Executive Card Manager

HEWLETT PACKARD

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Introduction to Executive Card Manager

Welcome to Executive Card Manager

Hewlett-Packard's Executive Card Manager (ECM) is an information management system that captures the speed and power of your personal computer within the convenient form of a rotary card file.

You use ECM just as you'd use a ROLODEX Card File, except ECM simplifies your work. When you add cards, ECM automatically files them in their proper place. If you want to read a specific card, ECM finds it for you. If you want to inspect these cards that refer to a specific event, ECM quickly locates them and displays them for you to view. If you want to place a phone call, ECM not only finds the appropriate card but also dials the number for you. ECM will also generate your reports while giving ample formatting flexibility. Futhermore, ECM lets you design and print form letters and their accompanying mailing labels.

You may have as many different cardfiles as you need to meet a wide variety of business, professional, and personal needs, such as:

- client information
- patient histories
- employee information
- invoices
- phone messages
- personal addresses
- tax records
- bibliographies
- record or book catalogs

Executive Card Manager: Templates (HP Product Number 68335F) is a companion product to ECM. It consists of a series of predesigned forms and report formats that can be put to immediate use. These **Templates** will save you the time of gathering all the information that it takes to design your own card forms. You can use the **Templates** as they are or adapt an existing form to create a card form that suits your needs.

How to Use the Books for ECM

Three books are provided for you with ECM. They are:

- **Setting Up Executive Card Manager**
- **Executive Card Manager**
- **Quick Reference Card to Executive Card Manager**

Setting Up Executive Card Manager provides the details to get ECM up and running on your personal computer. Read this manual and follow the instructions for installing ECM, setting up your printer, and authorizing ECM as a preliminary step before you begin using ECM.

This book, **Executive Card Manager**, includes both **Learning Executive Card Manager** and **Using Executive Card Manager**. If using ECM is a new experience for you, we suggest that you begin by using **Learning Executive Card Manager**. It is a tutorial that teaches you how to use ECM. The tutorial contains five sessions that teach you the basics of using and creating a cardfile. Altogether, the sessions take about an hour to complete, but you can stop at the end of any session and continue at a later time. When you are finished, you will know enough about ECM to set up and use your own cardfiles.

Using Executive Card Manager is a complete reference guide to the features of ECM. You'll probably read this in bits and pieces when you need specific information on a certain task.

A **Quick Reference Card to Executive Card Manager**. You will find this card is a handy reminder for more difficult tasks for ECM. The card opens out of the binder for easy reading, or you can take it out and set it up next to your computer.

Executive Card Manager: Templates

If you have purchased the **Templates** package, you also received a manual that describes each of the templates and shows a variety of ways that you may print the information contained within the form.

What We Mean When We Say...

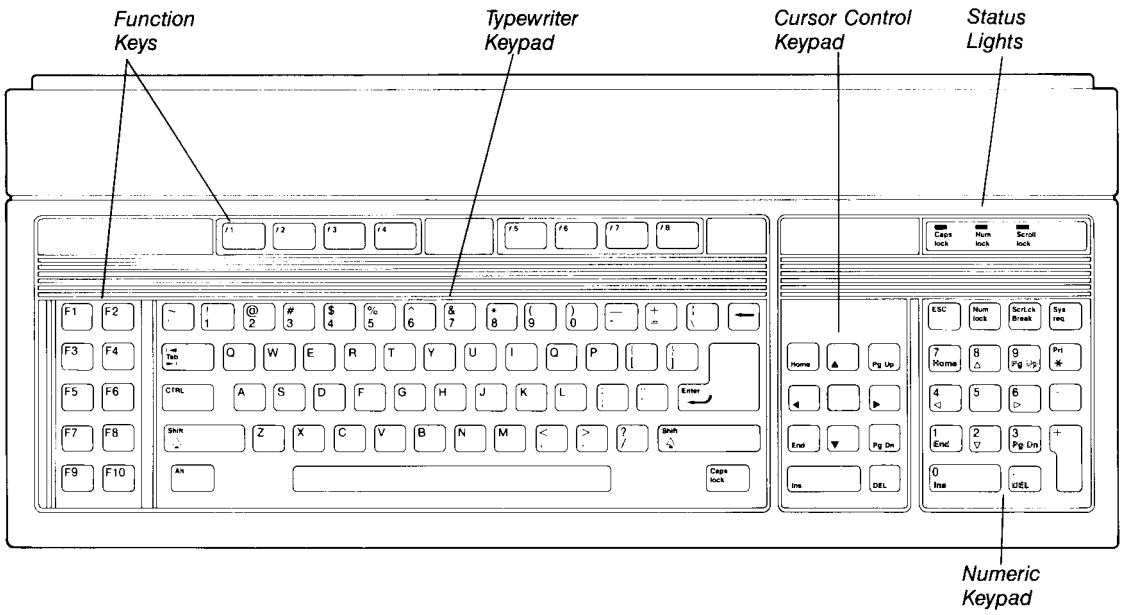
ECM works with three input devices: your computer's keyboard, touch, and a mouse. The following table tells you what our instructions mean for the different input devices.

When we say. . .	And you're using. . .	You should. . .
Choose `function label`	the keyboard	Choose the function key that corresponds to `function label`.
	touch	Touch `function label` on the display.
	a mouse	Move the Pointer to `function label` on the display, then press and release the left button of the mouse.
Highlight	the keyboard	Press Tab (or Shift + Tab) until the item you're choosing becomes highlighted.
	touch	Touch the item on the display that you're choosing.
	a mouse	Move the Pointer to the item on the display that you're choosing, then press and release the left button of the mouse.
Press key	the keyboard	Press key on the keyboard. (You can't use touch or a mouse.)
Type `text`	the keyboard	Type `text` on the keyboard as you would on a typewriter.

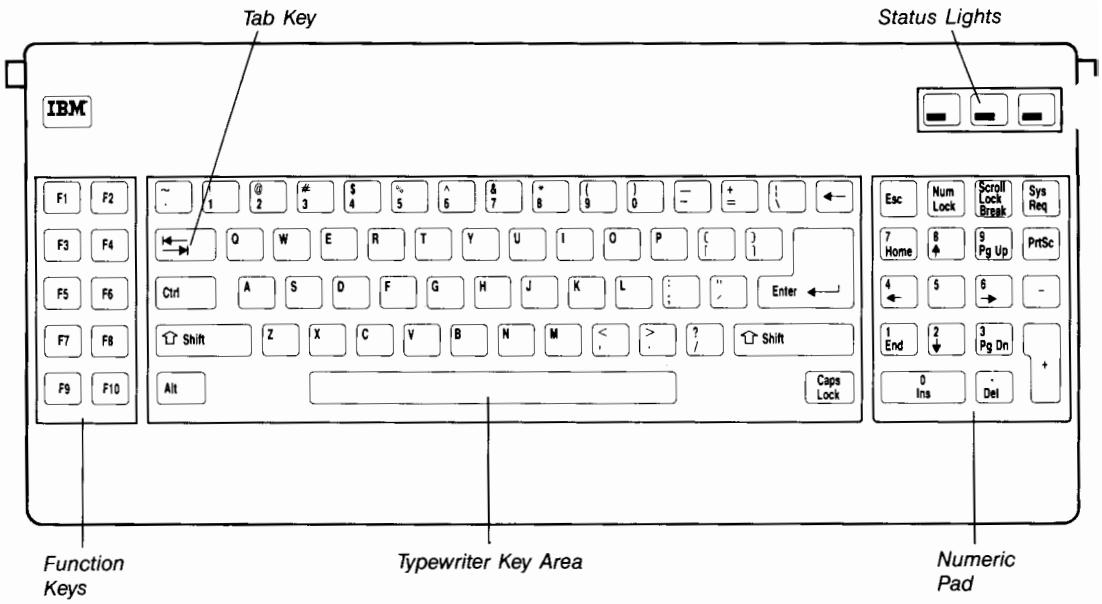
Keyboards

The keys on your personal computer keyboard are grouped according to their functions. The location of some keys on the HP Vectra keyboard varies from that on the IBM AT keyboard; however, they perform the same functions in ECM. The following keyboard pictures show how the keys are grouped on each keyboard. Refer to your personal computer manual if you need more information about your keyboard.

HP Vectra Keyboard



IBM AT Keyboard



1 Getting Started with ECM

This session shows you how to begin using ECM. You will:

- Start ECM from PAM or DOS.
- Look at a typical ECM menu.
- Get some tips for learning ECM.
- Get the cardfile you want to use.
- Locate cards.
- Select a card for reading.
- Read a card.
- Print a card.

Before You Begin

Before you begin using ECM you should have:

- your computer set up
- your printer set up
- a work copy of ECM

If these are not done, refer to **Setting Up Executive Card Manager**. This booklet contains information concerning installing your application, setting up your printer and authorizing your application.

You can start ECM from PAM or DOS. If you need assistance with either PAM or DOS, refer to the manual that came with your personal computer.

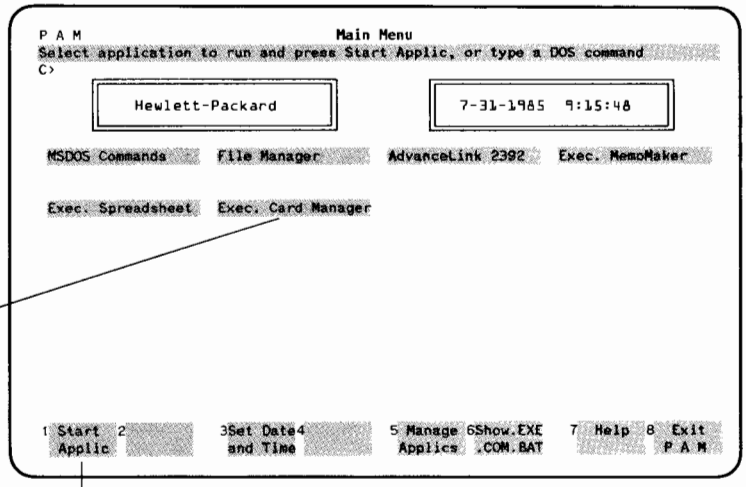
Starting ECM from PAM

With the PAM Main screen on your display:

1. Is your ECM work copy on a flexible disc?

   If YES. . . place the ECM work copy into the drive.

   If NO. . . your work copy is on a hard disc, go on to step 2.
2. On the PAM Main screen, highlight `Executive Card Manager`.
3. Choose `Start Applic`.



Highlight this box to select ECM.

Choose this label to start the application.

The PAM Main screen goes away, and ECM displays its *Main* menu.

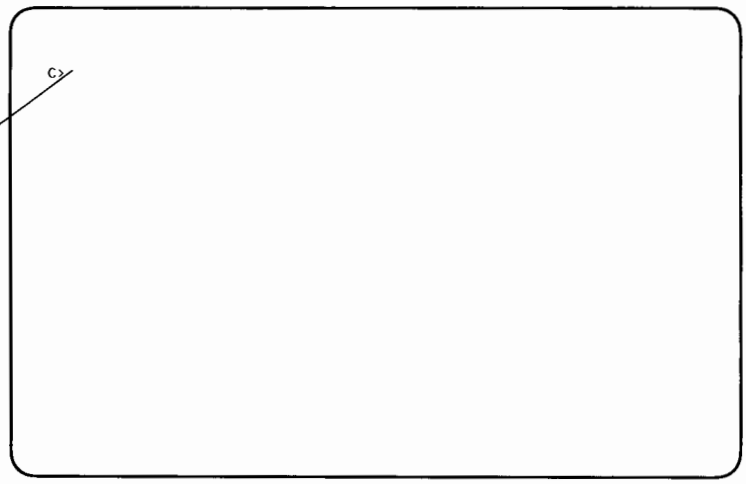
Starting ECM from DOS

With the DOS prompt on your display:

1. Is your ECM work copy on a flexible disc?

   If YES. . . place the ECM work copy disc into the drive.

   If NO. . . your work copy is on a hard disc, go on to step 2.
2. At the DOS prompt, type `ECM`.
3. Press Enter.

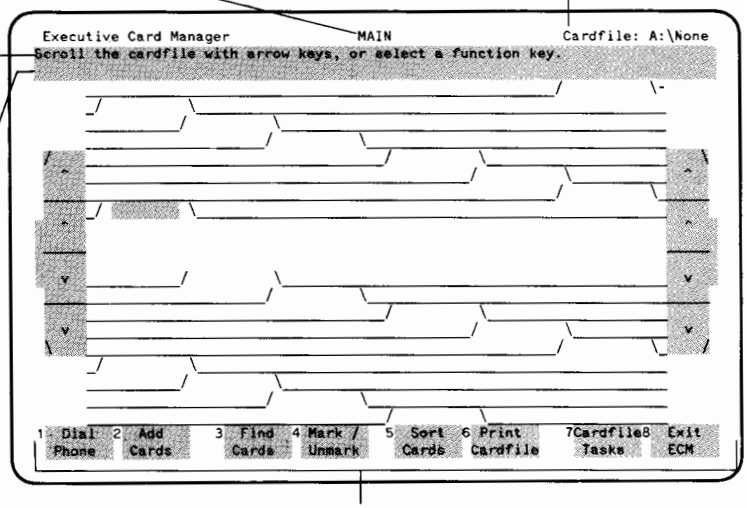


In a moment the ECM *Main* menu is displayed.

Looking at an ECM Menu

The Main menu is one of several menus that ECM presents to help you perform a task. Like all ECM menus, it contains information to help you use the program.

Take a moment to study the following picture and locate the information as it actually appears on your display.



MENU NAME tells you where you are in ECM and usually describes the task you're currently performing.

CARDFILE NAME tells you which cardfile ECM is currently using.

MESSAGE LINE prompts you and provides other helpful information. Refer to this when you're not sure what to do next.

INPUT LINE is where you type responses to ECM. When ECM is ready for a typed response from you, the cursor automatically appears on the input line.

FUNCTION LABELS present you with a menu of actions for ECM to take. When the menu name changes, so do the function labels that appear.

Tips for Finding Your Way Around ECM

The following tips can make it easier for you to learn ECM while you use this booklet. They can also help you develop the skills you need to explore more advanced features on your own.

Get Familiar with the ECM Menu Organization

Take the time now to learn where ECM displays helpful information in a menu. We'll be constantly referring to menu names, function labels, and messages throughout this booklet to help you verify that you're in the right place in ECM. (If you didn't study the picture of the Main menu in the section on **Looking at an ECM Menu**, please do before you begin the next section.)

If You Get Lost, Read the Menu Name...

The menu name is your signpost to where you are in ECM. It tells you the kind of tasks you can perform with that menu, and can usually tell you which menu was on the screen just before the current one.

...Then Choose the F8 Function Key...

The function key F8 does two important things:

- It takes you to the menu before the current menu.
- It cancels anything you've done at the current menu (except in the Select, Field Types, Make/Adjust, Adjust Field, Printer Setup, Break Options, and Set Breaks menu).

If you're not at the menu you want, you can choose this function key to get you to the previous menu—probably the one at which you took the wrong turn. If that menu doesn't look familiar, you can continue this process until you get to the Main menu.

...And Use the Map to ECM

The **Map of ECM**, located in the back cover of this book, shows you how to get from menu to menu. The map is easiest to use when you're at the Main menu, but it can help you no matter where you are.

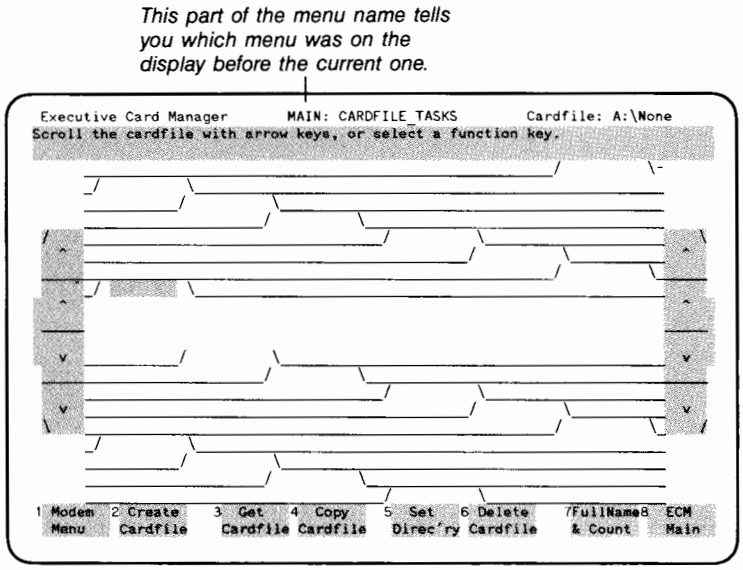
Getting a Cardfile

In these exercises you use a sample cardfile named IMPORTS.

To get the IMPORTS cardfile:

1. From the Main menu, choose **Cardfile Tasks**.

   ECM displays the Cardfile Tasks menu:



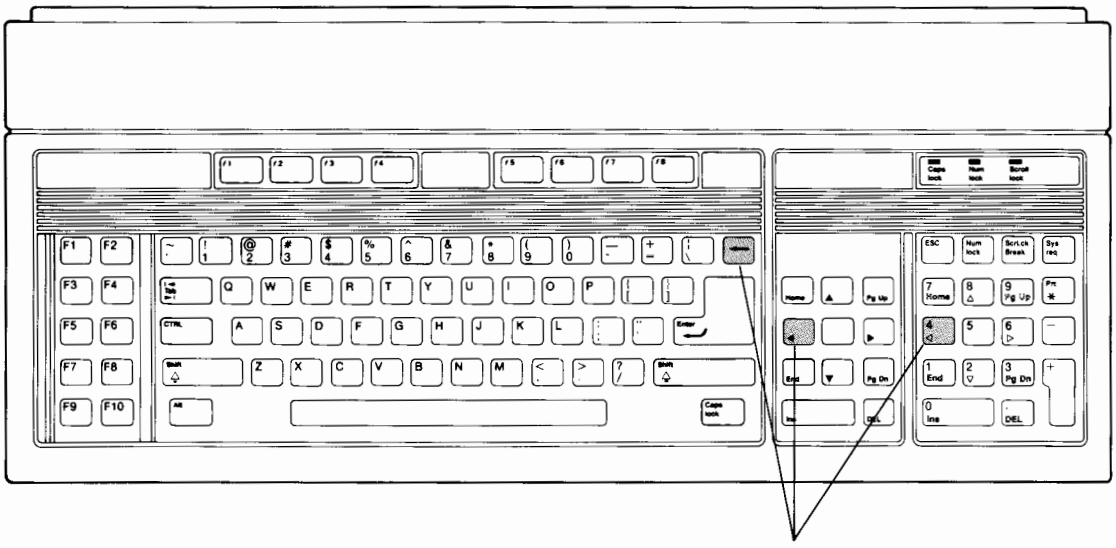
2. Choose **Get Cardfile**.

   Notice that the message line prompts you to type in the cardfile name. On the input line, ECM automatically types in the file pathname for you, so all you have to enter is the cardfile name.

3. Type `imports`, checking the input line for the text as you type it.

   If you make a typing mistake, just back up to the incorrect letters and type over them.

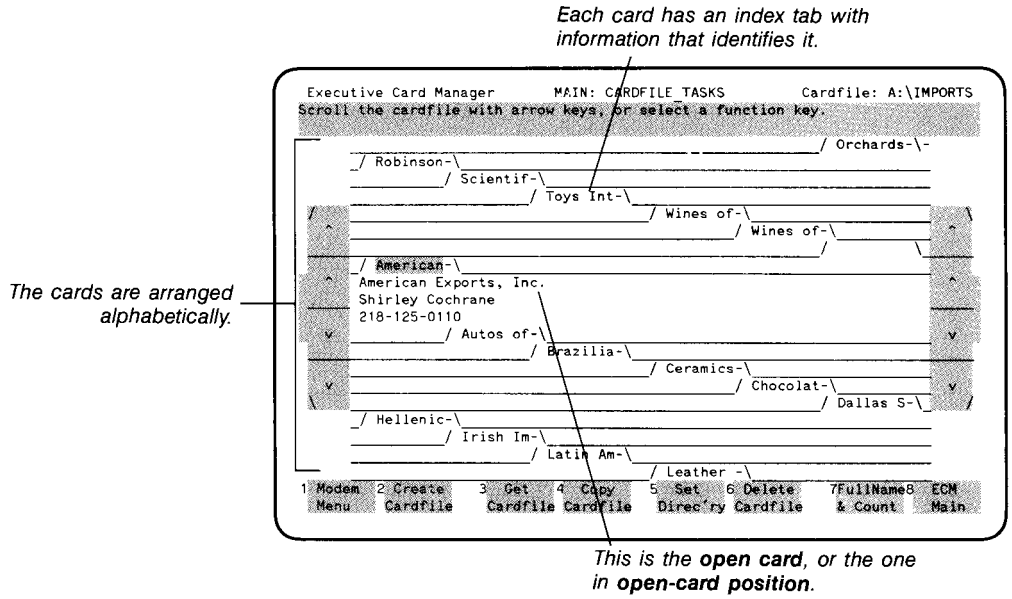
Note When typing a cardfile name, you can type capitals, small letters, or a combination of the two.



If you make a typing mistake, use either key to back up to the incorrect letters.

4. Press Enter.

The message line tells you that ECM is opening the cardfile. In a moment, ECM shows you the IMPORTS cardfile on the Cardfile Tasks menu:



5. Choose ECM Main.

ECM returns to the Main menu with the IMPORTS cardfile displayed.

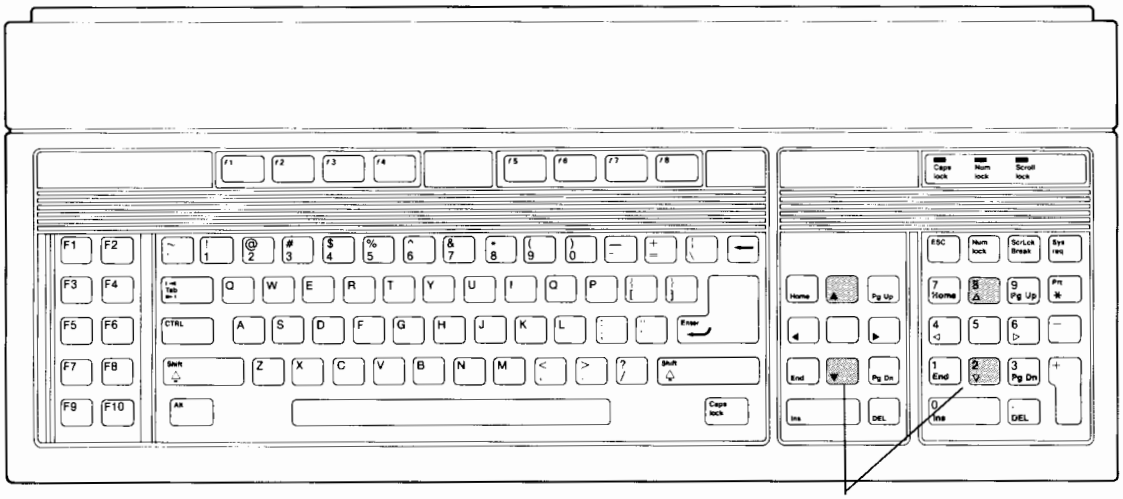
Locating Cards in the Cardfile

ECM looks and works much like the familiar desktop rotary cardfile. You can "turn its knobs" by *scrolling* to scan many cards quickly. Or, you can *pinpoint* a specific card if you know which card you want to see, without scrolling through lots of cards. You'll locate some cards in the IMPORTS cardfile using both methods.

Scrolling the Cardfile

To scroll the cardfile with the cursor keys:

1. Locate the ▲ and ▼ keys on your keyboard:



You press one of these keys to scroll the cardfile.

2. Press ▲.

   ECM scrolls up the cardfile continuously until you stop pressing the key.

3. Press ▼.

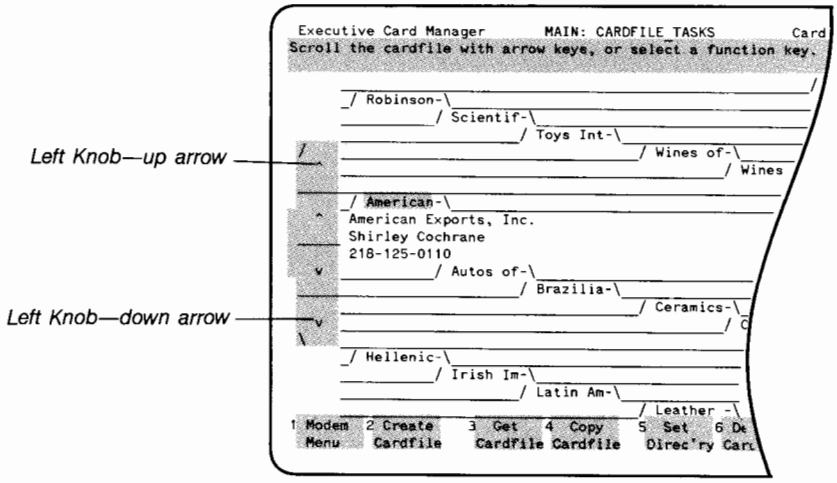
   Now the cardfile scrolls down.

Scrolling card-by-card with cursor keys. To scroll one card, you press the ▲ or ▼ key once instead of pressing it continuously.

Scrolling with Touch or a Mouse

If you ordered HP Touch or a mouse with your personal computer, you can also scroll the cardfile using touch or a mouse. The following table describes the steps you will use:

Scrolling with. . .	You must. . .	Then. . .	What happens
a mouse	move the Pointer to an up (or down) arrow on the right (or left) knob.	press the left button of the mouse.	ECM scrolls up (or down) the cardfile continuously until you release the button.
touch	touch an up (or down) arrow on the right (or left) knob.		ECM scrolls the card file continuously until you take your finger off the knob.



Asking for a Card by Name

If you know which card you want and it isn't on the menu, you can *pinpoint* the card, bringing it into the open-card position without scrolling. You do this by asking for it by name—that is, by typing the name that appears on the index tab. Try this now.

To pinpoint the card for Hellenica Exports:

1. With the rotary cardfile appearing on your display, type `hellenic`.

   Look at the input line to see the text that you just typed. Notice that you typed in only the first eight characters of the company name. When pinpointing a card, ECM uses at most eight characters of the name you type in.

2. Press Enter.

   ECM brings the card for Hellenica Exports into the open-card position.

Suppose there were no card for Hellenica Exports in the cardfile? Then ECM would have pinpointed the card *after* the one you asked for; in this case, Irish Import-Export Service.

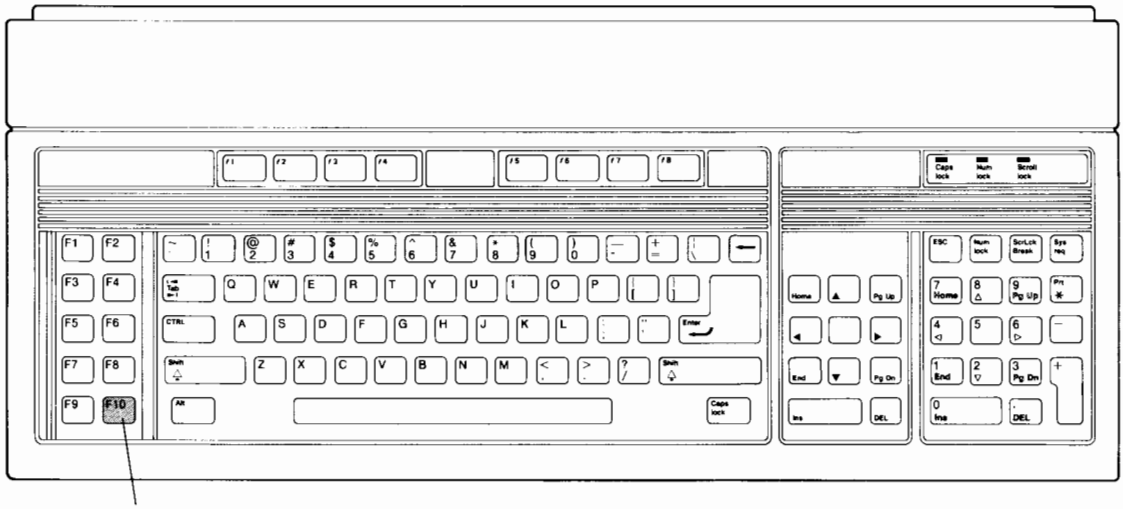
Selecting a Card for Reading

When you want to read more than just the first three lines of a card, you can *select* a card and ECM will display it.

Selecting a Card with the Keyboard

To select the Chocolates of Belgium card with the keyboard:

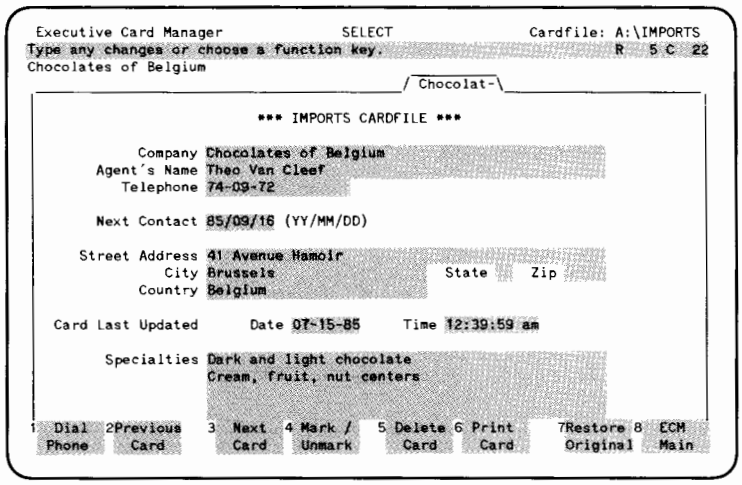
1. With the rotary cardfile appearing on your display, scroll the cardfile until you see the index tab that says `Chocolat-`.
2. Press Tab (or Shift + Tab) until the index tab of the Chocolates of Belgium card is highlighted.
3. Locate F10 on the keyboard:



You press this key to select the chosen card for reading.

4. Press F10.

ECM brings up the Select menu and shows you the Chocolates of Belgium card:



Now, return this card to the cardfile:

5. Choose **ECM Main**.

ECM returns to the Main menu with the previously selected card—Chocolates of Belgium—in the open-card position.

Selecting with Touch or a Mouse

If you ordered HP Touch or a mouse with your personal computer, you can also use touch or a mouse to select a card. The following table describes the steps you will use.

With the rotary cardfile appearing on your display:

To Select a Card with. . .	You must. . .	Then. . .	What Happens
a mouse	move the pointer to the card's index tab.	press and release the left button of the mouse.	ECM shows you the card in the Select menu.
touch	touch the card's index tab		ECM shows you the card in the Select menu.

Reading a Long Card

The cards in IMPORTS are *long* cards. That means every card contains more than one page—a screenful—of information.

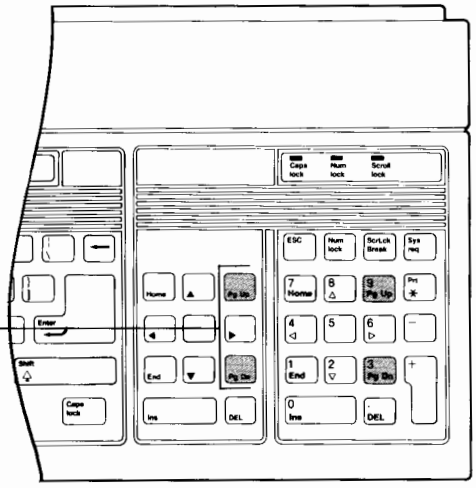
To read the entire card, you can flip the pages back and forth. Or, you can roll the card up or down one line at a time.

Flipping Pages of a Long Card

1. With the rotary cardfile appearing on your display, select a card of your choice.

   The card you chose appears in the Select menu.

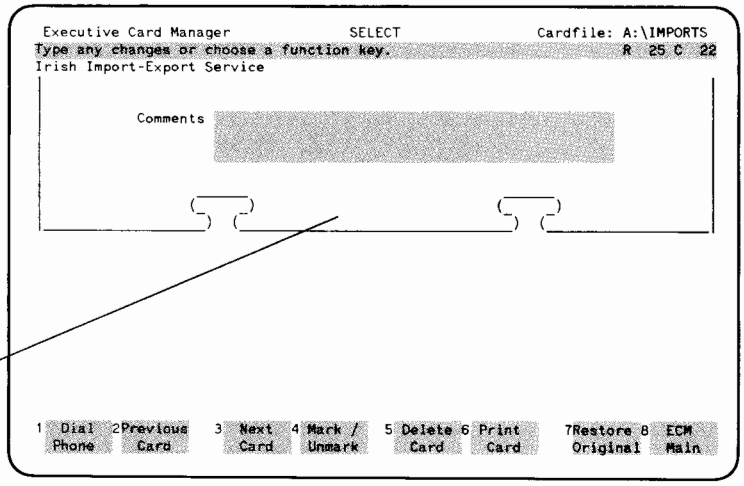
2. Locate [Pg Dn] and [Pg Up] on the keyboard:



You press one of these keys to flip the pages of a long card.

3. Press Pg Dn

ECM shows you the second page of your card:



This is the bottom of the card. It means that ECM is displaying the last page of the card.

4. Press Pg Up.

ECM brings back the previous page of your card.

This is the first page of the card. (You can tell it's the first by the index tab at the top of the page.) Notice that this page doesn't have a bottom. That's how you can tell that a card is long: the first page won't have a bottom.

Rolling a Long Card

You can also roll a long card using the keyboard. With the Select menu on your display:

1. Press [ScrLck] on your keyboard.

The status light comes on. This means when you press the [△] and [▽] keys, the card on your screen will scroll (rather than the cursor move).

2. Press [△] once.

   The card rolls up by one line.

3. Now press [△] until the computer starts to beep.

   ECM rolls up the lines of the card until it reaches the bottom of the card—that's when it starts beeping. ECM also stops rolling when you release the keys.

4. Press [ScrLck] again.

The status light goes out and the cursor arrow keys return to their normal functions.

Now return the card to the cardfile:

5. Choose **ECM Main**.

   ECM brings up the Main menu, ready for another task.

Rolling a Long Card with a Mouse

If your computer doesn't have a mouse, continue to the next section titled, **Printing a Card**.

1. With the rotary cardfile appearing on your display, select the card you want to read.

2. Holding down the left button of the mouse, drag the mouse so that the Pointer moves toward the bottom of the card.

   The card rolls up until you stop dragging the mouse, release the button, or until you reach the bottom of the card.

3. Now do the same thing in step 2, but in the opposite direction.

   The card now rolls down.

4. Return the card to the cardfile by choosing ECM Main.

Printing a Card

If your computer doesn't have a working printer attached, continue to the next section titled **End of Session 1**.

You can get a convenient printed copy of a card by selecting the card, then printing it from the Select menu. Try it with a card of your choice in the IMPORTS cardfile:

1. With the rotary cardfile appearing on your display, select the card you want printed.

   The card you selected appears in the Select menu.

2. Choose Print Card.

   ECM prints the entire card.

3. Choose ECM Main to return to the Main menu.

There are other ways to print information in a cardfile. You can print just a portion of a multipage card. Or you can print reports and mailing labels. (In Session 5, you'll see how to print reports.)

End of Session 1

Now that you know how to select and read cards, feel free to browse through the the IMPORTS cardfile on your own. *When you're finished browsing, be sure to return to the Main menu.*

Leaving ECM

If you want to exit ECM at this time, go to step 1. If you want to continue, go on to Session 2, **Creating a New Cardfile**.

With the Main menu on your display:

If the Main menu isn't there, use the **Map of ECM** on the inside of the back cover to help you return to the Main menu.

1. Choose Exit ECM.

   ECM prompts you to confirm that you want to leave the program.

2. Choose Yes.

   After a few moments, the PAM screen (or the DOS prompt) appears.

2 Creating a New Cardfile

To create a new cardfile, you first draw the form of its card to show the information you want in it and how it's laid out. Then you tell ECM such things as how the cards should be ordered in the cardfile. Finally, you tell ECM to save a new cardfile on the disc which uses the form for its cards. At that point, you've created a new cardfile and can begin adding cards to it.

In this session, you will:

- Draw the card form on the display.
- Tell ECM to arrange your cards in the order you want.
- Save a new cardfile on the disc.

Before You Begin

If you left ECM after Session 1, start the program again. (For a refresher on starting ECM, reread **Starting ECM**, in Session 1, page 1-2.)

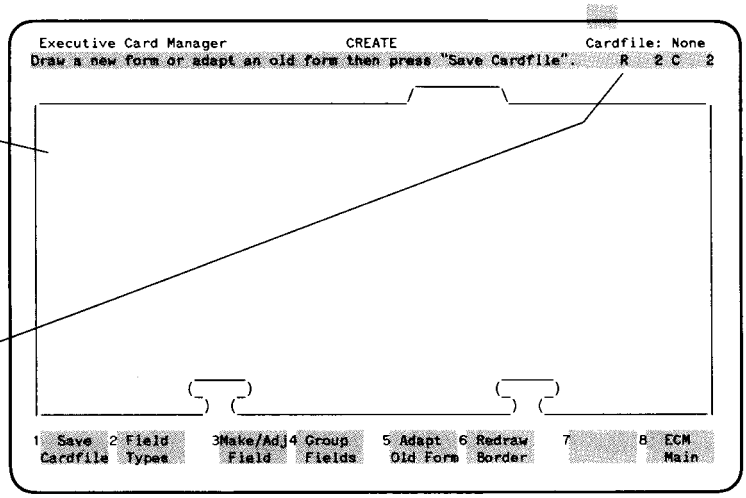
Drawing a Form

To begin drawing a card form:

1. From the Main menu, choose `Cardfile Tasks`.
   ECM shows you the Cardfile Tasks menu.
2. Choose `Create Cardfile`.
   In a moment, ECM shows you the Create menu:

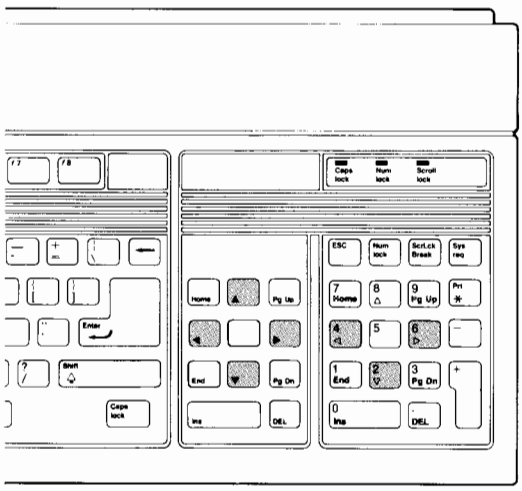
You draw the card form specifications in here.

The cursor's row and column numbers in the card form.



Moving the Cursor As You Draw a Form

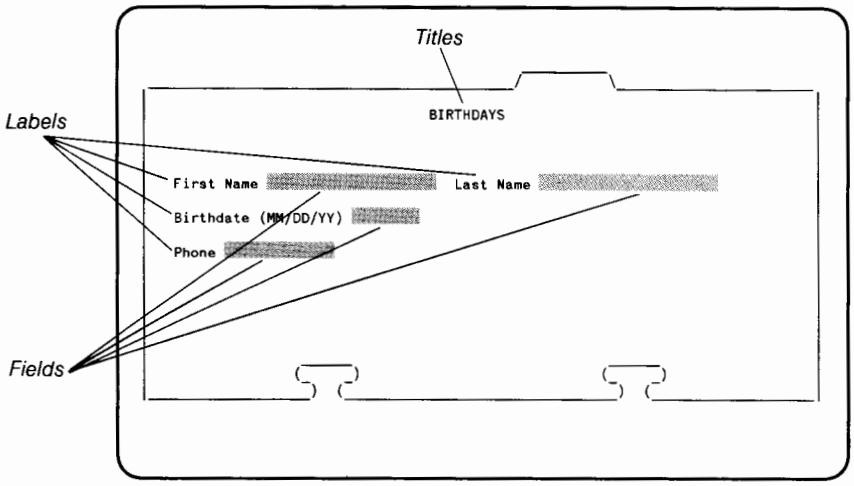
You can use these keys to move the cursor as you draw the form:



Try these keys to see how they work. Watch the row and column numbers change as the cursor moves.

A Sample Form: BIRTHDAYS

This is the form you'll draw in this session:



Giving Your Form a Title

A *title* describes a cardfile's contents and serves as a memory aid for you. A title is optional, and you can position it where you like on the form.

To give your form the title BIRTHDAYS:

1. In the Create menu, move the cursor to row 3, column 35.

   Watch the row and column numbers to confirm `R 3 C 35`.

2. Type `BIRTHDAYS`.

Creating Fields on Your Form

A *field* is the blank you fill in with information. You need one field for each item of information. You can add a *label* in front of a field to describe the information the field contains.

To create the First Name label and field in the BIRTHDAYS form:

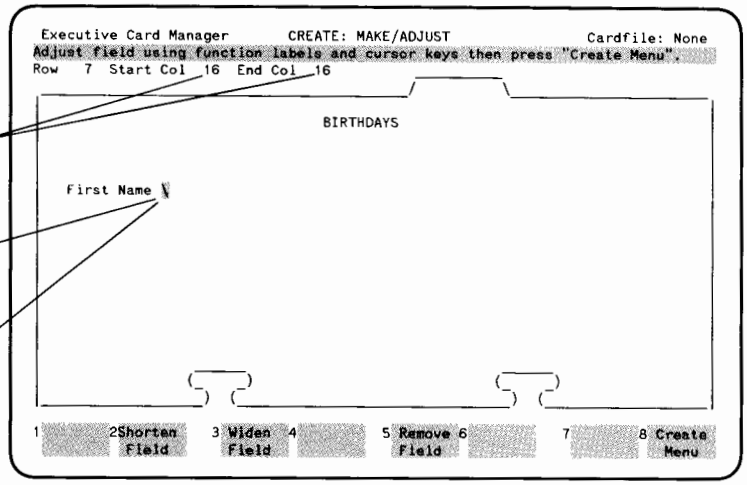
1. In the Create menu, move the cursor to `R 7 C 5`.
2. Type `First Name`.

   If you make a mistake while typing the label, backspace to the incorrect letters, then type over them.
3. Move the cursor to `C 16` in the same row.

   This puts a space between the label and the field.

4. Choose Make/Adj Field.

   After a few moments, ECM displays the Make/Adjust menu:



The first and last column numbers of the field.

The highlighted backslash tells you this column is in the field.

When you create a field, ECM starts it at the column where the cursor is located.

5. Watching the End Col indicator, choose Widen Field so that the end column is 36.

Note

How wide did you make the field? For a big field, there's a quick way to figure it out without counting each backslash: **End Col – Start Col + 1 = Field Width.** So the First Name field is 36 – 16 + 1 = 21 columns wide.

---

6. Choose Create Menu.

   ECM saves the First Name field and returns to the Create menu. The cursor is in the first column of the new field.

Modifying Fields on Your Form

Make/Adj Field lets you shorten, widen, move, and delete existing fields in the form.

To shorten the First Name field:

1. Make sure the cursor is in the First Name field.

   The cursor must be in the field you want to modify.
2. Choose Make/Adj Field to bring up the Make/Adjust menu.
3. Choose Shorten Field once.

   Now `End Col 35`.
4. Choose Create Menu.

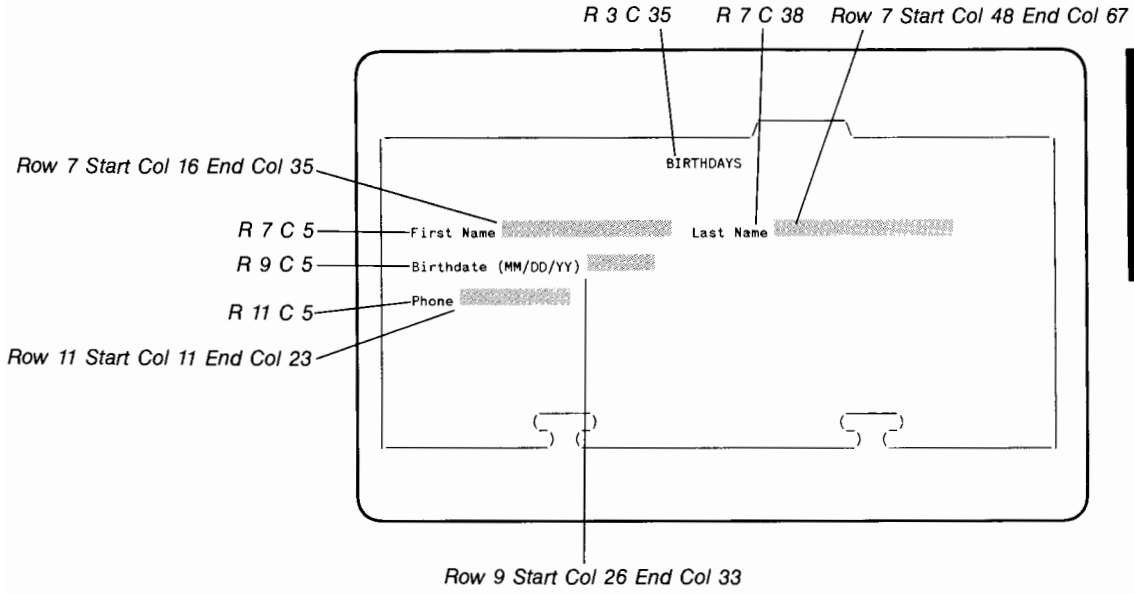
   ECM saves the change and returns to the Create menu.

