your changes permanent**. If no changes have been made, the translated activity is already scheduled.

New Activity View

Use the New Activity View to schedule new activities including Appointments, Events, To-Do's and Banners. This section will describe how to open the New Activity View and how to schedule a new activity.

Open New Activity View

1. **Select the New Activity View button**. Numerous tools will appear to help you define the new activity.



Create A New Activity

1. **Select the New Activity View button**.
2. **Enter the Activity Title in the Activity Title Region**.
3. **Select the date or date range of your activity in the Date Shutter**.
4. **If applicable, click the button immediately to the left of the Time Shutter to schedule the time of the new activity**. If your activity occurs at a specific time, you will want to open the Time Shutter so you can set the time. Otherwise, leave the Time Shutter closed.
5. **Select the To-Do button if your activity is a To-Do**.
6. **Select the Banner button if you want your activity to appear as a Banner in the Month View**.
7. **Use the Category button to choose the Category you want your activity assigned to**.
8. **Use the Priority button to choose the Priority you want to assign to your activity**.
9. **Enter any notes in the Notes Region**.
10. **Click the save button**. The new activity will be added to your schedule. If you decide at the last minute that you don't want to schedule the new activity, click the delete button instead.

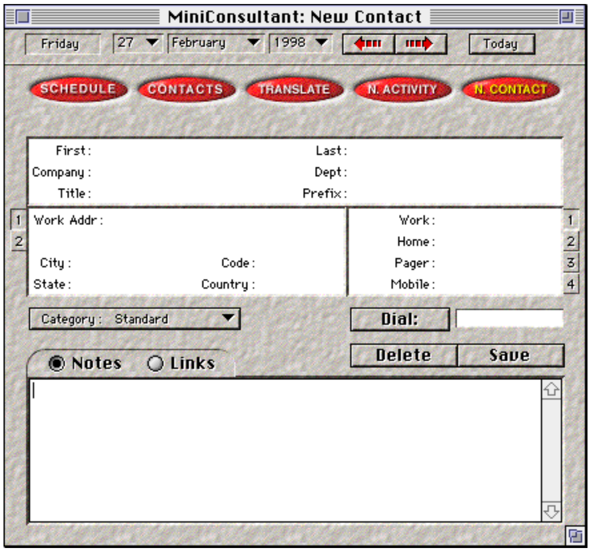
New Contact View

Use the New Contact view to create a new contact. This section will describe how to open the New

Contact View and how to create a new contact.

Open The New Contact View

1. **Select the New Contact View button**. Numerous tools will appear to help you define the new activity.



The New Contact View is divided into three quadrants and includes a Category button, a Dial button, a Save button, a Delete button, and the Notes/Links Region. The three quadrants provide fields for new contact information.

- **Personal Information Quadrant**. This quadrant provides fields for a contact's first and last name, company name, department, business title, and desired prefix. Press the Tab key on the keyboard to quickly move to the different fields.
- **Address Quadrant**. This quadrant provides fields for two addresses. Use the 1 or 2 button on the left edge of this quadrant to switch between the two addresses.
- **Phone/Custom Quadrant**. This quadrant provides the fields for eight phone numbers and eight custom fields. These sixteen fields are divided into four pages of four fields each. Use the 1 and 2 button to switch between the eight phone numbers and use the 3 and 4 button to switch between the custom fields.

Create A New Contact

1. **Select the New Contact View button**.
2. **Enter personal information into Quadrant 1**. Use the Tab key to move between fields.
3. **Enter address information into Quadrant 2**.
4. **Enter phone/custom information into Quadrant 3**.
5. **Use the Category button to choose the Category you want your contact assigned to**.
6. **Enter any notes into the Notes Region**.
7. **Click the save button**. The new contact will be added to your contact list.

Chapter 26

Activity & Contact Extensions

The purpose of this chapter is to describe how to use the Activity and Contact extensions which come with Consultant. Although every effort has been made to make Consultant as small and efficient as possible, there may be times when you just can't afford to keep it, or even MiniConsultant, open in memory. The purpose of the Activity extension is to provide a way to view your daily schedule and receive alarm notifications – even when Consultant or MiniConsultant isn't running. The purpose of the Contact extension is to display a list of your favorite contacts and their phone numbers – even when Consultant or MiniConsultant isn't running.

Topics Covered

- **About Extensions**. Describes what extensions are and how they work.
- **Install The Extensions**. Describes how to install the extensions.
- **Setup The Extensions**. Describes the steps necessary to setup proper use of the extensions.
- **Use The Extensions**. Describes how to use the functionality common to both extensions.
- **Use The Activity Extension**. Describes how to use the Activity extension.
- **Use The Contact Extension**. Describes how to use the Contact extension.
- **Frequently Asked Questions**. Answers many common questions regarding the extensions.