To make any change to a field, you use the same process as before—*except for step 3. The following table shows you what to do instead:*

If you want to do this . . .	Use this in step 3 . . .
move the field	▲, ▼, ◄, ►. With touch: touch the field and leaving your finger on it, move your finger to where you want the field positioned, then let go. With a mouse: position the Pointer on the field, hold down the left button, move the field, then release the button.
widen the field	Widen Field
delete the field	Remove Field (Skip step 4—ECM automatically returns to the Create menu.)

Practice Creating Fields and Labels

Create the other fields and labels of the BIRTHDAYS form. Use the following picture to help you position the fields at the proper row and column numbers:

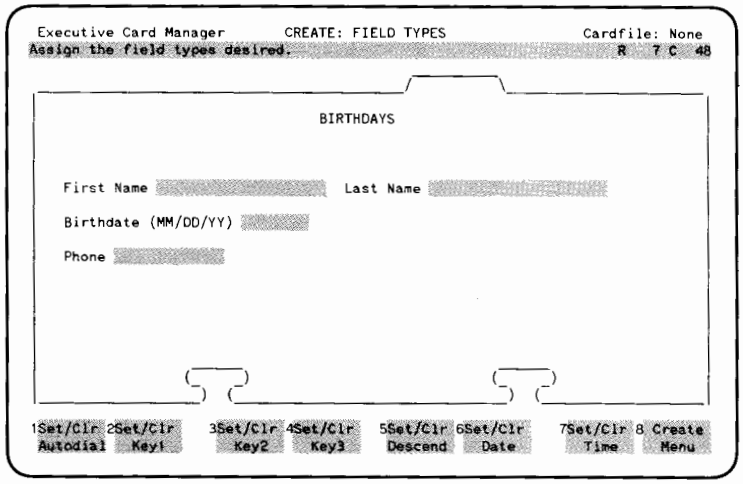


Arranging Your Cards in the Order You Want

To make ECM arrange your cardfile alphabetically by name, last name first:

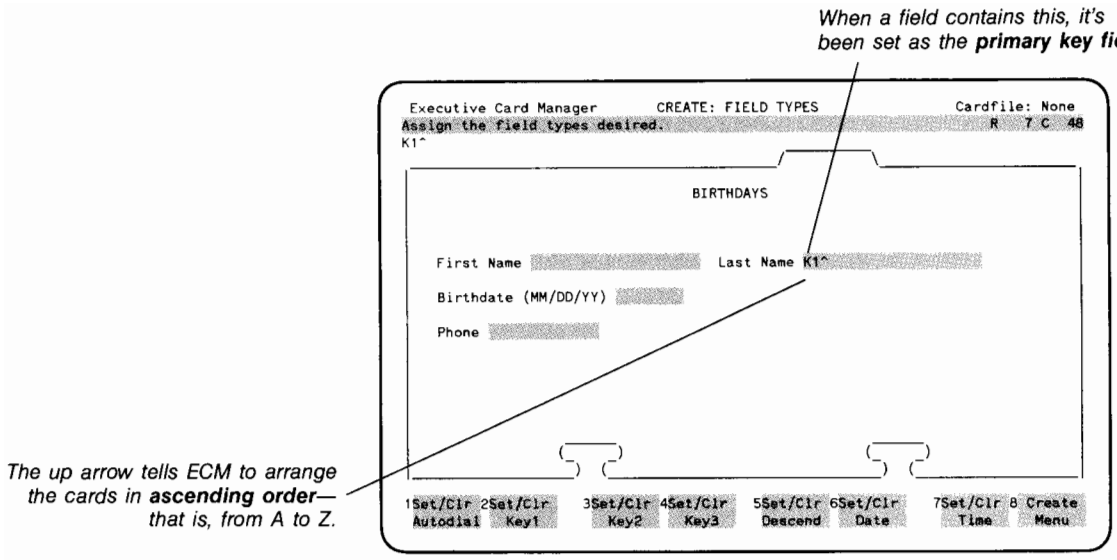
1. In the Create menu, choose **Field Types**.

   The Field Types menu appears with the BIRTHDAYS form:



2. Move the cursor anywhere in the Last Name field.
3. Choose **Set/Clr Key1**.

   The Last Name field is now set as the *primary key field*:



Because you set the last name field as the primary key field, ECM will arrange the cards in alphabetical order of the last names.

4. Move the cursor anywhere in the First Name field.
5. Choose Set/Clr Key2.

   You set the First Name field as the *secondary key field*. So cards with the same last name will be further arranged with first names in alphabetical order.
6. Choose Create Menu.

   ECM saves the field type information and brings back the Create menu.

Note

If *you* don't choose any key fields, ECM picks one for you. It sets the first field in the card as the primary key field.

Saving a New Cardfile on the Disc

ECM takes your form, builds a cardfile which uses the form for its cards, and saves the cardfile on the disc. You must give the new cardfile a name so that ECM can save it on the disc.

To save a cardfile named after you:

1. From the Create menu, choose Save Cardfile.

   ECM prompts you to type in a cardfile name.
2. Type the first eight letters of your first name (if your first name is less than eight letters, type your entire first name).
3. Press Enter.

   ECM tells you it's creating the cardfile. When it's done, ECM displays your cardfile on the Main menu, ready for you to add cards to your new cardfile.

End of Session 2

If you want to exit ECM at this time go to step 1. If you want to continue go on to Session 3, **Adding, Updating, and Deleting Cards.**

1. Choose ECM Main to return to the Main menu.

   If you have trouble returning to the Main menu, use the **Map to ECM** on the inside of the back cover to help you return.

2. Choose Exit ECM.

   ECM prompts you to confirm that you want to leave the program.

3. Choose Yes.

   After a moment, the PAM screen (or the DOS prompt) appears.

FYI: Other Ways to Create a New Cardfile

You don't always have to start from scratch to create a new cardfile. You may be able to take advantage of work that you or somebody else has already done:

- Use **Executive Card Manager: Templates** for ready-made forms (HP Product Number 68335F). This companion product to ECM contains over 20 ready-to-use forms, including Address Book, Appointment Scheduler, Business Contacts, Travel Expense Report, Stock Portfolio, and Inventory.
- Copy an existing cardfile so you get not only the same card form, but all of the same cards as well. (Refer to Chapter 18: **Copying Techniques** in the **Using** part of this book.
- Copy just the card form of an existing cardfile, then adapt the form to create a new cardfile. (Refer to Chapter 9: **Creating a New Card Form** in the **Using** part of this book.

3 Adding, Updating, and Deleting Cards

This session covers the basic tasks of maintaining a cardfile. You'll learn to:

- Add a card to a cardfile.
- Update the information in a card.
- Delete a card from a cardfile.

Before You Begin

1. Are you continuing directly from Session 2?

   If YES. . . go the the next section titled **Adding a Card to the cardfile.**

   If NO. . . go on to step 2.
2. Start ECM. (If you need help, refer to **Starting ECM** in Session 1, page 1-2 for instructions.)
3. Get the cardfile you created in Session 2 (it's named after you). If you need help, refer to **Getting a Cardfile** in Session 1, page 1-7 for instructions.
4. Return to the Main menu.

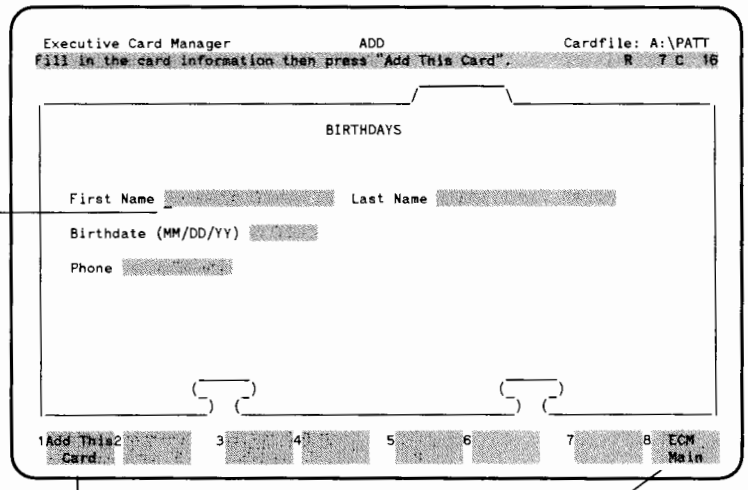
Adding a Card to the Cardfile

In this exercise, we'll provide the information for the first card you add, and show you how to move the cursor to other fields.

To add a card for John Doe:

1. From the Main menu, choose Add Cards.

   ECM shows you the Add menu with a BIRTHDAYS card ready to be filled in:



The cursor is ready for you to fill in the first field.

After you fill in a card, choose this to file the card in the cardfile.

Choose this when you're finished adding cards.

2. Type `John`.

   If you make a mistake, backspace to the error and type over the incorrect letters.

Note

You type information in the fields using capitals and small letters—exactly as you want it to look on the card.

3. Press [Enter].

   The cursor moves to the next field, labeled `Last Name`.

4. Type `Doe`.

5. Press [Tab].

   [Tab], like [Enter], moves the cursor forward from one field to the next. The cursor is now in the Birthdate field.

6. Type `11/22/33`.

   ECM automatically moves the cursor to the Phone field because you filled in the last character of the Birthdate field.

Caution

Watch out for fields where you fill in the last character position. Remember *not* to press [Enter] or [Tab] after filling in such a field. Otherwise, you'll skip the field next to it.

Let's say the birthdate should actually be *12/22/33*. The next step shows you how to move the cursor back to the previous field:

7. Press [Shift] + [Tab].

   The cursor moves back to the first character in the Birthdate field.

8. Change the month to `12`.

9. Move the cursor to the next field in the card—the Phone field.

10. Type `(909)555-4444`.

    Even though you filled in the entire Phone field, the cursor stays put because Phone is the last field in the card.

11. Choose Add This Card.

    ECM files John Doe's card and clears the fields.

If you had more cards to add, you could do that now without leaving the Add menu. Since you have no more cards to add to the cardfile:

12. Choose ECM Main.

    ECM takes you back to the Main menu. The last card you added is in the open-card position.

Practice Adding Cards

Add at least one more card to your cardfile now. Try adding cards that don't have Doe as the Last Name field to see ECM file them alphabetically. You can also add cards for Jane Doe and Jeff Doe to see the First Name work as the secondary key field.

Updating Information in a Card

To update John Doe's phone information:

1. From the Main menu, select John Doe's card. (If you need help with selecting a card, reread the section, **Selecting a Card for Reading** in Session 1, page 1-13.)
2. Move the cursor to the Phone field.
3. Type any new phone number you like.

If you make mistakes changing information, you might want to go back to the way the card looked before you started. To do that:

4. Choose Restore Original.

   ECM shows you the original phone number. If you had changed more than one field, ECM would have returned all of them to their original form.
5. Back up to the first character in the Phone field and retype the new phone number.
6. Make sure the information in the card is what you want saved.

Note

If you choose Next Card, Previous Card, or ECM Main in the Select menu, ECM automatically saves the card information as it appears in this menu.

7. Choose ECM Main.

   ECM returns the updated card to the cardfile and shows you the Main menu.

Deleting a Card from the Cardfile

1. From the Main menu, select the card you want to delete.
2. Choose Delete Card.

   ECM asks you to confirm that you want to delete the current card.

Caution

Once you delete a card, you cannot retrieve it.

3. When you are certain that this is the card you want to delete, choose Yes.

   ECM deletes the card and shows you the next card in the cardfile. (If you had deleted the only card in the cardfile, ECM would have automatically returned to the Main menu.)
4. Choose ECM Main.

   ECM returns to the Main menu, where you can see that the card you deleted is gone from the cardfile.

End of Session 3

This is the end of Session 3. You may continue on to Session 4, **Finding Sets of Cards** or you can exit ECM. If you need assistance with exiting, refer back to Session 1, **Leaving ECM**, page 1-20, for instructions.

4 Finding Sets of Cards

In this session, you'll learn how ECM can find all the cards in the category you choose.

For example, suppose you want to know which companies in the IMPORTS cardfile are in Italy. You would ask ECM, "Which cards have Italy in their Country fields?" You pose the question to ECM by asking for cards with specific information in a particular field. ECM gets the answer by searching the entire cardfile to find just those cards.

In this session you will ask ECM to do two kinds of searches:

- Find all cards having *the same* information in a field.
- Find all cards having *similar* information in a field.

Before You Begin

1. Are you continuing directly from Session 3?

   If YES. . . go on to step 2.

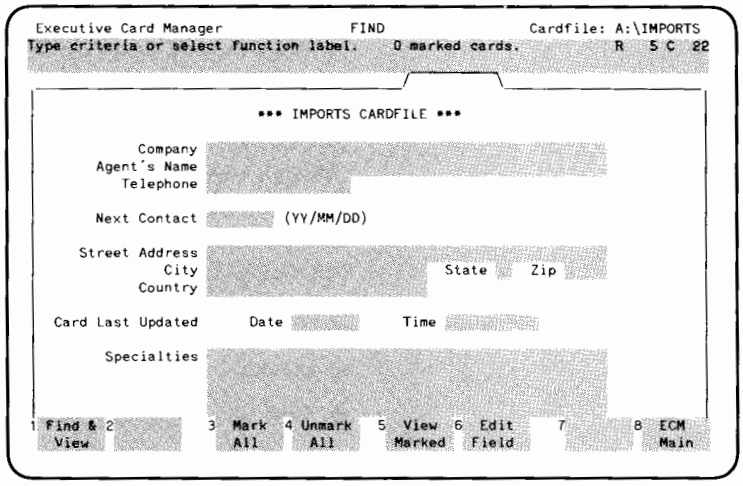
   If NO. . . Start ECM, (refer to **Starting ECM** in Session 1 if you need help), then go to step 2.
2. Get the IMPORTS cardfile.
3. Return to the Main menu.

Finding All Cards with the Same Information in a Field

To find all companies in Italy:

1. From the Main menu, choose Find Cards.

   ECM shows you the Find menu, where you see a blank card for the IMPORTS cardfile:



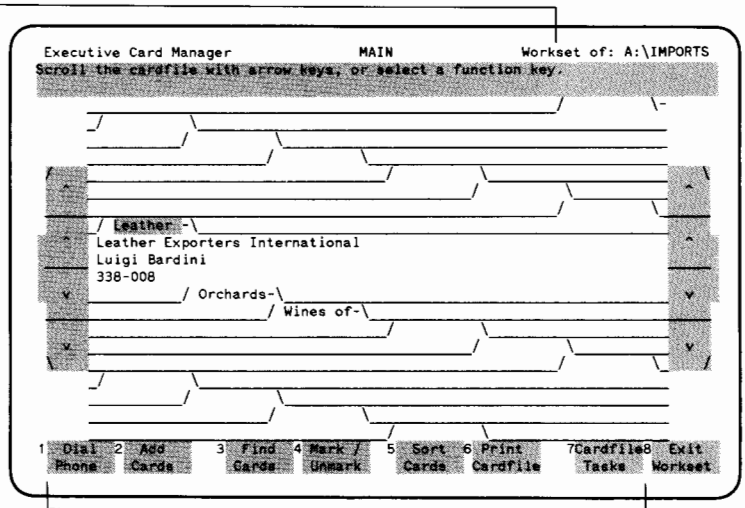
2. Move the cursor to the field labeled `Country`.
3. Type `italy`.

   If you make a typing mistake, backspace to the incorrect letters and type over them. You can type the information in capitals, small letters, or a combination of the two.

4. Choose Find & View.

   ECM searches IMPORTS for cards having Italy in the Country field, then displays the *workset* of cards it found on the workset Main menu:

You're using a workset and not a cardfile.



You can do the same tasks with a workset that you can with a cardfile.

A *workset* is a *temporary* cardfile that ECM creates from the cards found in the search. It works very much like a regular cardfile: you can scroll it, read and print cards from it, even do searches on it.

5. If you viewed a card, choose ECM Main to return to the Workset Main menu.

Exiting a Workset

When you exit a workset, its cards are returned to the original cardfile that they came from. Try that now:

1. From the workset Main menu, choose Exit Workset.

   ECM asks you to confirm that you want to exit the workset.

2. Choose Yes to confirm.

ECM puts the workset cards back into IMPORTS and returns you to the cardfile on the regular Main menu.

Finding All Cards with Similar Information in a Field

This is called a *wildcard* search. You ask ECM to look at portions of text in a field, rather than the entire field of text. You'll see how useful a wildcard search can be in the exercise which follows.

To find all companies in which the next contact occurs in 1986:

1. Choose `Find Cards`.
2. Move the cursor to the field labeled `Next Contact`.

   Notice that the date has the year first, then the month and day.
3. Type `86*`.

   The asterisk tells ECM to search only for the dates beginning with `86` and ignore the rest of the date.
4. Choose `Find & View`.

   ECM searches the cardfile, then shows you the workset of cards for all companies with dates for Next Contact in 1986.

You can select a card for reading if you'd like to check the Last Contact date. If you do, make sure you return to the workset Main menu when you're done.

5. Exit the workset to return to IMPORTS on the regular Main menu.

End of Session 4

This is the end of Session 4. You may continue on to Session 5, **Printing Reports** or you can exit ECM. If you want to exit ECM at this time, refer to Session 1, **Leaving ECM**, page 1-20, if you need assistance.

FYI: Other Kinds of Searches

We covered the most basic kinds of searches in this session. When you found all cards with the same information in a field, you did a *literal (character by character) whole word* search. Finding cards with similar information is a *literal partial word* search. ECM offers even more types of searches, including:

- **Multiple-field search.** You can fill in more than one field in the Find menu.
- **Negative search.** ECM matches everything that differs from the text you entered in the field.
- **Numerical search.** ECM compares numbers by their values, not by the characters. You ask for cards with values equal to, greater than, or less than the number you filled in.

For details on these searches, refer to Chapter 14: **Searching for Specific Cards** in the **Using** part of this book.

5 Printing Reports

This last session shows you how to make a report from the information in the IMPORTS cardfile. You will:

- Define a format for a report.
- Print a report on the printer.
- Save a report format.
- Conclude Learning Executive Card Manager.

Before You Begin

1. Are you continuing directly from Session 4?

   If YES. . . go to the next section titled, **Getting Ready to Print Reports**.

   If NO. . . go on to step 2.
2. Start ECM.
3. Is the cardfile appearing **IMPORTS**?

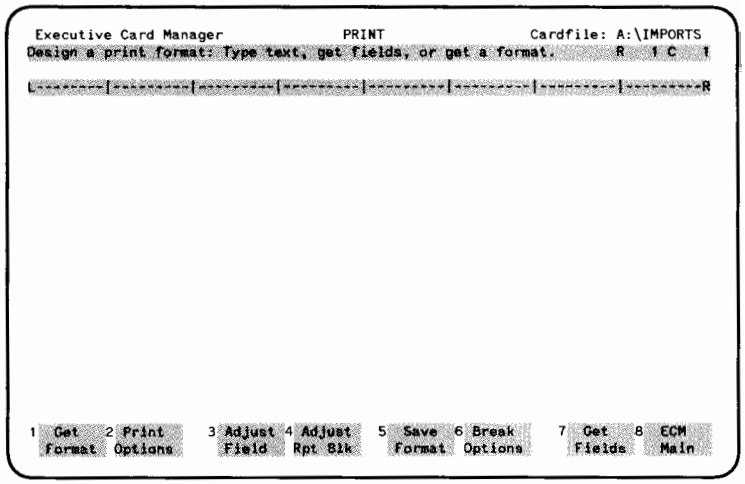
   If YES. . . go to the next section titled, **Getting Ready to Print Reports**.

   If NO. . . go on to step 4.
4. Get the IMPORTS cardfile.
5. Return to the Main menu.

Getting Ready to Print Reports

You need to get to the Print menu:

1. From the Main menu, choose `Print Cardfile`.
   In a moment, ECM displays the Print menu:



Defining a Format for a Report

A *format* provides ECM with instructions on how you want the printed report to look. You normally create a format for a specific cardfile. It takes three steps to define a format:

- Getting the fields to be included in the report
- Arranging the field layout and adding titles and headers
- Setting up the printer for printing reports

Getting Fields for a Report

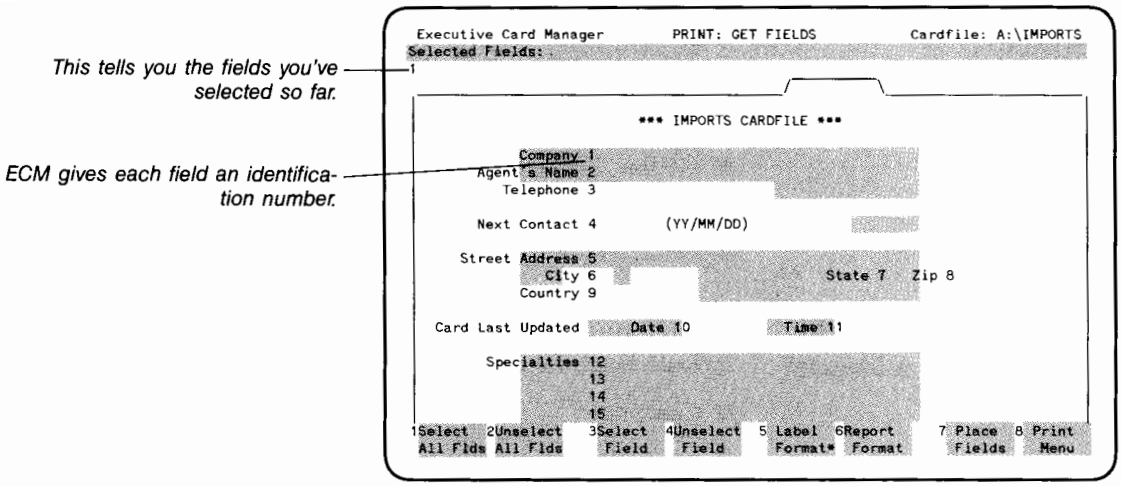
The report that you'll print for the IMPORTS cardfile will include these fields in the order listed:

- Company
- Country
- Agent's Name

To get the fields for the IMPORTS report:

1. From the Print menu, choose **Get Fields**.

   The Get Fields menu with the IMPORTS card form appears:



2. If no asterisk is in **Report Format**, choose its corresponding function key so that an asterisk appears.

   The asterisk in **Report Format*** tells ECM that you're getting fields for a report (and not a label) format.

You get the fields in the order in which you want them to appear in the report. Begin with field 1:

3. Make sure the cursor is in field 1, labeled `Company`.

   The field at the cursor position is highlighted.

4. Choose **Select Field**.

   You just selected field 1 for inclusion in the report format. Notice the message line:

   ```
   Selected Fields: 1
   ```

5. Get these fields in the order listed following the instructions in Steps 3 and 4:

   i. `Country`, field 9
   ii. `Agent's Name`, field 2

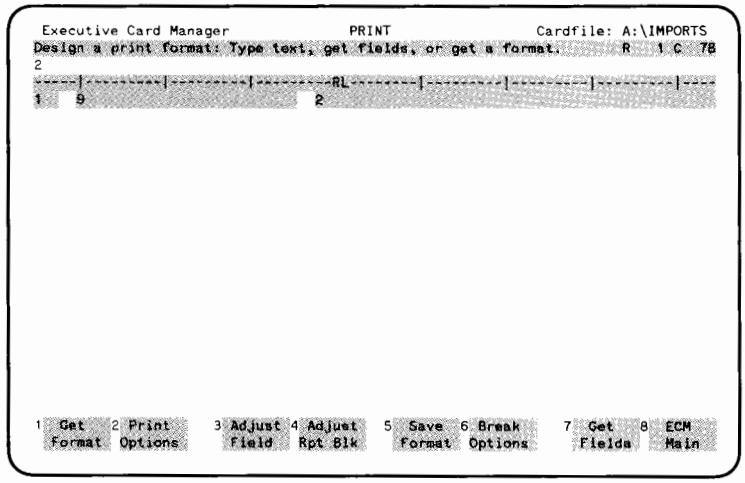
6. Check to make sure the selected fields are in order:

   `Selected Fields: 1,9,2`

   If they're not in order, choose **Unselect All Flds** and start again from step 3.

7. Choose **Place Fields**.

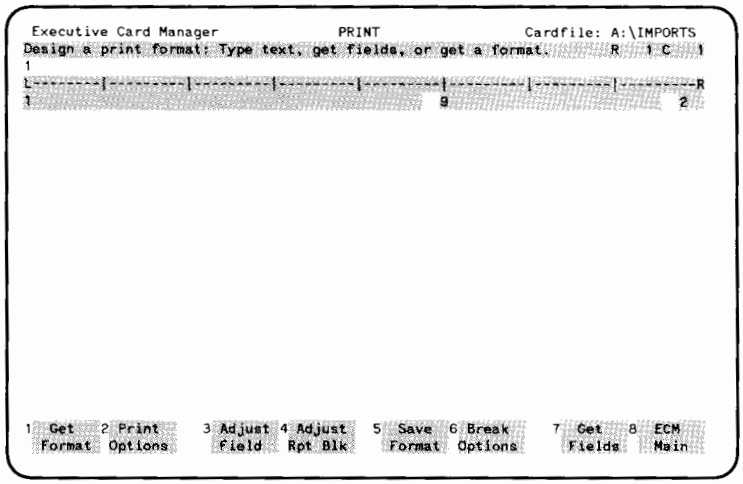
   ECM returns to the Print menu with the fields you've gotten. The cursor is in field 2, the last field you selected for inclusion in the report:



The next step will enable you to see the other fields as well:

8. Press Home.

Now you can examine the *default* report layout:



In the default report layout, the fields are the same size as they appear in the card form, and they're all placed on Row 1 in the order that you got them.

Adjusting Fields for a Report

When you get fields for printing a report, ECM automatically adjusts them in a *default*, or standard, report layout. ECM will print the report according to this layout unless you readjust it.

Notice that field 2 (`Agent's Name`) runs past the end of the display. This is normal if you are making a 132-column report. In the following example you will adjust the fields to fit in an 80-column report.

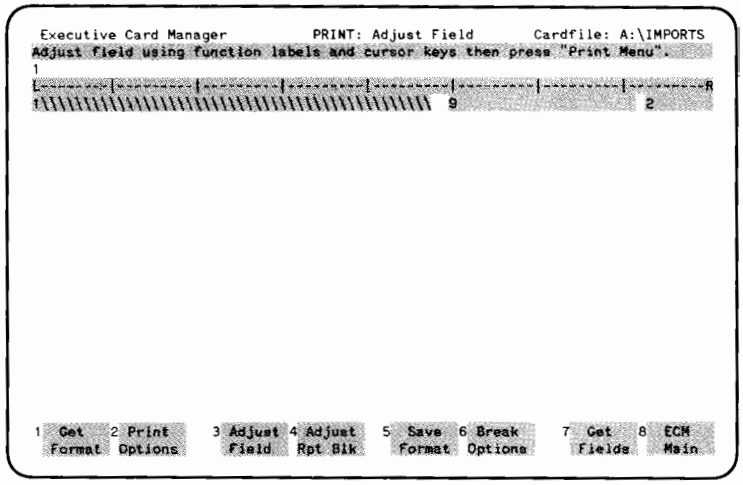
To do this, you will shorten each of the three fields. By doing so, you will also shorten the amount of information printed in each field. For example, if you shorten field 1 (`Company`) to 32 columns, you will only print the first 32 characters of each company's name.

For this report, you'll shorten field 1 (`Company`) to 32 columns, field 9 (`Country`) to 20 columns, and field 2 (`Agent's Name`) to 24 columns.

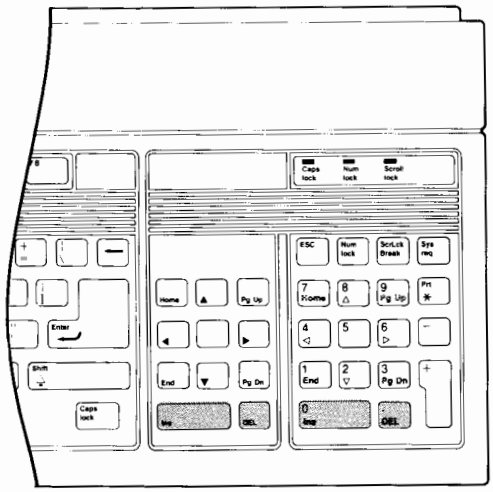
To adjust the print width of fields 1, 9, and 2:

1. With the cursor in field 1, choose **Adjust Field**.

   ECM displays the Adjust Field menu with field 1 chosen for adjusting:



2. Locate DEL and Ins on your keyboard:



3. Watching the `End Col` indicator, press DEL until `End Col 31`.

   Notice that the other fields automatically shifted to the left by one column each time you pressed DEL. (If you had chosen Shorten Field instead of pressing DEL, the other fields would not have shifted.) Field 1 is now 31 columns wide.

But the field should be 32 columns wide. Here's how to widen the field:

4. Press Ins.

   This turns on Insert mode. When Insert mode is *on*, the characters "IC" appear next to function label 5 on your screen. Using Widen Field with Insert mode will automatically shift the other fields to the right in addition to widening the field.

5. Watching the fields, choose Widen Field once.

   This adds a column to field 1 and shifts the other fields to the right by one column. Now `End Col 32`.

6. Press Ins to turn off Insert mode.

   The characters "Ins" disappear and you are no longer in Insert Mode. Also, you've finished adjusting the width of field 1.

7. Choose Print Menu.

   ECM saves the changes to field 1 and returns to the Print menu.

8. Now you adjust field 9 so that it's 20 columns wide. (When field 9 is 20 columns wide, `End Col 54`.)

9. Adjust field 2 so that it's 24 columns wide (`End Col 80`).

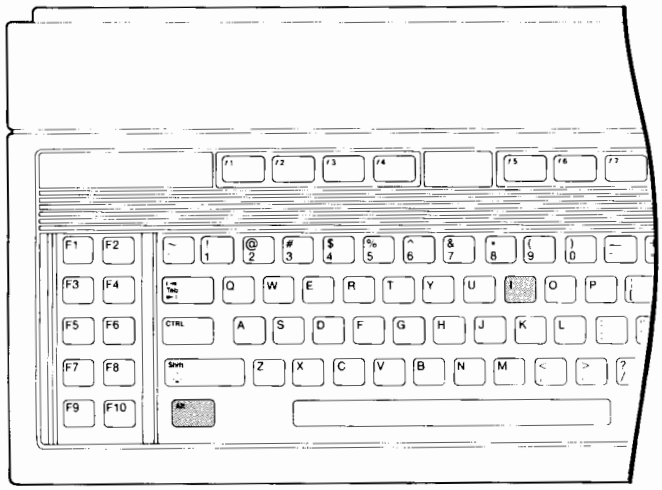
When you're finished adjusting the fields, you're back at the Print menu.

Adding Titles

You can add titles and column headers to a report just like you did when you drew a card form to create a new cardfile. They can be different from the labels you used in the form, too.

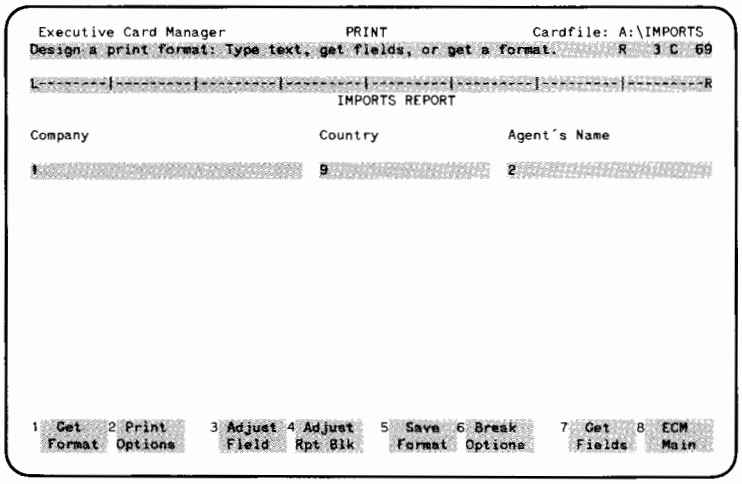
To add a title and column headers to the report:

1. Make sure the Print menu appears.
2. Press [Home] to move the cursor to the beginning of the report.
3. Locate [Alt] and [I] on the keyboard:



4. Press Alt + I four times to insert four lines.
5. Move the cursor to R1 C37 and type IMPORTS REPORT.
6. Move the cursor to R3 C1 and type Company.
7. Move the cursor to R3 C35 and type Country.
8. Move the cursor to R3 C57 and type Agent's Name.

Your report layout now looks like this:



Setting Up the Printer for a Report

ECM comes with general-purpose *printer setup values*. These values let ECM work with most printers in most situations. But you can change these values to handle exceptional cases; for example:

- You want to use a particular feature of your printer, such as compressed print (check your printer manual for its available features).
- You're creating an unusual, stylized report layout.
- Your printer requires special setup to work with ECM.

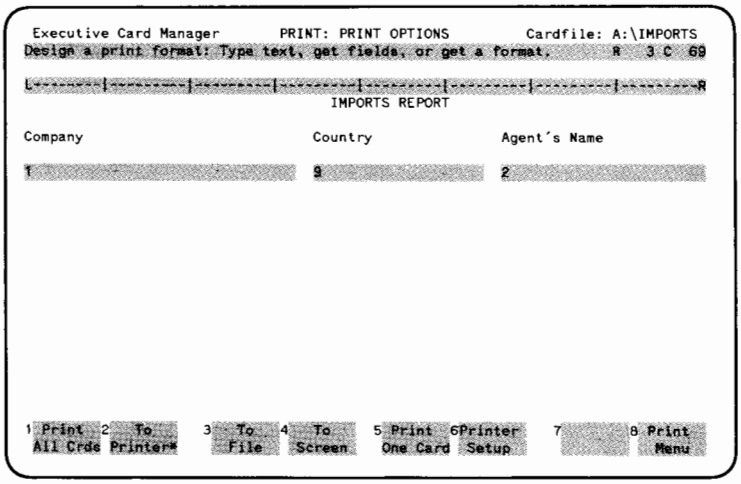
For this exercise, you'll create a typical report. However, if your printer is either an *HP LaserJet* or a *sheet-feed printer* , it requires special setup values which you'll need to set in the Printer Setup menu.

If you don't have one of these printers, you can continue to the next section titled, **Printing a Report on the Printer**.

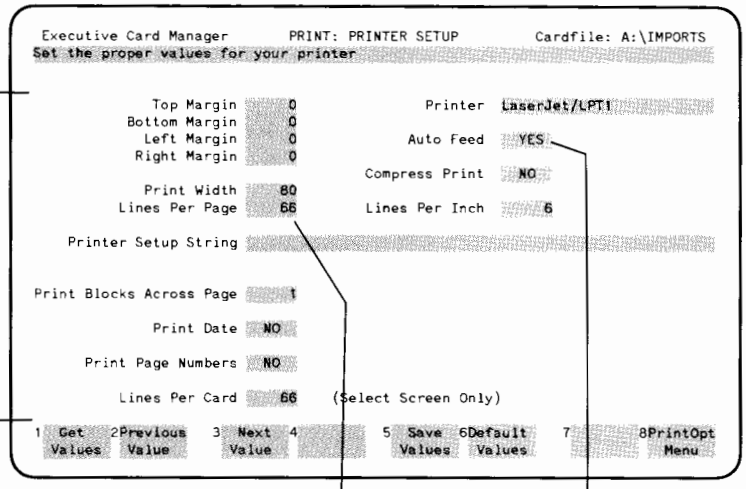
To change the printer setup values for the HP LaserJet or a sheet-feed printer:

1. From the Print menu, choose Print Options.

   The Print Options menu appears:



2. From the Print Options menu, choose **Printer Setup**.
   ECM shows the Printer Setup menu:



This picture shows the default printer setup values. The values in your menu many be different.

*For the **HP LaserJet**, this value should be* `60`.

*For a **sheet-feed printer**, this value should be* `NO`.

   The HP LaserJet prints 60 lines per page. A sheet-feed printer works best if there is no auto feed; with no auto feed, the printer will pause at the end of a page so you can insert a new sheet of paper into it.

3. Check the picture above to locate the value that you need to change for your printer. Move the cursor to that field.
4. Choose **Previous Value** or **Next Value** until the field contains the proper value.
5. Choose **Save Values**.

   ECM beeps and tells you that it has saved the values. These printer setup values will be used by ECM from now on, until you change and save the values again.

Note

If you change the values but don't choose Save Values, ECM will use those new values until you exit ECM. Then when you start ECM, the old values will be in effect.

6. Choose PrintOpt Menu.
7. In the Print Options menu, choose Print Menu.
   ECM returns to the Print menu.

Printing a Report on the Printer

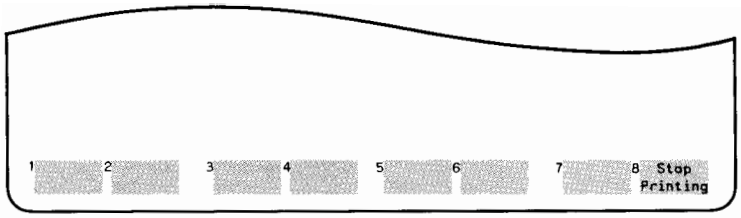
If your computer doesn't have a working printer attached, continue to the next section titled, **Saving a Report Format**.

1. Make sure the printer is turned on and there is paper in the printer.
2. In the Print menu, choose `Print Options`.

   ECM displays the Print Options menu.
3. If `To Printer` does not contain an asterisk, press its corresponding function key.

   The asterisk tells ECM you want to print the report on the printer.
4. Choose `Print All Crds`.

   ECM tells you it's printing, and the function labels *temporarily* change to allow you to cancel printing:



When ECM is finished printing, the Print Options function labels reappear.

5. When ECM is finished printing, choose Print Menu.

Saving a Report Format

You can save the format you defined. Then, at a later time, you can get it and reuse it. This is especially useful when you want to print reports for different worksets of the same cardfile.

To save a report format under your name:

1. In the Print menu, choose **Save Format**.

   ECM prompts for a file name.

2. Type your last name and press Enter.

   ECM saves the format under the first eight characters of your last name.

3. Choose **ECM Main** to return to the Main menu.

End of Session 5

You've completed all the sessions in *Learning Executive Card Manager.* You can exit ECM or try printing the sample formats in the next section.

FYI: Sample Formats

You'll find a couple of sample format files on your work disc that work with the IMPORTS cardfile. They demonstrate additional features of ECM's print capabilities. Use Get Format to bring up these formats:

- ILABELS: this format prints out mailing labels for the IMPORTS cardfile.
- IREPORT: this format is similar to the one you created in this session, but includes a count field.

Along with ready-made card forms, **Executive Card Manager: Templates** (HP Product Number 68335F) contains report format files designed to work with its forms.

For more information on printing labels and reports, refer to Chapter 17: **Printing Reports, Mailing Labels, and Form Letters** in the **Using** part of this book.

End of Learning Executive Card Manager

If you've completed all of the sessions in this book, you're ready to begin making and using your own cardfiles. You also know enough about ECM to do more sophisticated tasks on your own. As you explore other features, you'll find that the **Using** part of this book will be the best reference tool to use.

We hope you've enjoyed this tutorial!

Computer Museum

6 Preparing to Use ECM

Before you can put ECM to work, you must set up your personal computer. Since a variety of personal computers support ECM, you should consult the owner's manual for your computer for the necessary set-up procedures.

You should also read *Setting Up Executive Card Manager* as a preliminary step to using ECM. This manual provides useful information on connecting peripherals to your personal computer for use with ECM and how to install the ECM program.

Note

We strongly recommend that you make a working copy of ECM for use in your day-to-day tasks, then store the master disc that came with this package in a safe place. See the owner's manual for your personal computer and the set-up guide for this information.

The Equipment You Will Need

To use Executive Card Manager, you need:

- a personal computer that supports ECM
- sufficient internal memory to provide at least 128K bytes of execution space
- a work disc with ECM installed on it
- a fixed disc; some blank, formatted flexible discs; or a RAM disc with at least 32K bytes of available space

ECM works well without a printer. However, your productivity with ECM may increase if one is available for printing cards, labels, and reports.

Starting ECM

If you are using the HP Vectra personal computer, the simplest way to use ECM is through the facilities of PAM (Personal Application Manager). As its name implies, PAM aids you in managing your application programs.

To start working with ECM, you should bring up the PAM menu and choose ECM from the list of installed applications. Your actual steps may vary depending upon which personal computer you are using. (See your *Setting Up Executive Card Manager* manual for the necessary installation procedures.)

Bypassing PAM

You can also have ECM come up automatically, bypassing PAM. (This procedure is called *autostart*.) For these details, see the instructions on setting an application to start automatically in the owner's manual for your computer.

Some Special Terms

Certain words and phrases are especially important in ECM. The following list gives a brief definition of each.

autodial	The ability to have ECM dial a telephone number, once you have given it the proper instructions.
card	A card holds the information for each entry in your cardfile. It resembles a card in a ROLODEX Card File, except ECM cards may contain multiple pages.
card form	The layout for a particular set of cards. This includes all the items on the card as well as the order in which they appear.
cardfile	A set of cards, which share the same card form, that you have grouped together under one name.
current cardfile	The cardfile with which you are presently working.
field	The blanks that you fill in for each item on a card. A field can be from 1 to 80 columns wide.
field label	A name that you use to describe the information that is stored in a field.

group	A set of fields that ECM links together then treats as a unit when searching for information.
key field	A field that ECM uses to sort your cards. For example, if you designate a Last Name field as the primary key field, ECM arranges your cards alphabetically by last name. (Each card form may contain a maximum of three key fields.)
function key boxes	The eight highlighted boxes along the bottom of your display that correspond to the function keys ([F1] – [F8] and [f1] – [f8]) on the keyboard.
function label	The message inside a function key box that describes which task that function key currently performs.
open-card position	When the image of a cardfile appears, ECM shows the first three field lines of the card that is currently in the center of the rotary cardfile. This card is said to be in the open-card position.
pathname	The information required by ECM to pinpoint the location of a file on a particular disc.
workset	A temporary cardfile that ECM creates for a specific task (such as finding cards that meet certain criteria).

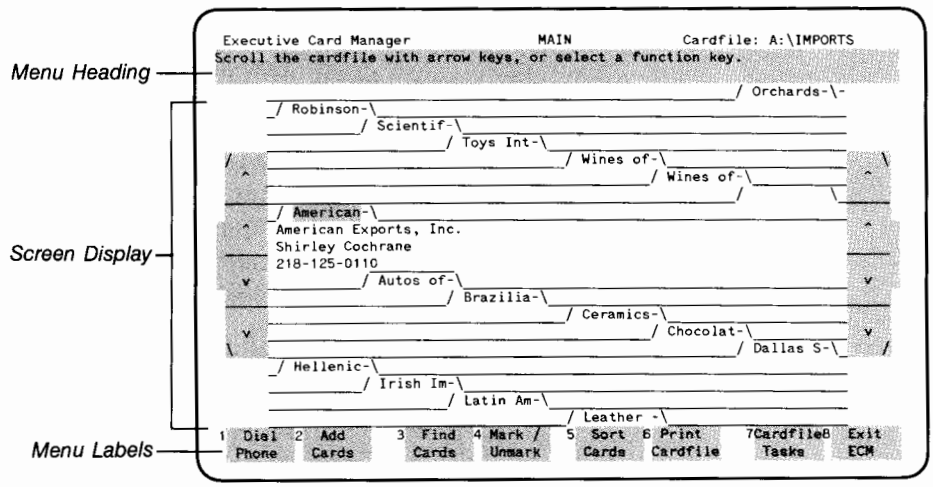
Looking at the ECM Main Menu

Working with ECM involves interacting with the image that appears on your display. To simplify this task, most images have a consistent look.

Note

You will quickly learn that several screens seem to be nearly identical. In fact, on some screens the center portion remains the same and only the top line and function labels change. Therefore, this manual uses the word *menu* to focus your attention on these areas and to draw it away from the screen.

A typical cardfile menu contains three parts:



The top portion of the menu contains three lines:

- The top line is the *banner line*. It lists the menu's name and the name of the cardfile you are currently using.
- The second line is the *status line*. It contains messages for you and an indicator that shows the cursor's current position.
- The third line is the *input line*. When you must enter a response on this line to tell ECM what to do, ECM automatically positions the cursor here for you.

On the Main menu, the center portion displays a rotary card file with its index tabs showing. Notice that this image remains the same when you access the Cardfile Tasks menu. On other menus, the center portion may display a card form or some other structure. The important point to remember is that you can always tell where you are by inspecting the banner line and function labels.

The bottom of the menu contains the function labels. You tell ECM what tasks to do by choosing the appropriate label.

Be especially aware of the message for F8. At times, you may press this key when you decide you don't want to continue a task that you have begun. It is as if you had started rearranging the furniture in a room and then decided that you preferred the room in its original condition. For example, when the message for F8 indicates ECM Main, choosing this key returns control to the Main menu and leaves everything the way it was. The only exception to this rule is the Select menu. When you leave this menu, any changes you have made to a card are incorporated into your cardfile. (See Chapter 13 for details on using the Select menu.)

Using ECM with Your Keyboard

The following keys perform special functions when the image of a cardfile or a card appears on your display. (Some of these keys take on additional functions under other menus. The appropriate chapter describe these functions.)

Key	Operation
[F1] – [F8] and [f1] – [f8]	These keys correspond to the function labels that appear at the bottom of your display. Choosing a function key performs the task that the label implies.
[▲] [▼] [◄] [►]	The arrow keys move the cursor one row or one column at a time in the direction of the arrow. When a cardfile appears on your display, pressing the [▲] key scrolls forward one card while pressing the [▼] key scrolls backward one card.
[ScrLck] + [△] [ScrLck] + [▽]	When an individual card contains so many fields that its entire contents won't fit on the display, pressing [ScrLck] + [△] scrolls forward to the next line of text, while pressing [ScrLck] + [▽] scrolls backwards to the previous line of text. When you press [ScrLck], the Scroll lock status light lights. Now, when you press [△] the text moves up on you screen instead of the cursor moving up. Press [ScrLck] again to turn the status light off and return the cursor to its normal function.

Pg Dn	When a card form contains multiple pages, pressing the Pg Dn key brings the next page of information into view.
Pg Up	When a card form contains multiple pages, pressing the Pg Up key displays the previous page of information.
Home	When a cardfile appears on your display, pressing the Home key highlights the tab for the first card in that cardfile. When a card appears on your display, pressing the Home key moves the cursor to the first field on the display. If the cursor is already within the first field that appears on the display, pressing the Home key moves the cursor to the first field on the form.
End	When a card appears on your display, pressing the End key moves the cursor to the last field that appears on the display. If the cursor is already within the last field that appears on the display, pressing the End key moves the cursor to the last field on the form.

Enter	When a cardfile appears, pressing Enter centers the cardfile on the first card. When a card appears, pressing Enter moves the cursor to the next field.
Tab	When a cardfile appears, pressing Tab highlights the index tab of the next card in the file. When a card appears, pressing Tab moves the cursor to the next field.
Shift + Tab	When a cardfile appears on your display, holding down Shift and pressing Tab highlights the index tab of the previous card in the file. When a card appears on your display, holding down Shift and pressing Tab moves the cursor to the previous field.
F10	Pressing the F10 key pulls a card from a cardfile so you may inspect the information on that card.

Using ECM with Touch or a Mouse

While you are working with ECM, you can simplify several tasks if your personal computer supports touch or a mouse.

Using touch is as intuitive as pointing out an object with your finger. Using the mouse is an equally natural extension of your hand. As you can make adjustments when you try to touch an object, you can make similar adjustments with the mouse.

You move the pointer to different parts of the display, then press the left button to choose the object that the pointer indicates. With touch, you combine the movement and the pressing by simply touching the object. If the object is a field, you choose that field. If the object is an index tab, you choose that tab. If the object is a function label, you choose that task.

Additional information on using these pointing devices for a particular task appears as a NOTE with the instructions that document that task.

Note

You should use touch or a mouse only when ECM is expecting directions from you and not when ECM is performing a task.

Leaving ECM

When you are ready to leave ECM:

1. Return to the Main menu.

   If you are currently doing a task, you must tell ECM you have finished each part of that task before you can return to the Main menu.
2. Once the Main menu appears, choose **Exit ECM**.

   ECM requests confirmation:

   ```
   To confirm exiting ECM, press "Yes".
   ```
3. If you decide to continue working with ECM, choose **No**.
4. If you want to leave the program, choose **Yes**.

When you leave the program, ECM incorporates any changes you have made, closes the current cardfile, then returns control to PAM.

When the PAM menu appears, you can safely remove your ECM application disc and your personal work disc.

Note

Always remove your flexible discs from their drives before you turn off the computer.

Removing a Disc

Follow these instructions carefully to ensure the integrity of the information that is stored on your discs.

To remove the ECM application disc:

Before you can safely remove the ECM application disc, ECM has to pass control to PAM or the File Manager program.

If you remove the ECM application disc, the following message may appear:

```
Please put the application disc back in the
drive and press ENTER.
```

This happens when the task you want to do is not in memory at that moment. You have not damaged your disc. Simply replace the application disc into its drive as the message requests.

To remove a personal work disc:

You can safely remove a personal work disc only when you are in File Manager or when ECM displays the message:

```
You can switch discs now.
```

Avoid removing a disc from its drive when you are using a cardfile that is on that disc. If you must remove the disc to access another file (such as a print format file), be sure to replace the cardfile disc you were using so you can complete your task. When you forget this step, ECM reminds you to:

```
Replace the cardfile disc in drive #.
```

(The # is replaced by the proper drive designator.)

Simply follow the instructions in the message to continue your work.

Caution

If you remove a disc from its drive while ECM is accessing it (that is, the red light is flashing on the face of the disc drive), you may irreparably scramble information or lose it completely.

7 Naming and Locating Cardfiles

This chapter introduces the terminology you need to work with ECM cardfiles and your computer's operating system.

Since ECM has to identify the individual cardfiles in your cardfile library, you give each cardfile you create a name. Then you use this name whenever you want access to that cardfile.

Besides the cardfile's name, ECM may require additional information to locate a cardfile. In particular, if you have created different directories or are using several discs, you must give ECM a complete description of where it may find your cardfile. Although the exact form of this information depends on the operating system under which ECM is running, the information that precedes the cardfile's name completely specifies the location. This manual refers to that information as the cardfile's pathname.

Naming a Cardfile

ECM uses the naming conventions established by your personal computer's operating system:

- A file name cannot contain any blank characters.
- A file name has a limit on the number of characters it may contain. With DOS the limit is eight.
- A file name may contain upper-case and lower-case letters; however, with DOS they are indistinguishable.

Thus, if you type `RESTAURANTS` or `restaurants` for a cardfile's name, DOS uses `RESTAURA` for the cardfile's name.

Note

See the owner's manual for your personal computer for a complete listing of the naming rules that pertain to your operating system.

How ECM Handles Cardfile Names

Although ECM recognizes cardfile names, it uses file names when it interacts with your computer's operating system. That is, instead of sending the operating system your cardfile, ECM supplies the operating system with three files that, when taken collectively, constitute your cardfile.

ECM gives each file a name that consists of your cardfile name plus a file extension. (A *file extension* consists of a period (.) followed by a maximum of three more characters.) For example, if you named a cardfile `IMPORTS`, ECM creates three files:

- `IMPORTS.EDT`
- `IMPORTS.EFM`
- `IMPORTS.EIX`

While the base name `IMPORTS` implies that the three files are closely related, the extensions identify specific files, each of which constitutes a part of your cardfile:

- The `EDT` file contains the information you entered in the fields (such as names, addresses, phone numbers, and so forth).
- The `EFM` file contains the design for the card form.
- The `EIX` file contains an index that tells ECM how to file the cards.

Choosing the Name

Within the limits established by your computer's operating system, you should choose a name that describes the cardfile's contents. You may build the name from any of the following characters:

- the letters A through Z
- the digits 0 through 9
- the dollar sign $
- the ampersand &
- the pound sign #
- the percent sign %
- the apostrophe '
- parentheses ( )
- the underscore _
- the commercial at sign @
- the caret ^
- braces { }
- the tilde ~
- the exclamation point !

Some application programs require the first character of a file name to be a letter.

Although you may use file extensions to group closely related files, you should avoid using a file extension when naming cardfiles.

Caution

If you are putting your own files in a directory that contains ECM cardfiles, you should avoid using the following extensions:

.EDT .EIX .EFM .SAV .IN$ .RM$ .VOL .DSK .MNU .MSG .COM .BAT .EXE

Locating a Cardfile

When ECM asks for the cardfile's name, it displays a default pathname. For example, if the default drive is drive B and the disc has no subdirectories, ECM displays: `B:\` for the default pathname. (The `B:` stands for drive B, and the slash (\) refers to the disc's root directory.) When you enter just the name for a cardfile, ECM uses the directory identified by this pathname to locate the cardfile.

What Is a Pathname?

Each of the three files that make up your cardfile has its own file name. Each file also has a *pathname* that tells where it is stored. The form of the pathname varies depending on which operating system your personal computer uses. Because DOS considers each disc to have its own root or main directory, it builds the pathname starting with a drive designator that specifies which disc is being used. Together, the pathname and file name specify the full file name. For example, assume a file named `FICTION.EDT` is stored in a subdirectory called `FRANK` on a disc in drive B. Its full file name is: `B:\FRANK\FICTION.EDT`. You may always distinguish between files (or cardfiles) by giving the full name.

What Is a Drive Name?

A *drive name* specifies which drive contains the disc you are using to store your files. If you have set up your computer according to the instructions in your owner's manual, the disc drives assume these values:

- If you are using dual flexible discs, the drive on the top is drive A and the drive on the bottom is drive B.
- If you are using a fixed disc, the fixed disc is in drive C and the flexible disc is drive A.
- If you are using a fixed disc and dual flexible discs, the drive on the top is drive A, the drive on the bottom is drive B, and the fixed disc is drive C.

ECM displays the drive name as a letter, followed by a colon, then a backslash (for example, `A:\` or `B:\`). The backslash (\) indicates the root directory for the disc in that drive.

What Is a Directory?

A *directory* is a grouping of files, just as a telephone directory is a grouping of phone numbers. Every disc has a root directory. But if you want to separate groups of files, you can create subdirectories. For example, if you want to keep your business cardfiles distinct from your personal cardfiles, you could create two subdirectories: one called `BUSINESS` and the other called `PERSONAL`. (The names for subdirectories obey the same rules as file names.)

ECM identifies the root directory with a single backslash. One or more subdirectories can follow the root directory, and each subdirectory is followed by another backslash. For example, `A:\JIM\BUSINESS\` identifies Jim's business subdirectory on the disc in drive A.

Using the Default Pathname

ECM assumes your cardfiles are located under a default pathname. Unless you tell ECM otherwise, ECM always searches for and stores your cardfiles in the location specified by this pathname. Thus, when you want to use the default settings, you just give the cardfile's name.

If you don't want to use the default settings, you can change the pathname in one of two ways:

- You can type the pathname that you want ECM to use.
- You can change ECM's default pathname.

Changing the Default Pathname

When you want to access several cardfiles with another pathname, you may use ECM to change the default settings. (Thus, you avoid typing the pathname each time ECM asks for a cardfile's name.)

To set a new default pathname:

1. Start from the Main menu where the function labels have the following values:

2. Choose Cardfile Tasks to display the Cardfile Tasks labels:

3. Choose Set Direc'ry.

   ECM now requests you to:

   ```
   Type a directory name and press ENTER.
   ```

4. Type one of the following responses:

   If you only enter a drive name, ECM makes that drive the default drive and that disc's root directory the default directory.

   If you enter a drive name and a series of directories, ECM uses this pathname for the default setting.

5. If you want to review what directory names are already in use, you may choose File Manager.

Note

Choosing Cancel cancels the current operation leaving the default pathname in effect. Also, the function labels return to their previous values so you may continue with the task at hand.

(You may also change ECM's default pathname by using the File Manager program. See Appendix E for the necessary details.)

Renaming a Cardfile with ECM

The following procedure summarizes the necessary steps to rename a cardfile using ECM's built-in facilities. Chapter 18 provides more information on copying a cardfile (steps 4-7); and Chapter 10 gives additional details on deleting a cardfile (steps 9-11).

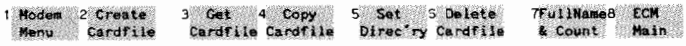
By using ECM to rename a cardfile, you avoid the bookkeeping associated with changing the individual files in a cardfile as ECM does this work for you.

Note

This procedure requires disc space to hold the new cardfile and your time to build and delete the cardfile. You may avoid these time and space requirements by using the File Manager to change the cardfile's name. Appendix E provides these details.

To rename a cardfile:

1. Start from the Main menu.
2. Get the cardfile you want to rename.
3. Choose `Cardfile Tasks` to display the Cardfile Tasks labels if these labels don't appear:



4. Choose `Copy Cardfile`.

5. Type a name for the new cardfile you are creating.
6. Choose **Copy**.
7. Choose **ECM Main** to return to the Main menu.
8. Choose **Cardfile Tasks** to display the Cardfile Tasks labels:

9. Choose **Delete Cardfile**.
10. Type the name for the original (current) cardfile.
11. Choose **Yes** to confirm that you want to delete this cardfile.

Keeping Track of Cardfile Names

These hints may help you remember a cardfile's name:

- Use names that suggest the contents of the cardfile. For example, if you have a cardfile for your clients, you could name that cardfile `CLIENTS`. Or, if you have a cardfile on fine hotels, you might name that cardfile `HOTELS`.
- Write the cardfile's name on the label of the disc where you stored it.
- Create a cardfile that contains all your cardfile names (including the subdirectories where they are stored). This cardfile resembles the data dictionaries of larger, data base systems. When you create a new cardfile, call up your "cardfile of cardfile names" and add another card for that cardfile.

If You Forget a Cardfile's Name

When you haven't worked with a cardfile for awhile, you could easily forget the exact spelling of that cardfile's name. If this happens, check the file listings under File Manager and look for groups of file names that end with the appropriate extensions (.EDT, .EFM, and .EIX). Whenever you see this grouping, you know you've found a cardfile.

Once you discover the correct name (it is the base word before the file extensions), you can return this information to the ECM program. ECM calls this operation "returning a file to ECM". As this involves using File Manager, refer to Appendix E for this procedure.

8 Planning an ECM Cardfile

Suppose you just bought a new desktop card file. Normally, the cards in it are blank since the manufacturer has no idea how you will use the card file. If you're like most people, you treat the empty cards as if they had a predefined pattern, by putting information in specific areas. For example you might place a person's name on the first line, their street address on the second line, and their telephone number on the third.

With ECM you go a step further as you put your mental image of the card's pattern into a concrete form. That is, you first construct a form with special areas to hold the pertinent information. These areas become the *fields* of your card. Then, when you fill out individual cards, you only type information into these fields; ECM prevents you from typing information anywhere else. You may also put helpful messages on the form. For example, you might name the form with a descriptive title of the card's contents and give every field a label to ensure that you enter the information correctly.

This manual calls the "fill-in-the-blanks" outline that you create the *card form*.

Creating a Card Form

Before you can put cards in an ECM cardfile, you must create the basic form that each card will have. You can have several cardfiles with the same form, or you can have different forms for each cardfile.

You create a card form in one of two ways:

- Design a new form from scratch.
- Adapt a form that already exists.

Chapter 9 describes how you create a card form. The remainder of this chapter gives guidelines that you should consider when planning any cardfile.

The Design Process

Designing a card form, whether with ECM or with an ordinary card file, takes a little thought. For example, you should make a Last Name field long enough to hold the longest name that you're likely to encounter; you should make a ZIP Code field big enough for a 9-place number; and you should decide what items belong on a single line and what items belong on separate lines.

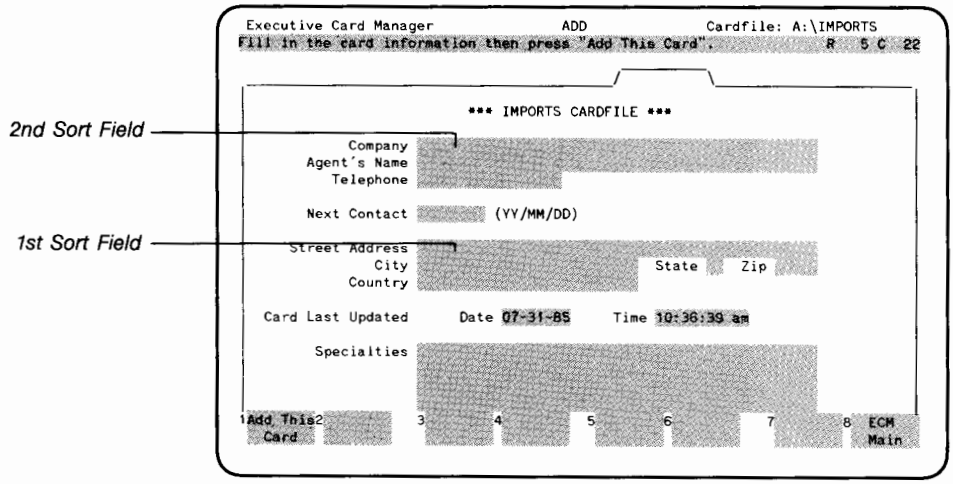
You may find that creating a card form is mostly experimenting and improvising. In general, exploring the alternative possibilities until one emerges as the best. Therefore, ECM allows you to change the form as often as you wish while you are designing it.

Deciding Upon Fields

A card can be up to 255 lines long and 80 columns wide. Within this area, you may place fields anywhere you wish. If the form becomes so large that it exceeds the display area, this poses no problem. ECM stores all the information, and you can bring different portions of the card into view by pressing the appropriate keys. (See Chapter 6 for details on using your keyboard.) Each screen-full of lines represents one *page* of the card. Besides making cards of several pages, you may also shorten a card if you want to conserve space.

Before you start placing fields on your form, you should decide:

- what fields you need
- where on the card to put each field
- how to label those fields that you want to label
- how much room to set aside for each field
- which field (or fields) to use for sorting the cards



With a little thought, you can create a form that meets your current and future needs. The following sections aid you in this process. Check off the features on this list that you need; then read the sections that pertain to these features.

_____planning the open-card display

_____filing your cards by name

_____filing your cards by date or time

_____using the automatic date or time stamping feature

_____using the autodial feature

_____using ECM with other programs

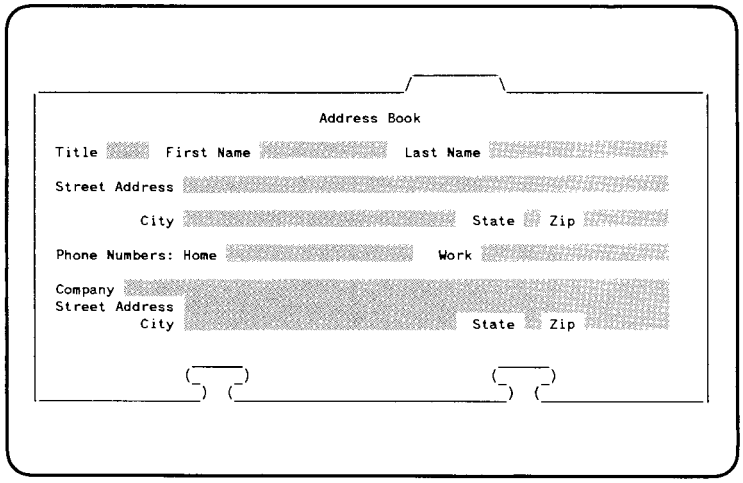
_____planning to split a cardfile into smaller pieces

Note

ECM extended features allow you to print the information in a cardfile in a variety of ways. It also provides simple solutions to sorting cards or transferring information between programs. However, a little planning can also simplify the use of these features.

Planning the Open-Card Display

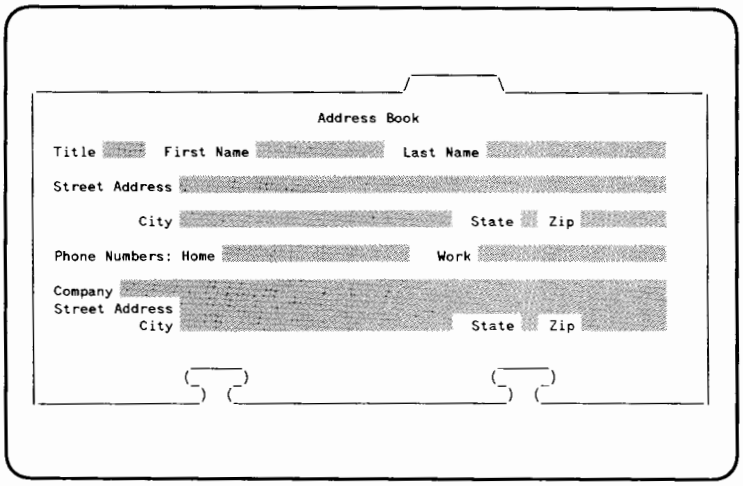
When ECM displays a cardfile, it always shows one card in the *open-card* position. For this card, ECM displays the information that occurs within the first three field lines. By placing the most pertinent information on these lines, you can use your cardfile efficiently, without displaying the entire card to read this information. Consider the following card form:



Is this a reasonable design?

When a card is in the open-card position, the person's name, business affiliation, and telephone numbers are readily available. If you are using this cardfile as a telephone directory, it probably gives you the most vital information at a glance. However, if you want to send the person an invitation for a social engagement, then you must display the entire card.

The conventional form for an Address Book might replace the Company field with a Street Address field and replace the Phone Number field on the third line with fields for the City, State, and ZIP Code. This traditional form would be less effective if you need quick-access to a telephone number or the company name.



Furthermore, remember that the information on the tab refers to the primary key field. When you add cards to a cardfile, ECM displays the entry (up to eight characters) from the primary key field on the tab. Carefully choosing this field increases the usefulness of the cardfile. For example, Last Name would be a logical choice for an Address Book or Telephone Directory. If you had a listing of restaurants, however, you might choose the primary key field from a list that included the restaurant's name, its cuisine, or the town where it is located. A traveling executive might choose a different key field than a person who was listing the restaurants in his neighborhood.

Planning To Sort by Name

ECM considers all the characters in a key field when it files your cards in alphabetical order. Remember these points if you plan to alphabetize by name:

- You may define a maximum of three key fields for each card form. With multiple key fields, ECM first orders cards by the information in the primary key field. Then, when several cards have identical information in their primary key field, ECM orders the cards by the information in their second key field. When cards have identical information in their primary and secondary key fields, ECM orders the cards by the information in the third key field. When all key fields match, ECM files the cards in the order in which they were entered.
- ECM evaluates the characters in each key field in sequential order. For example, if a key field holds a person's full name with the last name first (such as **Jones, Alan**), ECM files the cards under the last name. With this scheme, ECM alphabetizes all the first names under the same last name. Therefore, if you have cards for **Jones, Stephen**, **Jones, Barbara**, and **Jones, Alan**, ECM puts **Alan** before **Barbara** and **Barbara** before **Stephen**. When you begin a single name field with the first name, however, (as in: **Alan Jones**), ECM files the cards by first name.

- If you create two separate fields for last name and first name, and you only choose one key field, ECM uses just the name in the key field to alphabetize your cards. For example, if you choose the Last Name field as the key field, ECM files each new **Jones** card before all the existing **Jones** cards in the order that you add them rather than alphabetically within the **Jones** group.
- If you place last name and first name in two separate fields and you choose last name as the primary key field and first name as the secondary key field, ECM files your cards alphabetically by last name, then alphabetically by first name within each last-name grouping.

Planning to Sort Numbers

ECM can also sort fields numerically. Each of the three key fields can optionally be designated as a numeric field. Then ECM will treat the information in that field as a number rather than as an alphabetic string.

Planning To Sort by Date or Time

If you plan to sort or search by a date or a time of day, you must enter the information consistently so ECM interprets the numbers correctly.

- For dates, design your field so you can enter two digits each for year, month, and day, with a slash between the three elements (YY/MM/DD). In this case, ECM sorts your cards by year, then month, then date. For example, enter `84/03/22` for March 22, 1984. To help you remember the correct order, you can include the format as part of the label, as in `Birthdate (YY/MM/DD)`.
- For times, design your field to show times on a 24-hour clock (for example, `08:30` for 8:30 a.m.; and `20:30` for 8:30 p.m.).

Planning To Date a Card

If you define an Auto Time or Auto Date field, ECM will automatically stamp your card with the current time and/or date when you last changed the information on that card. With these special fields, ECM interprets the time and date correctly for sorting. Each card can contain at most one Auto Time field and one Auto Date field.

Planning for Automatic Phone Dialing

Once you have given ECM the proper instructions, it can automatically dial a telephone number for you. Part of these instructions is defining an autodial field. ECM sends up to 39 characters to the modem to dial; however, you can make the phone field longer if you want to include an extension or a note to yourself.

You should enter telephone numbers in a consistent format. For example, you may enclose the area code in parentheses and put a dash between the first three digits and the last four as in (408) 555-6349; or you may separate the area code from the phone number with another dash as in 408-555-6349. Choose any format that suits your needs, but use it consistently.

Caution

Avoid using the slash symbol (/) in a telephone field, since ECM makes special use of this character.

Remember these additional points when you plan an autodial field:

- Create a single field for the whole telephone number. That is, don't create distinct fields for the area code and the phone number if you want ECM to dial both.
- Allow room for area codes, international access codes, outside-access code numbers, and a plus sign (+) each time you need a pause to wait for a dial tone.
- Place multiple phone fields in close proximity to the Autodial field. When you access the Select menu to dial a number, ECM highlights the Autodial field. By grouping the other phone fields around this field, you can easily choose the number you want to call.

Planning To Share Information between Programs

Whether you're transferring information from other application programs into ECM (or vice versa), the programs expect the field information to be in a specific order and written in a specific format. Since ECM lets you specify the transfer order and the required format at the time you transfer the information, you needn't build these considerations into the card form's design. However, you should consider some additional guidelines.

Programs pass information as records, where each *record* is a distinct unit that holds the information found on a single card. For example, suppose that you want to transfer the information from an address file that contains 7 fields:

- a title field of 3 characters
- a first name field of 12 characters
- a last name field of 20 characters
- a street address field of 60 characters
- a city field of 20 characters
- a state abbreviation field of 2 characters
- a zip code field of 5 characters

These 7 fields form a record of the information stored in the address file. The first field contains 3 characters, the second field 12 characters, the third field 20 characters, and so on. Therefore, when you are designing your card form to accept this information, you should keep these points in mind:

- Fields should be long enough to accept all information that is transferred from the other program. For example, since the Last Name field permits up to 20 characters, the Last Name field of the ECM card form should be at least 20 characters in length. If your field is shorter than the corresponding transfer field, any excess characters are lost. If your field is longer than the corresponding transfer field, the extra space is padded with blank characters.
- You should ensure that the information from the other program is placed into the correct fields on your form. When the order of the fields don't correspond, you may reorder the fields when you transfer the information into your cardfile.
- You should write numbers in the same style that the sending application program uses. For example, if the other program uses MM/DD/YY for its date form, you should set up your ECM card form in the same way.

See Appendix D for more information about using ECM with other application programs and how you may reorder fields in the transfer process.

Planning To Split Up a Cardfile

When you design a card form, you might consider splitting off portions of the cardfile to meet special needs. You might use this feature to divide a large cardfile into smaller pieces, or to create subsets of a cardfile that you could carry with you on a portable computer. You can allow for this possibility by creating a special *break* field. For example, if you're just starting your own business, you could create a "yes" or "no" Out-of-State break field. Most of your original customers may be in-state buyers, but as your business grows, you may eventually have more out-of-state buyers. You could then use this field to split the cardfile in two, or to create a subset of the cardfile if you were going out of state on a business trip.

As another example, when you have a field that contains numbers, you can do comparative searches (using the greater than sign (<) and less than (>) sign) to create worksets (see Chapter 14). Then, you could make a workset for all the cards with dates before 1981 by using `<81/01/01` (earlier than January 1, 1981). Or, you could create a workset for cards with dates after 1980 by using `>80/12/31` (later than December 31, 1980).

9 Creating a New Card Form

ECM gives you the freedom to create a card form that suits your particular needs. In the design process, you may create a new form or adapt an existing form. This chapter explains both procedures.

If you purchased **ECM: Templates**, you can modify any of these templates to suit your needs. You may want to change the title of a template and add or delete fields. This can be done quickly and easily by modifying the old form and creating a new template from this form.

Getting to the Create Menu

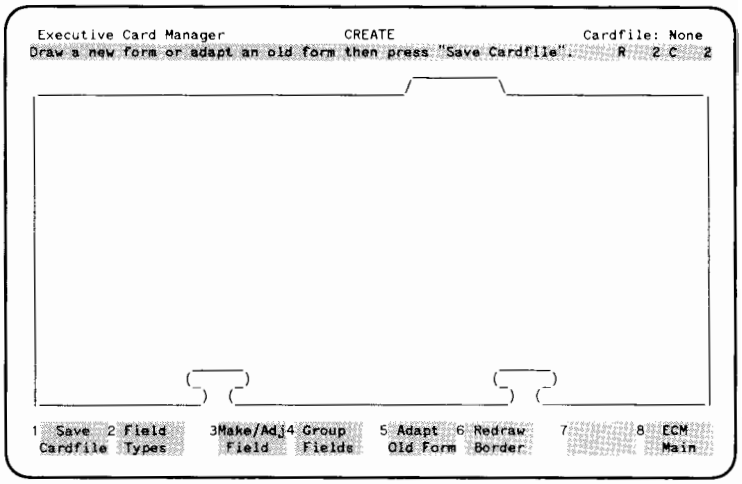
Whether you're designing a new form or adapting an old form, the basic premise remains the same. You are creating a new card form. Therefore, your first step is accessing the Create menu.

To display the Create menu:

1. Start from the Main menu.
2. Choose Cardfile Tasks to display the Cardfile Tasks labels:

3. Since you want to create a new cardfile, choose `Create Cardfile`.

   ECM displays the Create menu:



Notice that ECM expects you either to:

> `Draw a new form or adapt an old form then press "Save Cardfile".`

When you `draw a new form` you start with a blank index card. When you `adapt an old form`, you modify the card form of an existing cardfile to produce a new card form. Either pathway, however, is an interactive procedure where you can make changes to the design as you go along.

The next section tells how you display an existing card form on the Create menu. If you want to begin with the blank card form, you may skip this section.

To modify an old form:

1. Choose Adapt Old Form.

   ECM asks you to:

   ```
   Type a cardfile name and press ENTER.
   ```

   ECM also updates the function labels to assist you in entering the correct cardfile name.

2. Type the name of the cardfile whose form you want to adapt.

   If this cardfile is in a different directory, remember to provide the proper pathname.

3. When you finish typing the name, press Enter.

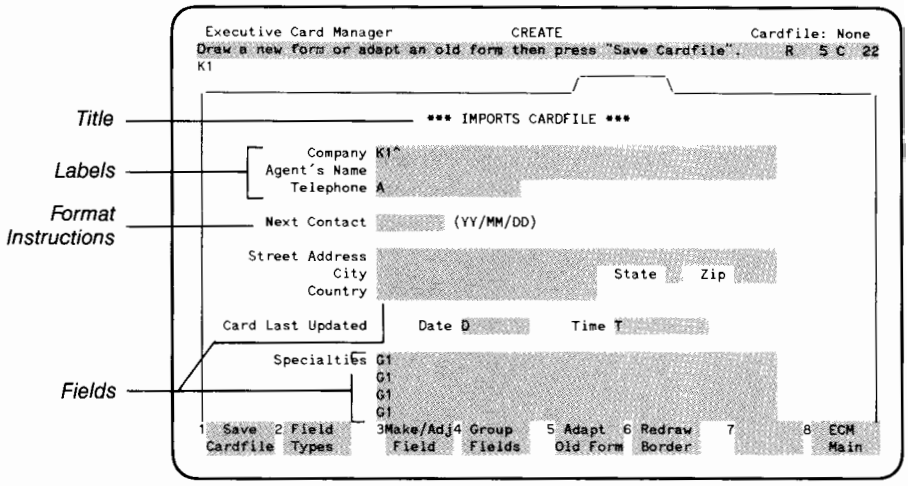
   ECM tells you that it is:

   ```
   Getting old form.
   ```

   After a few seconds, ECM displays a copy of the requested form.

Placing Text on Your Card Form

A card form consists of fields and text. ECM concerns itself with the fields and the information these fields contains. Other parts of the card form, including the card's border, are text. ECM stores this information but makes no other use of it, so you can do with it as you wish.



You can place text anywhere on a card form. The only restriction is that you can't place text over a field. If you want to make room for text, you can:

- Use Alt + I to push a field (and the rest of the print format) down one line.
- Use Ins to push a field (and the rest of the line) to the right as you type characters.

Widening the Card Form

Before you begin adding fields and text to your card form, you should decide whether you want to include the card's border as part of your design. By removing the borders, you can increase the card's width from 78 to 80 columns. Since fields must fit on a single line, you might consider this option, if you have a field that requires 80 characters.

If you decide to keep the card's border, proceed to the section, **Giving Your Form a Title**.

When Drawing a New Card

When you are starting from scratch, it is a simple procedure to remove the card border:

1. Move the cursor to row 2, column 1.
2. Press the [Alt] + [S] keys.

   ECM erases the card's border.

When Adapting an Old Form

When you are modifying an old form that contains the card border, you can still remove the border, but since other text probably appears on the form, you must take some additional steps so you don't erase the text that you want to keep.

To remove the side borders:

1. Use the space bar to erase the side borders from all the lines that you want to leave in your new form.
2. Move the cursor BELOW the last line you want to leave in the new design.
3. Press the [Alt] + [S] keys. to erase all the text from that line through the end of the form.

Note

Pressing the [Alt] + [S] keys only erases text. If the old form has fields below the last line you want to retain, you must use Remove Field from the Make/Adjust menu to delete each field individually.

To remove the bottom border:

If you followed the above procedure to erase the side borders, choosing the [Alt] + [S] keys also removes the bottom border. However, it is conceivable that the old form had fields on the same line as the card form's "notches". When you want to remove the notches but retain the fields and their labels, follow this procedure:

1. Move the cursor to one of the "notches".
2. Use the space bar to erase each outline by overwriting the "notches" with spaces.

Giving Your Form a Title

A title (such as Prospective Clients or Restaurants in New York City) describes a card's contents. You may make the title as long as you want. For instance, it can run across several lines of the card form.

The title serves as a memory aid; ECM makes no use of it. That is, ECM refers to the cardfile by its cardfile name and not by the card form's title. Of course, you can use the same name (for example, Clients) as both the title of the card form and also the name of the cardfile.

To give your form a title:

1. Position the cursor where you want the title to begin.
2. Type the title.

   If you make a mistake while typing, simply backspace over the erroneous characters, then type the title correctly.

Note

You may also change the title by using your computer's text-editing keys.

Using Descriptive Labels with Fields

You may supply labels to describe the different fields on a card form. Using a descriptive name for each label aids you in filling in cards, reading them, or searching for information.

A label can consist of several words and be as long as you want. (Some examples of labels are Name, Shoe Size, Home Phone, and Amount Usually Buys.)

You may also arrange a label and its field as you wish. For example, you can have the field label on the line above the field or put both the label and the field on the same line. Furthermore, when you create the card form, you can type all the labels and then create the corresponding fields.

To give a field a label:

1. Position the cursor where you want the label to begin.
2. Press the Alt + I keys or the Ins key, if necessary, to create room for the text.
3. Type the text for the label.

   While typing text, you may use your computer's other text-editing keys, such as DEL, Alt + L, and Alt + D.

Placing Fields on the Card Form

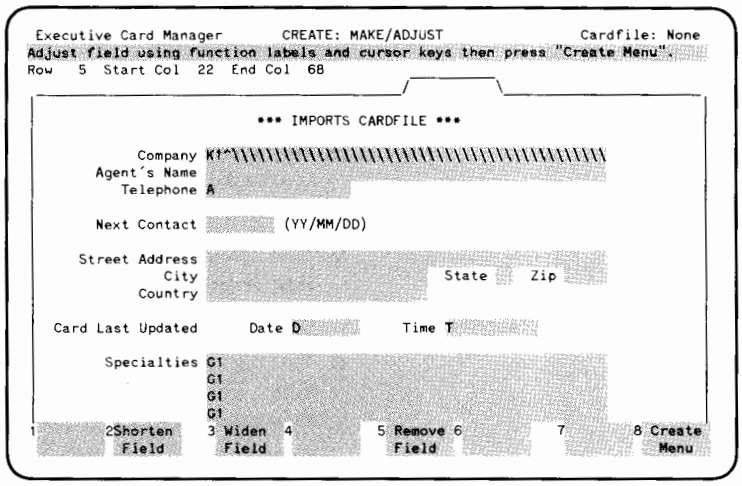
Fields are the blanks you fill in. You need a field for each item of information you are going to have on the card. For example, you can have a single Name field or you could create separate fields for First Name and Last Name.

Remember these points when you are deciding upon fields:

- Every form must have at least one field.
- You create each field as a separate task. That is, you create a field, establish its length, and end that field before you repeat this procedure for the next field.
- You should tailor the size of a field to fit the information that it holds. Remember, however, that a field must be from 1 to 80 columns wide.
- You can design a block of several lines under a single label. For example, you might set aside four lines for Miscellaneous Comments. ECM considers each of these lines to be a separate field. When you print information from your cardfile, you can decide to print only some of these lines. In searching, ECM searches each line as a separate field, unless you instruct ECM to group the fields together. (See the discussion on **Grouping Fields Together**, later in this chapter.)

To add a field:

1. Position the cursor where you want the field to begin.
2. If necessary, press the Alt + I keys to create a blank line between existing lines, or press the Ins key to open up space between fields on the same line.
3. Choose Make/Adj Field to display the Make/Adjust Field menu:



Note

When you are creating a new field, ECM reserves space for the first character in that field and shows the field's position by listing both its `Row` number and also its first and last column. Initially, when the field is one-character wide, `Start Col` and `End Col` have the same value.

4. Choose `Widen Field` once for each additional space you want ECM to reserve for this field.

   For example, if the longest last name in your Address Book cardfile might contain 20 characters, you should choose `Widen Field` 19 times to create a field 20 characters long.

Note

When you adjust a field, ECM marks each position in the field with a backslash (\) so you can easily count the number of spaces in the field. (You may also determine the field's length by subtracting the `Start Col` from the `End Col` and adding back 1.)

5. After you have set aside the appropriate space, choose `Create Menu`.

   ECM creates that field and returns to the Create menu.

If you change your mind:

If you decide that you don't want a field after you have started it, choose `Remove Field`.

Changing the Length of a Field

If you decide that a field is too long or too short for the information that you will normally put in that field, you can go back to that field and change its length.

To shorten a field:

1. Start from the Create menu.
2. Move the cursor to the field you want to shorten.
3. Choose Make/Adj Field.
4. Now take one of the following actions:
   - To shorten the field without affecting the rest of the line, choose Shorten Field.
   - To shorten the field and move the rest of the line to the left, choose the DEL key.

   In either case, each time you choose this key, ECM deletes the last character position in that field.
5. After you set the proper length, choose Create Menu.

   ECM saves the changes and displays the Create menu.

To widen a field:

1. Move the cursor to the field that you want to widen.
2. Choose Make/Adj Field.
3. Now take one of the following actions:
   - To widen the field without affecting the rest of the line, choose Widen Field.
   - To widen the field and move the rest of the line to the right, press the Ins key and then choose Widen Field. (After you set aside the necessary space, press the Ins key to take your computer out of Insert Character mode.)

   In either case, each time you choose Widen Field, ECM adds another space to the end of the field.

Note

Pressing the Ins key shifts the other fields on that line to the right and breaks the card border. Choosing Redraw Border repairs these breaks.

Changing a Field's Location

When the Make/Adjust menu appears on your display, you may use the cursor-control (arrow) keys to move a field to a new location:

- Pressing the [▲] key moves the field up one line.
- Pressing the [▼] key moves the field down one line.
- Pressing the [►] key moves the field one column to the right.
- Pressing the [◄] key moves the field one column to the left.
- Pressing the [Home] key moves the field to the left corner of the first line that currently appears on your display. If the field is already in this position but other lines exist above that line, pressing the [Home] key moves the field to the form's first line.
- Pressing the [End] key moves the field to the left corner of the last line that currently appears on your display. If the field is already in this position but other lines exist below that line, pressing the [End] key moves the field below the form's last line.

Note

If your personal computer supports a mouse, you may move a field to a new location by placing the pointer in that field, holding down the left button and moving the field to its new location, and then releasing the left button.

You should remember these facts when moving fields:

- You cannot place a field above the card's top border.
- You cannot place one field over another field.

To move a field:

1. Start from the Create menu.
2. Move the cursor to the field you want to adjust.
3. Choose `Make/Adj Field`.
4. Use the cursor-control (arrow) keys to move the field to its new location.
5. Choose `Create Menu` to save your changes and return control to the Create menu.

If the field's new position overlaps another field, ECM informs you that:

```
The field is improperly positioned. Place field
in a clear part of the form.
```

After you move the field to a satisfactory location, choosing `Create Menu` saves your changes and displays the Create menu.

Removing Fields

In the interactive process of designing a card form, you may decide that you don't need a field that you created. Removing a field is a simple task.

To remove a field:

1. Start from the Create menu.
2. Move the cursor to the field you want to remove.
3. Choose `Make/Adj Field` to display the Make/Adjust Field function labels:

4. Choose `Remove Field` to delete that field.

   ECM deletes the field and displays the Create menu.

To remove a field's label:

If the field also contains a label that you want to remove, take these additional steps:

1. Move the cursor to the field label.
2. Use the space bar to erase the label.

Note

You may also erase the label by using your computer's text-editing keys.

Setting Special Fields

You can assign special attributes to the fields on a card form. For example:

- Which fields should ECM use to file the cards in some sort of alphabetic order?
- Which phone field should ECM automatically choose if you instruct it to dial a number for you?
- Should ECM stamp each card with the time or date when you last modified the card?
- Should ECM treat each field separately, or is it more logical to treat certain fields as a group?

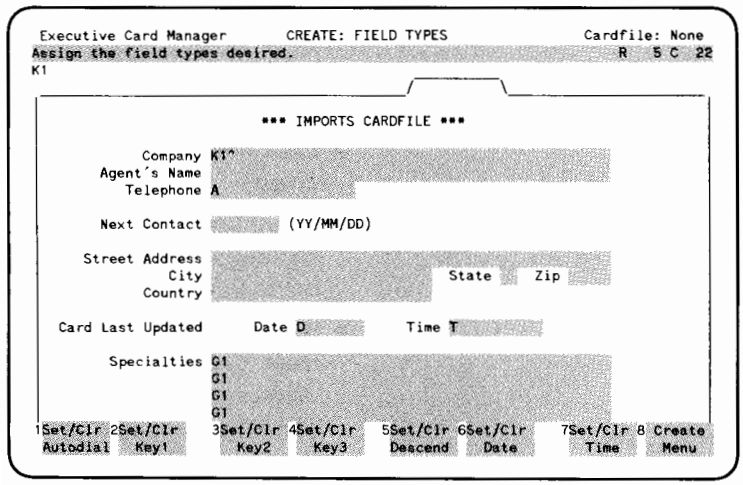
You can specify any of these attributes, or permissible combinations of them, by giving each field a type. This requires your accessing the Field Types menu.

Note

You may assign field types individually to each field after you create that field, or you may create all the fields then assign attributes to each field in one call to the Field Types menu. In either case, choosing Create Menu tells ECM you have finished setting attributes and returns control to the Create Menu.

To display the Field Type menu:

1. Start from the Create menu.
2. Choose Field Types to display the Field Types menu:



The following sections describe how you use the function labels to set specific attributes.

Setting the Fields That File Your Cards

When you are designing your card's layout, you can tell ECM how to arrange the cards in your cardfile. For example, if you want to file your cards alphabetically by city, you must tell ECM to sort by city.

The fields that ECM uses for arranging the cards are called *key fields*.

- You can set a maximum of three key fields for each card form.
- Each key field may be sorted in ascending or descending order.
- The information from the primary key field is shown on the index tab of each card in the cardfile. ECM files your cards in order, according to this field.
- When you assign a second key field, if multiple cards have identical information in their primary field, ECM further orders the cards by the information in their secondary key field.
- When you assign a third key field and several cards have identical information in both the primary and secondary key fields, ECM further orders the cards by the information in their tertiary key field.
- When all the key fields have identical values, ECM files the cards in the order that you entered them.
- While you may assign key fields in any order, ECM gives a sequential ordering of key fields to the final design. For example, you may designate a First Name field as a secondary key field then designate a Last Name field as the primary key field and save the form with these two key fields. However, if you assign a primary key field and a tertiary key field and save the design in this state, ECM makes the tertiary field the secondary field.

- When you omit choosing a key field, ECM uses the first field of the form as the primary key field.
- A key field may be designated as a numeric sort field.

To set the primary key field:

1. Move the cursor to the field that you want to set as the primary key field.
2. Choose Set/Clr Key1.

   When you choose this key, the field the cursor is in becomes the primary key field. (The symbols K1 appear within the field to show that this field is the primary key field and an up-arrow indicates that the items in this field are sorted in ascending order.) When a field is too small to display all the field type characters, ECM shows what it can within the field, but displays all the field type characters on the field expansion line.

Note

If you have chosen a primary key field, then move the cursor to another field and attempt to make that field the primary key field, ECM assumes you have changed your mind. Thus, it makes the current field the primary field and removes this designation from the former field.

To set additional key fields:

1. To set a secondary key field, move the cursor to the appropriate field and choose Set/Clr Key2.

   The letters K2 appear within the field, and an up-arrow indicates an ascending sort.

2. To set a tertiary key field, move the cursor to the appropriate field and choose Set/Clr Key3.

   The letters K3 appear within the field, and an up-arrow indicates an ascending sort.

To reverse the filing order:

ECM automatically files cards in ascending order (that is, "1" before "2" and "A" before "B"). However, if you want ECM to use a descending order, you must choose Set/Clr Descend while the cursor is within the appropriate field. If room exists, a down-arrow appears within the field to show that this field uses a descending sort. When the field is too small to hold all the field type characters, you can see the symbols that apply to that field by inspecting the field expansion line.

If you decide to change this field back to an ascending sort field, move the cursor to that field and choose Set/Clr Descend. This returns the field to its ascending sort order.

To set a numeric key field:

1. Move the cursor to the key field you want to change (this field contains the appropriate K number).
2. Choose Set/Clr Key1 to change K1 to K#1 (primary key field, numeric), Set/Clr Key2 to change K2 to K#2 (secondary key field, numeric), Set/Clr Key3 to change K3 to K#3 (tertiary key field, numeric).

To clear a key field:

The function labels that you used to set a key field are the same labels that remove a key field's setting.

1. Move the cursor to the field you want to change.

   (This field contains the appropriate K number.)
2. Choose Set/Clr Key1 until the primary key field is cleared, Set/Clr Key2 to clear a secondary key field, or Set/Clr Key3 to clear a tertiary key field.

   ECM removes the key designator from that field.

Note

You can also clear one field by choosing the same attribute for another field. For example, if you have chosen a secondary key field then attempt to set another secondary key field, ECM automatically makes the current field the new secondary key field.