About Extensions

Extensions are small programs that must always be placed in the *Extensions* folder which in turn is located inside the *System Folder*. Extensions automatically load and run at start-up time. Extensions are often represented by the small icons that appear at the bottom of the screen as your computer starts up.

The purpose of extensions is to extend the MacOS by adding functionality. Thus, most extensions do not provide any interface to the user, but simply let your computer do things not originally built into the system. A good example of an extension that extends the functionality of your system is the CD-ROM extension, which tells your computer what a CD-ROM drive is and how to use it.

Extensions are no longer used simply to extend the MacOS. Many software packages use extensions to provide features that are always available to the user – even when the main program is not loaded. In other words, extensions are being used for purposes that were not originally intended by operating system designers. The consequence of extension proliferation is that many extensions conflict and crash each other. Many MacOS users spend a great deal of their time using programs to help them figure out which of their extensions do not like each other.

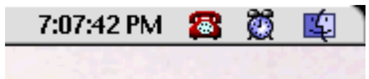
We delayed as long as possible the development of extensions because of their unwieldy nature. In order to make the extensions as problem-free as possible, we have taken the approach of keeping the extensions as simple as possible. You will thus find that the Activity and Contact extensions are small, simple, and relatively free of user interface. We hope they can remain this way while providing the basic functionality users need.

Install The Extensions

You have the option of installing the Activity and Contact extensions when you install Consultant. You can install either extension or both extensions. For more information on installing Consultant and the extensions see Chapter 3 *Install Consultant* on page 18.

Setup The Extensions

The Activity and Contact extensions load and run during the start-up process. After your computer has started up, you will notice an alarm clock icon in the menu bar for the Activity extension and a telephone icon in the menu bar for the Contact extension.



The extension icons in the menu bar provide a quick and easy way to access your schedule and contacts.

1. **Click and hold your mouse button down on either extension icon in the menu bar**. A pop-down menu will appear. You will see an *Update From File* menu item at the top of the menu. You may see several other choices as well.
2. **Release your mouse button without selecting anything**. Wait until you have properly setup the extension before you begin using it.

In order to fully use the extensions, there are four setup steps you must perform.

1. **Launch Consultant**. When you launch Consultant, the location of the Consultant application is stored in the *Consultant Preferences* file in the *Preferences* folder which is located in the *System Folder*. The extensions use this location information to launch Consultant.
2. **Launch MiniConsultant**. When you launch MiniConsultant, the location of the MiniConsultant application is stored in the *Consultant Preferences* file in the *Preferences* folder which is located in the *System Folder*. The extensions use this location information to launch MiniConsultant.
3. **Specify A Primary File**. The specified Primary File is stored in the *Consultant Preferences* file in the *Preferences* folder which is located in the *System Folder*. The extensions use this location information to display your schedule and favorite contacts in the extension menus. You can specify a Primary File by clicking the Primary File button in the Open dialog when you open a file. For additional information on specifying a Primary File see *Create A New File* in Chapter *Get Started* on page 18.
4. **Restart Your Computer**. Your changes to the *Consultant Preferences* file do not become effective until the next time you restart your computer.

Once you have restarted your computer, the extensions know where to find Consultant, MiniConsultant, and your Primary File. You are now ready to use the extensions.

Use The Extensions

The Activity Extension and Contact Extension have three basic functions in common. This section will describe those three basic functions.

- **Update From File**.
- **Open Consultant**.
- **Open MiniConsultant**.

Update From File

When the extensions are first run at start-up time, they read through the Primary File to build your schedule for the day and generate a list of favorite contacts. If you or another uses your Primary File later in the day, then there is a chance that your schedule or favorite contacts might change. Whenever you quit Consultant or MiniConsultant, these two programs automatically update the extensions so they reflect your latest changes. There is, however, a chance that another user might change your Primary File unbeknownst to the extensions. The *Update From File* command is provided so that you can force the extension to go out and update itself from the Primary File. This command is also useful if your Primary File is located on a volume that is not immediately available when you start-up your computer.

1. **Click and hold your mouse button down on either extension icon in the menu bar**. A pop-down menu will appear.
2. **Choose “Update From File” from the menu**. The extension will bring itself up to date based on the current contents of the Primary File.

Open Consultant

You can directly launch Consultant from the Activity or Contact extension at any time.

1. **Click and hold your mouse button down on either extension icon in the menu bar**. A pop-down menu will appear.
2. **Choose “Open Consultant” from the menu**. Consultant will launch and open your Primary File.

Open MiniConsultant

You can directly launch MiniConsultant from the Activity or Contact extension at any time.

1. **Click and hold your mouse button down on either extension icon in the menu bar**. A pop-down menu will appear.
2. **Choose “Open MiniConsultant” from the menu**. MiniConsultant will launch and open your Primary File.