Setting the Autodial Field

When you give it the proper instructions, ECM can dial a telephone number for you. This feature is called *autodialing*. (See Chapter 16 for information on using autodial.)

When setting an Autodial field, remember:

- You can set only one field for autodialing. (ECM dials the number in this field when you choose Dial Phone from the Main menu.)
- If your card form has multiple phone fields, you can use the Select menu to choose another phone field, and then have ECM dial that number.

To set the Autodial field:

1. Move the cursor to the phone field that you normally want ECM to use for autodialing.
2. Choose Set/Clr Autodial.

   The letter A appears within that field.

If you change your mind:

1. Move the cursor to the current Autodial field.
2. Choose `Set/Clr Autodial` to clear the field.

Note

Since a card form can have only one autodial field, you can also change the field by moving the cursor to a new field, and choosing `Set/Clr Autodial`. In this case, ECM automatically removes the `A` designation from the original field and assigns it to the current field.

Setting Date and Time Fields

You can also create Auto Date and Auto Time fields to show when the information on a particular card was last changed.

Note

The Auto Date and Auto Time fields show when you update the information on a card; they do not show when you created the card form.

ECM automatically maintains these fields for you and formats them in a style that is appropriate for each country.

For the United States, ECM displays dates in a `MM/DD/YY` format, where `MM` is the month number, `DD` is the day of the month, and `YY` is the last two-digits for the year.

For the United States, ECM displays times in a `HH:MM AP` format, where `HH` is the hour, `MM` is the minutes after the hour, and `AP` is either "am" or "pm".

You can't assign a single field the attributes for both Auto Date and Auto Time. For example, if you have a cardfile for phone messages, and you want ECM to stamp the date and time on each message, you must create two fields: one for the date, the other for the time.

To set the date:

1. Move the cursor to the field that you want to set as an Auto Date field.
2. Choose Set/Clr Date.

   The letter D appears in that field.

To set the time:

1. Move the cursor to the field that you want to set as an Auto Time field.
2. Choose Set/Clr Time.

   The letter T appears in that field.

If you change your mind:

After setting an Auto Date or Auto Time field, if you decide you don't need this feature, you can remove those attributes:

1. Move the cursor to the field that you want to change.

   This field contains the letter D if it is an Auto Date field or the letter T if it is an Auto Time field.
2. Choose Set/Clr Date to cancel an Auto Date field.
3. Choose Set/Clr Time to cancel an Auto Time field.

Grouping Fields Together

When designing a form, you might envision that certain information won't fit into neat pigeonholes. For example, suppose you are a field biologist using ECM to record the results of a day-long shorebird census. Your form probably contains fields for the starting time and ending time, and fields for different aspects of the weather (such as temperature, cloud cover, wind direction, and so on). You might also have a series of five Comment lines; and, as the weather may change during the day, these lines may contain information such as:

09:00 Fog lifts (WEATHER)
10:30 Storm brewing: wind 15 knots, SW (WEATHER)
11:55 Peregrine Falcon takes Dunlin (PREDATION)
13:10 Starting to rain (WEATHER)

Later, when analyzing your results, if you want to search for all weather-related information, you would search the specific fields pertaining to weather plus any miscellaneous remarks in the Comment lines. The easiest way to find this information is to treat the separate comment lines (each of which constitutes one field) as a group.

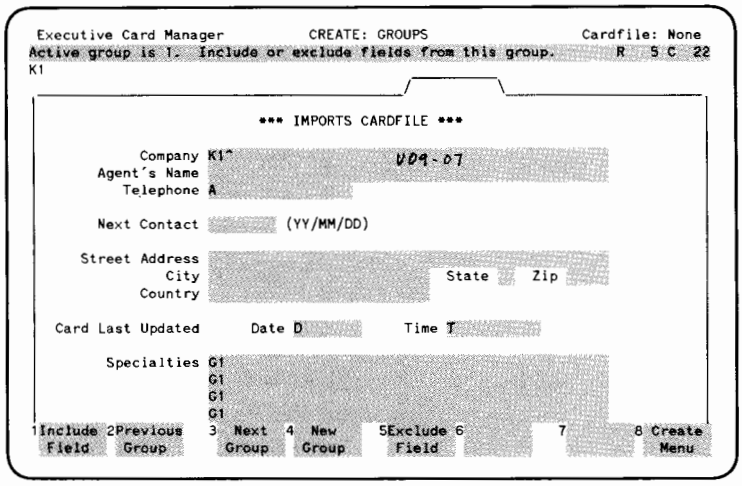
To group fields together requires your accessing the Group Fields menu.

Note

You may not group an Auto Date and an Auto Time field together.

To display the Group Fields menu:

1. Start from the Create menu.
2. Choose `Group Fields` to display the Group Fields menu:



Since you may want ECM to treat certain fields as part of one group and other fields as part of another group, you must give ECM all the information it needs to form each group. ECM assists you in this task by displaying the number for the currently `Active group` on the message line.

To define a group field:

1. Display the group number that you want for the `Active group`.

   For the first group, ECM automatically displays the number `1`. If you want another group number, you may choose `Previous Group` or `Next Group` to cycle through the permissible values of 1 through 10.
2. Move the cursor to a field that you want to include within this group.
3. Choosing `Include Field` assigns the current `Active group` number to that field.
4. Now repeat steps 2 and 3 for the remaining fields that you want within this group.

Note

ECM will group fields together, regardless of their position on the form. For example, you can group the field on the last line of the form with a field on the first line of the form.

To define another group field:

1. Choose New Group.

   ECM displays the next available group number as the `Active group`.

2. If you want a different group number, you may choose Previous Group or Next Group to cycle through the permissible values of 1 through 10.

3. Move the cursor to a field that you want to include within this group.

4. Choosing Include Field assigns the current Active group number to that field.

5. Now repeat steps 3 and 4 for the remaining fields that you want within this group.

To remove a field from its group:

You may remove one or more fields from a group by following this procedure:

1. Move the cursor to the appropriate field.
2. Choose `Exclude Field` to remove that field from its group.

When you finish setting group fields:

1. Choose `Create Menu`.

   ECM sets the groups that you have specified and displays the Create menu.

Changing the Length of Your Card Form

Since a card form may have from 1 to 255 lines, after you finish designing the card form, ECM allows you to redraw the bottom card border at the end of the form.

To shorten your card form:

1. If you want to create a card form with less than 19 lines, move the cursor to the last line that you want to include.
2. Press the Alt + S keys.

   ECM erases all the textual information from this point.

Note

The Alt + S keys will not remove fields from a card form. If you have created fields that you later decide not to include in the card form, you may press the Alt + S keys to erase labels and the card border, but you must use Remove Field to delete the unwanted fields.

3. Choose Redraw Border.

   ECM asks you to:

   ```
   Move cursor to where you want the card
   to end.
   ```

4. If you change your mind, you may choose Cancel to end this procedure and return the function labels to their previous values.
5. Move the cursor to the line where you want the card's bottom border. (Be sure to allow enough room for the notches.)
6. Choose Redraw Border to replace the bottom border.

Lengthening a Card Form

Putting the bottom border on a card that exceeds 19 lines requires a few more steps to remove the old bottom border.

To remove the old border:

1. Move the cursor to the old border.
2. Remove the border by using the space bar to overwrite the notches and the bottom line with spaces or use the Alt + D keys to remove these lines from the form.

To replace the bottom border:

1. Choose Redraw Border.

   ECM asks you to:

   ```
   Move cursor to row for bottom border. Press
   ''Redraw Border''.
   ```

2. If you change your mind, you may choose Cancel to end this procedure and return the function labels to their previous values.
3. Put the cursor on the line where you want the card's bottom border.
4. Choose Redraw Border to replace the bottom border.

Cleaning Up Stray Marks

If you have used your computer's text-editing keys to modify your form, pieces of the right side border may have been pulled inside.

To remove these marks:

1. Move the cursor under the mark you want to remove.
2. Press the space bar to erase the mark.

Finishing Up Your Design

At this point, you should check your card form to make sure it is correct and complete. For example, a final review can show where you might want to make further changes:

- Are there any spelling errors?
- Are the fields long enough?
- Have you included all the fields you need?
- Is the card the size you want it to be?
- Have you set the appropriate key fields?
- Do you want to set an autodial field?
- Do you want to set an Auto Date or Auto Time field?
- Do you want to group certain fields together?

While you are designing the card form, you can make any necessary changes.

Naming and Saving the Card Form

After you have completed the design process, you may choose between two function labels to leave the Create menu.

Note

If unforeseen circumstances prevent you from finishing the card's design in one sitting, the work you have done isn't lost. Simply save your work (using Save Cardfile); then when you are ready to continue, access the Create menu and use Adapt Old Form to finish the design. After you save the complete version, you may delete the cardfile with the incomplete design.

To save your card form:

1. Choose Save Cardfile.

   ECM asks you to:

   ```
   Type a cardfile name and press ENTER.
   ```

2. Enter a name for the cardfile.

   (See Chapter 7 for the necessary guidelines.)

3. Pressing Enter ends the name and directs ECM to continue.

   ECM tells you it is:

   ```
   Creating the cardfile.
   ```

   Then, ECM opens that cardfile. While it is doing this task, ECM displays the message:

   ```
   Opening the cardfile.
   ```

Eventually, ECM displays an empty cardfile on the Main menu for the cardfile you just created.

Note

If a cardfile with that name already exists, ECM protects you from overwriting that file by informing you that: `Cardfile already exists.` If this happens to you, press Enter to clear the message, then type another name for the cardfile and press Enter to continue.

Now you are ready to put cards in the cardfile. Chapter 11 tells you how to add cards.

To leave the Create menu without saving the form:

ECM also lets you discard an incomplete form that you don't want to keep.

1. Choose ECM Main.

   ECM asks for confirmation that you don't want to save the card form:

   ```
   Cardfile will not be created. Choose
   "Yes" to confirm.
   ```

2. If you want to discard the form, choose Yes.

   ECM discards the card form. ECM then displays the Main menu with the cardfile you were using last.

3. If you decide against discarding the form, choose No.

   ECM cancels the current operation and returns to the Create menu.

10 Deleting a Cardfile

You can rid a disc of any obsolete cardfiles to make room for other information. You do this by deleting the cardfile from its disc. (If you are unsure whether you might use the cardfile again, make a backup copy to another disc before deleting the cardfile from your work disc.)

You may delete any cardfile. That is, you may delete the current cardfile or another cardfile.

Deleting the Current Cardfile

When you delete a cardfile, you lose that particular cardfile forever. Therefore, you may want to display the cardfile and scroll through its cards before you delete it. Once you verify that you have no need for this information, ECM allows you to delete the cardfile even though you are currently working with it.

To delete the current cardfile:

1. Start from the Main screen.
2. Choose `Cardfile Tasks` to display the Cardfile Tasks labels:

3. Choose `Delete Cardfile`.

   ECM asks you to:

   ```
   Type a cardfile name and press ENTER.
   ```

   To aid you in entering the correct cardfile name, ECM displays the default pathname and updates the function labels to the following values:

4. Type the name of the current cardfile.

5. Verify that the name is correct.

   (If you made a mistake, backspace over the name and correct it.)

6. Pressing Enter ends the cardfile's name and directs ECM to continue.

   ECM requests confirmation:

```
THE CURRENT CARDFILE WILL BE DELETED.
Choose "Yes" to delete.
```

Caution

Once you delete a cardfile, you cannot retrieve it.

7. If you change your mind, choose No.

   ECM doesn't delete that cardfile but waits for you to give it the name of the cardfile that it should delete. When you want to retain the cardfile and continue with another task, choose Cancel to return the function labels to the Cardfile Tasks values.

8. Choosing Yes deletes the cardfile.

When you are deleting the current cardfile, ECM informs you that it is:

```
Closing current cardfile.
```

Next, ECM tells you it is:

```
Deleting cardfile.
```

As the cardfile is now empty, the index tabs go blank.

Deleting Another Cardfile

If you have just copied a cardfile, you may decide to delete the old cardfile. Since you are probably certain of the cardfile's contents, you may delete this cardfile directly, without first making it the current cardfile.

To delete a cardfile other than the current cardfile:

1. Start from the Main screen.
2. Choose `Cardfile Tasks` to display the Cardfile Tasks labels.
3. Choose `Delete Cardfile`.

   ECM asks you to:

   ```
   Type a cardfile name and press ENTER.
   ```

4. You can switch work discs when the cardfile you want to delete is not on a disc in your computer.

Caution

Do not remove the ECM Application work disc. This is usually the disc in your primary drive.

5. Type the name of the cardfile you want to delete.

   Because the same cardfile name may appear in several directories, you should give the full cardfile name (for example, `B:\JIM\MOTELS`). This prevents you from deleting the wrong cardfile.

6. Verify that the full cardfile name is correct. If you find an error, backspace over the name and change it.

7. Pressing Enter ends the cardfile's name and directs ECM to continue.

   ECM displays the full cardfile name on the input line and requests confirmation:

   ```
   The following cardfile will be deleted.
   Choose "Yes" to confirm.
   ```

Caution

Once you delete a cardfile, you cannot retrieve it.

8. If you change your mind, choose No.

   ECM returns to its previous state and waits for you to give it the name of the cardfile that it should delete. When you want to retain the cardfile and continue with another task, choose Cancel to return the function labels to the Cardfile Tasks values.

9. Choosing Yes deletes the cardfile.

   When you are deleting a cardfile other than the current cardfile, ECM informs you it is:

   ```
   Deleting cardfile.
   ```

   The current cardfile remains in view. Its status stays the same when you delete another cardfile.

If problems arise:

If ECM fails to find the cardfile that you named, it informs you that it:

```
Can't find cardfile.
```

This may indicate one of two problems:

- You have inserted the wrong disc into the drive.
- You have entered the wrong name for the cardfile.

Note

Use File Manager to find out which files a disc contains and to verify the spelling for the cardfile names.

If the problem persists and you must back out of the procedure because you can't find the right disc or cardfile name, choose ECM Main if the Cardfile Tasks labels appear or No when ECM is asking for confirmation.

ECM expects procedures to follow a predictable path. However, you may alter a procedure to the point where ECM becomes confused and can't continue. Since we have stressed the importance of making back up copies of your discs, let's consider the following scenario:

- You make an exact copy of one of your ECM cardfile discs as a back up.
- You place the original cardfile disc into drive B and make one of the cardfiles (for example `B:\ADDRESS`) the current cardfile.
- You remove the original disc and insert the back up disc.
- You attempt to remove `\ADDRESS` from this disc.

ECM wants to close the current cardfile before deleting it, but it is already closed. That is, ECM can't close `\ADDRESS` because the open version (on the original disc) is no longer in drive B. ECM attempts to close `\ADDRESS` on the back up disc, but it is already closed. Being hopelessly confused, ECM simply hangs within this loop.

Note

To delete the back up copy of a cardfile with the same path name as the current cardfile, simply use `Get Cardfile` to make the back up copy the current cardfile before you attempt to delete it.

Deleting a Large Workset

When you are doing certain tasks, ECM creates a temporary *workset* to hold cards for you to view. While worksets resemble cardfiles, ECM prevents you from doing certain cardfile tasks with worksets. In particular, if you created a workset of inactive members from your club's roster, you can't use Delete Cardfile to remove the cards in this workset. Rather, you should follow a procedure similar to this one:

- Mark all the cards in the cardfile.
- Use the Find menu to isolate all the inactive members.
- Unmark the cards in this workset.
- Exit the workset.
- View all the marked cards. (This workset contains all the active members.)
- Use the Copy menu to replace the current cardfile with this workset.

Computer Museum

11 Adding Cards to a Cardfile

Adding a card means filling in the fields of a blank card form then filing the completed card in its cardfile.

You may add cards:

- to a new cardfile
- to a cardfile that already contains cards
- to a workset of a cardfile

This chapter gives the simple steps involved in adding cards to the current cardfile. When you start a session with ECM, ECM displays the last cardfile with which you were working if it can locate that cardfile on the disc(s) you are using. Or, after you create a new cardfile, the Main menu reappears with that cardfile as the current cardfile.

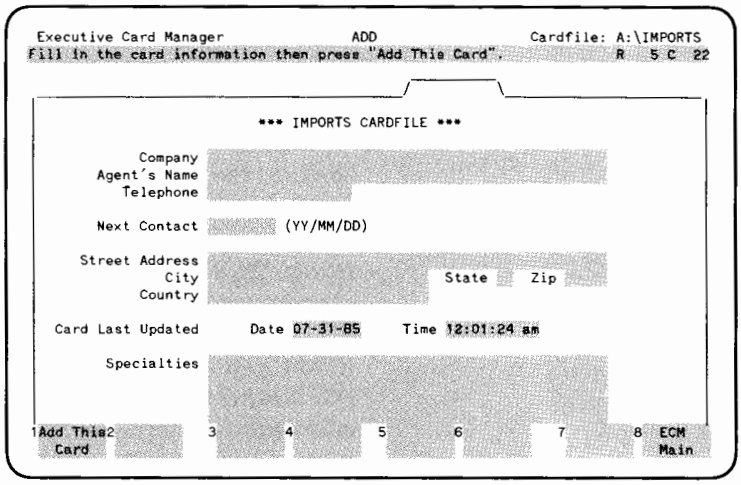
If you want to get another cardfile, refer to Chapter 12 for these details, then follow the instructions in this chapter to add cards to that cardfile. Similarly, Chapter 14 and 15 explain worksets. After you create a workset, you may use the techniques in this chapter to add cards to that workset.

Displaying the Add Menu

You place information in a cardfile by adding cards to that cardfile. This requires your filling in the appropriate information in the Add menu.

1. Start from the Main menu where the function labels have the following values:

2. Choose **Add Cards** to display the Add menu.



Caution

Do NOT remove the disc containing your cardfile while you are displaying the Add menu. Removing it may damage your cardfile.

Moving the Cursor Between Fields

When the Add menu appears, ECM positions the cursor at the beginning of the first field. Thus, if you want to fill in the fields in sequential order, you may start typing immediately. Notice that when you completely fill a field, ECM automatically advances the cursor to the beginning of the next field.

Note

Don't use the space bar to advance the cursor. Within a field, pressing the space bar prints a blank character at the cursor's current position. Beyond the boundaries of a field, pressing the space bar produces an audible beep because this is an improper keystroke at that location.

ECM also provides several ways for you to move the cursor to the beginning of a field without typing any text:

- To move the cursor to the next field, press Tab or Enter.
- To move the cursor to the previous field, hold down Shift and press Tab.
- To move the cursor to the first field that appears on your display, press the Home key.

- To move the cursor to the first field on the form, press the Home key while the cursor is within the first field that currently appears on your display.
- To move the cursor to the last field that appears on your display, press the End key.
- To move the cursor to the last field on the form, press the End key while the cursor is within the last field that currently appears on your display.

Note

You may also use touch or a mouse to move the cursor between fields, if your personal computer supports these pointing devices.

Filling Out a Card

The following list gives general guidelines for filling a blank card form:

- You can fill in the fields in any order.
- You may leave fields blank.
- If you fill in the primary key field, ECM files the card in its proper place in the cardfile.
- If you omit filling in the primary key field, ECM places that card at the beginning of the cardfile. This happens since ECM assumes nothing (that is, an empty field) comes before anything (that is, a field with information).
- You may not enter information into an Auto Date or Auto Time field as ECM automatically displays a value in these fields.

Remember that ECM prevents you from typing beyond the borders of a field. Furthermore, ECM automatically moves the cursor to the beginning of the next field once you have entered enough characters to fill the current field. For example, if you have a 5-digit ZIP Code field, after you enter the fifth character, ECM automatically advances the cursor to the next field.

Filling in Text

Entering text is as simple as writing your name. These hints may make it easier, however, to find information later:

- Remember that the first eight characters of the card's primary key field appear on the index tab of the card. Decide what information you'd like to see on the tab as a quick reference and place it first in the primary key field. (If the primary field contains more than eight characters, ECM displays the first eight characters in the tab and places a hyphen (-) after the tab to show that more information follows.)
- ECM sorts key fields according to the way the letters appear in that field. For example, if your form has a single Name field, ECM files **Dave Jones** under the letter **D**; but it files **Jones, Dave** under the letter **J**.
- If a card form has a single Name field, you can obtain a correct sort by filling in the last name, followed by a comma, then the first name. In this case, ECM alphabetizes the first names within the last name group. (For example, **Jones, Dave** comes before **Jones, Donna**).

Filling in Numbers

ECM sorts numbers in the same way that it sorts letters. For example, with text, ECM assumes that **A** comes before **ABC** and **ABC** comes before **D**. Similarly, ECM assumes **1** comes before **123** and **123** comes before **4**. (In other words, ECM treats **123** as a word beginning with the "letter" **1** and **4** as a word beginning with the "letter" **4**.) If you want ECM to sort your cards by value so **4** comes before **123**, you must determine how many numbers a field might contain, then account for all the digits by using zero as a place holder. For example, **004** comes before **123**.

However, if a field has been designated as a numeric key field, ECM will sort numbers by their value. That is, 4 comes before 123.

The following sections tell you how to fill in numbers where this treatment affects sorting your cards.

Filling in Dates

You may use ECM's automatic date stamping facility to mark your cards with the date when the information on the card was last changed. ECM automatically converts this date to a form that yields a proper sort. However, if you plan to use another field with dates as a key field for filing your cards, these pointers give the most useful way for entering dates:

- Give each element of the date a two-digit number. For example, enter 84 for the year 1984; 06 for the month of June; and 01 for the first day of the month. (You can, of course, enter a four-digit number for the year if your cardfile covers more than one century.)

- Enter year, month, and day in that order and separate them by slashes. This way, ECM first sorts by year, then month, then date. For example, enter `84/06/01` for June 1, 1984. (If you enter the date as `DD/MM/YY`, ECM sorts first by date, then month, then year.)

Filling in Times

You may use ECM's automatic time stamping facility to mark your cards with the time when that card was last changed. ECM manages the information in this field and places the cards in correct numerical order when you use this field as a key field. However, if you plan to use a time field that you created as a key field for filing your cards, these pointers give the most useful way for entering times:

- Convert the time to a 24-hour clock, in which noon is 12:00 and midnight is 24:00.
- Remember to add a zero to any single-digit hour. For example, enter `08:30` for 8:30 a.m.
- Be consistent in your form. This manual shows time in an `HH:MM` format (where we include a colon for clarity). However, the colon serves no magical purposes, so you could just as easily write all times as `HHMM`.

Filling in Telephone Numbers

The following pointers will help you enter telephone numbers in the most useful way for automatic dialing:

- Be sure to include all parts of the number that ECM needs to place your call. For example, if you use an access number (such as a `9` to get a dial tone), include this number in the autodial field. A telephone number may also include the # and * symbols.
- A plus sign (+) or comma (,) produces a two-second

pause to wait for a dial tone. For example, if you enter 9,202-555-2929, the modem pauses for two seconds after it dials the 9.

- ECM stops dialing when it reads an X (or x) in the autodial field. If your autodial field includes an X before an extension, ECM dials the number up to that point, then lets you ask for the extension.
- ECM recognizes the slash (/) character as a special symbol. (See Chapter 16 for details on using the slash symbol to pass information to a modem.)
- ECM ignores everything in the autodial field except numbers and the characters that were mentioned above. For example, if you enter a phone number as (202)555-2929, ECM interprets the number as 2025552929. Therefore, you can include such symbols, if you wish, to ease the entering and reading of telephone numbers.
- ECM reads as many as 39 characters in the autodial field (not including characters it ignores, such as parentheses).

Editing Fields

Once you finish filling in your form, check it for accuracy. If you find any mistakes, make the necessary corrections.

To redo an erroneous entry:

1. Move the cursor to the field you wish to change.
2. Type over the erroneous text with the correct information.
3. If the correction occupies less space than the original text, press the space bar until you have erased the remaining characters in that field.

To make minor corrections:

When you only want to change a few characters in an entry, you may use the computer's edit keys (such as the Ins key and the DEL key) to simplify your work. Notice that when you modify the text in a field, these keys behave as if each field were a separate entity.

1. To erase a single character, move the cursor to that position.
2. Press the DEL key.

   ECM deletes the character at the cursor's position and shifts the rest of the text in that field one space to the left.

3. To add a character (or characters) between existing text, move the cursor so it appears under the character before which you want to put the additional character(s).
4. Press the Ins key to put your computer in Insert Character mode.
5. Type the necessary correction.

   ECM inserts the text before the cursor and shifts the remaining characters to the right.
6. Press the Ins key a second time to return your computer to its regular mode of operation.

Caution

While your computer is in Insert Character mode, if you insert enough characters so the field becomes full, any subsequent characters forced to the right of the field boundary are lost. Also, if you place the cursor at the last position in a field and try to insert a character, the cursor advances to the next field (if a next field exits).

Filing a Card in the Cardfile

After you have finished working with a card, you must take one more step to place that card in your cardfile.

1. Choose Add This Card.

   ECM adds the card to your cardfile and displays another blank card form.

2. If you want to add another card, fill in the form and repeat step 1.

   Remember, you can add cards in any order. ECM automatically files each card in its proper place according to the key fields you have chosen.

To discard a card:

If you are filling out a card and decide that you don't want to save it, you can discard the card by leaving the Add menu.

Caution

Choosing ECM Main returns you to the Main menu without saving the current card.

1. Choose ECM Main.

   ECM warns you that:

   ```
   This card will not be added. Press
   "Yes" to confirm.
   ```

2. If you change your mind, choose **No**.

   ECM returns you to the Add menu. Now you may either modify the information on the card or choose **Add This Card** to place the card in your cardfile.

3. If you want to discard the card, choose **Yes**.

   If this is the only card you have worked with, ECM returns directly to the Main menu. However, if you have added cards to the cardfile before discarding the current card, ECM informs you that it is:

   ```
   Updating cardfile.
   ```

   Once ECM adds the new cards to the cardfile, it displays that cardfile as the current cardfile on the Main menu.

Leaving the Add Menu

After you have saved your last card, ECM displays another blank card for you to complete.

1. Since you have no more information to enter, choose **ECM Main**.

   ECM informs you that it is:

   ```
   Updating cardfile.
   ```

   Once ECM adds the new cards to the cardfile, it displays that cardfile as the current cardfile on the Main menu. The last card you added is in the open-card position; and all new cards are filed in their proper order.

What to Do When Your Disc Is Full

All card files have limits on the number of cards they can hold. As this rule also applies to ECM cardfiles, you may encounter one of two problems:

- the cardfile becomes full
- the disc becomes full

When you try addding a card to a full **cardfile**, ECM tells you:

```
The cardfile is full-no more cards may be added.
```

Because a cardfile may hold up to 64,000 cards, you'll probably never reach this limit. Therefore, the more common occurrence is reaching the capacity of your disc.

When you try adding cards to a full **disc**, ECM tells you:

```
DISC ERR0R--unable to save the card data.
```

You are unlikely to encounter this problem when you are using a fixed disc. If you are using flexible discs or RAM storage, you may create additional space by:

- deleting obsolete cards (Chapter 13) and then condensing the disc space used by that cardfile (Chapter 18); or deleting cardfiles (Chapter 10).
- copying some of your cardfiles onto another disc (Chapter 18).
- splitting a large cardfile into parts, and copying part(s) of it onto another disc (Chapter 18).
- Using special procedures to conserve disc space (Chapter 18).

12 Looking at the Cards in a Cardfile

This chapter explains how you get a cardfile to make it the current cardfile. (ECM refers to the cardfile that appears on the Main menu as the *current cardfile*.) This step is necessary because you must make a cardfile the current cardfile before you can work with it.

When you create a new cardfile, ECM automatically makes it the current cardfile.

Whenever you want to work with another cardfile, you must inform ECM of your intentions. The following section tells you how, then subsequent sections explain ways to locate cards within the current cardfile.

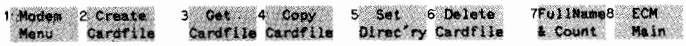
Getting a Cardfile

Your home base when working with ECM is the Main menu, and the name of the current cardfile appears on the banner line. (If no current cardfile exists, ECM displays `None` for the cardfile's name.)

To get a cardfile:

1. Start from the Main menu where the function labels have the following values:

2. Choose `Cardfile Tasks` to display the Cardfile Tasks labels:



3. Choose `Get Cardfile`.

   If you had been working with a cardfile, ECM informs you it is:

   ```
   Closing the cardfile.
   ```

   Next, ECM asks you to:

   ```
   Type a cardfile name and press ENTER.
   ```

   Anticipating that you want another cardfile on the same disc, ECM supplies the first part of the pathname for you on the input line.

Note

The disc that contains your cardfile determines your next step. If the cardfile occurs on the same disc that you are now using, your task is straightforward, so go to step 8. If you want to access a cardfile on another disc, go to step 6. If you are not presently using the disc which contains that cardfile, you have probably stored the disc in a safe place, so continue with step 4.

4. Remove your work disc, the one that does not contain the ECM application program.
5. Insert the disc which contains the desired cardfile into the empty disc drive.
6. Hold down Shift and press the Alt + L keys.

   ECM erases the pathname which it supplied.
7. Type the letter for the drive that contains the cardfile, followed by a colon (:), a backslash (\) for the main directory, then a name and backslash for each subdirectory (if any apply).
8. Type the cardfile's name.

   After you complete this step, you have given ECM the full cardfile name. For example, the input line might read: `B:\DONNA\IMPORTS`, In this case, ECM will search for the IMPORTS cardfile in the subdirectory called DONNA on the disc in Drive B.
9. Pressing Enter ends the cardfile's name.

   ECM searches for that cardfile in the location you specified. If it finds the cardfile, ECM informs you that it is:

   ```
   Opening the cardfile.
   ```

   Then ECM displays that cardfile on the Main menu.

If problems arise:

If ECM fails to find the cardfile, it informs you:

```
The cardfile could not be found. Press ENTER to
clear the message.
```

You should therefore take the following steps:

1. Pressing [Enter] clears the warning message.
2. Ensure that you are using the correct name for the cardfile.

   (See Chapter 7 if you are unsure of the cardfile's name.)
3. Verify that the pathname you are using for the cardfile is correct.

   (Appendix E provides information on using File Manager to determine a cardfile's full name.)
4. Consult Appendix F if you see any other message that you don't understand.
5. Type the cardfile's name again.

   If the cardfile is in a different directory, give the proper pathname.
6. Pressing [Enter] completes the name.

Obtaining Information on Your Cardfile

At times, ECM asks you to supply a cardfile's full name; that is, you must supply not only the name for the cardfile but also its pathname. Also, you may wonder how many cards a cardfile contains, especially if you are considering splitting that cardfile into smaller pieces. ECM provides a convenient way, therefore, for you to obtain this information.

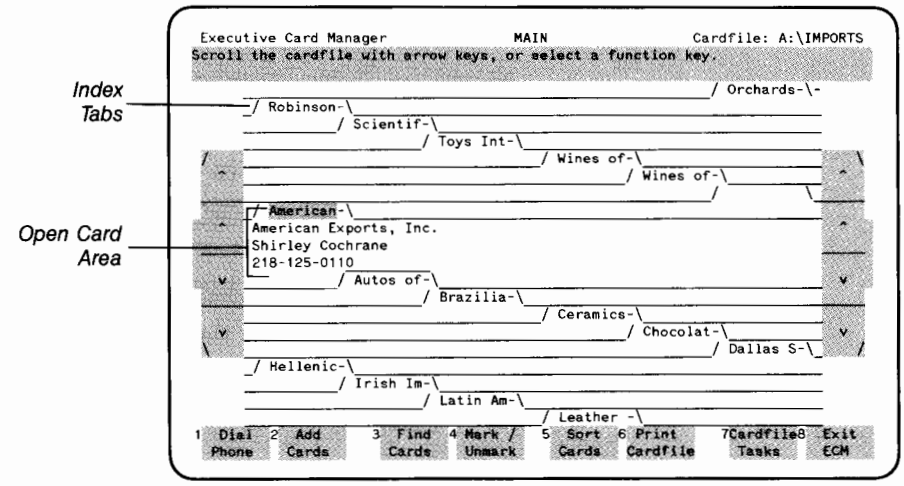
To ask for more information about your cardfile:

1. Start from the Main menu.
2. Get the cardfile that you want to check.
3. Choose `Cardfile Tasks` to display the Cardfile Tasks labels if they don't appear.
4. Choose `FullName & Count`.

   ECM displays the full name of the cardfile followed by the number of cards it contains—for example, `B:\DONNA\IMPORTS (308 cards)`.

Scrolling through the Cardfile

ECM focuses your attention on one card at a time. This card is in the *open-card* position, and ECM displays the information from that card's first three field lines. For the remaining cards in the file, ECM displays only their index tabs.



By scrolling through your cardfile, you can bring different cards into the open-card position and quickly scan the cardfile for pertinent information.

To scroll through a cardfile:

1. To scroll forward, press ScrLck and hold down the △ key.
2. To scroll backward, press ScrLck and hold down the ▽ key.

When you press ScrLck, the status light lights indicating the scrolling feature is on. You press ScrLck again to turn the scrolling feature off.

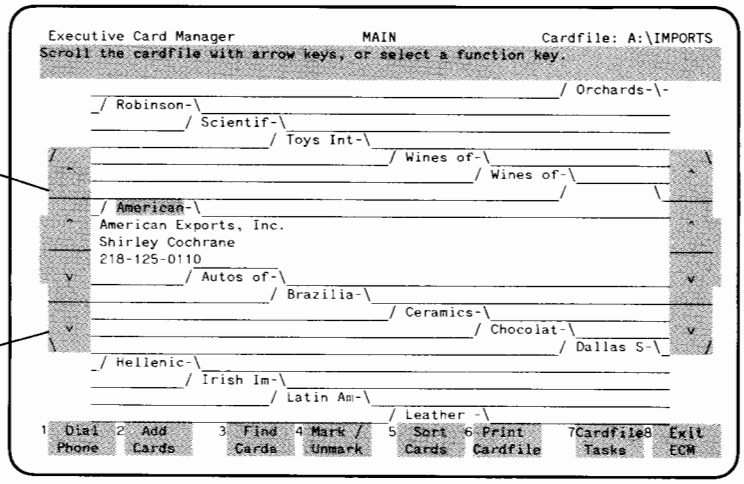
Note

If your personal computer supports touch, touching the top of one of the knobs on the card file scrolls the cards forward, while touching the bottom of one of the knobs scrolls the cards backward.

If your personal computer supports a mouse, you may scroll up or down the cardfile by moving the pointer to an up or down arrow on one of the knobs of the card file and pressing the left button of the mouse.

Touch the top of a knob to scroll forward through the cards.

Touch the bottom of a know to scroll backward through the cards.



Locating Specific Cards

When you are working with a large cardfile, you can find cards quickly by typing part of the information that appears within the primary key field. (This information forms the text on the index tabs.)

When typing the information that ECM uses for its search, you should remember these points:

- You may use a maximum of eight characters for the search. (ECM ignores any additional characters.)
- You may use upper-case letters, lower-case letters, or both. For example, ECM considers `cummings`, `Cummings`, and `CUMMINGS` to be identical.
- If you press the space bar before or after entering any search characters, ECM ignores these leading or trailing blanks. So if you press the space bar before typing the letter `P`, ECM still locates the first `P` card.
- You can go directly to the beginning of the cardfile by pressing either the Enter key or the Home key.
- If your cardfile is sorted by dates, a date appears on the index tab. When these dates have the form `YY/MM/DD`, typing `81` displays the first 1981 card, (or the first 1982 card if no cards for 1981 exist). If you put slashes between the year, month, and day (`YY/MM/DD`), remember to include them when you ask for the date. For example, if you want the first card for February 1984, you must type `84/02`, not `8402`.

To request a specific card:

1. Type the first one to eight characters of the information that appears on the tab.

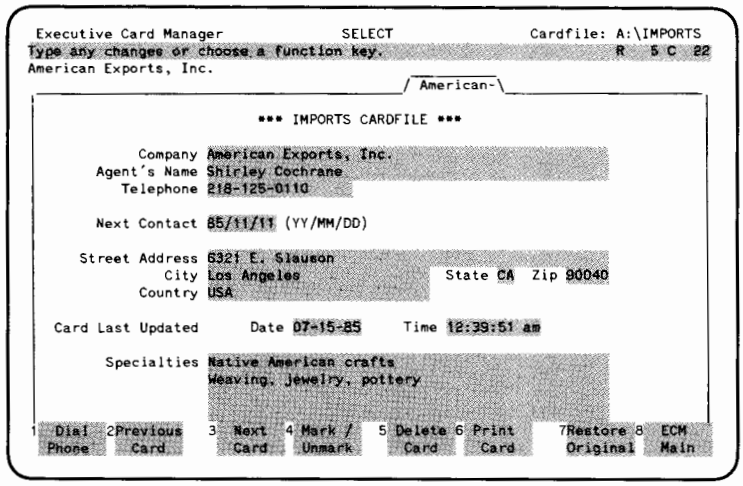
   For example, if your cardfile contains cards for WELLINGTON and WELLINGSON, type `WELLINGT` if you want the WELLINGTON card. If you want the first `W` card, type `W`.

2. Press Enter.

   ECM positions the first card whose index tab meets your specifications in the open-card position. When ECM fails to find a card that meets the search criteria, it rolls the cardfile so the next sequential card beyond this point appears in the open-card position.

Reading the Information on a Single Card

When a cardfile appears on your display, you see the first three field lines of the card in the open-card position. To read the entire card, you must pull the card from the cardfile. When you pull a card, ECM displays it in full-card format on the Select menu.



To pull a card:

1. Highlight the index tab for the card you want to see.

   You may accomplish this by:

   - typing the characters which will identify that card and pressing Enter
   - scrolling through the cardfile by using the ScrLck + ▽ or the △ keys
   - accessing individual cards by pressing Tab

2. Press the F10 key.

   ECM displays that card on the Select menu.

Note

If your personal computer supports touch or a mouse, you may choose any card whose index tab is visible by pointing to that card's tab.

To read other cards without leaving the Select menu:

1. Choose Next Card.

   ECM displays the card that comes next in order.

2. Choose Previous Card.

   ECM displays the preceding card.

From the Select menu, you can update the information in that card, place a phone call, mark that card, print it, or delete it. Chapter 13 tells how you perform these actions.

To return to the Main menu:

1. Choose ECM Main.

13 Working with Individual Cards

This chapter describes updating, marking, and deleting cards. The other tasks that you can do from the Select menu are described in Chapter 16 (autodial) and Chapter 17 (printing cards).

Displaying the Select Menu

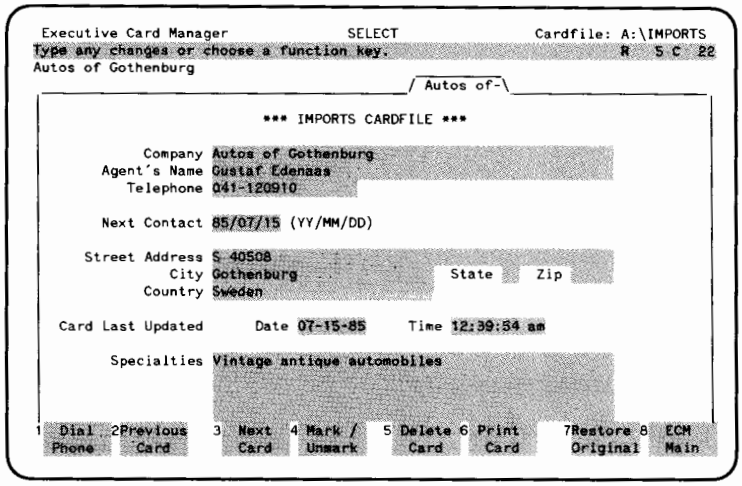
You work with individual cards on the Select menu.

1. Start from the Main menu.
2. Get the cardfile you want to use.

   Chapter 12 gives the details for this step.
3. Highlight the index tab of the card you want to see.

   See Chapter 12 for a variety of ways to choose an individual card from your cardfile.

4. Press the F10 key to display this card on the Select menu.



Updating a Card

While you are inspecting the card, you may decide to change the information within some of the fields. Before you start modifying a card, you should remember these general guidelines:

- You may change the information in the fields in any order.
- If you want to return the original value to a field, you must move the cursor to that field and retype the original information. When you want to return the entire card to its original form, choosing Restore Original replaces the modified card with a copy of the original card. (You must do this, however, before you choose any other function label.)
- You cannot change the field labels or the form title as ECM protects these areas from being overwritten.

Note

If your card form contains an Auto Date or Auto Time field and you make any changes to the card, ECM updates the value in these fields.

Moving the Cursor between Fields

ECM provides several keys that move the cursor quickly from field to field:

- Pressing [Tab] or [Enter] advances the cursor to the next field.
- Holding down [Shift] and pressing [Tab] moves the cursor to the previous field.
- Pressing the [Home] key moves the cursor to the first field that appears on your display.
- Pressing the [Home] key (while the cursor is within the first field that appears on your display) moves the cursor to the first field on the form.
- Pressing the [End] key moves the cursor to the last field that appears on your display.
- Pressing the [End] key (while the cursor is within the last field that appears on your display) moves the cursor to the last field on the form.

Note

You may use touch or a mouse to move the cursor to the appropriate field, if your personal computer supports these pointing devices.

Changing the Information on a Card

While a card appears on the Select menu, you may make whatever changes you want. When you return a card to its cardfile (by either displaying another card or returning to the Main menu), ECM replaces the old version of that card with the information that currently appears on the display.

To change the information on a card:

1. Move the cursor to the appropriate field.
2. Type your new information over the existing text.

   If this response is shorter than the original entry, press the space bar to erase the remaining text.

Note

You may also use the Ins key and the DEL key to modify the entry in a field.

---

3. Repeat steps 1 and 2 until you have made all the necessary changes.
4. When you finish updating the card, check that the information is correct.

5. If you change your mind, choose Restore Original to replace the original information in all the fields.

Note

To return a card to its original condition, you must choose Restore Original while you are updating the card and before you choose any other function label.

---

6. You may change the information in adjacent cards without leaving the Select menu. Choosing Next Card gets the next sequential card while choosing Previous Card gets the previous card in your cardfile.
7. When you have no further changes to make, choose ECM Main to return to the Main menu.

   If you have changed the information in the primary key field, this change could affect the placement of the card in the cardfile. For example, if Ms. Jones marries and takes her husband's last name (Smith), ECM refiles her card under the letter "S".

Marking Cards

When you are working with a cardfile, you can single out certain cards. (For example, you might mark the cards of the clients you were calling on today.) ECM accomplishes this task by placing an asterisk in front of the entry on the index tab of the appropriate cards.

To mark individual cards:

1. From the Select menu, choosing Mark/Unmark marks the current card.

   ECM displays an asterisk (*) before the entry in the index tab to show that you have marked this card.

You may also mark groups of cards from the Find menu. See Chapter 14 for that information.

To unmark individual cards:

Once you have marked a card (these cards show an asterisk before the entry on their index tab), you may return the card to its unmarked status.

1. Choose Mark/Unmark.

   ECM removes the asterisk (*) from the index tab.

Notice that choosing Mark/Unmark either marks or unmarks a card. The result depends upon the current status of the card. If the card is not presently marked, choosing Mark/Unmark marks it. Similarly, if the card is presently marked, choosing Mark/Unmark unmarks it.

You may also unmark groups of cards from the Find menu. Refer to Chapter 14 for this information.

Printing a Card

Chapter 17 provides information on ECM's printing facilities. As the Select menu uses information stored in the Printer Setup menu, please refer to that chapter for details on setting these values. In particular, the entry for the `Lines Per Card` field determines how many lines ECM prints for each card.

Note

The value in the `Lines Per Card` field sets the upper limit for the number of lines that ECM prints for any card. Therefore, if this value is 10, ECM only prints 10 lines, even though more lines may appear on your display.

To print all the information on a card:

1. Display the card you want to print.
2. Choose `Print Card`.

   ECM prints all the information on that card. When a card contains several pages, ECM prints the information that is visible on the display as well as any information that is off the display.

   The card's image appears with the card borders, the form title, the field labels, and field contents. The fields are underlined, and the card border appears as a series of dots and dashes rather than a solid line. (Since a card is 80 columns wide, ECM prints the card's full width, regardless of the settings for the Left and Right Margins in the Printer Setup menu.)

3. To print adjacent cards, choose Next Card to display the next card or Previous Card to display the previous card.
4. Choose Print Card after each card appears.

To print several cards quickly:

You may print several cards in rapid succession by choosing Next Card, Print Card, Next Card, Print Card, and so on, without waiting for ECM to print each card.

Under these circumstances, the computer stores the commands in its memory, and ECM carry them out in sequence.

You can also instruct ECM to print just the information that appears within certain fields on the card form. Such printouts resemble lists, not actual cards. (Chapter 17 describes ways to print information in a cardfile.)

To print a portion of a card:

ECM allows cards to be a maximum of 255 lines in length. When a card's length exceeds 19 lines, ECM only displays a portion of the card on your display. When you just want to print the card information that appears on your display, hold down Shift and press the Prt Sc key. ECM prints only the part of the card which appears on the display. You may then use the Pg Dn or Pg Up keys to bring another portion of the card into view.

Deleting a Card

Since a cardfile contains a fixed amount of space, you should remove extraneous cards.

To delete a card from your cardfile:

1. Display the card you want to delete.
2. Inspect the information on this card and verify that you have no further use for this information.
3. Choose Delete Card.

   As the information on this card will be lost, ECM asks you to confirm your intentions:

   ```
   To confirm that you want to delete this
   card, choose "Yes".
   ```

4. If you want to delete this card, choose Yes.

   ECM deletes the card and displays the next card in the cardfile.

If you change your mind:

If you chose Delete Card by mistake, or if you decide you want to keep the card, choose No to cancel this operation.

Leaving the Select Menu

1. Once you have finished all your tasks on the Select menu, choose ECM Main.

   ECM displays the Main menu. The last card on which you were working appears in the open-card position.

14 Searching for Specific Cards

At times, you want to inspect specific cards in your cardfile, rather than viewing the entire cardfile. For example, suppose you are visiting New Orleans and you get an insatiable craving for pizza. First, you might search for Italian restuarants that serve your favorite German beer. Then, after checking your wallet, you might refine the search to those restuarants whose dinners average less than ten dollars.

With a traditional cardfile, this is a tedious task. Using ECM, however, you can quickly find the desired cards as ECM uses its computer speed to search the cardfile for you. Furthermore, after it identifies all the cards that meet your criteria, ECM displays them for you to view.

Note

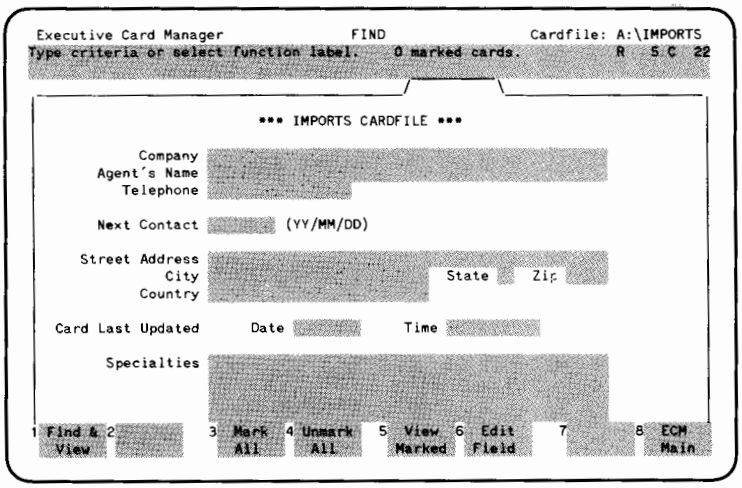
You may also use the Find menu to mark all the cards in a cardfile or only those cards that meet certain criteria. See the section on **Marking a Group of Cards** for more information.

Preparing for a Search

The first step in isolating a particular set of cards is calling up the Find menu. As ECM requires disc space to build a temporary file, be sure sufficient room exists to store this file in the directory which contains the cardfile.

To display the Find menu:

1. Start from the Main menu.
2. Get the cardfile that you want to search.
3. Choose Find Cards to display the Find menu.



Creating a Workset

From the Find menu, ECM will locate all the cards with fields that match the information you specify. These cards make up a workset.

To create a workset:

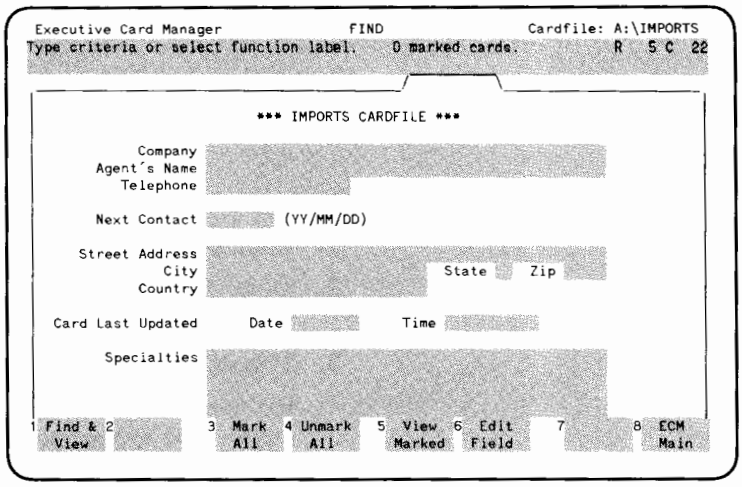
1. Start from the Find menu.
2. Move the cursor to the field you want ECM to use in its search.
3. Type the search criterion into that field.

   For example, you might type `Smith` into the Last Name field to find all the Smith entries in your cardfile.

Note

The concluding sections in this chapter describe the different types of searches that ECM provides. Refer there for information on literal searches, numeric searches, negative searches, and wildcard searches.

4. If you want to further refine the search, repeat steps 2 and 3 for each appropriate field.



5. After you fill in the appropriate fields, check each entry and make any necessary corrections.
6. Choose Find & View.

   ECM tells you it is:

   ```
   Searching the cardfile.
   ```

   ECM then displays the Main Workset menu. The Workset menu appears identical to the Main menu except the caption on the first line reads `Workset of:` rather than `Cardfile:`, and the label for F8 reads Exit Workset rather than Exit ECM. The workset includes only those cards that met your criteria.

7. From the Workset menu, you may simply view the cards, or you may work with them as you would the cards from a cardfile.

8. When you finish working with the workset, choose Exit Workset.

   As ECM returns the cards to the original cardfile, it first asks for confirmation:

   ```
   The current workset will be discarded.
   Press "Yes" to exit workset.
   ```

9. Choosing Yes discards the workset, and the original cardfile you were using reappears on the Main menu.

Filling in a Field

When filling in fields, remember that:

- You can fill in the fields in any order.
- You can specify only one term in each field.
- You can search as many fields as you want. When you search on several fields, you ask ECM to find those cards that meet the criteria in all the fields, not just one or two of them.
- You can use a whole word (`California`), part of a word (`Cal*`), or a phrase (such as `Los Angeles` or `reasonable prices`).
- You can use a complete number (`84/01/25`) or part of a number (`*/01/*` for all the dates in January).
- When you search by part of a word or number (such as `Cal*` or `*/01/*`), the asterisk (`*`) is a wildcard symbol, which stands for all possible combinations of characters that you omitted.
- You can search for all the cards before or after a given number (for example, all the cards with prices lower than $100).
- You can mix types of search categories. For example, you can search by a wildcard in one field and by a whole term in another. You can search by numbers in one field and by letters in another.

Making Long Entries

When you want to enter search characters into a field and the field does not have sufficient room to hold all the characters, you may enter the necessary information on the menu's input line by using Edit Field.

To enter a search string into a short field:

1. Start from the Find menu.
2. Move the cursor to the field that you want to search.
3. Choose Edit Field.

   This keystroke produces a flurry of activity:

   - The function labels go blank except for F8, which now indicates Cancel.
   - ECM prompts you to: `Edit the information then press ENTER.`
   - In preparation for your reply, ECM moves the cursor to the beginning of the input line.
   - If the field contains information, ECM also displays this information on the input line
   - ECM fills the chosen field with backslashes (\) to show that you must enter the search information on the input line.

4. Type the complete information required for the search.

   If necessary, you may go back and make any necessary corrections by either retyping the information or using the keyboard's editing keys.

5. If you change your mind, choose **Cancel**.

   ECM replaces the original entry in the chosen field and returns the function labels to their previous values.

6. If you want to continue with the search, pressing Enter completes the entry.

   Upon sensing this keystroke, ECM performs the following tasks:

   - It returns the function labels to their previous values.
   - It returns the cursor to the proper field.
   - It displays as much of the entry as possible within that field.

You may now enter additional search terms using either the normal method or this procedure for another long entry.

Making Corrections

While you are entering your search criteria, you can make corrections to any of your entries just as you would when you enter information into a field.

ECM searches the cardfile based upon the information that currently appears in each field. Therefore, when you change a field's contents, be sure to replace the entire entry, deleting extraneous text when necessary.

Filling in Group Fields

If your card form contains grouped fields (see Chapter 9), you may search for a particular piece of information in all the combined fields.

Note

You should conduct a wildcard search for the information you want to find by enclosing this information between asterisks (*). For example, if you want to search a cardfile's Comment fields for "reasonable" prices, you should enter `*reasonable*`.

When you type the search criterion in one of the fields, ECM displays the same information in the other fields of that group. Then, once you choose Find & View, ECM searches all the fields as though they were one continuous field. This ensures ECM will locate cards which contain that information, even if the information crosses a line boundary. For example, if you are searching an On-order field for Hewlett-Packard equipment and "Hewlett-" occurs at the end of one field and "Packard" begins the next field, ECM identifies this card as containing the required information.

Completing the Search

Once you have typed the search criteria on the Find menu, choose Find & View. (If you decide to abandon your search, choose ECM Main to redisplay the Main menu.)

At this point, ECM searches your cardfile for the cards that meet your criteria. The time required for the search depends on the size of your cardfile.

Upon completing the search, ECM displays a new rotary card file that contains the desired cards. For example, if you searched your Address cardfile for all Illinois cards, the new card file contains Illinois cards (if any exist) and no others.

The Illinois card file is a *workset*, not a cardfile. ECM informs you of this fact in several ways. Most obviously, the cardfile's name on the first line now reads `Workset of: ADDRESS` rather than `Cardfile: ADDRESS`. Furthermore, on the Main menu, the label for F8 changes from Exit ECM to Exit Workset.

Working with the Workset Menu

A *workset* is a group of cards that ECM temporarily pulls from a cardfile. In most ways, a workset resembles an ordinary cardfile. You can print an individual card from the workset, or you can print the entire workset. Furthermore, you can copy the workset, transfer information into it or out from it, and even conduct additional searches on that workset. When you conduct a search on a workset, ECM displays the results of this search as a workset of a workset. Any task that you can do with a workset, you may also do with a workset of a workset.

Note

Worksets differ from cardfiles in one, important way; worksets are temporary while a cardfile is permanent.

Because ECM returns the cards in a workset to the original cardfile, any changes you made in the workset are automatically preserved in the cardfile. In other words, if you create a workset of a cardfile and then delete one of the cards in the workset, you also delete the card from the original cardfile. Similarly, adding cards to a workset or updating a card within the workset makes the corresponding change to the original cardfile.

Leaving the Original Cardfile Intact

If you want to add cards to a workset, delete cards from it, or revise cards in it, without affecting the original cardfile, you must make the workset into a permanent cardfile. Chapter 18 explains how you can copy a workset to make a new cardfile.

Once ECM has copied the workset, the copy becomes a separate, permanent cardfile. You may then change to the new cardfile and use it without affecting the original cardfile.

Narrowing a Search

If, after searching for a workset of your cardfile, you decide to further refine the search, ECM makes it easy to search for a workset of that workset. For example, suppose you want to know how many of your employees earn between $25,000 and $50,000 a year. Even though ECM provides a wide variety of searches, no one search yields that result. Rather, you must conduct two searches. First you find the cards for those people who have salaries over $25,000. Then from this workset, you isolate the cards of those people who earn $50,000 or less. The resulting workset (actually, a workset of a workset) contains the cards of all employees who earn between $25,000 and $50,000.

To narrow the search:

1. Start with the current workset appearing on the Workset menu.
2. Choose Find Cards.

   ECM displays the Find menu.
3. Enter the additional search criteria that refine your seach.
4. Press Enter.

   ECM eliminates all the cards that don't meet the new conditions and displays only the cards that do. (The cardfile name is still preceded by `Workset of:`.)

When you finish using a workset of a workset:

1. Choose Exit Workset.

   As the workset will be discarded, ECM asks you to confirm your intentions:

   ```
   The current workset will be discarded.
   Press "Yes" to exit workset.
   ```

Caution

You can't return to an earlier workset. When you choose Exit Workset, ECM refiles the cards in the original cardfile and returns to the Main menu with the original cardfile showing.

2. If you want to discard the workset, choose Yes.

   ECM returns the cards to their cardfile and displays the Main menu.

3. If you want to retain the workset, choose No to cancel your request.

   Then follow the procedures in Chapter 18 on saving a workset as a cardfile.

4. Choose ECM Main to return to the Main menu.

Marking a Group of Cards

You may also use the Find menu to mark cards. (Chapter 13 describes how you can use the Select menu to mark individual cards.)

To mark all the cards in a cardfile:

If you want to mark all the cards in a cardfile, you don't have to mark each card individually.

1. Start from the Main menu.
2. Get the cardfile that you want to mark.
3. Choose Find Cards.

   ECM displays the Find menu. The middle portion of the message line displays the number of marked cards in your cardfile. For example, when no cards are marked, ECM displays: `0 marked cards`.
4. Choose Mark All to mark every card in the cardfile.

   After you have marked all the cards, you may continue with the task you had in mind.

To unmark all the cards in a cardfile:

If you want to remove the mark from all the cards in a cardfile, follow these steps:

1. Start from the Main menu.
2. Get the cardfile that you want to change.
3. Choose Find Cards.

   ECM displays the Find menu. The middle portion of the message line displays the number of marked cards in the cardfile.
4. Choose Unmark All to remove the mark from every card.

   ECM requests confirmation:

   ```
   All cards will be unmarked. Press
   "Yes" to confirm.
   ```
5. If you change your mind, choosing No retains the mark.
6. Choosing Yes removes the mark from all the cards.

To mark all the cards in a workset:

Usually you want to choose a group of cards from a cardfile, then work with that subset of cards.

1. Start from the Main menu.
2. Get the cardfile that you want to search.
3. Choose Find Cards.

   ECM displays the Find menu.
4. If you only want to mark the cards in the workset you are going to create, choose Unmark All to remove any existing marks.
5. Fill in the appropriate information on the Find menu to tell ECM how to search the cardfile.
6. Choose Find & View to create the workset with the desired cards.

   ECM finds all the cards that meet your criteria and displays them as a temporary workset on the Main Workset menu.

Note

Remember, you are working with a workset, not a cardfile. For visual reminders, the first line reads `Workset of` and the message for [18] is Exit Workset.

---

7. Choose Find Cards to return to the Find menu.
8. If you want to mark all the cards in the workset, choose Mark All.

9. If you only want to mark some of the cards, you may use the Mark/Unmark function label from either the Main or Select menus.

Note

You may unmark all the cards in a workset by choosing Unmark All.

10. By repeating steps 3 to 9, you may define smaller and smaller subsets of the original workset. Remember, if you only want to mark some cards, rather than all the cards in a workset, use the Mark/Unmark function label from either the Main or Select menus.
11. To return to the Main menu, choose ECM Main.

    ECM returns you to the Main menu, but the marks you placed on the cards are retained.

To see a workset of all the marked cards:

When you have marked cards in successive worksets, you can create a workset that contains all the marked cards:

1. Start from the Main menu.
2. Choose Find Cards.
3. Choose View Marked.

   ECM locates all the cards that contain a mark and displays these cards, as a workset, on your display.
4. To return to the Main menu, choose ECM Main.

Widening a Search

When you enter search criteria in several fields, you ask ECM to find those cards that meet all the criteria. When you *narrow* a search, you conduct consecutive searches on the same field to produce a more restrictive workset. Similarly, you may do consecutive searches on a field and mark the cards in each workset. Then, if you combine all the marked cards, you have effectively *widen* your search.

For example, suppose you are working for a political party and you are making a list of the major contributors to last year's campaign. From a cardfile for the United States, you decide to create a series of cardfiles for different regions. Therefore, to create a NEWENG cardfile, you could search for contributors in Maine and mark their cards; then search for contributors from Vermont and mark their cards; and so on, until you have marked the cards for everyone from these states. Then choosing View Marked builds a workset that contains all the contributors from New England. Finally, you could copy this workset to make a permanent cardfile; unmark the cardfile, and continue with the next region.

Searching in Greater Detail

ECM works with two basic types of searches:

- literal searches (in which ECM compares two items, character by character)
- numerical searches (in which ECM compares numbers by their values)

Within each of these categories, you may instruct ECM to do:

- a normal search (in which ECM matches the information you enter)
- a negative search (in which ECM matches everything that differs from the information you entered)

Finally, you may enter information into the fields, in one of two ways:

- you can search by a whole word or number
- you can search by part of a word or number

When you search by part of a word or number, you are conducting a *wildcard* search.

The following paragraphs provide additional details on the different types of searches.

Conducting a Literal Search

In a literal search, ECM looks for an exact match of characters. Therefore, always enter your search criteria in exactly the same manner as it appears in the fields. For example, if you want to search for doctors, and your card form uses `Dr.` in the title field, you must search for `Dr.` (or `dr.`) and not `Doctor` (or `doctor`).

You conduct a literal search by typing the desired information into the appropriate field. The items may look like text (such as `Fort Collins`) or numbers (such as `(312) 555-2531`).

When you conduct a literal search, you may search for either the entire entry in a field or for part of an entry (that is, by wildcard). For example, if you want to find all the cards for people in San Francisco, type the complete entry `San Francisco`. However, to find all the cards for people in cities that begin with "San", type `San *`. In this case, ECM finds the cards for San Antonio, San Bernardino, San Francisco, and so on. However, if you omit the space between `San` and the asterisk (`*`), ECM also finds the cards for cities such as Sandusky and Santa Barbara.

Because ECM considers all searches to be literal searches unless you instruct it otherwise, you may enter just the required information. When you want to qualify the literal search with a relational operator, however, you must precede the search string with a combination of symbols that specifies the type of search. The following list provides more information.

You may direct ECM to perform the following literal searches:

- To find an exact match. For example, typing `SMITH` or `A=SMITH` finds all the cards that contain SMITH in the designated field.
- To find anything that ends with the given information. For example, typing `*SMITH` or `A=*SMITH` finds all the cards that end in SMITH (such as BLACKSMITH).
- To find anything that begins with the given information. For example, typing `SMITH*` or `A=SMITH*` finds all the cards that begin with SMITH (such as SMITHSONIAN).
- To find anything that contains the given information. For example, typing `*SMITH*` or `A=*SMITH*` finds all the cards that contain SMITH (such as WORDSMITHS).
- To find anything that exceeds the given information. For example, typing `A>SMITH` finds all last names which come after SMITH.
- To find anything that is greater than or equal to the given information. For example, typing `A>=SMITH` finds all last names from SMITH through the end of the cardfile.
- To find anything that is less than the given information. For example, typing `A<SMITH` finds all last names that precede SMITH.
- To find anything that is less than or equal to the given information. For example, typing `A<=SMITH` finds all last names up to and including SMITH.

You may conduct a literal search on a field with numbers when you remember exactly how you entered the numbers into that field. For example, if all your cards show dates with slashes between the three elements, typing `76/07/04` in a date field finds all the cards with the Bicentennial date of July 4, 1976.

You may also use relational operators for literal searches on numbers. For example, typing `A>83/10/27` finds all the cards with dates after October 27, 1983; while typing `A>=83/10/27` finds all cards with dates on or after October 27, 1983. Similarly, typing `A<83/10/27` finds all the cards with dates before October 27, 1983; and typing `A<=83/10/27` finds all cards with dates on or before October 27, 1983.

You may also use wildcards in a literal search. For example, to find all the cards with dates in 1976, you may type `76/*`. In this case, the asterisk (*) stands for any month and day.

Although certain literal searches resemble numeric searches, ECM considers these searches to be very different. For example, in a literal search, 120 is less than 60 because 1 is less than 6. However, in a numeric search, 120 is greater than 60 because 120 is twice the value of 60.

Conducting a Numeric Search

In a literal search, ECM considers 2000 to be different from 2,000 because one number has a comma and the other does not. But what happens if you forget whether you entered a number as 2000 or 2,000?

ECM provides an easy way to search for numbers when you only remember the numbers and are uncertain what symbols (if any) the number includes. In this case, you ask ECM to conduct a numeric search.

In a numeric search, ECM compares two numbers by evaluating their values. That is, ECM only considers the numbers (such as digits, a decimal point, and a minus sign) and ignores all other characters. (The minus sign may come before the first digit or after the last.) Thus with a numeric comparison, ECM considers the telephone numbers `(313)555-4448` and `313-555-4448` to be identical. In a literal search, where ECM compares each character in sequence, these two phone numbers are distinct.

With a numeric search, you must provide a relational operator to tell ECM how it should test the values. You must choose the operator from the following list: `=`, `>`, or `<`. (You may combine the equal sign (`=`) with the other two operators.) You may also include the letter `N` (or `n`) for Numeric before the relational operator as a visual clue that you may use to distinguish numeric searches from literal searches.

- When you type `=` (equals) before a number, ECM finds only those cards which have that number in the chosen field. For example, you would type `=1000` in the price field to see all the cards for items that cost exactly $1,000.

- When you type < (less than) before a number, ECM finds all the cards which have a lower number in that field. For example, you would type `<1000` in the price field to see all the cards for items that cost less than $1,000.
- When you type > (greater than) before a number, ECM finds all the cards with a higher number in that field. For example, you would type `>1000` in the price field to see all the cards of items that cost more than $1,000.

You may also use the equal sign in conjunction with the other two symbols. That is, typing >= finds all the numbers greater than or equal to the given number. Likewise, typing <= finds all the numbers that are less than or equal to the given number.

Whenever you use these symbols in a numeric search, you must remember:

- You cannot combine the greater than and less than symbols. For example, you can't ask for all the salaries greater than $25,000 but less than $50,000. (See the section on **Narrowing a Search** for ways of doing this task.)
- ECM only reads digits, the first decimal point, and a minus sign when evaluating a number. Therefore, if you type `=2000`, ECM finds all the cards having that value. For example, you could see cards for $2,000 or 2,000; but not for $20.00 or -2,000.
- You cannot use a wildcard symbol (*) when you search by the numeric method.

Conducting a Negative Search

Besides the normal search for specific information, you may also direct ECM to find all the cards that have a different entry than the information you supply. In computer terminology, this is the NOT function. That is, you want ECM to find all the values that are NOT the given value.

You indicate the NOT function by typing a tilde (~) before the information you want ECM to use in its comparison. For example, typing `A~=*done*` finds all the cards without `done` somewhere in that field.

You must place the tilde (~) first in the field, unless you are using the letters A or N. In this latter case, the tilde follows the A (or N) and precedes the relational operator. For example, you may use either `~*done*` or `A~=*done*`.

Conducting a Wildcard Search

You can use an asterisk (*) as a *wildcard* when conducting a search. ECM assumes the wildcard matches any character (or any possible combination of characters). For example, typing `SMITH*` in the Last Name field produces not only the SMITH card but also the SMITHFIELD and SMITHY cards. Typing `*/04/*` in a YY/MM/DD birthday field produces all the cards with April birthdays.

Note

You may use wildcards in literal searches and negative searches, but not in numeric searches. For example, typing `A~=*` in a field locates those cards where that field is *empty*.

Special Types of Numerical Searches

If you have consistently entered the values for a time field, date field, or telephone field, you may use literal searches to find specific cards. However, if the entries use differing formats, you should use a numeric search to find the proper value.

Searching by Times

You may use either a literal search or a numeric search when searching by times.

Note

Auto Time fields use an HH:MM:SS format. The following searches pertain to time fields that use an HH:MM format.

For literal searches:

You may use literal searches to find exact times or parts of times. Remember to type the time exactly as you wrote it on your cards.

- To find a specific time, type the exact time. For example, if you entered times in an `HH:MM` format, type `10:00` to find all the meetings scheduled for 10:00.
- To find part of a time, type the part of the time you want (either hour or minutes) and supply an asterisk (`*`), the wildcard symbol, for the missing terms. For example, to find all the meetings between 10:00 and 11:00, type `10:*`.

For numeric searches:

When you search for times by the numeric method, you must use a whole term, not just part of a term. That is, if the time includes both hours and minutes (as in the format: `HH:MM`), you must enter both elements.

- Because you must use the whole time, you cannot search by wildcard. For example, you cannot type `>*:30` to find all times later than half past the hour.
- Use < (less than) or > (greater than) to find all times before or after a given time. For example, to find all meetings scheduled after 2 p.m., type `>1400` in the appropriate field. (Remember, when you conduct a numeric search, ECM ignores the colon.)

Searching by Dates

You may search by dates using either the literal or the numeric method.

Note

Auto Date fields use a localized format for the date. The following searches pertain to date fields that use a YY/MM/DD format.

For literal searches:

Use literal searches to find exact dates or parts of dates. Remember to use the date, or part of the date, exactly as it is written on your cards.

- To find a complete date that is shown as YY/MM/DD, type the date in the same style. For example, type `84/02/16`.

- To find all the dates in a certain year, use the first part of your date (YY/) and include the slash and a wildcard symbol (*). For example, type `84/*` to find all the 1984 cards.
- To find all the dates in a given month, use the second part of your YY/MM/DD date. Surround the month by slashes and wildcard symbols to show that you are searching for the month. For example, type `*/04/*` to find all the April cards.
- To find all the dates on a given day of the month, use the third part of the YY/MM/DD date. Include the slash and wildcard symbol (*). For example, type `*/13` to find all the cards with a date on the 13th day of a month.

For numeric searches:

When you search for dates by the numeric method, you must use the whole date, including two digits each for year, month, and day. For example, type `840218`. (ECM ignores the slashes in dates written as YY/MM/DD.)

- Because you must use the whole date when you use the numeric method, you cannot use a wildcard as part of your search. For example, you cannot use `>64/*` to find all dates after 1964.
- To find all the dates before or after a given date, use < (less than) or > (greater than) followed by all the numerals in the date. For example, to find all the people with birthdays after 1950, type `>501231`. To find all the people with birthdays after July 1950, type `>500731`.

Searching by Telephone Numbers

You may search a telephone number field using either the literal or numeric method.

For literal searches:

Use literal searches to find telephone numbers when you know what special symbols the numbers include; for example, (313) 555-3212 as opposed to 313-555-3212.

- You can use wildcard searches to find parts of telephone numbers. For example, to find all numbers with a 212 area code, type `*212*` in the Phone field. ECM then finds all the phone numbers whether they have 212 area codes written as (212) or 212-.

Note

In a literal search, ECM also finds a card with the phone number 528-2120, because *212* tells ECM to find the combination 212 wherever it appears—no matter what precedes or follows it. On the other hand, typing `212*` fails to find the `(212)` cards, since no wildcard symbol tells ECM to look for characters before the 212.

- You can use a similar procedure to find all the phone numbers with a given exchange.

For numeric searches:

You can type an equal sign (=) before a telephone number when you don't remember how you entered the number on the card. For example, typing `=2125558854` finds the correct card whether you entered the number as `(212) 555-8854` or `212-555-8854`.

15 Rearranging the Cards in a Cardfile

If you have filed your cards in one order then decide you would like to see a different ordering, ECM provides a convenient way to rearrange the cards in a cardfile. This chapter provides that procedure.

Note

ECM displays the rearranged cards in a temporary workset. If you want to retain this ordering, you must copy the workset to save it as a cardfile.

Preparing to Sort Your Cardfile

The first step in rearranging a cardfile is displaying the Sort menu.

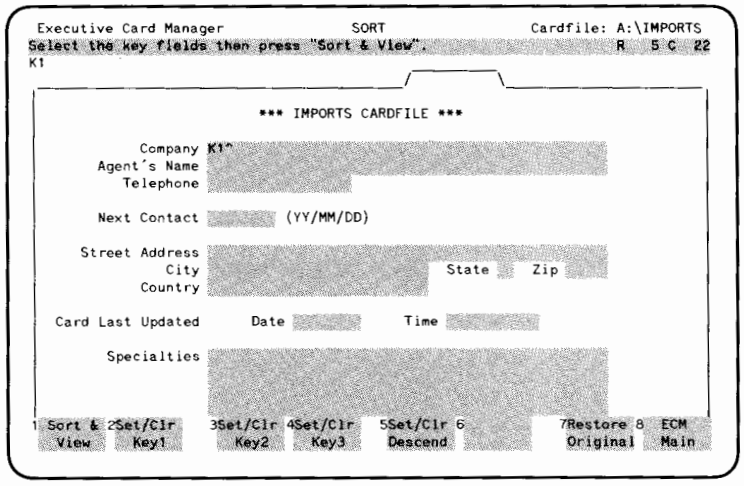
Caution

ECM requires disc space to build a temporary file to hold the newly sorted cards. Be sure that sufficient room exists for this file in the directory that contains the cardfile.

To display the Sort menu:

1. Start from the Main menu.
2. Get the cardfile that you want to rearrange.
3. Choose Sort Cards.

   ECM displays the Sort menu:



Setting the Search Terms

The fields that ECM uses for sorting are called *key fields*. The following sections describe how you set these fields. Setting a new key field automatically cancels the designation of that field anywhere else on the form.

You should also remember these points about key fields:

- You can set a maximum of three key fields.
- If several cards have identical values in all the defined key fields, ECM files the cards in the order in which they were created.
- You may assign key fields in any order. For example, you may set a First Name field as a secondary key field then set a Last Name field as the primary key field. Furthermore, ECM converts the final listing to a sequential ordering. So, if you set a primary key field and a tertiary key field and sort the cardfile on these two fields, ECM considers the tertiary field to be the secondary field.
- When you omit setting a key field, ECM uses the first field of the form as the primary key field.
- You may set an Auto Date or an Auto Time field as a key field.
- You may designate key fields to be sorted by numeric value.

Setting the Primary Field

The information from the primary key field is shown on the index tab of each card in your cardfile. ECM files your cards in order, according to this field.

To set the primary key field:

1. Move the cursor to the field that you want to use as the primary key field.
2. Choose Set/Clr Key1.

   When you choose this key, the current field becomes the primary key field. The symbols K1 appear within the field and an up-arrow indicates that the items will be sorted in ascending order.

Note

When a field is too small to show all the field type characters, ECM displays this information on the field expansion line.

---

3. Choose Set/Clr Key1 again to designate the primary key field as a numeric key field. The symbols K#1 appear within the field.

Setting a Secondary Field

When you assign a second key field, if multiple cards have identical information in their primary field, ECM then sorts the cards by the information in their secondary key field.

To set a secondary key field:

1. Move the cursor to the appropriate field.
2. Choose Set/Clr Key2.

   The letters K2 appear at the beginning of the field, and an up-arrow indicates an ascending sort.
3. Choose Set/Clr Key2 again to designate the second key field as a numeric field.

Setting a Tertiary Field

When you assign a third key field and several cards have identical information in both the primary and secondary key fields, ECM further orders the cards by the information in their tertiary key field.

To set a tertiary key field:

1. Move the cursor to the appropriate field.
2. Choose Set/Clr Key3.

   The letters K3 appear at the beginning of the field, and an up-arrow indicates an ascending sort.
3. Choose Set/Clr Key3 again to designate the third key field as a numeric field.

Changing the Sort Order

ECM automatically sorts cards in ascending order (that is, "1" before "2" and "A" before "B"). However, when you want ECM to use a descending order for sorting your cards, you must give ECM explicit directions:

1. Move the cursor to the appropriate field.
2. Choose Set/Clr Descend.

   ECM displays a down-arrow to show that this field uses a descending sort.

If you decide to change this field back to an ascending sort field, move the cursor to that field and choose Set/Clr Descend. This returns the field to its original ascending sort order.

Removing a Key Field

The function labels that you used to set a key field are the same labels that remove a key field.

To remove a key field:

1. Move the cursor to the field you want to change.

   This field contains the appropriate K value, showing it is a key field.

2. Choose Set/Clr Key1 until the primary field is cleared, Set/Clr Key2 to remove a secondary key field, or Set/Clr Key3 to remove a tertiary key field.

   ECM removes the K designator from that field.

Note

If removing a key field produces a gap in the numbering of key fields, ECM automatically closes the gap to give the proper sequence when sorting the cards.

Returning to the Original Key Values

After you have changed the key fields on the Sort menu, you may return the fields to their original settings if you decide to start over.

Note

Choosing Restore Original only displays the previous values for the key fields on the Sort menu. It does not re-sort the cardfile.

To return the key fields to their original values:

1. Choose Restore Original.

   ECM returns the key fields to their previous values.

Caution

If you have chosen Sort & View, then return to the Sort menu and choose Restore Original, ECM uses the current values for the workset you just created as the previous values and not the cardfile's original key values.

Creating a Workset

After you have entered the appropriate key values, you can create a workset that sorts the cards according to their new values.

To create a newly sorted workset

1. Choose Sort & View.

   ECM displays the message:

   ```
   Sorting the cardfile.
   ```

   After ECM reorders the cards, it displays them as a workset for you to view.

2. You may now do the task that you had in mind when you created this workset.

Caution

Since this is a workset and not a permanent cardfile, you must copy the workset if you want to retain the new ordering.

Returning to the Main Menu

After you finish working with the Sort menu and its workset, you may return to the Main menu and the original cardfile.

To return to the Main menu:

1. Choose `Exit Workset`.

   As the workset will be discarded, ECM asks for confirmation:

   ```
   The current workset will be discarded.
   Press "Yes" to exit workset.
   ```

2. If you want to discard the workset, choose `Yes`.

   ECM returns the cards to their original order and displays the current cardfile on the Main menu.

3. If you want to retain the workset, choose `No`.

   ECM cancels the request and returns the function labels to their previous values so you may choose another task.

16

Using Autodial

Autodialing permits ECM to place telephone calls for you. As you may make the most of this feature if an Autodial field appears on your card form, you should read the section in Chapter 9 on **Setting the Autodial Field** when you are creating a new cardfile. Chapter 11 provides details on filling in the Autodial field.

What Equipment Do You Need?

To use Autodial, your personal computer must have access to a modem, and you must connect the modem to your telephone line.

Using a Modem

ECM works with a variety of modems. However, if you are using a modem other than a Hayes compatible modem, you must supply the necessary information to prepare your modem to place a call. You accomplish this task through the Modem menu.

Before You Place a Call

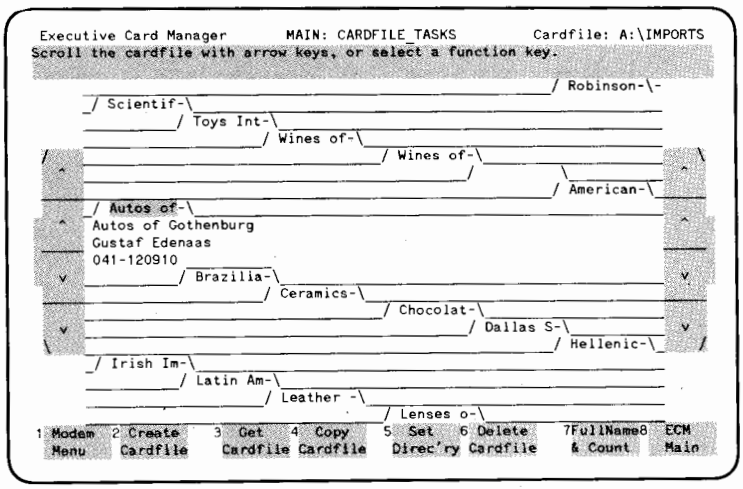
Before you place your first call, you must give ECM the information it needs to accomplish three tasks:

- prepare the modem to dial
- dial the number
- return the modem to its initial state

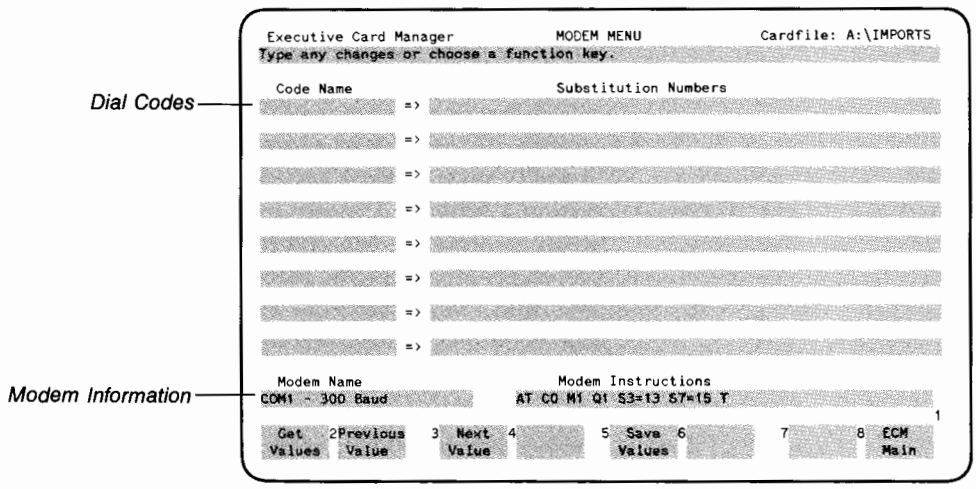
You specify this information in the Modem menu. Furthermore, the Modem menu allows you to enter dial codes which simplify your work when typing telephone numbers.

To reach the Modem menu:

1. Start from the Main menu.
2. Choose Cardfile Tasks to display the Cardfile Tasks labels:



3. Choose Modem Menu to display the Modem menu.



Defining Dial Codes

A dial code consists of a `Code Name` and `Substitution Numbers`.

The *code name* identifies a specific number. Using a name for a series of numbers eases the task of entering telephone numbers on individual cards and lessens the chance for error. A good example of how dial codes may simplify your work is MCI access numbers. Rather than typing a long MCI access number in several phone fields, you may give the MCI prefix a name. For example, if you call the prefix `MCINUM`, whenever ECM encounters `/MCINUM/` in an Autodial field, it recognizes `MCINUM` as a dial code and substitutes the actual access number for that name.

Note

When you type telephone numbers onto a card, remember that you must enclose special characters between slash symbols (/). Then, if the characters between the slashes form the name of a dial code, ECM sends the substitution number rather than the name. If the characters don't form a code name, ECM sends the characters to the modem exactly as you entered them.

The *Substitution Numbers* field contains the information you want ECM to send whenever it encounters that dial code's name.

You may enter up to 60 characters in this field, but the number may contain a maximum of 39 dialable characters. As ECM normally ignores blank characters, you may include spaces to ease the reading of this information.

Note

If you want to include a dial code or some other special characters, enclose this information between slashes (/).

Because ECM replaces a code name with its substitution number, the 39 dialable characters includes the expanded version of the number; not the abbreviated form.

You may refer to any other dial code only once within a substitution number. For example, you could define LOG-ON to be 123-4567 /PASSWORD/ and PASSWORD to be 54321. However, you can't define PASSWORD to be 54321 /LOG-ON/ since LOG-ON refers to PASSWORD.

You may define a maximum of eight dial codes for each cardfile. These dial codes become part of the cardfile, so when you copy the cardfile to a disc, ECM stores the dial codes with the card information. Thus, you can use the cardfile on another system without making any special changes.

Controlling Your Modem

Before ECM can place a telephone call, it must know where to find your modem and how to prepare the modem to dial the number. You supply this information on the bottom portion of the Modem menu.

The *Modem Name* identifies how your modem is connected to your personal computer and what the baud rate is. The default setting is `COM1-300 Baud`. You can change this setting by choosing the Previous Value or Next Value keys until the appropriate value is displayed in the field.

The *Modem Instructions* field permits ECM to work with a variety of modems. Within this field you give the required instructions:

- to prepare your modem for dialing
- to dial the number
- to return the modem to its initial state

ECM sends this information to the modem for every call you place using the Autodial facility.

Any part of the characters in the Modem Instruction field can contain a maximum of 39 dialable characters. This total does not include spaces (which you may include to faciliate reading), attention codes, or control characters (such as CTRL-M for the carriage return character).

Caution

You cannot use dial codes within the Modem Instruction field.

The values that initially appear in this field give the proper instructions to prepare a Hayes compatible modem for dialing. The following discussion summarizes the meaning for these symbols. If you want to change these values, you should consult your modem manual for further information.

Symbol	Meaning
AT	The *Attention* code. As your instructions to the modem may contain several commands, you must begin each command with an attention code. AT must be in capital letters; other commands may be in capital letters or small letters.
C0	The *Transmitter Carrier Signal* parameter. A value of 0 turns the transmitter off while 1 turns it on.
M1	The *Monitor Speaker* parameter. A value of 0 always leaves the speaker turned off, a value of 1 leaves the speaker turned off until the carrier is detected, and a value of 2 always leaves the speaker turned on.
Q1	The *Result Codes* parameter. Results codes are the modem's responses to your commands. A value of 1 prevents the sending of codes (Quiet mode), while 0 sends all result codes.
S3=13	The *Carriage Return Definition* parameter. A value of 13 defines CTRL M as the carriage return character. Upon encountering a carriage return character, the modem executes the current command.

`S7=15`	The *Timing* parameter. A value of `15` sets 15 seconds as the time ECM waits after dialing before it breaks the connection.
`T`	The *Touch-Tone Dialing* parameter. `T` specifies Touch-Tone dialing. A value of `P` would set Pulse dialing. (The pulse dialing speed is fixed at 10 pulses per second.)
`D`	The command to the modem to dial a number. (Being a new command, you must precede it with an attention code.)

Note

When the Modem Instructions contain multiple commands, you must end the first command with a carriage return character and immediately begin the next command with an attention code (with no intervening space).

The default setting in the Modem Instruction field contains no command to return the modem to its initial state. If you have a Hayes compatible modem, you may use `Z` as the *Reset* command. This command returns the modem to its initial state by establishing the settings specified by the modem's switches. It also clears any commands that remain on the original command line. When the modem instructions don't contain a reset command, the modem waits for the Timing parameter (`S7`) to expire before it hangs up.

Filling in the Modem Menu

If you are using a Hayes compatible modem, ECM simplifies your work by supplying values that automatically prepare your modem for dialing. In most cases, these values should meet your needs. However, if you are using a different kind of modem or if you decide to change any of these values, consult the owner's manual for your modem for the necessary information.

Note

If you have previously defined values in a Modem menu for another cardfile, you may reduce your work by getting these values. See the following section on **To get values from another cardfile**.

To enter a dial code:

1. Start from the Modem menu.
2. Move the cursor to a field under `Code Name`.
3. Type the name for the number you are about to enter.

   The name may contain a maximum of 16 characters, and you may use any character within the name.
4. Move the cursor to the `Substitution Numbers` field on that line.

5. Type the actual number you want ECM to use.

   If this number contains any special characters, or references to other dial codes, you must enclose this information between slash characters.

Note

The substitution number may contain references to other dial codes as long as the codes don't refer to themselves.

6. To define another dial code, repeat steps 2 to 5.

To enter special modem information:

1. Choose Previous Choice or Next Choice to name the port and baud rate that your modem uses.

   The default setting is COM1-300 baud. (See the owner's manual for your modem modem if you want to change this value.)

2. Type the special instructions that your modem needs to place a call.

   You may include a set-up string that prepares your modem for dialing, an exclamation point (!) that represents the number to be called, and a take-down string that returns the modem to its initial state. Any one of these parts may contain 40 dialable characters, but the total length must be 50 characters or less.

To get values from another cardfile:

If you have previously defined values in a Modem menu for another cardfile, you may reduce your work by reading these values into the current menu.

1. Start from the Modem menu.
2. Choose **Get Values**.

   ECM requests the name of the cardfile that contains the Modem menu information you want to use.
3. Enter the full cardfile name.

   You may switch discs if that cardfile is not presently on your system. (The original disc must be returned to the drive when you are finished.)
4. Pressing Enter ends the name and directs ECM to continue.

   If ECM finds the cardfile, it places the values from the Modem menu of the specified cardfile into the corresponding fields on your display.

   If ECM fails to find the cardfile, it notifies you that:

   ```
   The cardfile could not be found.
   ```

   Press Enter to clear the message and then verify that you are using the correct disc and providing the proper pathname and cardfile name.
5. You may now modify these values or define additional values.
6. When you are satisfied with the menu, choose **Save Values**.

If you change your mind:

If you have modified the Modem menu and subsequently decide against keeping these values, you may return to the Main menu without saving your changes.

1. Choose ECM Main.

   As ECM will discard the information you have entered, it asks for confirmation:

   ```
   Last changes will be lost. Press "Yes"
   to confirm.
   ```

2. If you decide to keep the changes, choose No.

   ECM returns to the Modem menu where you may continue your work or choose another task.

3. Choosing Yes discards the information.

   ECM displays the Main menu.

To save the information in the Modem menu:

1. Ensure that the information you have entered is correct.
2. Choose Save Values.

   ECM saves the Modem menu and stores this information with the current cardfile.

Placing a Phone Call

You can use the Autodial facility from either the Main menu or the Select menu.

Before you attempt to dial a number, however, ensure that:

- you have properly connected the modem to your computer
- you have properly connected the modem to your telephone line
- you have turned the modem on

Using the Autodial Field

You may place a phone call from the Main menu when your card form contains an Autodial field. However, if you must read an extension number to complete the call and the Autodial field does not appear in the open-card position, you should follow the next procedure to display the card on the Select menu.

To use the Autodial field:

1. Start from the Main menu.
2. Get the cardfile that contains the number you want to dial.
3. Move the appropriate card into the open-card position.
4. Choose Dial Phone.

   ECM displays the message:

   ```
   Telephone call in progress. When the
   connection is made, press ENTER.
   ```

   If your modem has a speaker, you should hear ECM dialing the number. If you hear nothing, check that the volume on the modem is turned up.

Note

If you use a Hayes-compatible modem that does not have a speaker, you won't hear the dial tones, dialing, or ringing.

---

5. If you decide that you don't want to complete the call, choose Cancel.

   When the Modem Instructions contain a reset command, ECM sends this command to the modem. Otherwise, the time specified in the Timing parameter is allowed to expire.

6. After ECM has dialed the number, pick up the phone and wait for an answer.

   If you fail to pick up the phone within the specified time (normally 15 seconds), ECM automatically hangs up for you.

Caution

Be sure to pick up the phone before ECM breaks the connection. If you want a longer time delay, change the value for `S7` in the Modem menu's `Modem Instructions` field.

7. After the connection is made, press Enter.

   If your Modem Instructions contain any commands after the Dial command, ECM sends this command to the modem; and you control the phone call from your telephone receiver.

Personally Choosing the Phone Field

Since a card can contain several telephone fields, you sometimes want to call a number other than the number in the Autodial field. Or, the card form may contain telephone fields but no Autodial field. In either event, you must access the Select menu to dial the number.

To choose a phone field:

1. Start from the Main menu.
2. Get the cardfile that contains the number you want to dial.
3. Move the appropriate card into the open-card position.
4. Press the F10 key.