Use The Activity Extension

The Activity Extension has two main functions. The beauty of the Activity extension is that these two functions are always available – even when Consultant is not running.

- **Notifies you of alarms**.
- **Displays your schedule**.

Alarm Notification

The Activity extension will automatically notify you of any alarms when Consultant and MiniConsultant are not running. An alarm will sound and display an alert dialog which identifies the activity. When you close the alarm notification dialog, the alarm is not dismissed. The Activity Extension simply makes sure that you know about the alarm. You will need to open Consultant or MiniConsultant to dismiss or snooze the alarm.

See Your Schedule

The Activity extension will instantly display your schedule for the current day at any time.

1. **Click and hold your mouse button down on the Activity extension icon in the menu bar**. A pop-down menu will appear. Appointments, To-Dos, and Events will appear separated in the menu. Please note that To-Dos which have been completed will not appear in the menu since you no longer need to worry about them.
2. **Choose an Appointment, To-Do, or Event from the menu and release the mouse button**.

MiniConsultant will open and select the activity you chose so you can edit the activity or view its complete information. If MiniConsultant is not available, Consultant will open instead and select the activity.

Use The Contact Extension

The purpose of the Contact extension is to list your favorite contact's names and phone numbers. Use the Favorite button in the Consultant's Contact Card View to specify which contacts are your favorite. For more information see *Favorite Button* in Chapter *Contact Views* on page 110. Since the Contact extension is always available, your favorite contact's information is only a click away.

1. **Click and hold your mouse button down on the Contact extension icon in the menu bar**. A pop-down menu will appear and list up to twenty of your favorite contacts. You will see the first name, last name, company name and phone number for each contact. Please note that the Contact extension displays the number found in the first phone number field of the contact.
2. **Choose a contact from the menu and release the mouse button**. MiniConsultant will open and select the contact you chose so you can edit the contact, dial the contact, or see the contact's complete information. If MiniConsultant is not available, Consultant will open instead and select the contact.

Frequently Asked Questions

- **Why don't I see my schedule or favorite contacts?** You may need to choose a Primary File (see above). If your data file is on a remote volume (i.e. NOT on your start-up hard disk), you will have to choose "Update From File" before you will see any information. When your system boots up, the extensions have no way of knowing if or when the volume containing your Primary File will be mounted, so you have to explicitly tell the extensions to go out and look for the Primary File.
- **When is the information in the extension's menu updated?** The information is updated when you start your computer or when you quit either Consultant or MiniConsultant. You may choose "Update From File" to force an update at any time (even if Consultant/MiniConsultant is running).
- **What happens when I select an activity or contact?** The extension will try to launch MiniConsultant and select the item. If MiniConsultant is not available, it will launch Consultant. If either application is already open, it will tell the open application to select the activity or contact.
- **How does the Activity Extension handle alarms?** The Activity Extension will sound the alarms that you've scheduled for the day when Consultant or MiniConsultant are not running. If you have an alarm set for an activity, the extension will sound the alarm and display an alert dialog identifying the activity. You may then open Consultant or MiniConsultant and snooze or dismiss the alarm.
- **How do I choose the contacts that will appear in the Contact Extension?** You may choose up to 20 favorite contacts from the Contact Card View in Consultant. To designate a contact as a Favorite Contact, select the contact in the Contact Card, then highlight the button marked "Favorite" (the Favorite button is below the Business button).
- **I think the extensions are locking up my computer at start-up. What do I do?** 1) Hold the Shift key down as you restart your computer to turn all extensions off. 2) Delete the *Consultant Preferences* file which is located in the *Preferences* folder which is located in the *System Folder*. This file contains a reference to your Primary File as well as references to where Consultant and MiniConsultant are located. If this file is corrupt, the extensions may not be able to start-up. 3) Restart your computer immediately. If your computer restarts fine then the preferences file was corrupt. If it doesn't restart fine, then there may be a conflict among one or more extensions. Use the Extensions Manager control panel to selectively turn off extensions until you discover the conflict. 4) Perform the four setup steps to use the extensions. For more information on these steps see *Setup The Ex-*

tensions in Chapter *Activity & Contact Extensions* on page 219.

- **Why don't completed To-Dos appear in the Activity extension?** The Activity extension only displays To-Dos that have not been marked as completed. The Activity extension does this for two reasons. First, many users have long To-Do lists and only want to see To-Dos that they still need to worry about. Second, menus have limited space and thus need to be as clutter free as possible.
- **I can't mark/check-off my To-Dos. Am I doing something wrong?** You cannot mark To-Dos directly from the Activity Extension. Instead, choose the To-Do you want to mark. MiniConsultant or Consultant will open so you can mark the To-Do.
- **What phone number does the Contact Extension display?** The Contact extension always displays the phone number found in the first phone field whether it be a home, work, fax, or other type of number.