   ECM displays this card on the Select menu.

Note

If your personal computer supports HP Touch or a mouse, you may use these pointing devices to display a card by choosing that card's tab.

---

5. Choose Dial Phone.

   ECM highlights the Autodial field (if one exists) and asks you to:

   ```
   Select the field to dial then choose
   "Dial Phone" again.
   ```

6. Move the cursor to the appropriate telephone field.

   ECM highlights this field.

7. If you decide that you don't wait to place the call, choose Cancel.

   ECM cancels your request and returns to the Select menu.

8. Choose Dial Phone to instruct ECM to place the call.

   ECM notifies you that the call is in progress.

Note

The remaining options and steps for completing a call are identical to the steps listed under **Using the Autodial Field**.

---

17 Printing Reports, Mailing Labels and Form Letters

You can print the information in a cardfile in a variety of ways. You can print an exact replica of each card, just as ECM displays it, by choosing Print Card on the Select menu. (Refer to **Printing a Card** in Chapter 13 for these instructions.) For greater flexibility, you can create a *print format* that prints the cardfile information in a specific way. This chapter tells you how to create and use print formats.

You create a print format from the fields in a particular cardfile or workset. First you choose the cardfile fields you want to print. Then you build the print format much as you built the cardfile's card form. You can:

- Arrange the fields in any order, using the fields that are found on the card form.
- Add text, using your computer's text-editing keys.
- Choose whether to print a report, mailing labels, or form letters.
- Choose other options such as printing headings, or perform certain mathematical calculations such as computing sums or averages.

As a print format can be 255 lines long, you may roll the print format by pressing the [ScrLck] key to turn the scrolling function on. Press the [△] key to roll the print format up, and the [▽] key to roll the print format down. Additionally, because the print format can be 255 characters wide, you may roll the print format left by pressing the [△] key or right by pressing the [▽] key. Press [ScrLck] again to turn the scrolling function off and return the screen and cursor to their normal functions.

Note

If your personal computer supports a mouse, you can roll the format by holding down the left button and moving the mouse in the direction you want to go.

Because each print format is based on the specific fields of a particular cardfile, you normally use a print format with its cardfile, or with a cardfile that uses the same card form. But you can create any number of print formats for one cardfile. For example, you could create three distinct print formats if you regularly print three different styles of reports from the same cardfile.

The first three sections in this chapter, **Printing Reports**, **Printing Mailing Labels**, and **Printing Form Letters** introduce the specific printing features of ECM. The fourth section, **Basic Steps in Printing**, gives an overview of printing. The fifth section, **Printing a Full Listing**, gives the steps to create a print format, either by building a new format or by getting a format that has already been saved. Be sure to read this section; it gives the foundation for the detailed information that follows. The remaining sections describe ECM's printing features in detail. You probably won't need all these features, particularly at first; but later you can build more sophisticated print formats by adding features to your existing print formats.

Printing Reports

You can summarize the information in a cardfile by printing a report. In Report format, ECM prints the information from a single card across the printed page. Thus, when a series of cards are printed, the information for each field appears as a column.

The first steps in creating a print format are described in **Building a Print Format**. If you're planning to create a columnar report, follow the instructions for placing fields in Report format in that section. Then read the next section, **Adding Text**.

Your report may have headings at the top of each page; see **Printing a Heading** for this information. Furthermore, if you want to include the date or page number, see the section on **Printing the Date and Page Number**.

Printing a Report in Sections

You can break a report into sections by starting a new section whenever the information in a key field changes. For example, you could sort the IMPORTS cardfile using the Country field and then begin a new page when the entry in the Country field changes to break the report into sections by country.

Chapter 15 describes sorting a cardfile. The procedure for printing a report in sections appears in **Breaking a Report into Sections** in this chapter.

Accumulating Statistics

You can calculate the sum or average of all the values in a given field and print each value or only print the accumulated sum or average. You may also print a count of how many cards are in each section. You could also choose to print values right-justified, which is useful for printing numbers in columns. Instructions appear in **Printing Sums, Averages, and Counts**.

Printing Wide Reports

To print a wide report on a regular-sized printer, ECM first prints columns 1 through 80 of the entire report, then columns 81 through 160 of the entire report, and so on. You can tape together these *side pages* to produce the full-width final report.

Printing Mailing Labels

You can print mailing labels by listing the name and address fields from different cards. First read **Building a Print Format** and **Adding Text**. Then to properly position the names and addresses on sheets of mailing labels, read **Positioning Printed Output on the Page**.

Printing Form Letters

You can use ECM to produce form letters by typing the text of the letter and including the appropriate fields where information from a cardfile is needed. Read **Building a Print Format** and **Adding Text** for these necessary details. (When you are building the print format, remember to choose Label Format.) Then to start each letter on a new page, read **Breaking a Report into Sections** and treat each letter as a section. Then print your cardfile. ECM automatically shifts the text to compensate for any leading or trailing blanks in a field.

Basic Steps in Printing

This section summarizes the steps in printing the information in a cardfile. The next section, **Printing a Full Listing**, gives you step-by-step instructions for these tasks. Remember, you can ignore any options you don't need.

Choose the Cards To Print

Begin by displaying the cardfile or workset that you want to print on the Main menu. When you just want to print a few consecutive cards, scroll the cardfile until the first card to print is in the open-card position. When you want to print cards that are scattered throughout a cardfile, use the Find menu to mark these cards and create a workset (see Chapter 14). If you create a print format **before** you make the necessary workset, you must save the print format, return to the Main menu, create the workset, and then print information from that workset using the saved format.

Sort the Cards

When you want to print the cards in a different order than they appear in the Main menu, use the Sort menu to create a workset that arranges the cards in that order. (Instructions for using the Sort menu appear in chapter 9.) This is most useful for printing reports, where you can break the report into sections according to the new key fields.

Note

You should normally resort a cardfile so its key fields correspond to the key fields of the print format you are using.

Choose the Print Format

You can use an existing print format, adapt an existing print format, or create an entirely new print format. To use or adapt an existing print format, you simply specify its file name. If no changes are necessary, you can proceed directly to choosing the output device.

To create a print format:

- Begin by choosing `Print Cardfile` from the Main menu.
- Use the Get Fields menu to choose fields from the cardfile and place them on the print format.
- Use the Adjust Field menu to arrange the fields as you want them to appear on the print format.
- Add any necessary text to the print format.
- Use the Adjust Block menu to adjust the size of the repeat block. The *repeat block* is a part of the print format which is printed for each card. By enlarging the repeat block, you can precisely define the white space between printed cards (useful for mailing labels). By excluding text and fields at the top of the print format from the repeat block, you can define headings to be printed at the top of each page (useful for reports).
- Use the Break Options menu to identify special fields (useful for reports). As ECM prints, it can calculate the sum or average of values in a field, or it can count the number of cards that have a value in a particular field. ECM can also right-justify the values in a field when it prints that information.

- Use the Set Breaks menu to break a report into sections. At each new section, you can print sums, averages, and counts or start a new page.
- Use the Printer Setup menu to describe how the printed page should appear. (See the last section in this chapter for these instructions.) You may also use the Printer Setup menu to specify whether to print the date and page number on each page (useful for reports) and whether to print cards one beside another on the page (useful for mailing labels).

Choose the Output Device

Use the Print Options menu to choose where to send the printed output. Normally, you'll send the output to your printer. However, if you want to test a new print format, you can send the output to your display. You can also send the output to a file, and store it on a disc to print later or to transmit via a modem.

Print!

With all the preparation done, you can now print the entire cardfile (or workset), or you can print cards one at a time.

After you've successfully created a new print format, be sure to save it on a disc.

Printing a Full Listing

This section describes two procedures that you could use to print a full listing of a cardfile. The first procedure creates a new print format and saves it as a disc file; the second procedure gets a saved format and prints a listing using that format. While you may never print a cardfile that uses such a simple format, these procedures show how easy it is to build a print format and print a cardfile using that format.

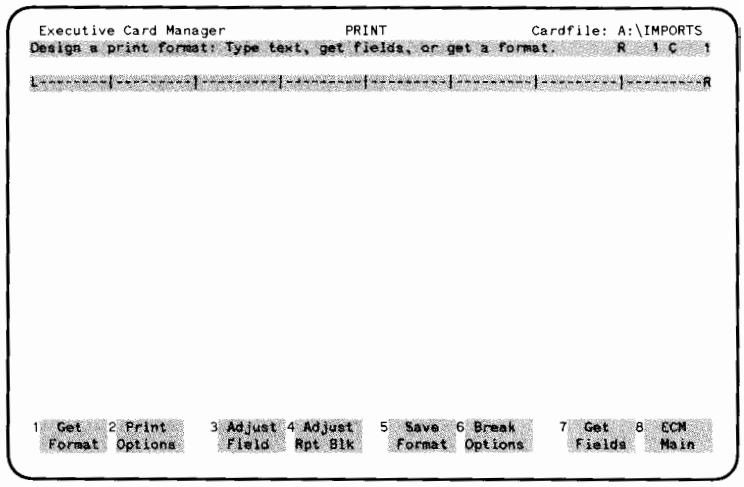
This section assumes that you have a printer connected to your computer and that the printer is ready to use. If you need help connecting your printer, refer to the manuals for your computer and the printer. If you need help configuring your printer, refer to those manuals and to Chapter 16 in this manual.

Creating a New Print Format

The following procedures give the necessary steps to create a new print format, print it, and save it.

To display the Print menu:

1. Start from the Main menu.
2. Get the cardfile that you want to print.
3. If you used the Cardfile Tasks menu to get another cardfile, choose ECM Main to return to the Main menu.
4. Choose Print Cardfile to display the Print menu:

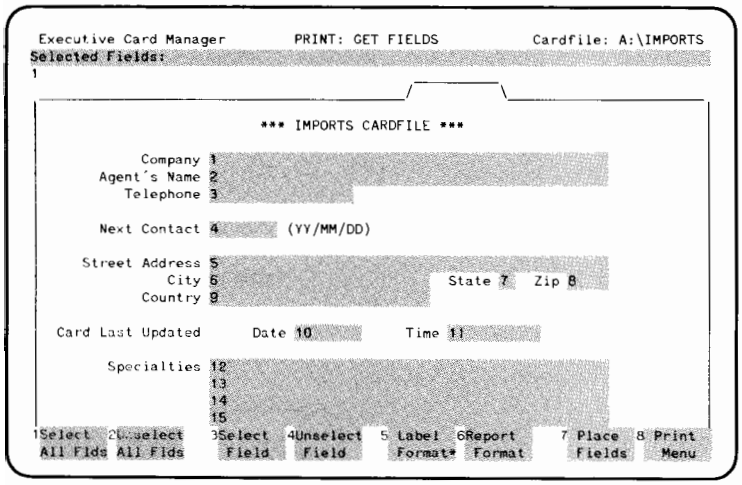


To build a print format:

The initial Print menu is mostly blank as you haven't specified or created a print format. The following steps tell you how to create a new print format.

1. Choose Get Fields.

ECM displays the Get Fields menu, which shows the card form with the fields consecutively numbered:



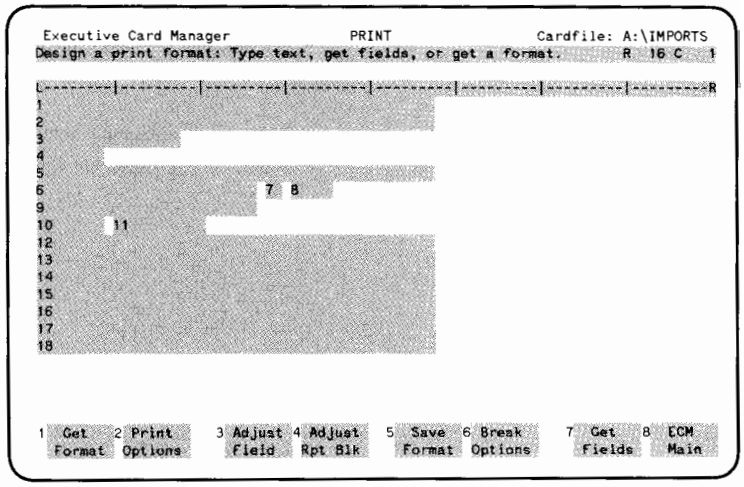
Now you choose which fields in the card form you want to appear in the print format.

2. Choose Select All Flds.

   ECM lists all the fields, in the order they appear on the form, at the top of the Get Fields menu after `Selected Fields:`. If the list contains more fields than ECM can display at one time, you can press ScrLck to turn the scrolling function on, then press the △ or ▽ keys to bring different parts of the list into view. Press ScrLck when you are done to turn the scrolling function off (the ScrLck indicator light turns off).

   The asterisk that appears in Label Format* indicates that ECM will place the chosen fields in Label format rather than Report format.

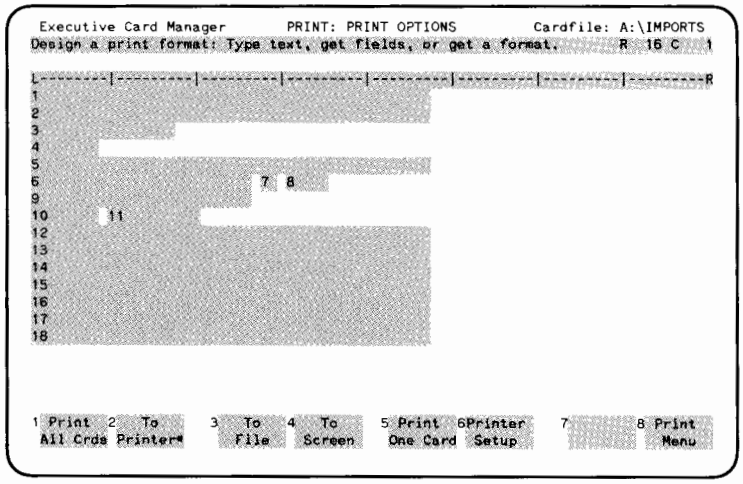
3. Choose Place Fields to place the print format on the Print menu:



To print a full listing:

Your print format now includes all the fields in the cardfile, in the order they appear on the card form. If you want to rearrange the fields or add text, or add other ECM printing features to your print format, you would do so now. But this simple print format is all that's needed for a full listing of a cardfile. (Before you save your print format, you should test it to be sure it is working as you intended.)

1. Choose Print Options to display the Print Options menu:



   As an asterisk marks the To Printer* label, the output will go to your printer rather than to a file or to the display.

2. Choose Print One Card.

   ECM prints the card that currently appears in the open-card position. If you're satisfied with the result, go on to the next step. If you're dissatisfied, you can return to the Print menu and make the necessary improvements.

3. Choose Print All Crds.

   ECM prints the entire cardfile.

4. Choose Print Menu.

   ECM displays the Print menu.

To save the print format:

Once you are satisfied with the printout of your cardfile, you should save the print format so you can use it again.

1. Choose Save Format.

   ECM asks you to:

   ```
   Type file name and press ENTER.
   ```

2. Type the name you want to give the new print format.

   Remember to provide the proper pathname.

3. Press Enter.

   ECM saves the print format in a file with that full file name.

Note

Since ECM allows you to specify several print formats for a cardfile, you may find it helpful to create a cardfile that has fields for a cardfile's name, the names of the files that contain print formats that apply to that cardfile, and comment lines that describe the different formats.

---

4. Choose ECM Main.

   ECM returns to the Main menu.

Using an Existing Print Format

The following procedure describes using a print format that you have previously saved as a file. Once you have saved a print format for a cardfile, you may find it easier to modify that format rather than creating a new format from scratch.

To display the Print menu:

1. Start from the Main menu.
2. Get the cardfile you want to print.
3. If you used the Cardfile Tasks menu to get another cardfile, choose `ECM Main` to return to the Main menu.
4. Choose `Print Cardfile`.

   ECM displays the Print menu.

To get a print format:

1. Choose `Get Format`.

   ECM asks you to:

   ```
   Type file name and press ENTER.
   ```

2. Type the full name of the file that holds your print format.

   Be sure the file you're getting contains a print format that corresponds to the current cardfile.

3. Press Enter.

   ECM displays the requested print format. If you want to modify this format, you would do so now. You could then save the new version using a new name, to have a choice of print formats; or you could save the new version using the same name, to replace the original version.

4. If the print format has a different ordering of key fields than the cardfile you are using, ECM suggests that you resort the cardfile to match these keys.

   Therefore, you should return to the ECM Main menu, use the Sort menu to create a workset with the appropriate key fields, then return to the Print menu to print the cardfile using that format.

To print a full listing:

In this procedure, you simply print a cardfile using an existing format. Under these conditions, you might print the cardfile without testing it first.

1. Choose Print Options.

   ECM displays the Print Options menu, and an asterisk appears in the To Printer* label.

2. Choose Print All Crds.

   ECM prints the information from the cardfile, using the instructions in the print format.

   If you don't want to print anything else, you can now leave the Print Options menu.

3. Choose Print Menu to return to the Print menu.
4. Choose ECM Main to return to the Main menu.

Building a Print Format

Building a print format involves two tasks:

First, using the Get Fields menu, you choose what fields will be placed on the print format and in which order. You then place these fields on the Print menu either in Label format (where fields from each line on the card form go on separate lines in the print format) or in Report format (where as many fields as possible are placed on a line, which can be 255 characters wide).

Second, after placing the fields on the Print menu, you can use the Adjust Fields menu to rearrange fields, make fields larger or smaller, or delete fields. You can also return to the Get Fields menu and get other fields, including additional copies of fields that already appear on the print format.

Getting Fields

When you want to print a few fields, or when you want fields printed in a different order than they appear on the card form, you can individually choose the fields you want to print.

Note

The following procedures assume that you are presently working with the cardfile that you want to print.

To select fields one at a time:

1. Start from the Print menu.
2. Choose `Get Fields`.

   ECM displays the card form on the Get Fields menu.
3. Move the cursor to the first field you want to place on the print format.
4. Choose `Select Field`.

   ECM writes the number for this field as the first of the `Selected Fields`.
5. Repeat steps 3 and 4 for each additional field you want on the print format, in the order you want them to appear.

   A print format can contain several copies of a single field, but since you can select a field only once each time you display the Get Fields menu, you must take these additional steps:
6. If you attempt to choose a field that has already been selected, ECM informs you:

   ```
   This field has been selected already.
   Place these fields, then come back and
   select more.
   ```
7. Choose `Place Fields`.

   ECM places the currently selected fields on the Print menu.

8. Choose Get Fields.

   ECM displays a new version of the Get Fields menu, where no fields have been selected.

9. Move the cursor to the field you want to include again on the print format.

10. Choose Select Field.

    ECM lists this field as a selected field. (Then when you finish choosing fields and place these fields on the Print menu, the print format has two entries for the repeated field.)

To remove a field from the list of selected fields:

1. Move the cursor to the field you want to remove.

2. Choose Unselect Field.

   ECM removes that field from the list of selected fields.

3. If you decide you want to start over, choose Unselect All Flds.

   ECM removes all the fields from the list of chosen fields.

Choosing between Label or Report Format

After you have chosen the appropriate fields on the Get Fields menu, you place the fields on the Print menu. When placing the fields, you can instruct ECM to use either Label format or Report format.

You would use Label format when you want to print mailing labels or form letters. Label format resembles the card form as fields on the same line in the card form are placed on the same line in the print format, while fields on different lines in the card form are placed on different lines in the print format.

You would use Report format when you want to print columnar reports. For Report format, ECM places as many fields as possible on a 255 character line, regardless of the position of the fields on the card form.

Label and Report format also differ in the way information in a field appears on the printed page:

- When you choose Label format, ECM prints only the information in a field and any extraneous leading or trailing spaces in that field are ignored. Fields and text to the right of the printed field are moved to the left accordingly. For example, a print format for mailing labels can have fields for First Name and Last Name with a single space between them; and ECM will print the names with a single space between them, regardless of the number of characters in the First Name field.
- When you choose Report format, ECM prints the information with enough spaces to fill the field. The positions of fields and text to the right of a printed field are unaffected by the length of each entry. This format generates a columnar report.

To place fields in Label format:

1. If no asterisk appears in Label Format, choose Label Format.
2. Choose Place Fields.

   ECM displays the selected fields in Label format on the Print menu.

To place fields in Report format:

1. If no asterisk appears in Report Format, choose Report Format.
2. Choose Place Fields.

   ECM displays the selected fields in Report format on the Print menu.

Note

As you may make several calls to the Get Fields menu when you are building a print format, you can place some fields using Label format and then place other fields using Report format. Either format gives an initial layout to the fields, which you may then modify as you wish. When you actually print the information from a cardfile, ECM uses the format that you selected last.

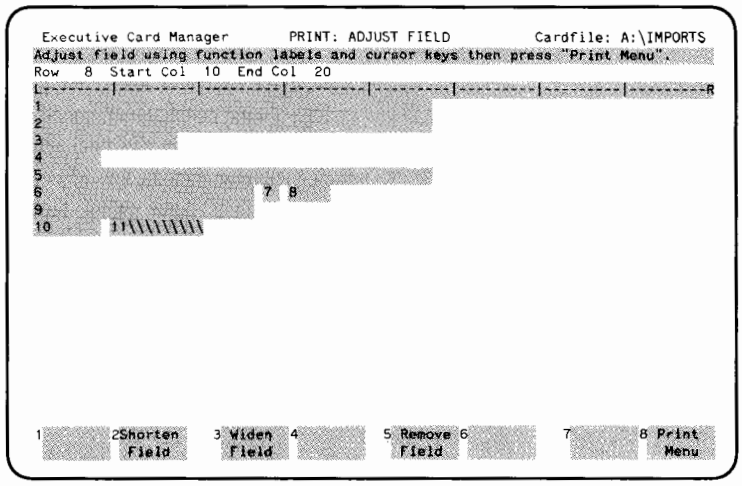
Adjusting a Field's Location

You can move a field anywhere on the print format. The only restriction is that fields can't overlap.

You may move a field as part of a text-editing operation by using your computer's text-editing keys (see the section on **Adding Text**). However, these operations don't change the order of the fields on the print format. When you want to move a field past other fields or text, or move a field without otherwise altering the print format, use the following procedure.

To move a field:

1. Display the print format on the Print menu. (See **Building a Print Format** for these steps.)
2. Move the cursor to the field you want to relocate.
3. Choose `Adjust Field` to display the Adjust Field menu:



4. Use the cursor-control keys to move the field to its new location.

   When that location doesn't appear on the display, pressing ScrLck and the appropriate cursor-control key, or the Pg Up and Pg Dn keys, exposes different parts of the print format.

Note

If your personal computer supports a mouse, you may move a field to a new location by placing the pointer in that field, holding down the left button and moving the field to its new location, and then releasing the left button.

---

5. Choose Print Menu.

   ECM saves the changes and returns to the Print menu.

Adjusting the Size of a Field

When you create a card form, you set aside enough space to accommodate the largest entry that a field might contain. Before you print the information from a field, you might want to change the size of that field.

To change the size of a field:

1. Display the print format on the Print menu.
2. Move the cursor to the appropriate field.
3. Choose Adjust Field.

   ECM displays the Adjust Field menu.
4. Choose the appropriate key:
   - To shorten the field without affecting the rest of the line, choose Shorten Field.
   - To shorten the field and move the rest of the line to the left, press the DEL key.
   - To widen the field without affecting the rest of the line, choose Widen Field.
   - To widen the field and move the rest of the line to the right, press the Ins key and then choose Widen Field. After you set aside the necessary space, press the Ins key to take your computer out of Insert Character mode.
5. Choose Print Menu.

   ECM saves your changes and returns to the Print menu.

Removing a Field

If you have chosen a field on the Get Fields menu and included that field as part of the print format, you may remove the field if you decide you don't want to print this information after all.

To remove a field:

1. Display the print format on the Print menu.
2. Move the cursor to the appropriate field.
3. Choose Adjust Field.

   ECM displays the Adjust Field menu.
4. Choose Remove Field.

   ECM removes that field and returns to the Print menu.

Adding Text

You can add text anywhere on the print format. The only restriction is that you can't place text over a field. If you want to move fields to make room for text, you can:

- Use Alt + I to push a field (and the rest of the print format) down one line.
- Use Insert Character mode to push a field (and the rest of the line) to the right as you type characters.

To add text:

1. Display the print format on the Print menu.

   (See **Building a Print Format** for these steps.)
2. Move the cursor to where you want the text to begin.
3. Press the Alt + I keys or the Ins key, if necessary, to create room for the text.
4. Type the text.

   While typing text, you may use your computer's other text-editing keys, such as DEL, Alt + L, and Alt + D.

Note

The Alt + L keys only delete text from a line while the Alt + D keys only work when no fields occur on that line.

Printing Headings

The simplest heading you can print includes just the date. ECM can print such a heading automatically, as described in **Printing the Date and Page Number**. For custom headings, you can add text and fields at the top of a print format. ECM then prints this heading at the top of every page.

Each print format contains a repeat block. The *repeat block* is the part of the print format which is printed for each card. The text and fields **above** the repeat block will be printed **only** at the top of a page, not for every card. (When you're printing cards side-by-side across the page, the heading is printed for every card that is printed at the top of the page.)

You can direct ECM to begin a new page and print a heading whenever the value of a key field changes. For instructions, refer to **Breaking a Report into Sections**.

To print text in the heading:

1. Display the print format on the Print menu.

   (See **Building a Print Format** for these steps.)
2. Move the cursor to the top of the print format.
3. Press the Alt + I keys to create space to the top of the print format.

   Add as many blank lines as you want for the heading.
4. Type the text you want to appear in the heading.

   You can use your computer's text-editing keys, such as Ins, DEL, Alt + L, and Alt + D.

When you add text at the top of a print format, this text is automatically above the repeat block and will be printed as a heading. However, when you add fields at the top of a print format, ECM automatically includes these fields in the repeat block. You must therefore change the size of the repeat block to **exclude** these fields if you want the fields to appear in the heading.

The following procedure describes how you can move the top edge for the repeat block to include fields in a heading. Also see the section **Changing the Size of the Repeat Block** for more information on adjusting the size of the repeat block.

To print fields in the heading:

1. Display the print format on the Print menu.

   (See **Building a Print Format** for these steps.)

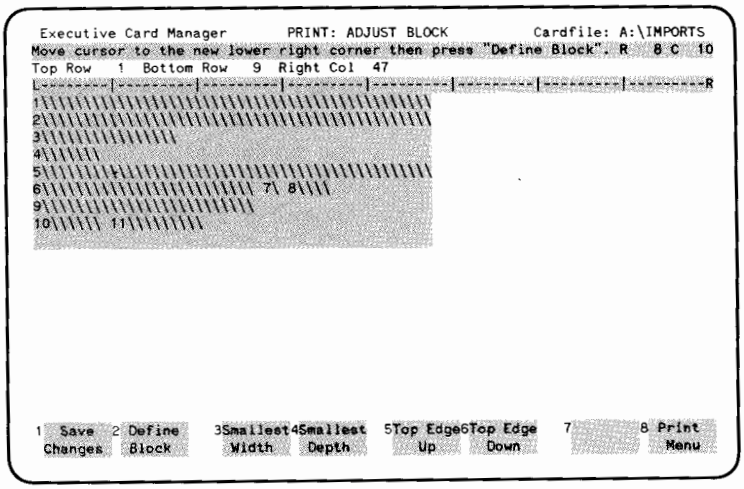
2. Make sure there's room at the top of the print format.

   If you haven't already created a heading area at the top (see the previous procedure), use Alt + I to add blank lines at the top of the print format.

   Now you can exclude fields from the repeat block.

3. Choose Adjust Rpt Blk.

   ECM displays the current repeat block for your print format.



4. Choose Top Edge Down until the top edge of the repeat block is below the text and fields you want to appear in the heading.
5. If you overshoot your mark, choose Top Edge Up to position the top edge correctly.
6. Choose Save Changes.

   ECM incorporates the new repeat block size into the print format and returns to the Print menu.

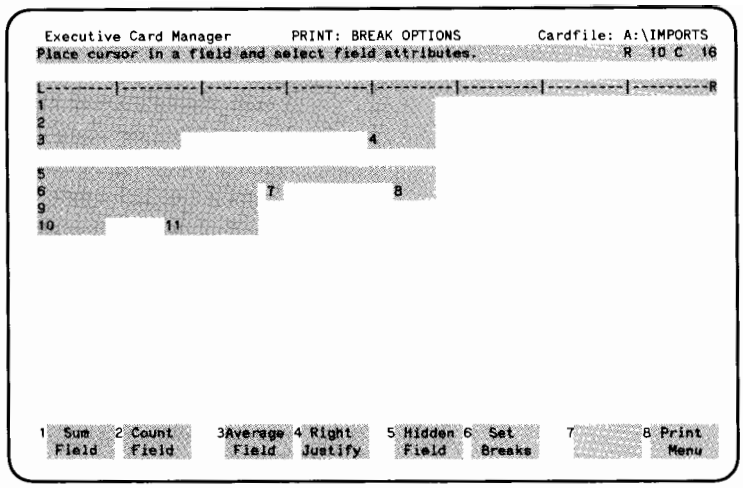
Printing Sums, Averages, and Counts

ECM provides several features that facilitate the printing of numeric reports. For example, you can print the sum or average of values in a numeric field, print only the accumulated statistics, print a count of the number of cards printed, and print information right-justified.

You can direct ECM to print sums, averages, and counts whenever the value of a key field changes. For instructions, refer to **Breaking a Report into Sections**. When ECM prints these statistics, it indicates whether the statistics are subtotals (at the end of a section) or grand totals (at the end of the cardfile), and it labels each type of statistic.

To identify a break option field:

1. Display the print format on the Print menu. (See **Building a Print Format** for these steps.)
2. Choose `Break Options` to display the Break Options menu:



3. Move the cursor to a field that you want to designate as a special break field.
4. Choose the appropriate function label:
   - To accumulate the sum of individual entries for the field, choose **Sum Field**. The letter S appears in that field.
   - To accumulate a count of the number of cards with an entry in that field, choose **Count Field**. The letter C appears in that field.
   - To accumulate the average of individual entries for the field, choose **Average Field**. The letter A appears in that field.
   - If you want the column of values to be right-justified, choose **Right Justify**. The letter R appears in that field.

- If you want to print only the accumulated values, choose Hidden Field. The letter H appears in that field.

If you change your mind, you may move the cursor to the appropriate field and choose that option again. That is, these function labels act like on/off switches. When a field doesn't have that particular attribute, choosing the appropriate label selects it. However, if a field does have that attribute, choosing that label cancels it.

Note

You may choose any combination of break options for each field. For example, you may choose Count Field and Hidden Field if you just want to print the accumulated total for that field when a break occurs.

---

5. Repeat steps 3 and 4 for any other fields you want to define.
6. Choose Print Menu.

   ECM sets these break options and returns to the Print menu. Note that the letters indicating the special fields (S, C, A, R, or H) now appear in the print format.

Caution

When you perform mathematical calculations, be sure that the designated field can hold the calculated value. If a field is too small to hold this value, ECM truncates the least significant digits.

Breaking a Report into Sections

You can print a report in sections; for example, you can print subtotals when a section ends, or you can start a section at the top of a new page. You break a report into sections by identifying key fields that correspond to the sections you want. (Remember, key fields determine the order in which cards appear in a cardfile.) In addition, you can identify a key field as a *break field*. As ECM prints a cardfile, it remembers the information in a break field from one card to the next. When the information in a break field changes, ECM ends the old section with the previous card and begins the new section with the current card.

You can set one, two, or all three of a cardfile's key fields to be break fields. For each break field you specify what happens during that break: that is, should ECM print subtotals, start a new page, or both. While break fields determine when a break occurs, you may designate any of the fields on the print format to be *break action* fields. (The break action fields are the fields that you assigned special attributes, such as Sum or Count fields, in the Break Options menu.) The subtotals for each break action field are independent of the subtotals for other break action fields. The different combinations of break fields and break actions allow you to design several types of reports.

As an example, suppose that a parent company has a cardfile of the orders and sales of individual sales persons within their subsidiary companies. The cardfile might use the Company field as the primary key field (K1), the Sales Person field as the secondary key field (K2), and the Month as the tertiary key field (K3).

To print a sales report, you could identify break fields and break actions as follows:

- Identify the primary key field (Company), the secondary key field (Sales Person), and the tertiary key field (Month) as break fields to print subtotals.
- Identify the Orders and Sales fields as Sum and Right-justified break action fields.

The last page of the report, which automatically contains a grand total of the sum fields, might look like this:

```
***** SALES LISTING ******

SalesPerson          Month          Orders       Sales
-----------          -----          ------       -----
A. Brown             February          456   15,550.00
A. Brown             February           34    2,345.00
Subtotals for: February
Sum:                                  490.0   17,895.00

A. Brown             March             345   12,346.00
Subtotals for: March
Sum:                                  345.0   12,346.00

Subtotals for: A. Brown
Sum:                                  835.0   30,241.00

B. Jones             February          345    6,760.00
B. Jones             February          123    3,567.00
Subtotals for: February
Sum:                                  468.0   10,327.00

B. Jones             March             456   12,000.00
Subtotals for: March
Sum:                                  456.0   12,000.00

Subtotals for: B. Jones
Sum:                                  924.0   22,327.00

Subtotals for: Hewlett-Packard
Sum:                                  1,759   52,568.00

Grand Totals:
Sum:                                  1,759   52,568.00
```

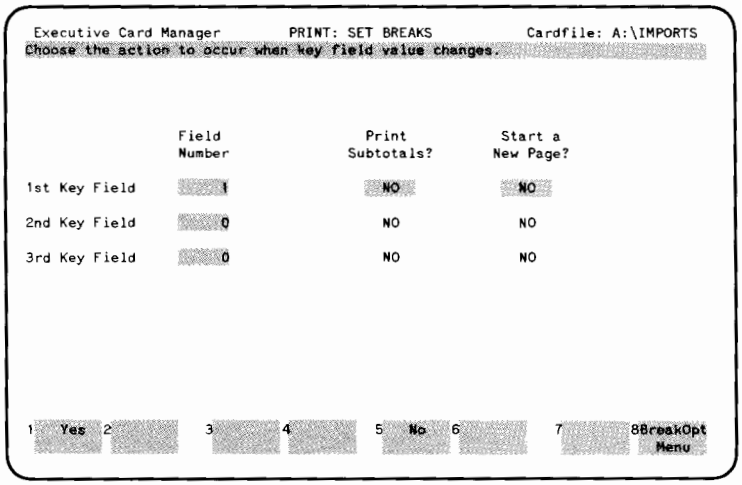
Because a cardfile's key fields determine what fields may be break fields, if your cardfile isn't sorted in the order you want to print the cards, use the Sort menu to create the necessary workset. You can then use the new key fields as break fields.

For example, suppose you want to print the IMPORTS cardfile in sections by country. You would use the Sort menu to identify the Country field as the primary key field. Then, in the print format, you would identify the Country field as a break field to start a new page. (By placing a copy of the Country field in the heading, you can print the section title at the top of each page. Refer to **Defining Page Headings** for these instructions.)

Setting Break Fields

You set break fields by using the Set Breaks menu to direct ECM what action it should take when a key field changes.

1. Display the print format on the Print menu. (See **Building a Print Format** for these steps.)
2. Choose Break Options to display the Break Options menu.
3. Choose Set Breaks to display the Set Breaks menu:



There are three rows, one row for each possible key field (1st, 2nd, and 3rd). The first column, `Field Number`, shows which field on the print format corresponds to that key field. An entry of `0` indicates that no key field with the corresponding value appears on the card form. The second and third columns specify which break actions you want to take for that key field.

To print subtotals:

Take these steps if you want to print a subtotal when the value of a key field changes.

1. Move the cursor to the proper row under `Print Subtotals?` for the key field you want to use.
2. Choose `Yes` to direct ECM to print subtotals when the value in that key field changes.
3. Repeat steps 1 and 2 for any other values in this column that you want to change.

To start a new page:

Take these steps if you want ECM to start a new page when the value of a key field changes.

1. Move the cursor to the proper row under `Start a New Page?` for the key field you want to use.
2. Choose `Yes` to direct ECM to start a new page when the value in that key field changes.
3. Repeat steps 1 and 2 for any other values in this column that you want to change.

To return to the Print menu:

After you have given ECM the necessary break instructions, you can return to the Print menu.

1. Choose `BreakOpt Menu`.

   ECM displays the Break Options menu.

2. Choose `Print Menu`.

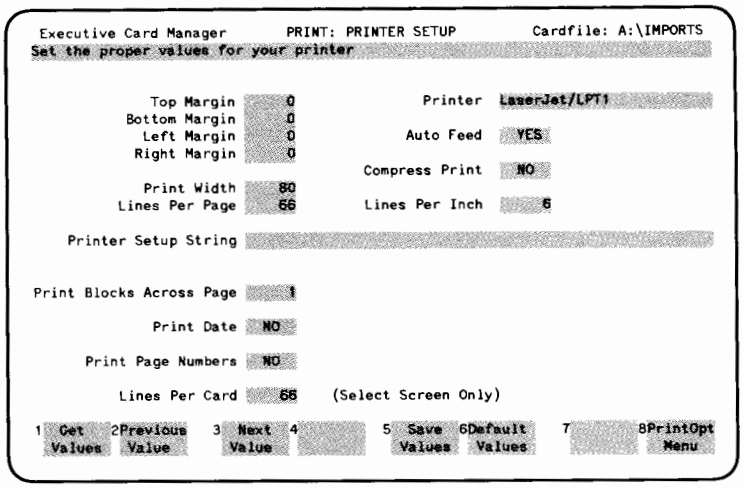
   ECM returns to the Print menu.

Printing the Date and Page Number

ECM can automatically print the date at the top of each page and the page number at the bottom. You can choose either or both options by changing values in the Printer Setup menu. Note that these options are distinct from the headings you define yourself, which were described in **Printing Headings.** The following procedure shows how to get to the Printer Setup menu and change the values for the `Print Date` and `Print Page Number` fields.

To print the date and page number on each page:

1. Display the print format on the Print menu. (See **Building a Print Format** for these steps.)
2. Choose `Printer Setup` to display the Printer Setup menu:



3. Move the cursor to the field for `Print Date`.
4. Choose `Next Value`, if necessary, to change the value of the field from `NO` to `YES`.
5. Move the cursor to the field for `Print Page Number`.
6. Choose `Next Value`, if necessary, to change the value of the field from `NO` to `YES`.
7. Choose `Save Values`.

   These values are now your standard values when you work with ECM.
8. Choose `PrintOpt Menu` to display the Print Options menu.
9. Choose `Print Menu` to display the Print menu.

Positioning Printed Output on the Page

Each print format has a repeat block, which is the part of the print format that is printed for each card. By enlarging the repeat block beyond the fields and text you've already placed on the print format, you can add white space between printed cards to position the printed information precisely on a page.

For example, you might want to print an 8.5 by 11 sheet of mailing labels. Suppose that the overall size of each mailing label is 21 characters by 6 lines. (The usable part of each mailing label may be smaller.) By matching the print format's repeat block to the overall size of the mailing label, you can correctly position the name and address on each mailing label.

Adjusting the Size of the Repeat Block

The following procedure allows you to change both the width and depth of the repeat block. Changing the depth of the repeat block is all that's required to control vertical spacing between printed cards. However, to print cards across the page, as in the example of mailing labels, you must change not only the width of the repeat block but also the value of the `Print Blocks Across Page` field in the Printer Setup menu. (Refer to the next section on **Printing Blocks Across the Page**).

To change the size of the repeat block:

1. Display the print format on the Print menu.

   (See **Building a Print Format** for these steps.)

2. Choose `Adjust Rpt Blk`.

   ECM displays the currently defined repeat block for your print format.

3. Choose `Smallest Width`.

   ECM moves the cursor to the last column in the print format that contains a field or any text.

4. Move the cursor to where you want the right edge of the repeat block.

5. Choose `Smallest Depth`.

   ECM moves the cursor to the last row in the print format that contains a field or any text.

6. Move the cursor to where you want the lower edge of the repeat block.

   The above steps position the cursor at the lower-right corner of the required repeat block.

7. Choose `Define Block`.

   ECM adjusts the repeat block to that size.

8. Choose `Save Changes`.

   ECM incorporates the new repeat block size into the print format and returns to the Print menu.

Printing Blocks Across the Page

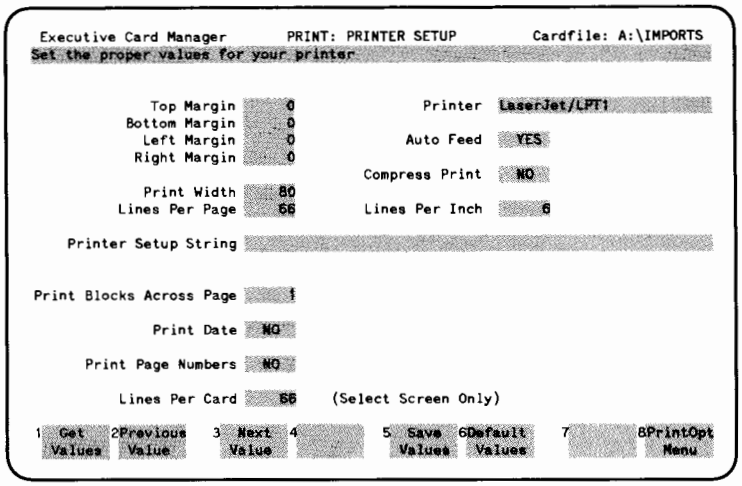
You can print small print formats, such as mailing labels, side by side across the page. The width of the repeat block, multiplied by the number of print formats, cannot exceed the value of `Print Width` in the Printer Setup menu.

Note

You cannot print side pages when you're printing multiple blocks across a page.

To print blocks across the page:

1. Display the print format on the Print menu.
2. Choose `Print Options` to display the Print Options menu.
3. Choose `Printer Setup` to display the Printer Setup menu:



4. Move the cursor to the field for **Print Blocks Across Page**.
5. Choose **Next Value** repeatedly, until the field shows the correct number of cards to be printed across the page.

   If you overshoot the number you want, choose **Previous Value** to display the correct number.
6. Choose **Save Values**.

   These values are now your standard values when you work with ECM.
7. Choose **PrintOpt Menu** to display the Print Options menu.
8. Choose **Print Menu** to display the Print menu.

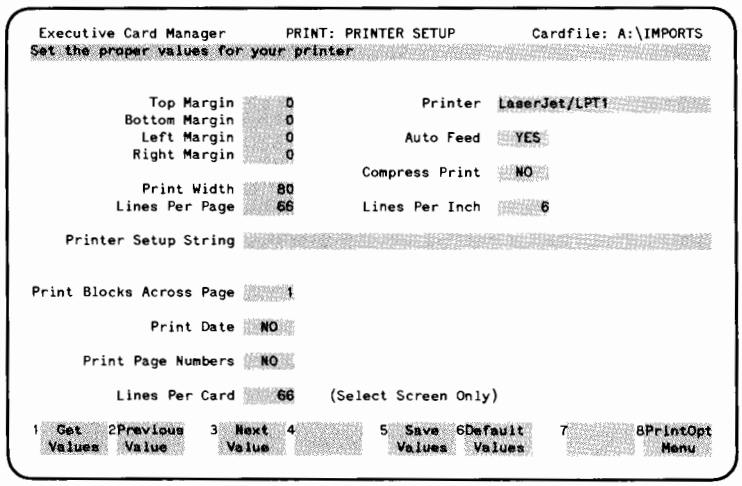
Using the Printer Setup Menu

The previous sections described some special uses of the Printer Setup menu. This menu contains other fields that also determine how ECM formats a document. By knowing what features the different fields govern, you may change the values in certain fields to produce a specific format. To change these values requires your accessing the Printer Setup menu.

To display the Printer Setup menu:

1. Start from the Main menu.
2. Choose `Print Cardfile`.
3. Choose `Print Options`.

4. Choose Printer Setup to display the Printer Setup menu:



This figure shows the values that ECM normally uses for each field.

Making Changes to the Printer Setup Menu

ECM establishes values for each of the fields in the Printer Setup menu. Except for the `Printer Setup String` field, each of the remaining fields has a list of permissible values. You may cycle through these values by choosing `Next Value` or `Previous Value`. (For the `Printer Setup String`, you must type the appropriate information into this field.)

The following list summarizes the fields in the Printer Setup menu and gives your available choices. Consult this list when you want to change one of these values.

Parameter	Meaning
`Top Margin`	The number of blank lines at the top of each page. Initially this value is set to `0`, leaving no blank lines at the top of the page.
`Bottom Margin`	The number of blank lines at the bottom of each page. Initially this value is set to `0`, leaving no blank lines at the bottom of the page.
`Left Margin`	The number of spaces to indent from the left edge of the page. Initially this value is set to `0`, leaving no indentation from the left edge of the page.
`Right Margin`	The number of spaces to indent from the right edge of the page. Initially this value is set to `0`, leaving no indentation from the right edge of the page.
`Print Width`	The width of the page (as given in characters or columns). Initially, this value is set to `80`, but it may range from `1` to `255`. The value for this field

	determines the upper limits for the left and right margins.
`Lines Per Page`	The total number of lines on each page. Initially, this value is set to `66`, but it may range from `1` to `255`. The value for this field determines the upper limits for the top and bottom margins.
`Printer Setup String`	An ASCII string that ECM sends to the printer to prepare it for printing. For example, you may use this field to direct your printer to print bold characters or underline text. (This setting remains in effect until you enter another printer setup string or reset your printer.) As the exact form of this string varies depending on which printer you are using, see the owner's manual for your printer for this information.
`Printer`	This field presents you with a list of all the printers installed on your system. If the printer you want to use does not appear in the list, refer to the instructions for installing a printer in the booklet *Setting Up Executive Card Manager*.
`Auto Feed`	`YES` for continuous-fed paper; `NO` for single-sheet paper. Initially, this value is set to `YES`.
`Compress Print`	This field only applies to HP printers that support Compress Print. (Other printers may use the `Printer Setup String` field to obtain similar results.) `YES` compresses 132 columns of text to fit into 80 columns while `NO` prints 80

	columns of text in 80 columns. Initially, this value is set to NO to generate normal print. If you select Compress Print, after each print operation finishes, ECM returns the printer to normal print then reestablishes compress print when the next print operation is requested.
Lines Per Inch	This field only applies to HP printers that let you set the vertical pitch. (Other printers may use the Printer Setup String field to obtain similar results.) A value of 6 prints six lines of text in a vertical inch while a value of 8 prints eight lines of text in a vertical inch. Initially, this value is set to 6 to generate normal print. If you set this value to 8, after each print operation finishes, ECM returns the printer to normal print then reestablishes the vertical pitch when the next print operation is requested.
Print Blocks Across Page	The number of print blocks to place on the page. Initially, this value is set to 1, but it may range to 255.
Print Date	YES prints the date on each page; NO omits it. Initially, this value is set to NO.
Print Page Numbers	YES prints a page number on each page; NO omits them. Initially, this value is set to NO.
Lines Per Card	The value in this field is only used in the Select menu, and it determines how many lines are printed for each card. Initially, this value is set to 66, but it may range from 1 to 255.

Saving Your Setup Values

If you make any changes to the Printer Setup menu, you should save your values by choosing Save Values if you want to use these values again. When you don't save these values, the settings remain in effect for the duration of the current session. Then, the next time you use ECM, ECM returns to the values that were saved last.

To restore your saved values:

When you save values from the Printer Setup menu, these values become your standard values. If you make other changes to the Printer Setup menu and then decide to return to your previous values before you save the new values, you may return the menu to your standard values by choosing Get Values.

In this case, ECM sets the values in each field to those values that you have last stored away.

Returning to ECM's Standard Values

After you have set new values for the Printer Setup menu, you may return to ECM's standard values by choosing Default Values.

In this case, ECM changes each field in the Printer Setup menu to a standard value that it provides.

18 Copying Techniques

ECM provides three general operations for copying information. These operations are:

- Save
- Merge
- Transfer

The first section in this chapter describes the Save and Merge operations. Chapter 19 describes how to modify a cardfile which contains information, by transferring the information to a new card form. Appendix D describes the more common use of the **Transfer** operation, which is to integrate information between ECM and other application programs.

You may **save** a cardfile to produce a duplicate copy of that cardfile, to replace an old cardfile, or to append two cardfiles to each other. When you replace a cardfile, you overwrite an existing cardfile with new information. You may also overwrite the current cardfile with a workset of that cardfile. (For example, if you used the Sort menu to rearrange the cards in your cardfile, you may replace the original cardfile with this workset.) When you append one cardfile to another, ECM combines the cards from both cardfiles and places each card in its proper order.

When you **merge** two cardfiles, you update the information in one cardfile with changes that were made in another cardfile.

You can copy, replace, combine, or update cardfiles whether they are on the same disc or on different discs. This section explains copying operations using one disc.

The second section in this chapter, **Copying Cardfiles Between Discs**, gives the procedure for copying cardfiles between two discs. The techniques in this section provide ways to back up a cardfile and move a cardfile from a crowded disc.

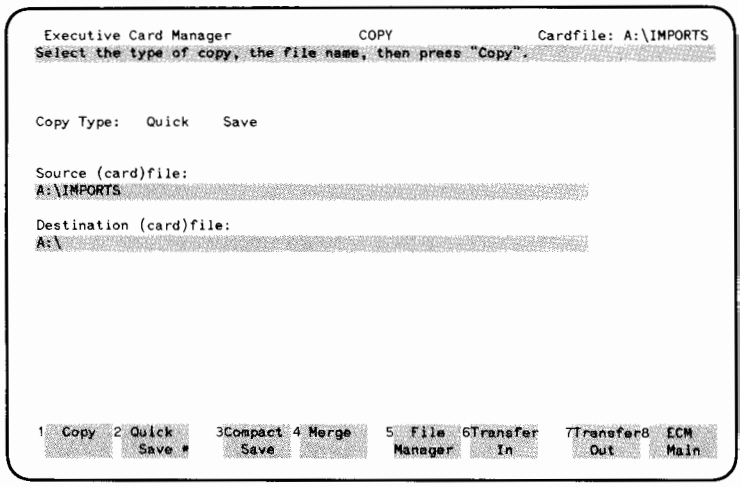
If you are using flexible discs, you may eventually fill a disc with so much information that ECM cannot complete an operation. The remaining section, **Copying Tricks When Disc Space is Limited**, tells you how to copy, transfer, and combine cardfiles if ECM cannot complete an operation that takes additional disc space.

Getting to the Copy Menu

Your first step in copying a cardfile is to display the Copy menu:

1. Start from the Main menu.
2. Get the cardfile that you want to copy.
3. Choose `Cardfile Tasks` to display the Cardfile Tasks labels if these labels don't appear:

4. Choose Copy Cardfile to display the Copy menu:



Working with the Copy Menu

Notice that ECM expects you to take three actions:

- Choose the appropriate copy operation.
- Provide a file or cardfile name.
- Choose "Copy" to initiate the copy operation.

To choose the copy operation:

When the Copy menu appears, the function labels assume these values:

Five labels provide your choices for the type of copy. These labels are:

- Quick Save
- Compact Save
- Merge
- Transfer In
- Transfer Out

Quick Save gives an exact file-to-file copy of your cardfile. It is a faster operation than Compact Save, but it may waste disc space if you are copying a cardfile that has been greatly modified.

Compact Save conserves disc space by compacting the cardfile as much as possible.

Merge updates a master cardfile with new information from another cardfile that has a similar card form.

Transfer In copies information into an ECM cardfile. (See Chapter 19 for this procedure.)

Transfer Out copies information from an ECM cardfile (see Chapter 19).

You may choose the specific copy operation that meets your needs. After you make your choice, ECM marks that label with an asterisk. Furthermore, ECM displays the type of copy operation after the entry for `Copy Type:`. You may always refer to this field on the Copy menu to see what copy operation is in effect.

To provide the file name:

The prompt line also requests a file name.

Notice that on the Copy menu, ECM provides two groups of lines: one for a `Source (card)file`; the other for a `Destination (card)file`.

All five copy operations use the current cardfile for either the source or destination cardfile. The actual assignment depends upon which copy operation you choose. On each version of the Copy menu, ECM underlines the entry that contains the current cardfile. You may not change this value. ECM highlights the other entry with a bright box. Then, when you enter your response for the file's name, ECM displays the name within this box.

For the Quick Save version of the Copy menu, ECM sets `Source (card)file` to the current cardfile and underlines this entry. A box appears under `Destination (card)file`. Thus, for the Quick Save screen, ECM supplies the source cardfile and expects you to enter the destination cardfile.

Copying a Cardfile

When copying information from a cardfile, you determine how the copy operation proceeds by your choice of the name for the cardfile you are creating. If the full cardfile name you supply is distinct from all other cardfile names, ECM creates a new cardfile. If the full cardfile name matches an existing cardfile's name, ECM allows you to replace the existing cardfile or to append new cards to it.

Making a Duplicate Copy

You normally duplicate a cardfile as a safeguard against inadvertently damaging the original copy. If you copy the cardfile to the same disc, you ensure a copy of the cardfile as long as that disc remains intact. By copying to another disc, you ensure the integrity of the cardfile even if something happens to the original disc. (See **Copying Cardfiles Between Discs** in this chapter for the procedure.)

Duplicating a cardfile on the same disc is a straightforward task. Your major decision is choosing between Quick Save and Compact Save.

To make a duplicate copy:

1. Start from the Copy menu.
2. Choose `Quick Save` if you want a file-to-file copy of the cardfile or `Compact Save` if you want to produce the most space-efficient version of the cardfile.

   ECM marks that label with an asterisk and displays `Quick Save` or `Compact Save` for the `Copy Type`.
3. Type a name for the cardfile you are creating.

   ECM displays the cardfile's name in the box under `Destination (card)file:`.
4. Verify that the name is correct.

   When you are creating a duplicate cardfile, the full cardfile name must be distinct from all other cardfile names. Therefore, provide a distinct cardfile name, or give a different pathname if you want to use the same cardfile name in another directory.

Note

If you are uncertain which cardfiles appear in a directory, you may choose `File Manager` for help.

Note

The next step begins the copy operation. If ECM discovers that the name you supplied already exists, it updates the function labels so you may append to the current cardfile, replace the current cardfile, or cancel the operation. If this happens, choose Cancel and provide a distinct name for the new cardfile.

5. Choose Copy to initiate the copy procedure.

   ECM informs you it is:

   ```
   Copying current cardfile to disc.
   ```

6. If you decide to cancel the operation at this time, choose Cancel.

   ECM cancels the operation and deletes the partial cardfile. The original cardfile remains intact.

7. If you allow the operation to continue, after ECM copies the cardfile, it displays the message COPY COMPLETE and returns control to the Copy menu.

8. Choose ECM Main to return to the Main menu.

Replacing a Cardfile

Replacing a cardfile is identical to creating a duplicate copy except for this important difference:

- Specifying a distinct cardfile name for `Destination (card)file` creates a new cardfile for the duplicate copy.
- Specifying an existing cardfile name for `Destination (card)file` overwrites the existing cardfile with the current cardfile.

To replace a cardfile:

1. Start from the Copy menu.
2. Choose `Compact Save` to condense each file while copying the cardfile.

   ECM marks this label with an asterisk.

Note

You may also choose `Quick Save` to make a file-to-file copy of the cardfile.

---

3. Type the full name for the cardfile you want to replace.

   ECM displays this information in the box under `Destination (card)file:`.
4. Verify that the name is correct.

   If the other cardfile is in a different directory, provide the proper pathname.

5. Choose Copy to initiate the copy procedure.

   Once ECM discovers that a cardfile exists with the name you supplied, it requests additional information. In particular, it asks if you want to append to the existing cardfile, replace the existing cardfile, or cancel the operation in case you have changed your mind.

Caution

If you enter the wrong cardfile name, you may choose Cancel to cancel the operation and preserve the old cardfile. Once you choose Replace, however, ECM deletes the old cardfile.

---

6. Choose Replace.

   ECM deletes the existing cardfile. While it creates the new cardfile, ECM informs you it is:

   ```
   Copying current cardfile to disc.
   ```

7. If you decide to cancel the operation at this time, choose Cancel.

   ECM cancels the operation and deletes the partial cardfile. The cardfile you were replacing has also been deleted.

8. If you allow the operation to continue, after ECM copies the cardfile, it displays the message `COPY COMPLETE` and returns control to the Copy menu.

9. Choose ECM Main to return to the Main menu.

Combining Cardfiles

When copying a cardfile, if you provide a cardfile name for the new cardfile and that cardfile already exists, ECM allows you to choose between appending to the existing cardfile, replacing it, or canceling the operation. When you choose to append, ECM combines the cards from both cardfiles and places the cards in order according to their key fields. Since the expanded cardfile contains cards from both cardfiles, the cardfiles must have similar card forms.

Caution

When appending cardfiles, ECM automatically produces a condensed version of the cardfile.

Preparing to Combine Two Cardfiles

Do not attempt to combine cardfiles that do not satisfy these requirements. You can combine cardfiles if

- they have the same key fields,
- the same number of fields,
- same order for the fields,
- and the same length for the fields.

Other features of the card may vary. For example, one card could have five comment lines which were grouped together, while the other card had five comment lines which were not considered to be a group.

An easy way to meet the requirements for combining cardfiles is to have identical card forms for both cardfiles. (You can create identical card forms by choosing Adapt Old Form under the Create menu; see Chapter 9.)

Choosing the Current Cardfile

When you choose a copy operation, ECM assigns the current cardfile to be either the source cardfile or the destination cardfile. With the "Save" versions of the Copy menu, ECM makes the current cardfile the source cardfile. Therefore, you should remember these implications before you get the current cardfile.

You combine cardfiles by copying one cardfile into another. The cardfile that supplies the cards is the source cardfile. It remains unchanged during the copy operation. For example, if you make the cardfile called WASHDC the current cardfile and combine it with another cardfile named CALIF, the original WASHDC cardfile remains intact.

The cardfile that receives the cards is the destination cardfile. Its composition changes during the copy operation. For example, if you copy your WASHDC cardfile into your CALIF cardfile, the CALIF cardfile now contains cards from both cardfiles.

When combining cardfiles, ECM places copies of the cards from the source cardfile, in their proper sequence, into the destination cardfile. For example, if the WASHDC cardfile contains an **Able** card and a **Charlie** card, and the CALIF cardfile contains a **Baker** card, the expanded CALIF cardfile contains **Able** before **Baker** and **Baker** before **Charlie**.

If you want to preserve the destination cardfile in its original form, make a duplicate copy first. Using the above example, you might name the new cardfile CALIFDC. Then, make WASHDC the current cardfile and combine it with the new CALIFDC cardfile. Afterwards, you have

both original cardfiles (WASHDC and CALIF), plus the CALIFDC cardfile, which now contains cards from both cardfiles.

To append two cardfiles together:

1. Start from the Main menu.
2. Get the cardfile that you want to use as the source cardfile. (This cardfile remains unchanged.)
3. Choose Cardfile Tasks to display the Cardfile Tasks labels if these labels don't appear:

4. Choose Copy Cardfile.
5. Type the name of the destination cardfile.

   ECM displays the name in the box under `Destination (card)file:`
6. Verify that the name is correct.

   If the cardfile is in another directory, provide the full cardfile name.
7. Choosing Copy initiates the copy operation.

   Because a cardfile exists with the name you supplied, ECM asks if you want to append to the existing cardfile, replace the existing cardfile, or cancel the operation.

Note

If you entered the wrong cardfile name, choose Cancel to cancel the operation.

8. Choose Append.

   ECM combines the current cardfile with the existing cardfile and informs you it is:

   ```
   Copying current cardfile to disc.
   ```

9. If you decide to stop the operation, choose Stop Copying.

   ECM stops the copy operation, but as some information may have already been added to the destination cardfile, you should inspect that cardfile and delete any cards you don't want.

10. If you allow the operation to continue, after ECM copies the cardfile, it displays the message `COPY COMPLETE` and returns control to the Copy menu.

11. Choose ECM Main to return to the Main menu.

Copying a Workset

Because worksets are temporary, you must copy a workset if you want to preserve it as a permanent cardfile. When you supply a distinct cardfile name, ECM creates a new cardfile. However, if you supply a name for an existing cardfile, ECM requests if you want to append the workset to the existing cardfile, replace the cardfile, or cancel the operation. In this regard, copying a workset is identical to copying a cardfile.

You may also replace the current cardfile with its current workset (see the discussion on **Replacing a Cardfile with Its Workset**).

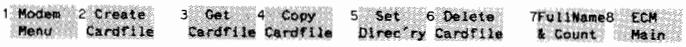
Creating a New Cardfile

Copying a workset is similar to copying a cardfile. For example, you may choose between `Quick Save` and `Compact Save`, but normally the workset's size determines your choice.

1. Create a workset. (See Chapter 14 or 15 for this procedure.)

   When you finish this task, ECM displays the workset on the Main Workset menu.

2. Choose `Cardfile Tasks` to display the Cardfile Tasks labels:



3. Choose **Copy Cardfile**.

   When the Copy menu appears, an asterisk marks the **Quick Save *** label, and ECM asks you to:

   ```
   Select the type of copy, the file name, then
   choose "Copy".
   ```

4. Choose **Compact Save** to compress the cardfile while copying it.

   ECM marks the label with an asterisk to show it is your current choice. This is a logical choice when the cards you are saving are a small subset of the entire cardfile. (You may also choose **Quick Save** to make a file-to-file copy of your cardfile. This choice makes sense when the number of cards in the workset approximates the total number of cards in the cardfile.)

5. Type a name for the cardfile you are creating.

   ECM displays this name in the box under `Destination (card)file:`

6. Verify that the name is correct.

   If you want to put the cardfile in another directory, give the full cardfile name.

Note

When you are uncertain which cardfiles appear in a directory, you may choose **File Manager** for help.

Note

The next step begins the copy operation. If ECM discovers that the name you supplied already exists, it updates the function labels so you may append to the current cardfile, replace the current cardfile, or cancel the operation. If those labels appear, choose Cancel, then provide a distinct name for the new cardfile.

7. Choose Copy to initiate the copy procedure.

   ECM tells you it is:

   ```
   Copying current cardfile to disc.
   ```

8. If you decide to cancel the operation at this time, choose Cancel.

   ECM cancels the operation and deletes the partial cardfile. The workset remains intact.

9. If you allow the operation to continue, after ECM copies the cardfile, it displays the message COPY COMPLETE and returns control to the Copy menu.

Replacing a Cardfile with Its Workset

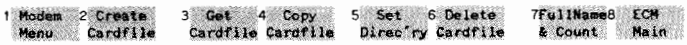
At times you may want to replace a cardfile with a workset you have just created. For example, if you have used the Sort menu to rearrange the cards in your cardfile, you may decide to replace the cardfile with this workset.

To replace a cardfile:

1. Create the workset you want to save. (See Chapter 14 or 15 for this procedure.)

   When you finish this task, ECM displays the workset on the Main Workset menu.

2. Choose `Cardfile Tasks` to display the Cardfile Tasks labels:



3. Choose `Copy Cardfile`.

   When the Copy menu appears, an asterisk marks the `Quick Save *` label, and ECM asks you to:

   ```
   Select the type of copy, the file name, then
   choose "Copy".
   ```

4. Choose Compact Save to compress the cardfile while copying it.

   (You may also choose Quick Save to make a file-to-file copy of your cardfile.)

5. Type the current cardfile's name.

   ECM displays the name in the box under `Destination (card)file:`.

6. Verify that the names for the `Source (card)file` and the `Destination (card)file` are the same.

7. Choose Copy to initiate the copy procedure.

   When ECM discovers the cardfile exists, it asks if you want to append to the existing cardfile, replace the existing cardfile, or cancel the operation.

Caution

If you change your mind about replacing the current cardfile, choose Cancel to cancel the operation. Once you choose Replace, ECM completes the requested task. You cannot cancel or stop the operation during this time.

8. Choose Replace.

   ECM overwrites the existing cardfile with the current workset and informs you it is:

   ```
   Copying current cardfile to disc.
   ```

   After ECM copies the cardfile, it displays the message `COPY COMPLETE` and returns to the Copy menu.

9. Choose ECM Main to return to the Main menu.

Using Merge to Update a Cardfile

Merge allows you to work with a small portion of a cardfile then incorporate any changes from that cardfile back into the original cardfile. For example, suppose you are visiting your sales office in Hawaii and you want to carry information from several cardfiles with you on a flexible disc. Since the flexible disc can't hold the complete cardfiles, you create worksets of the specific cards you'll need and then save each of these worksets as a cardfile. During your trip, you change several cards in different cardfiles, as well as adding new cards to some of the cardfiles. Now, when you return to the main office, you can merge this new information into the "master" cardfiles.

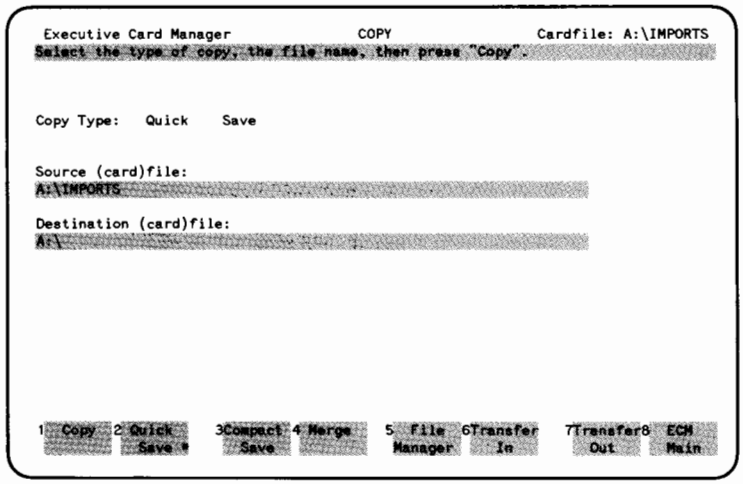
Note

You can merge any cardfiles that have similar card forms. (The rules that apply to combining cardfiles also apply to merging cardfiles. See the discussion under **Preparing to Combine Two Cardfiles**.)

When merging cardfiles, ECM places all the cards from the source cardfile (which contains the new information) into the destination cardfile by comparing the next card to be inserted with the sorted cards in the destination cardfile. When the key fields differ, ECM considers the card to be a new card, so it adds that card to the cardfile. When the key fields match, ECM compares a special number that it assigned to each card when it created that card. If the special numbers also match, ECM considers the cards to be identical, so it replaces the card in the master cardfile with the card from the source cardfile.

To update a cardfile:

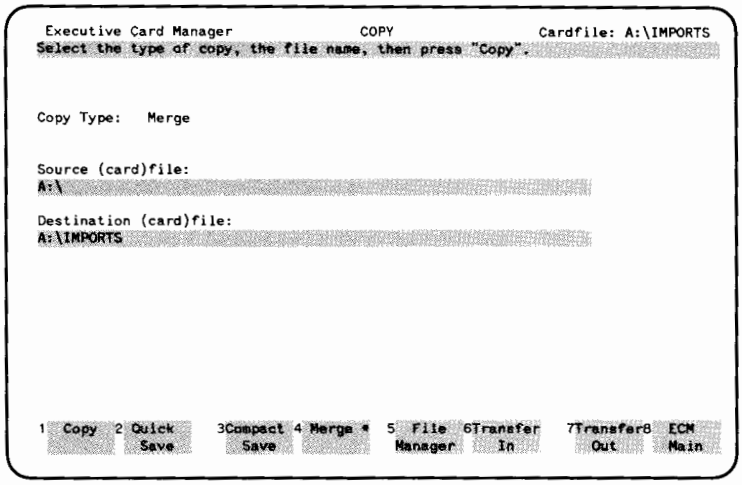
1. Start from the Main menu.
2. Get the cardfile that you want to update.
3. Choose `Cardfile Tasks` to display the Cardfile Tasks labels if they don't appear.
4. Choose `Copy Cardfile` to display the Copy menu:



Since you want to update the cardfile by merging in new information, choose the merge operation.

5. Choose Merge.

   ECM marks this label with an asterisk and displays the Merge version of the Copy menu.



6. Type the name of the cardfile that contains the new information.

   ECM enters this name for the source cardfile.

7. Verify that the name is correct.

   If the cardfile is in another directory, provide the proper pathname.

8. Choose Copy to initiate the merge operation.

   ECM informs you it is:

   ```
   Copying current cardfile to disc.
   ```

9. If you decide to stop the operation, choose Stop Copying.

   ECM stops the copy operation, but as some information may have already been added to the master cardfile, you should inspect that cardfile and delete any cards that you don't want.

10. If you allow the operation to continue, after ECM merges the two cardfiles, it displays the message COPY COMPLETE and returns control to the Copy menu.

11. Choose ECM Main to return to the Main menu.

Copying Cardfiles Between Discs

This section gives the procedure for copying cardfiles between two discs. Additionally, the techniques provide ways to:

- back up a cardfile
- move a cardfile from a crowded disc

Both of these concepts will be discussed, however, the procedure for copying a cardfile between discs is identical, regardless of the reason for doing it.

Backing Up a Cardfile

The first section in this chapter showed how to make a duplicate of a cardfile on the same disc. This procedure protects the integrity of the cardfile if you inadvertently delete cards or perform some other unwanted operation. It offers no protection, however, if the disc itself is damaged or lost. Therefore, it is a good practice to *back up* your cardfile by placing the duplicate copy on another disc. This safeguards the cardfile even if the original disc is damaged or lost.

Moving a Cardfile from a Crowded Disc

When a work disc becomes full, you may decide to move one or more cardfiles to another disc.

The amount of information that a disc can hold depends on two things:

- the size or capacity of disc you are using
- how much information is stored on the disc

Let's look at each of these factors in greater detail.

Your personal computer supports a wide range of disc drives: from fixed discs (with extremely high storage capacity) to flexible discs (with lesser amounts of storage). Furthermore, flexible discs may store information on double sided or high capacity discs. All these factors affect the amount of information that a disc can hold. (Consult the owner's manual for your disc drive for further information.)

You decide what information is stored on a disc. For example, when building your cardfile library, you may put each cardfile on a separate disc or you may store several cardfiles on one disc. You may also put different application programs on one disc or separate discs. If you place a large spreadsheet and several cardfiles on one disc, this limits the size of the cardfiles on that disc.

When you try adding cards to a disc that has reached its capacity, ECM informs you:

```
DISC ERR0R-unable to save the card data.
```

The following procedure explains how you can copy cardfiles to another work disc so you may delete the originals from the crowded disc.

Copying to Another Disc Drive

This section describes the copying procedure when you have a dual, flexible disc drive. This is a typical configuration for many systems. See Appendix C if your system has a fixed disc.

Copying to a disc in another drive involves these steps:

- copying the cardfile from drive B to a temporary location in drive A
- getting this copy as the current cardfile and replacing the old work disc with another disc
- recopying the cardfile from drive A to the new disc in drive B

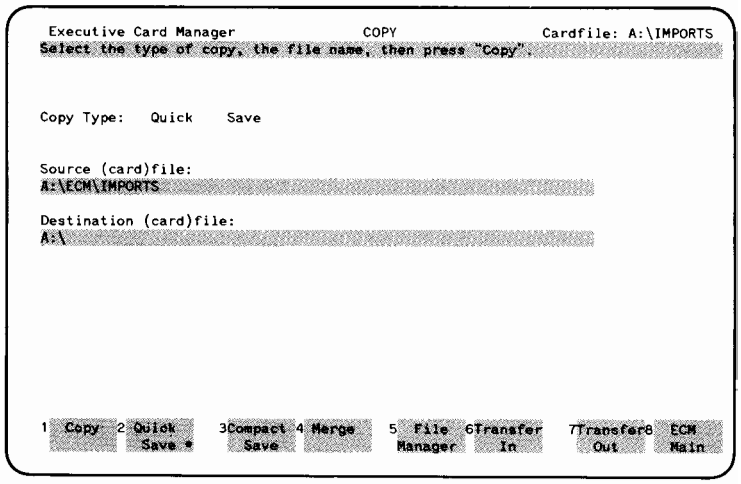
The following instructions work when the disc in drive A has sufficient room to hold a temporary copy of the cardfile. If you attempt this procedure and ECM discovers that not enough room exists, it informs you:

```
DISC ERROR-unable to save the card data.
```

If this happens, refer to the last section in this chapter **Copying Tricks When Disc Space is Limited** for details on copying cardfiles when insufficient space remains on the disc to use these procedures.

To display the Copy menu:

1. Start from the Main menu.
2. Get the cardfile that you wish to copy.
3. Choose Cardfile Tasks to display the Cardfile Tasks labels if they don't appear.
4. Choose Copy Cardfile to display the Copy menu.



Copying from Drive B

Your first task is copying the cardfile from the crowded work disc in drive B to a temporary cardfile on a disc in drive A. (Normally, drive A holds your working copy of the ECM program and any other information that you have stored on that disc.)

Note

Remember, the cardfile you place on the ECM Application disc is temporary only if you subsequently delete it.

---

1. Start from the Copy Menu.
2. Choose `Compact Save`.

   ECM marks this label with an asterisk. Then, when you initiate the copy procedure, ECM produces the most space-efficient version of the cardfile.

Note

You may also choose `Quick Save`; but under most circumstances, `Compact Save` is the more logical choice.

---

3. Type a name for the temporary cardfile.

   ECM displays the cardfile's name in the highlighted box under `Destination (card)file`.

4. Verify that the name is correct.

   Since you are copying from drive B to another directory in drive A, be sure to include the proper pathname. For example, typing `A:\KARLIE\IMPORTS` places the `IMPORTS` cardfile in the `KARLIE` subdirectory under the root directory in drive A.

5. Choose **Copy** to initiate the copy procedure.

   ECM tells you it is:

   ```
   Copying current cardfile to disc.
   ```

   After ECM copies the cardfile, it returns control to the Copy menu.

6. Choose **ECM Main** to return to the Main menu.

Getting a New Current Cardfile

Before you switch discs in drive B, you must make the copy that you just put in drive A the current cardfile.

Caution

Do not switch discs until ECM tells you it is safe to do so. (See the third step in the following procedure.)

To get the copy in drive A:

1. Start from the Main menu.
2. Choose `Cardfile Tasks`.
3. Choose `Get Cardfile`.

   ECM displays the default pathname and asks you to:

   ```
   Type a cardfile name and press ENTER. (You
   can switch discs now.)
   ```

   At this time, ECM is not accessing drive B so you may also switch discs in that drive.

Note

The next step directs you to insert another disc in drive B. If you are inserting a brand new disc, remember to format it first.

4. Remove the disc that is currently in drive B and insert another disc.

5. Type the name of the cardfile that you temporarily stored in drive A.

   Be sure to provide the proper pathname.

6. Pressing Enter ends the cardfile's name and directs ECM to continue.

   ECM informs you it is:

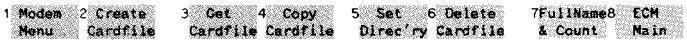
   ```
   Getting cardfile.
   ```

After it locates the cardfile, ECM displays it as the current cardfile.

Recopying to Drive B

You may now copy the current cardfile to your new disc in drive B.

1. Start from the Main menu.
2. Choose Cardfile Tasks to display the Cardfile Tasks labels:



3. Choose Copy Cardfile to display the Copy menu.

4. Choose Quick Save to make an identical copy of the three files that make up your cardfile.

   This suffices because you previously used Compact Save to make the most efficient files for this cardfile.

5. Type the cardfile's name.

   Remember to provide the proper pathname. Using our previous example, you would type `B:\KARLIE\IMPORTS` if the new disc has a KARLIE subdirectory and you want the cardfile to retain its current name.

   ECM enters this information in the highlighted box under `Destination (card)file`.

6. Verify that the full cardfile name is correct.

7. Choose Copy to initiate the copy procedure.

   After ECM copies the cardfile, it returns control to the Copy menu.

8. Choose ECM Main to return to the Main menu.

Copying to an Electronic Disc

Many personal computers offer an electronic disc. An *electronic disc* is a section of Random Access Memory (RAM) that the computer sets aside for temporary storage. Since RAM storage is temporary, it is also called *volatile memory* because information is lost upon power failure to the memory chip.

Since your personal computer treats the electronic disc as it does any other disc, you follow the same procedure to copy a cardfile to an electronic disc. Just remember to provide the proper name that designates this disc when you enter the pathname.

Deleting the Old Cardfiles

Once you follow the procedure in this section to copy a cardfile between discs, you have three copies of that cardfile:

- the original cardfile on the first disc in drive B
- the duplicate cardfile on the second disc you put in drive B
- the temporary cardfile on the disc in drive A

You no longer need the copy in drive A, so you should delete that cardfile now. You may also delete the cardfile from the disc that was initially in drive B unless you want copies on separate discs as a back up. Chapter 10 explains the procedure for deleting a cardfile.

Copying Tricks When Disc Space Is Limited

One of the major advantages of a fixed disc is its large storage capacity. For most users, a fixed disc should easily store all the cardfiles you might create. If you are using flexible discs, however, you may eventually fill a disc with so much information that ECM cannot complete an operation that takes additional disc space.

This section tells you how to copy, transfer, and combine cardfiles if ECM runs out of room when you attempt one of these operations.

Note

A simple solution, which may solve many of your problems, is using Compact Save to reduce the amount of space each cardfile takes. However, if you know your files are space efficient and you still cannot complete a copy operation, then try the tricks in this chapter.

Why Copying Tricks Are Necessary

It is always safe to try copying, transferring, or printing a cardfile. However, if ECM discovers that a disc has insufficient space to complete an operation, it displays one of these messages:

- `Can't finish copying to the disc file`
- `Can't open temporary printout file`
- `DISC ERROR-unable to create the cardfile`
- `DISC ERROR-unable to save card data`
- `The data for the card cannot be created`
- `The form cannot be saved`

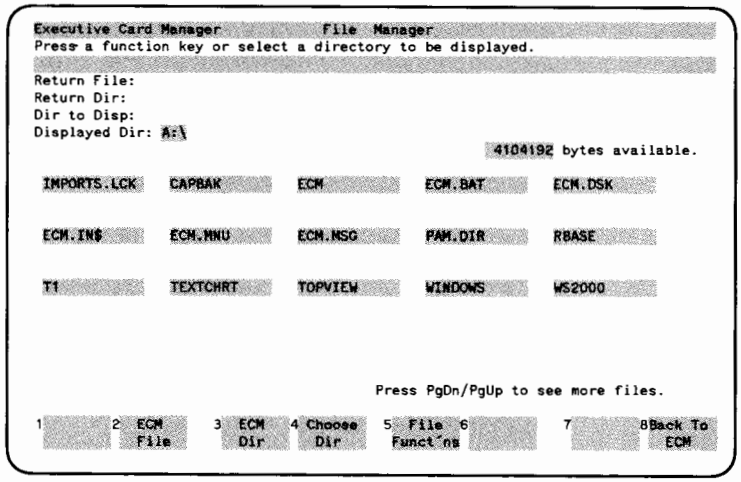
When insufficient room exists to complete a copy, transfer, or print operation, ECM deletes the incomplete copy. Therefore, you could try again with another destination disc that contains more available space. Or, you can use one of the tricks described in this section.

You may need these tricks because you cannot remove your personal work disc while you are using that disc as a source for copying, printing, or transferring information. As an alternative method, you may remove the ECM Application disc. However, you may only remove the application disc while you are using File Manager.

Estimating a Cardfile's Size

You may use File Manager to estimate a cardfile's size. Remember, however, that this is an estimate since a cardfile may occupy more space than it actually needs. (This happens, for example, when you delete several cards.) When you use Compact Save to replace each cardfile with its condensed version, the figures represent the smallest size.

1. Start from the Main menu.
2. Choose Cardfile Tasks.
3. Choose Set Direc'ry.
4. Choose File Manager to display the File Manager Main menu.



A box on the right of the menu (before `bytes available`) tells how much memory remains in that directory. If you plan to copy a cardfile to this location, this number sets the upper limit to the size that the three files (which constitute a cardfile) can have.

Note

If the cardfile you want to copy is on another disc, see the following discussion on **To check another directory**, then continue with step 5.

---

5. If this disc contains the cardfile you want to copy, choose `Choose Dir`.
6. Choose `Expanded Dir`.

   In the expanded directory, the first number to the right of the file name tells how many units of memory (in bytes) that file contains.
7. Find the names for the three files in your cardfile.

   If they aren't visible, press the Pg Dn key until you display them.
8. Add the number of bytes in each of these files and compare that total with the amount of available space in the directory where you want to copy the cardfile.
9. Choose `Expanded Dir*` to remove this option.
10. Choose `Exit Choose` to return to the File Manager Main menu.

To check another directory:

If you want to check another directory, take these steps.

1. Start from the File Manager Main menu.
2. Choose `Choose Dir` .
3. Type the pathname of the directory you want to inspect.
4. Press Enter to end your response.

   File Manager displays that directory. You may see how much space exists by inspecting the value for `bytes available`.

Copying Tricks to Overcome Space Limitations

If a message tells you that ECM ran out of room when it tried to copy, print, or transfer a cardfile, the following sections give you alternate methods for copying that cardfile. The section tells you how to copy cardfiles using File Manager rather than ECM's copy facilities. The last four sections tell you how to combine cardfiles when disc space becomes progressively tighter.

Note

Since the File Manager does a file-to-file copy, you should replace the appropriate cardfiles with their condensed version by using Compact Save before continuing with these procedures.

The following procedures involve switching discs between drives and changing the current cardfile. To help clarify these tasks, the examples use specific names for each cardfile. In particular, the examples assume that a person named Terry has a personal subdirectory on a disc where he stores his financial information. His TERRY subdirectory contains a cardfile called INCOME. He also has another cardfile called BUDGET. Although these names may simplify the examples, it is important that you remember which cardfile is your source cardfile and which cardfile is the destination cardfile.

Copying from Drive B to Drive A

In this example, the INCOME cardfile (the source cardfile that you want to copy) is on a disc in drive B and your working copy of the ECM program is on a disc in drive A. Because the ECM Application program also takes space, the disc in drive A may not have enough room for the copy. The strategy, therefore, is to access File Manager and put another disc in drive A.

Note

When you use File Manager, you work with the three files that make up a cardfile rather than the composite cardfile. Thus, copying a cardfile implies copying all three files.

In the following steps, you enter File Manager from the ECM program, but you can also enter File Manager from PAM. When you enter from PAM, you go directly to the File Function menu. When you enter from ECM, you first see the File Manager Main menu. Choosing `File Funct'ns` accesses the File Functions menu.

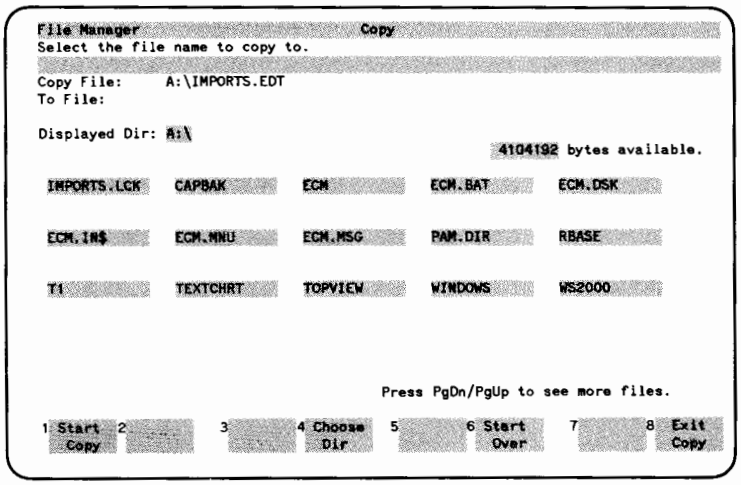
To display the File Manager Copy menu:

1. Start from the Main menu.
2. Choose `Cardfile Tasks`.
3. Choose `Set Direc'ry`.
4. Choose `File Manager` to display the File Manager Main menu.

   If you don't see the three files that make up your cardfile, they may be on the next screen or in another subdirectory. Press the Pg Dn key to view the next screen-full of information. (If you want to inspect

another directory, see the previous discussion on **To check another directory**.) After you find the files, remember to return to the File Manager Main menu so you can continue this procedure.)

5. Choose File Funct'ns to display the File Functions menu.
6. Remove the ECM Application disc from drive A and insert a disc with more available space.
7. Choose Copy File to display the File Manager Copy menu.



To copy a file using File Manager:

1. Move the pointer to the file you want to copy.
2. Press the F10 key to choose this file.

Note

You may also use touch to choose a file, if your personal computer supports this feature.

File Manager displays the full name of that file as the `Copy File`. For example, if you selected INCOME.EDT from Terry's subdirectory on the disc in drive B, the full cardfile name is `B:\TERRY\INCOME.EDT`. (If you want to select another file, you may choose Start Over and repeat this step.)

Next, File Manager asks you to:

```
Select or type the file name to copy to.
```

3. Type the full name for the new file you want to create. (This is the `To File`).

   Because you are copying to drive A, include the proper pathname and the appropriate three-letter extension (.EDT, .EFM, or .EIX). For example, to put INCOME.EDT in Patrick's subdirectory in the disc in drive A, you would type:

   ```
   A:\PATRICK\INCOME.EDT
   ```

   (If you omit the file's name, File Manager gives the copy the same name as the original file.)

4. Press Enter to end the file's name.

   File Manager displays the name you just entered as the To File and asks you to:

   ```
   Press Start Copy if selection is correct.
   ```

5. When you are satisfied with your instructions, choose Start Copy.

   File Manager informs you it is:

   ```
   Copying the selected file.
   ```

6. Repeat steps 1 through 5 to copy the remaining two files for the cardfile you are copying.

To return to ECM:

1. Once you have copied all three files, remove the work disc that you put in drive A and replace it with the ECM Application disc.
2. Choose Exit Copy to return to the File Functions menu.
3. Choose Exit FileFctn to return to the File Manager Main menu.
4. Choose Back To ECM to leave File Manager and return to the ECM program.

Combining Cardfiles Using File Manager

You can use File Manager to combine two cardfiles if both cardfiles can fit on one disc and enough room remains to hold the combined cardfile. (If your cardfile is too large for this method, proceed to the next section.)

In this example, you start with two cardfiles, a source cardfile named INCOME and a destination cardfile called BUDGET. (When you adapt this procedure for your needs, supply the appropriate names for the source and destination cardfiles.)

1. Place the disc containing the source cardfile (INCOME) in drive B.

Note

When you enter File Manager from ECM, you start with the File Manager Main menu so you must choose File Funct'ns to continue this procedure. (If you enter File Manager from PAM, you go directly to the File Functions menu.)

---

2. Follow the steps in the preceding section to copy the source cardfile (INCOME) from drive B to drive A.

   At step 6, be sure to replace the ECM Application disc with the disc that contains the destination cardfile (BUDGET). The subsequent steps place a copy of the INCOME cardfile on this disc.

3. Be sure you complete the entire procedure for copying from drive B to drive A using File Manager. In particular, remember to replace the work disc in drive A with the ECM Application disc and choose Back To ECM when you complete the procedure to return to the ECM program.

   ECM returns you to the Cardfile Tasks menu (the point from which you entered File Manager).

4. Choose Get Cardfile so you may change the current cardfile.

   ECM tells you to:

   ```
   Type a cardfile name and press ENTER.
   ```

5. Remove the disc (which contains the original INCOME cardfile) from drive B and replace it with the disc that now contains both the BUDGET and INCOME cardfiles.

6. Type the name for the source cardfile (in this example, INCOME).

   Be sure to provide the proper pathname.

7. Press Enter to end the cardfile's name.

   ECM displays INCOME as the current cardfile.

8. Now use the procedure at the beginning of this chapter (under **Combining Two Cardfiles**) to combine INCOME and BUDGET into a single cardfile.

Using Transfer In and Transfer Out to Combine Cardfiles

The preceding method requires that your work disc has sufficient room to store three cardfiles: the source cardfile, the destination cardfile, and the combined cardfile. If you don't have enough room on one disc to use this method, you can still use File Manager to combine cardfiles if:

- you have room on one disc for the combined cardfile
- you have room on the ECM Application disc for the transfer file

In this method you transfer out the field information from the source cardfile (INCOME) to the ECM Application disc in drive A. Then you combine this information with a copy of the destination cardfile (BUDGET) on a disc in drive B.

To transfer from the source cardfile:

1. Use File Manager to copy the source cardfile (INCOME) to another disc. (This procedure is given in the first part of this appendix.)

   When you finish, the ECM Application disc should be in drive A, the original copy of the source file (INCOME) should be in drive B, and your new copy of the source cardfile should be on top of your desk.

2. From the Main menu, choose Cardfile Tasks to reach the Cardfile Tasks menu.
3. If INCOME is not the current cardfile, use Get Cardfile to make it the current cardfile.
4. Choose Copy Cardfile.

   ECM displays the Copy menu and asks you to:

   ```
   Select the type of copy, the file name, then
   "Copy".
   ```

5. Choose Transfer Out.
6. Type the name for the destination holding file.

   Because you are transferring to the ECM Application disc, provide the full pathname. You may also include a three-letter extension, such as .BXF for "BASIC Transfer File". For example, if you are transferring the INCOME cardfile to Patrick's subdirectory on the disc in drive A, you would type:

   ```
   A:\PATRICK\INCOME.BXF
   ```

7. Choose Copy.

   Once the copy operation finishes, ECM returns to the Copy menu.

To transfer in to the destination cardfile:

Before you transfer the information to the destination cardfile, you must place the appropriate discs in the proper drives and make the destination cardfile the current cardfile.

Caution

When you get another cardfile, ECM closes the current cardfile before it opens the new cardfile. Because you take advantage of this two-step process to switch discs, rather than anticipating steps, you should follow each step explicitly. In particular, switch discs after you type the name for the new cardfile but before you press Enter.

1. Choose ECM Main to display the Main menu.
2. Choose Cardfile Tasks to display the Cardfile Task menu.
3. Choose Get Cardfile.

   ECM closes the current cardfile.
4. Type the name of the destination cardfile (in this example, BUDGET).
5. Remove the disc, which contains the INCOME cardfile that you just closed and replace it with the disc that contains the destination cardfile (BUDGET).
6. Press Enter to end your response for getting the destination cardfile.

   ECM displays the BUDGET cardfile.

7. Choose **Copy Cardfile** to display the Copy menu.
8. Choose **Transfer In**.

   As the Transfer In version of the Copy screen sets the current cardfile to be the destination cardfile, you specify the holding file as the source file.
9. Type the full name for the file you temporarily stored on the ECM Application disc in drive A.

   For our example, you would type:

   ```
   A:\PATRICK\INCOME.BXF
   ```
10. Choose **Copy**.

    Once ECM copies the transfer file into BUDGET, it returns to the Copy menu.
11. Choose **ECM Main** to return to the Main menu.

Using File Manager and Transfer In and Out to Combine Cardfiles

Since the ECM program occupies space on your working copy of the ECM Application disc, this disc may not have enough room to hold the transfer file. In this case, you can still combine the cardfiles using File Manager and the transfer labels if:

- The destination disc (which contains BUDGET in our example) has sufficient room for the combined cardfile and a transfer file of INCOME.
- The disc containing the INCOME cardfile has room for a transfer file of itself.

To transfer from the source cardfile:

1. Use File Manager to make a copy of BUDGET on another disc.

   Follow the procedure under **Copying from Drive B to Drive A Using File Manager** in the first part of this appendix. When you finish, the ECM Application disc should be in drive A, the original version of BUDGET on a disc in drive B, and the new copy of BUDGET should be on top of your desk. (This copy of BUDGET is your destination cardfile.)

Note

If you entered File Manager from a point other than the Cardfile Tasks menu, take step 2 to display this menu.

---

2. From the Main menu, choose `Cardfile Tasks` to reach the Cardfile Tasks menu.
3. Choose `Get Cardfile`.

   ECM closes the current cardfile.
4. Remove the disc that contains the original BUDGET cardfile from drive B and replace it with the disc that contains the source cardfile (INCOME).
5. Type the name for the source cardfile (INCOME) which you just placed in drive B.

   Remember to provide the proper pathname. For example, you might type:

   ```
   B:\TERRY\INCOME
   ```

6. Press Enter to end the cardfile's name.

   ECM makes INCOME the current cardfile.

7. Choose **Copy Cardfile**.

   ECM displays the Copy menu and asks you to:

   ```
   Select the type of copy, the file name,
   then "Copy".
   ```

8. Choose **Transfer Out**.

   For the Transfer Out version of the Copy screen, ECM sets the current cardfile to be the source cardfile.

9. Type the name for the holding file.

   Remember to provide the proper pathname and a cardfile name to distinguish this file from all other files. For example, if you are placing the holding file in the same directory, you could type:

   ```
   B:\TERRY\INCOME.BXF
   ```

10. Choose **Copy**.

    Once the copy operation finishes, ECM returns to the Copy menu.

To copy the holding file using File Manager:

1. From the Copy menu, choose `File Manager`.
2. Remove the ECM Application disc from drive A and replace it with the copy of the destination cardfile (BUDGET).
3. Copy the holding file from the disc in drive B to the disc you just placed in drive A.
4. Choose `Exit Copy` to return to the File Functions menu.
5. Remove the disc in drive A and return the ECM Application disc to this drive.
6. Choose `Exit FileFctn` to return to the File Manager Main menu.
7. Choose `Back To ECM` to return to the Cardfile Tasks menu.

To transfer in to the destination cardfile:

Before you transfer the information to the destination cardfile, you must place the appropriate discs in the proper drives and make the destination cardfile the current cardfile.

Caution

When you get another cardfile, ECM closes the current cardfile before it opens the new cardfile. Because you take advantage of this two-step process to switch discs, rather than anticipating steps, you should follow each step explicitly. In particular, switch discs after you type the name for the new cardfile but before you press Enter.

---

1. Choose Get Cardfile.

   ECM closes the current cardfile.
2. Type the name of the destination cardfile.
3. Remove the disc in drive B and replace it with the disc that contains copies of the INCOME holding file and the BUDGET cardfile.
4. Press Enter to end your response for getting the destination cardfile.

   ECM displays BUDGET as the current cardfile.

5. Choose Copy Cardfile to display the Copy menu.
6. Choose Transfer In.
7. Type the full name for the holding file.

   Remember that in this case the INCOME transfer file is on the same disc as the BUDGET cardfile.
8. Choose Copy.

   Once ECM copies the transfer file into BUDGET, it returns to the Copy menu.
9. Choose ECM Main to return to the Main menu.

   Since ECM has transferred the INCOME holding file to the BUDGET cardfile, it displays the combined BUDGET cardfile on the Cardfile Tasks menu.

Combining Cardfiles Using Worksets

When you don't have enough room on a disc to copy the whole transfer file from drive B to drive A, you can split the cardfile into worksets then transfer the worksets one at a time. (Chapter 14 tells you how to create a workset.)

The following steps summarize this procedure:

1. Create a workset from the source (INCOME) cardfile.
2. Using **Transfer Out**, copy the contents of the workset from drive B to drive A.
3. Then use **Transfer In** to copy the workset's transfer file into the destination cardfile (BUDGET).
4. Delete the copy of the transfer file you just appended to make room for the next transfer file.
5. Repeat steps 1 through 4 until you transfer all the information from the source cardfile (INCOME) into the destination cardfile (BUDGET).

Note

When the ECM Application disc lacks sufficient room to store the transfer file, you must create the transfer file on the source disc (the one containing INCOME in our example) then use File Manager to copy it directly to the destination disc (the one containing BUDGET).

When Printing or Transferring a Cardfile Fails

If you are creating a print file or transferring a data file into a cardfile, the destination disc may fill up before all the information has been received from the source cardfile. If this happens, ECM stops the operation, deletes the incomplete file, and displays a message to alert you that it couldn't complete the task. Therefore, you should take these steps:

1. Create additional space on the destination disc.

   You can create additional space by either deleting other files from the destination disc or copying the destination cardfile to a fresh disc.

2. Try the operation again.

19 Changing a Cardfile Once It Contains Cards

This chapter explains how you can change a cardfile that contains information. The mechanics for modifying the design of the card form is identical to that presented in Chapter 9. Now, however, you must not only change the card design but also transfer information from the old cardfile to a temporary *holding* file, and then to the new card form. This chapter explains the transfer procedure.

Changing a Cardfile

When you change the design of a cardfile with cards in it, you take these steps:

- Move the existing field information to a holding file.
- Call up the old card form, make the necessary changes, then save the card form as a new cardfile.
- Move the field information from the holding file to the new cardfile, which uses the modified card form.

Caution

Do not use Merge or Quick Save or Compact Save with Append because the card form is going to change.

Let's look at each step in greater detail.

When you move information to a holding file, you *transfer out* a copy of that information. Therefore, the original cardfile remains intact. For example, if you want to change the layout of your Address Book cardfile, you first copy the information stored in that cardfile to a holding file.

Next, you call up a copy of the original card form and modify it. Again, your changes have no effect on the original card form. For example, you might change the card form of your Address Book cardfile so the open-card area displays fields for a Work Phone and Home Phone rather than the Street Address.

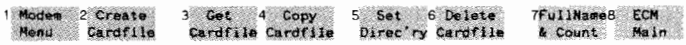
After you modify the old form and save it as a new cardfile, you then *transfer in* the information that you stored in the holding file. You now have two cardfiles: the original cardfile as you created it and a new cardfile, which holds the same information but in a different layout. You may now delete the original cardfile and the holding file if you have no further need for this information.

Getting Ready to Transfer

Since transferring out is a copy operation, your first task is accessing the Copy menu.

To display the Copy menu:

1. Start from the Main menu.
2. Get the cardfile whose card form you want to change.
3. Choose `Cardfile Tasks` to display the Cardfile Tasks labels if these labels don't appear:



4. Choose `Copy Cardfile`.

   When the Copy menu appears, an asterisk marks the `Quick Save *` label, and ECM asks you to:

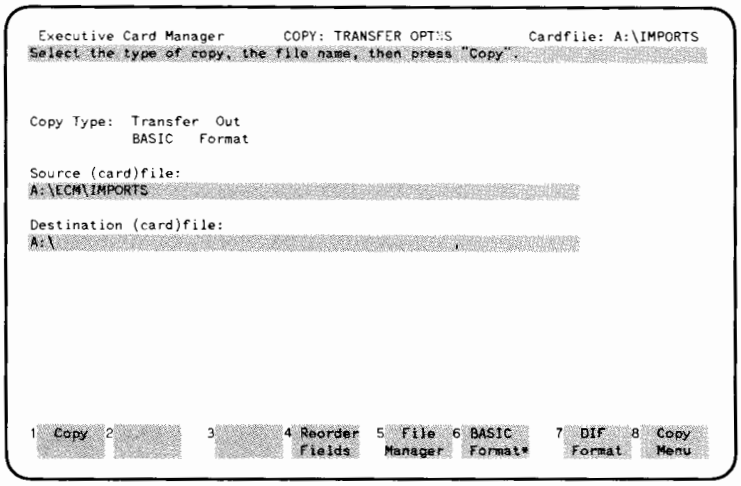
   ```
   Select the type of copy, the file name, then
   choose "Copy".
   ```

   Since you want to transfer out information to a holding file, you must choose this label.

5. Choose `Transfer Out`.

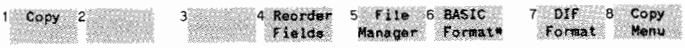
Using the Transfer Out Menu

When you choose Transfer Out, ECM marks this label with an asterisk and displays the "Transfer Out" version of the Transfer Options menu.



On the "Transfer Out" menu, ECM supplies the name of the current cardfile for the `Source (card)file`. You cannot change this entry. ECM expects you to name the holding file, so it highlights the area under `Destination (card)file`. Also, the entry for `Copy Type` shows both the type of copy (in this case `Transfer Out`) and the type of format (in this case `BASIC Format`).

Let's take a quick look at the labels on the Transfer Option menu:



Copy initiates the copy procedure.

When you copy a cardfile using Quick Save, Compact Save, or Merge, ECM copies the fields as they appear on that card form. For the transfer operations, you may specify the order in which ECM transfers fields by using Reorder Fields to display the Reorder Fields menu.

File Manager accesses the File Manager program.

BASIC Format and DIF Format determine how ECM writes the information to the holding file. The important fact to remember is that you must use the same format to transfer information out and in. Unless you direct it otherwise, ECM uses BASIC format. (Appendix D, which describes using ECM with other programs, provides further information on BASIC and DIF format.)

Note

BASIC format passes information as quoted strings. Hence, you should avoid putting quotation marks (") within fields that you plan to transfer to another cardfile. (If any fields have quotation marks in them, you should change this symbol to a single quote (') or two single quotes ('')).

Copy Main returns control to the Copy menu.

Transferring Out the Information

When you want to transfer all the information in a cardfile as it currently appears, your next step is to name the transfer file. However, if you want to change the order in which ECM will transfer the fields, see the concluding section in this chapter on **Setting Fields in Order**.

1. Type a file name for the holding file.

   You may put the holding file on a different disc. If you decide to do this, supply the proper pathname. You may also use a file extension to identify this file as a transfer file. For example, you might type the cardfile name followed by the extension `.BXF` for a BASIC transfer file or `.DXF` for a DIF transfer file.

Note

The next step begins the transfer procedure. If ECM discovers that the name you supplied already exists, it updates the function labels so you may append to the current file, replace the current file, or cancel the operation. If these labels appear, choose Cancel, then provide a distinct name for the holding file.

---

2. Choose Copy.

   ECM informs you it is:

   ```
   Copying current cardfile to disc.
   ```

3. If you decide at this time that you don't want to continue, choose Cancel.

   ECM cancels the operation and deletes the partial holding file.

4. If you allow the transfer to continue, after ECM copies the cardfile, it displays the message COPY COMPLETE and returns control to the Copy menu.

5. Choose ECM Main to return to the Main menu.

Changing the Old Card Form

After you have transferred the field information to a holding file, your next step is changing the old card form. Chapter 9 describes this procedure.

As you are transferring information into the new form in a specific order, you should plan for the necessary changes:

- Wherever you changed the sequence of fields, move the affected fields to their new positions.
- Wherever you incremented the transfer-order number to leave room for a blank field, create this new field on the card form.
- Wherever you omitted assigning a number to a field (so ECM didn't transfer its contents), delete that field from the card form.

You may also make other changes to the card form, such as changing the title or labels, or adjusting the length of different fields. However, be sure you include at least as many fields in the new form as you are transferring from the original cardfile. Also, avoid shortening a field to the extent that it no longer holds its original information.

Once you have modified the card form, you must give it a name and save it to disc. Avoid names that already exist in the directory you plan to use. For example, if your old cardfile is named IMPORTS and you want to store the new cardfile in the same directory, you could name the new cardfile IMPORTS2.

Once you save the card form, ECM returns to the Main menu, and the new cardfile is now the current cardfile. Thus, you are ready to transfer in the information from the holding file.

Transferring In to the Modified Form

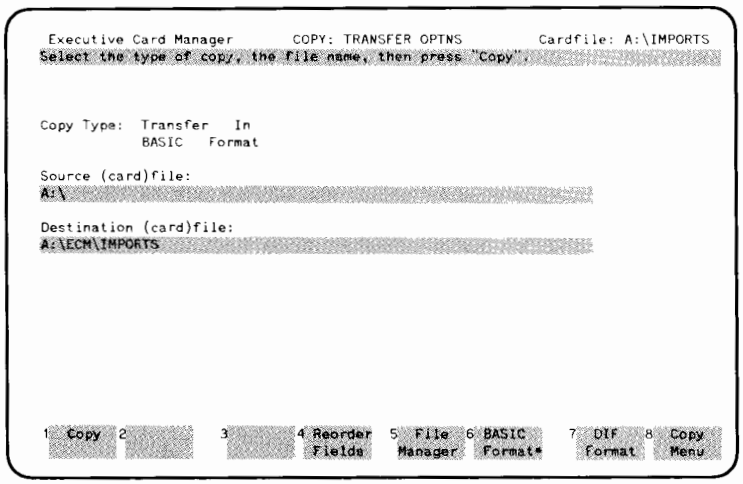
After creating the new card form, your next task is putting the information from the holding file into this form. ECM calls this operation *transferring in*.

1. Start from the Main menu.
2. Choose **Cardfile Tasks**.
3. Choose **Copy Cardfile**.

   ECM displays the Copy menu and asks you to:

   ```
   Select the type of copy, the file name, then
   choose "Copy".
   ```

4. Choose **Transfer In**.



5. If the new card form has additional fields between the fields in the holding file, choose Reorder Fields and skip over the additional fields. (See the concluding section on **Setting Fields in Order**.)
6. Type the name for the holding file.

   Remember to supply the proper pathname, if this file is in a different directory.
7. Choose Copy.

   ECM informs you it is:

   ```
   Copying current cardfile to disc.
   ```
8. If you decide at this time to cancel the operation, choose Stop.

   ECM stops the transfer operation; but as some information may have been transferred to the new cardfile, you should inspect that cardfile and delete any cards, or the entire cardfile, if you don't want this information.
9. If you allow the transfer to continue, after ECM copies the cardfile, it displays the message COPY COMPLETE and returns control to the Copy menu.

Returning to the Main Menu

After you transfer the information from the holding file into your new cardfile, you may do additional copy operations, or you may return to the Main menu to begin other tasks.

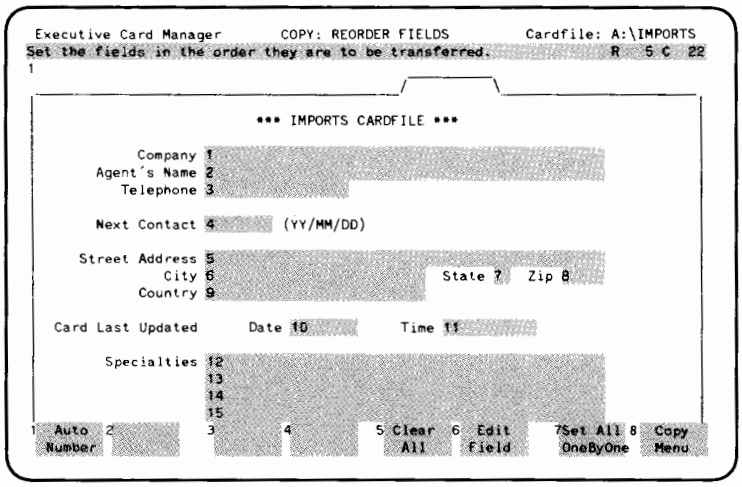
1. Choose ECM Main to return to the Main menu.

   ECM displays the Main menu with your new cardfile showing. If you have changed the primary key field, your cards are sorted accordingly. If you have modified the placement of the fields on the first three lines of the card form, the open-card area reflects this change.

2. If you have no further need for the information in the holding file or the original cardfile, you should delete these files.

Setting Fields in Order

The simpliest way to transfer information from a cardfile is to copy all the fields in their current order. At other times, though, you want the ability to change the order in which ECM transfers the information. When you are working with either of the Transfer Option menus, choosing Reorder Fields displays the Reorder Fields menu:



The Reorder Fields menu contains a copy of the original card form for the current cardfile. ECM has numbered the fields in sequential order, beginning from the top left corner of the form and progressing to the bottom right corner. Because these numbers give the order in which ECM will transfer the fields, you may change the numbers to transfer all or some of the fields in a different order.

When the Reorder Fields menu appears, ECM asks you to:

```
Set the fields in the order they are to be
transferred.
```

When you want to transfer all the fields in their current order, simply leave the menu as it is.

However, you must set a new transfer order when you want to:

- Switch the position of fields on the form.
- Create space to add new fields.
- Remove unwanted fields.

Note

ECM uses the transfer order numbers that presently appear on the menu. (For example, if you leave the menu blank, ECM transfers nothing.) Therefore, when you change the Reorder Fields menu, you should ensure that the numbers appear as you intended.

The following sections on **Rearranging Fields**, **Adding Fields**, and **Removing Fields** explain how to reorder fields when you have a specific task in mind. But, as three function labels may help you with any of these tasks, their use is presented first.

To start with a clean slate:

When you want to rearrange several fields, you may shorten your work by chooseing Clear All. When you choose this label, ECM erases the numbers from all the fields and uses 1 for the first field number. Therefore, move the cursor to the first field you want to transfer, choose Clear All, and begin numbering from there.

To edit the value in a field:

When you move the cursor to a field, ECM displays the transfer-order number for that field on the input line. Field expansion is in effect. (For example, if you have a state abbreviation field that contains two characters and this field is the 100th field you plan to transfer, ECM displays 100 on the input line.)

Field expansion also assists you in changing a field's transfer-order number when the field's size is so small that it prevents you from modifying the number in place.

1. Move the cursor to the field you want to change.

   ECM displays the field's transfer-order number on the input line.

2. Choose Edit Field.

   ECM asks you to:

   ```
   Type the order number for the field then
   press ENTER.
   ```

ECM also fills the current field with slashes and moves the cursor to the input line.

3. You may now modify the number by overtyping characters or by using your keyboard's editing keys.
4. If you change your mind, you may return the original value to its field by choosing Cancel.
5. When you finish making your changes, press Enter.

   ECM returns the cursor to the field and displays as much of the transfer-order number, as possible, within that field. (The entire number appears on the input line.)

To start over:

If you change your mind, you may choose Set All OneByOne. This numbers the field from the top left to the bottom right, starting from one and incrementing by one for each field.

Rearranging Fields

ECM transfers fields in the order specified by the numbers on the Reorder Fields menu. Therefore, if you want to change the order in which fields appear on the new card form, you must supply the proper sequence to produce this transfer order. You may change the order in which ECM transfers fields, either manually or with ECM automatic numbering facilities.

To rearrange fields manually:

If you want to reorder a few fields, follow these simple steps:

1. Move the cursor to a field whose number you want to change.
2. Type the appropriate number into this field.

   ECM also displays the number on the input line.
3. Repeat steps 1 and 2 until you specify the exact sequence you want ECM to follow.

   For example, you may change:

Work Phone 9 Home Phone 10

to:

Work Phone 6 Home Phone 5

by overtyping the numbers in the first listing.

To rearrange fields automatically:

When you are resequencing fields and you want to include several consecutive fields from the old form, follow this procedure:

1. Choose **Auto Number** to start automatic numbering.

   ECM sets the `next field order number` to a value one greater than the current high value on the menu.

2. If you want to set another value for the `next field order number`, choose **Reset Auto Num**.

   When ECM requests a value, enter the appropriate number and press Enter to continue.

   If you change your mind, choose **Cancel** to retain the old number.

3. Move the cursor to the first field you want to include in the new sequence.

4. Choose **Place Auto Num**.

   ECM assigns the `next field order number` to the cursor's current field, increments the `next field order number` by one, and moves the cursor to the next field.

5. Repeat step 4 until you have included all the fields which occur in this sequence.

6. Choose **Auto Number*** to end automatic numbering.

Adding Fields

While setting transfer-order numbers, you should follow a form that shows the design of the new cardfile. Whenever the design shows a new field, you can instruct ECM to leave room for this field by skipping the next number. That is, you produce a gap when you transfer the information to a holding file, then you create a field on the new card form that corresponds to this gap. You may produce the gap manually or with ECM's automatic numbering facility.

To create room manually for a new field:

When numbering fields manually, simply skip the next number in the sequence of transfer-order numbers. For example, if you want to include three new fields between the sixth and seventh fields on the old form, type `6` in the sixth field, then mentally skip numbers 7, 8, and 9 to allow space for the new fields, and type `10` in the seventh field on the old form.

If you want to include several fields from this point, you may choose to rearrange the subsequent fields using the automatic numbering facility.

To create room automatically for a new field:

1. Enter the transfer-order numbers for the fields that precede the new field that you plan to create.
2. Move the cursor to the field that immediately follows the proposed field.

   That is, you want to create a gap between the last numbered field and this field.
3. Choose `Auto Number` to start automatic numbering.
4. Choose `Next Auto Num`.

   ECM increments the `next field order number` by one.
5. If you want to add several consecutive fields, repeat step 4 until you have set aside enough space for all the new fields.
6. Once you have created the appropriate number of blank fields, choose `Place Auto Num`.

   ECM assigns the `next field order number` to the cursor's current field, increments the `next field order number` by one, and moves the cursor to the next field.
7. Choose `Auto Number*` to end automatic numbering.

Removing Fields

When transferring information to a holding file, ECM omits all fields with no transfer-order number. Therefore, if you plan to delete a field on the new card form, you should omit placing this information in the holding file.

1. Move the cursor to the beginning of the unwanted field.
2. Press the Alt + L keys to erase any number which currently appears in that field.
3. If you also want to delete the next field, move the cursor to that field and repeat steps 2 and 3.

Note

If you plan to delete a majority of the fields, you may choose **Clear All** to erase the numbers from all of the fields. Then, just enter numbers for the fields you want to transfer.

---

4. If you want to include several fields sequentially from where you deleted the last field, choose **Auto Number** and follow the procedure for rearranging fields automatically.

Leaving the Reorder Fields Menu

After you finish setting the transfer-order numbers in the Reorder Fields menu, you must choose **Copy Main** to return to the Transfer Options menu you were using.

20 Reference Guide to the Function Labels

This chapter gives an alphabetical listing of the ECM function labels. Each entry supplies:

- the menu heading under which the function label appears
- the corresponding function key (F1 through F8)
- the task it performs

Adapt Old Form — F5 on the Create menu. Choose **Adapt Old Form** when you want to create a new card form by modifying an existing form. When you choose **Adapt Old Form**, ECM requests a cardfile's name, then displays that card form as your model. (See Chapter 9.)

Add Cards — F2 on the Main menu. When you choose **Add Cards**, ECM displays the Add menu with a blank form for you to complete. (See Chapter 11.)

Add This Card — F1 on the Add menu. After entering your information on the blank card form, choose **Add This Card** to place the new card in your cardfile. (See Chapter 11.)

Adjust Field	F3 on the Print menu. Choosing Adjust Field accesses another group of function labels that you may use to change a field's position or to widen, shorten, or remove that field. (See Chapter 17.)
Adjust Rpt Blk	F4 on the Print menu. Choosing Adjust Rpt Blk accesses another group of function labels where you specify a block of text which you want to repeat when printing a cardfile. (See Chapter 17.)
Append	F1 assumes this value when you attempt to copy a cardfile and a cardfile already exists with the name you supplied. Under these circumstances, choosing Append adds the new cardfile to the existing cardfile. (See Chapter 18.)
Auto Number	F1 on the Reorder Fields menu under the Transfer Options menu. When you choose one of the Transfer operations on the Copy menu, ECM provides Reorder Fields so you may specify the order in which ECM should transfer the information on the card form. Auto Number lets you choose whether you want to enter the transfer order manually or with ECM's assistance. Automatic numbering is active when an asterisk appears in the Auto Number* label. (See Chapter 19.)
Average Field	F3 on the Break Options menu under the Print menu. Choosing Average Field includes the current field when computing an average. (See Chapter 17.)

F6 on the Transfer Options menu. When you choose one of the Transfer operations on the Copy menu, ECM provides two labels so you may specify how ECM should transfer the information on the card form. Choosing BASIC Format transfers the information as quoted strings. (See Appendix D.)

F6 on the Print menu. Choosing Break Options accesses another group of function labels where you tell ECM which fields it should use for special formatting considerations. (See Chapter 17.)

F8 on the Set Breaks menu. Choosing BreakOpt Menu returns ECM to the Break Options menu. (See Chapter 17.)

F8 on the Set Directory menu. Additionally, this label appears during copying and printing operations. Choosing Cancel stops the current task, and ECM returns the function labels to their previous values.

F7 on the Main menu. Choose Cardfile Tasks if you want to create a cardfile, display a different cardfile, copy a cardfile, delete a cardfile, find out how many cards are in the current cardfile, or access the Modem menu.

F5 on the Reorder Fields menu under the Transfer Options menu. When you choose one of the Transfer operations on the Copy menu, ECM provides Reorder Fields so you may specify in which order ECM should transfer the information on the card form. Then, if you choose Clear All, ECM removes the transfer numbers that it automatically provides for you. Now you may enter the necessary numbers in the blank fields. (See Chapter 19.)

F3 on the Copy menu. When you copy a cardfile using **Compact Save**, ECM creates the most space-efficient version of the cardfile. The extra work required to make this copy takes time. (See Chapter 18.)

F1 on the main Copy menu and also on the Transfer Options menu. After you tell ECM how it should copy a cardfile, choosing **Copy** initiates the copy operation. (See Chapter 18.)

F4 on the Cardfile Tasks menu. When you choose **Copy Cardfile**, ECM displays the Copy menu. From here, you may give ECM explicit directions on how it should copy a cardfile. (See Chapter 18.)

F8 on the Transfer Options menu and also under the Reorder Fields menu. Since ECM provides several options for copying a cardfile, you may traverse to different levels from the Copy menu. Choosing **Copy Main** returns the function labels to the values they have when the Copy menu first appeared and cancels the operation that you were doing. (See Chapter 18.)

F2 on the Break Options menu under the Print menu. Choosing **Count Field** includes the current field in a running tally. (See Chapter 17.)

Create Cardfile

F2 on the Cardfile Tasks menu. Choosing Create Cardfile displays the Create menu and changes the function labels to values that assist you in designing a new card form or adapting an old form. (See Chapter 9.)

Create Menu

This message appears as the label for F8 on the Make/Adjust, Field Types, and Group Fields menus. For the Field Types and Group Fields menus, choosing Create Menu completes your work with that menu and returns control to the Create menu. With the Make/Adjust menu, choosing Create Menu returns control to the Create Menu WITHOUT incorporating your changes. (See Chapter 9.)

Default Values

F6 on the Printer Setup menu under the Print menu. From the Print menu, you may choose Printer Setup to display a menu where you specify characteristics for your printer. Choosing Default Values sets the value in each field to the standard values ECM uses. (See Chapter 17.)

Define Block

F2 on the Adjust Block menu under the Print menu. The Adjust Block menu creates a block of text that ECM repeats across the page or down the page when printing the cardfile. As ECM allows you to modify the repeat block, choosing Define Block sets the size of the block to your specifications. (See Chapter 17.)

Delete Card

F5 on the Select menu. Choosing Delete Card (with confirmation) deletes the card that currently appears on the Select menu. (See Chapter 13.) If you want to delete an entire cardfile, see Delete Cardfile.

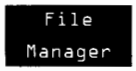
Delete Cardfile	F6 on the Cardfile Tasks menu. Choosing Delete Cardfile (with confirmation) deletes an entire cardfile. (See Chapter 10.) If you want to delete individual cards, see Delete Card.
Dial Phone	F1 on the Main and Select menus. From the Main menu, choosing Dial Phone dials the number in the Autodial field of the card with the highlighted tab. From the Select menu, you may choose any phone field on the card form, then choose Dial Phone to call that number. (See Chapters 13 and 16.)
DIF Format	F7 on the Transfer Options menu. When you choose one of the Transfer operations on the Copy menu, ECM provides two labels so you may specify how ECM should transfer the information. Choosing DIF Format transfers the information in a special format that is recognized by many software houses. (See Appendix D.)
ECM Main	This message appears as the label for F8 on the following menus: Cardfile Tasks, Create, Select, Add, Find, Sort, Copy, Print, and the Modem menu. Choosing ECM Main returns ECM to the Main menu, WITHOUT completing the task that you began. The only exception to this rule is the Select screen, where any changes you make are incorporated into the cardfile.
Edit Field	F6 on the Find menu and on the Reorder Fields menu which is under the Transfer Options menu. If you want to modify the contents of a field and the field is too small to display all the symbols, you may choose Edit Field then make changes to the field's contents on the Input Line. (See Chapters 14 and 19.)

F5 on the Group Fields menu under the Create menu. From the Create menu, you may choose Group Fields to tell ECM if it should consider an individual field to be part of a larger grouping. After establishing such a group, you may remove a field from the active group by choosing Exclude Field. (See Chapter 19.)

F8 on the Main menu. When you choose Exit ECM, ECM asks for confirmation that you want to leave the ECM program. Choosing Yes ends your current session. (See Chapter 6.)

When you create a workset from a cardfile, ECM updates the message for F8 to read Exit Workset. When you finish using the workset, choosing Exit Workset returns ECM to the Main menu with the current cardfile showing. In this process, ECM discards the workset; so if you want to retain the workset, you must copy it before you choose Exit Workset. (See Chapter 10.)

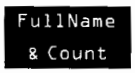
F2 on the Create menu. Choosing Field Types displays another group of function labels where you specify if a field should be a Key field, Autodial field, Auto Date field, or Auto Time field. (See Chapter 19.)



F5 on the Directory, Copy, and Transfer Options menu. Choosing File Manager brings up the File Manager program. From here, you may set another pathname as the default; find files in any directory; return files to ECM; or rename, delete, and browse files. (See Appendix E.)

F3 on the Main menu. When you choose **Find Cards**, ECM displays the Find menu. You use this menu to search for cards that meet particular criteria or to mark (or unmark) a cardfile or workset. (See Chapter 14.)

F1 on the Find menu. Use **Find & View** after you have told ECM which cards you want to isolate. When you choose **Find & View**, ECM searches the current cardfile and finds all the cards that meet your criteria. (See Chapter 14.)



F7 on the Cardfile Tasks menu. Choosing **FullName & Count** displays the complete pathname for the current cardfile and the number of cards it contains. (See Chapter 12.)

F3 on the Cardfile Tasks menu. Choose **Get Cardfile** when you want to view a different cardfile or when no cardfile appears as the current cardfile. (See Chapter 12.)

F7 on the Print menu. Choosing **Get Fields** displays another group of function labels where you specify how ECM should format your cardfile and what fields it should print. (See Chapter 17.)

F1 on the Print menu. Choosing **Get Format** recalls a previously defined set of instructions for printing a cardfile. (See Chapter 17.)

Get Values

F1 on the Modem menu and the Printer Setup menu which is under the Print menu. From the Print menu, you may choose Printer Setup to display a menu that tells ECM how your printer works. Choosing Get Values sets the fields to values that you have previously defined for another cardfile. In a similar fashion, when you are filling in the Modem menu, pressing F1 loads values that you have previously saved to configure your modem. (See Chapters 16 and 17.)

Group Fields

F4 on the Create menu. Choosing Group Fields accesses another group of function labels where you may tell ECM to consider individual fields as though they were part of a larger grouping. (See Chapter 17.)

Hidden Field

F5 on the Break Options menu under the Print menu. When you choose Hidden Field, ECM only prints the contents of the current field if it also appears in a sum, count, or average field. (See Chapter 17.)

Include Field

F1 on the Group Fields menu under the Create menu. From the Create menu, you may choose Group Fields to tell ECM which fields it should group together. Choosing Include Field adds the field in which the cursor appears to the currently active group. (See Chapter 17.)

Label Format

F5 on the Get Fields menu under the Print menu. Choosing Label Format instructs ECM to print the cardfile as mailing labels. (See Chapter 17.)

F3 on the Create menu. Choosing **Make/Adjust Field** accesses another group of function labels which you use to change a field's position or to widen, shorten, or remove that field. (See Chapter 17.)

F3 on the Find menu. Choosing **Mark All** marks every card in the cardfile or workset you are using. An asterisk, which serves as the mark, appears on the card's index tab when the cards are returned to their cardfile. (See Chapter 13.)

F4 on the Main and Select menus. Choosing this label marks the card that appears on the Select menu or whose index tab is highlighted on the Main menu. (An asterisk appears in the label to draw attention to this card.) Subsequently, if you want to remove the asterisk from the tab, choosing **Mark/Unmark** returns the card to its unmarked condition. (See Chapter 13.)

F4 on the Copy menu. You normally merge two files when you want to update one cardfile with information from a subset of that cardfile. However, you may also choose **Merge** to join two cardfiles together. (See Chapter 18.)

F1 on the Cardfile Tasks menu. Choosing **Modem Menu** displays the Modem menu, where you set special instructions for using your modem and define Dial Codes to ease your using the Autodial feature. (See Chapter 16.)

New Group

F4 on the Group Fields menu under the Create menu. From the Create menu, you may choose **Group Fields** to tell ECM whether it should consider an individual field to be part of a larger grouping. Choosing **New Group** updates the active group number to the next available value between 1 and 10. (See Chapter 9.)

Next Auto Num

F3 on the Reorder Fields menu under the Transfer Options menu. When you choose one of the Transfer operations on the Copy menu, ECM provides the **Reorder Fields** label so you may specify in which order ECM should transfer the information on the card form. Then, choosing **Auto Number** updates the value of F3 to **Next Auto Num**. Choosing **Next Auto Num** skips the next sequential number n the transfer sequence. This creates a phantom field, where you may insert a new field on the new card form. (See Chapter 19.)

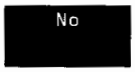
Next Card

F3 on the Select menu. Choosing **Next Card** displays the next sequential card in the cardfile. This action also saves any changes that were made to the card on which you were working. When ECM is displaying the last card in the cardfile, choosing **Next Card** brings up the first card. (See Chapter 13.)

Next Group

F3 on the Group Fields menu under the Create menu. From the Create menu, you may choose **Group Fields** to tell ECM whether it should consider an individual field to be part of a larger grouping. Choosing **Next Group** displays the next sequential number for the active group number. (See Chapter 9.)

F3 on the Printer Setup menu under the Print menu. From the Print menu, you may choose Printer Setup to display a menu that tells ECM how your printer works. All but one of these fields have a predefined set of values. Choosing Next Value displays the next permissible choice for the current field. (See Chapter 17.)



F5 on the Set Breaks menu under the Print menu. Choose No when you don't want ECM to start a new page when the value in the designated field changes. (See Chapter 17.) This label also appears under certain tasks to allow you to cancel a request.

F4 on the Reorder Fields menu under the Transfer Options menu. When you choose one of the Transfer operations on the Copy menu, ECM provides the Reorder Fields label so you may specify in which order ECM should transfer the information on the card form. Choosing Auto Number updates the value of F4 to Place Auto Num. Choosing Place Auto Num places the number that appears on the Status Line in the current field. Additionally, ECM increments the count on the Status Line by one in preparation for your entering the next number. (See Chapter 19.)

F7 on the Get Fields menu under the Print menu. When designing a report, you use the Get Fields menu to tell ECM which fields it should print and how it should format these fields. After you make these decisions, choosing Place Fields returns control to the Print menu, where ECM paints the screen with the design you requested. (See Chapter 17.)

Previous Card

F2 on the Select menu. Choosing **Previous Card** displays the card that comes before the card that currently appears on the Select menu. (This action also saves any changes you made to the card on which you were working.) When ECM is displaying the first card in the cardfile, choosing **Previous Card** brings up the last card. (See Chapter 13.)

Previous Group

F2 on the Group Fields menu under the Create menu. From the Create menu, you may choose **Group Fields** to tell ECM whether it should consider an individual field to be part of a larger grouping. Choose **Previous Group** to display the previous number for the active group number. (See Chapter 9.)

Previous Value

F2 on the Printer Setup menu under the Print menu. From the Print menu, you may choose **Printer Setup** to display a menu that tells ECM how your printer works. All but one of these fields have a predefined set of values. Choosing **Previous Value** displays the previous choice for the current field. (See Chapter 17.)

Print All Crds

F1 on the Print Options menu under the Print menu. After you have fully specified how you want ECM to print your cardfile, choosing **Print All Crds** prints the entire cardfile. (See Chapter 17.)

F6 on the Select menu. Choose **Print Card** to print individual cards. When you choose **Print Card**, ECM prints the card that currently appears on the Select menu complete with its card borders, title, and field labels. (See Chapter 13.)

F6 on the Cardfile Tasks menu. Choosing **Print Cardfile** displays the Print menu. From here, you may use other labels to print all or some of the information from the cards in the current cardfile. (See Chapter 17.)

This message appears as the label for F8 on the following menus: Get Fields, Adjust Field, Break Options, Adjust Block, and Print Options. For the Break Options and Print Options menus, choosing **Print Menu** completes the task of setting options and returns control to the Print menu. For the remaining menus, choosing **Print Menu** returns ECM to the Print menu, WITHOUT completing the task which you began. (See Chapter 17.)

F5 on the Print Options menu under the Print menu. Choosing **Print One Card** prints the first card in the cardfile so you may verify that everything is working properly before you print the entire cardfile. (See Chapter 17.)

F2 on the Print menu. Choosing **Print Options** accesses another group of unction labels where you tell ECM how much information it should print and to what device. It also provides access to the Printer Setup menu. (See Chapter 17.)

PrintOpt Menu	F8 on the Printer Setup menu. Choosing PrintOpt Menu returns ECM to the Print ption menu, WITHOUT saving the values you have entered. (See Chapter 17.)
Printer Setup	F6 on the Print Options menu under the Print menu. Choosing Printer Setup displays he Printer Setup menu, where you may set special characteristics for your printer. (See Chapter 17.)
Quick Save	F2 on the Copy menu. Choosing Quick Save makes a file-to-file copy of the three files that constitute a cardfile. Although this procedure is fast, it may be wasteful of disc space. (See Chapter 18.)
Redraw Border	F6 on the Create menu. Choosing Redraw Border displays other labels that allow ou to redraw the card's borders. (See Chapter 9.)
Remove Field	F5 on the Make/Adjust Field menu under the Create menu, and the Adjust Field menu under the Print menu. Choosing Remove Field deletes the field in which the cursor appears. (See Chapters 9 and 11.)
Reorder Fields	F4 on the Transfer Options menu. When you choose one of the Transfer operations on the Copy menu, ECM provides this label so you may specify the order in which ECM should transfer the information. (See Chapter 19.)

Replace	F5 assumes this value when you attempt to copy a cardfile and a cardfile already exists with the name you supplied. Choosing Replace overwrites the old cardfile with the new cardfile. (See Chapter 18.)
Report Format	F6 on the Get Fields menu under the Print menu. When designing a report, you use the Get Fields menu to tell ECM which fields it should print and how it should format these fields. Choosing Report Format prints a cardfile as a series of columns in report format. (Additionally, ECM provides several features so you may customize the report to your specific needs.) (See Chapter 17.)
Reset Auto Num	F2 on the Reorder Fields menu under the Transfer Options menu. When you choose one of the Transfer operations on the Copy menu, ECM provides the Reorder Fields label so you may specify in which order ECM should transfer the information. Choosing Auto Number updates the value of F2 to Reset Auto Num. Choosing Reset Auto Num resumes numbering the fields automatically, beginning with the number that currently appears on the Status Line. (See Chapter 19.)
Restore Original	F7 on the Select and Sort menus. Use Restore Original when you want to return the card to its original form. You must take this action, however, before you choose any other function label. (See Chapters 13 and 15.)
Save Cardfile	F1 on the Create menu. After you have designed a card form, choosing Save Cardfile saves the card form as a permanent cardfile. (See Chapter 9.)

F1 on the the Adjust Block menu. After you complete your task, choosing **Save Changes** preserves the changes you made.

F5 on the Print menu. After you fully specify how ECM should print a cardfile, choosing **Save Format** saves this information so you may use it again. (See Chapter 17.)

F5 on the Modem menu and the Printer Setup menu which is under the Print menu. From the Print menu, choose **Print Options** then choose **Printer Setup** to display a menu that tells ECM how your printer works. Choosing **Save Values** stores the values so you may subsequently recall them. In a similar fashion, if you are filling in the Modem menu, choosing **Save Values** stores the information in this menu for future use. (See Chapters 17 and 18.)

F1 on the Get Fields menu under the Print menu. When designing a report, you use the Get Fields menu to tell ECM which fields it should print and how it should format these fields. Choosing **Select All Flds** includes all the fields in the card form. You may subsequently modify how the fields appear by using the Adjust Field menu. (See Chapter 17.)

F3 on the Get Fields menu under the Print menu. When designing a report, you use the Get Fields menu to tell ECM which fields it should print and how it should format these fields. Choosing this label includes the cursor's current field in the design for the layout of the printed document. (See Chapter 17.)

Set All OneByOne	F7 on the Reorder Fields menu under the Transfer Options menu. When you choose one of the Transfer operations on the Copy menu, ECM provides the Reorder Fields label so you may specify in which order ECM should transfer the information. When the Reorder Fields menu appears, ECM automatically numbers all the fields on the card form. If you change this initial order then decide to retain it, choosing Set All OneByOne returns the number in the fields to their original sequence. (See Chapter 19.)
Set Breaks	F6 on the Break Options menu. Choosing Set Breaks accesses another group of function labels where you can tell ECM whether it should start a new page if the value in a Break Option field changes. (See Chapter 17.)
Set Direc'ry	F5 on the Cardfile Tasks menu. Choosing Set Direc'ry allows you to set a new default directory without accessing the File Manager program. (See Chapter 19.)
Set/Clr Autodial	F1 on the Field Types menu under the Create menu. Choosing Set/Clr Autodial marks the cursor's current field as the default Autodial field. To clear this setting, move the cursor to the Autodial field and choose Set/Clr Autodial. This clears the field of its Autodial setting. (See Chapter 9.)

Set/Clr Date

F6 on the Field Types menu under the Create menu. Choosing Set/Clr Date marks the cursor's current field as an Auto Date field. (ECM automatically stamps this field with the date when you change any information on the card form.) To clear this setting, move the cursor to the Auto Date field and choose Set/Clr Date. This clears the field of its Auto Date setting. A card form can contain one Auto Date field. (See Chapter 9.)

Set/Clr Descend

F5 on the Field Types menu under the Create menu and on the Sort menu. This label tells ECM whether it should sort key fields in ascending or descending order. Normally, ECM sorts cards in ascending order, so if you want cards sorted in descending order, choose Set/Clr Descend to set this feature. Subsequently, if you change your mind, choose Set/Clr Descend while the cursor is within that field to revert to an ascending sort order. (See Chapters 9 and 15.)

Set/Clr Key1

F2 on the Field Types menu under the Create menu and on the Sort menu. Choosing Set/Clr Key1 marks the cursor's current field as the primary key field. Choosing it again marks the primary key field as a numeric field. To clear a primary key field, move the cursor to the primary key field and choose Set/Clr Key1 again. This clears the field of its primary key setting. (See Chapters 9 and 15.)

F3 on the Field Types menu under the Create menu and on the Sort menu. Choosing Set/Clr Key2 marks the cursor's current field as the secondary key field. Choosing it again marks the secondary key field as a numeric field. To clear a secondary key field, move the cursor to the secondary key field and choose Set/Clr Key2 again. This clears the field of its secondary key setting. (See Chapters 9 and 15.)

F4 on the Field Types menu under the Create menu and on the Sort menu. Choosing Set/Clr Key3 marks the cursor's current field as the tertiary key field. Choosing it again marks the tertiary key field as a numeric field. To clear this setting from a field, move the cursor to that field and choose Set/Clr Key3 again. This clears the field of its tertiary key field setting. (See Chapters 9 and 15.)

F7 on the Field Types menu under the Create menu. Choosing Set/Clr Time marks the cursor's current field as an Auto Time field. (ECM automatically stamps this field with the time when you change any information on the card form.) To clear this setting, move the cursor to the Auto Time field and choose Set/Clr Time. This clears the field of its Auto Time setting. A card form can contain one Auto Time field. (See Chapter 9.)

F2 on the Make/Adjust Field menu under the Create menu and the Adjust Field menu under the Print menu. Choosing Shorten Field deletes one character position from the field in which the cursor appears. Use Remove Field if you want to delete the entire field. (See Chapters 9 and 19.)

F4 on the Adjust Block menu under the Print menu. The Adjust Block menu creates a block of text that ECM repeats across the page or down the page when printing the cardfile. Choosing **Smallest Depth** set the vertical length of the repeat block to the smallest size that will hold the given information. (See Chapter 17.)

F3 on the Adjust Block menu under the Print menu. The Adjust Block menu creates a block of text that ECM repeats across the page or down the page when printing the cardfile. Choosing **Smallest Width** set the horizontal length of the repeat block to the smallest size that will hold the given information. (See Chapter 17.)

F5 on the Main menu. Choosing **Sort Cards** displays the Sort menu where you may resort the cards in a cardfile. (See Chapter 15.)

F1 on the Sort menu. When you choose **Sort & View**, ECM reorganizes the current cardfile according to the new key fields which you have specified. ECM displays the results as a workset of the current cardfile. (See Chapter 15.)

F8 when appending, merging, or transferring in information from the Copy menu. When you choose **Stop Copying**, ECM stops the operation at that point. (See Chapter 18.)

F8 when a printing operation is in progress. When you choose **Stop Printing**, ECM stops the operation at that point. (See Chapter 17.)

F1 on the Break Options menu under the Print menu. Choosing **Sum Field** includes the value of the current field in an accumulating sum. (See Chapter 17.)

F3 on the Print Options menu under the Print menu. Choosing **To file** prints the cardfile to a disc file for storage. (See Chapter 17.)

F2 on the Print Options menu under the Print menu. Choosing **To Printer** prints the cardfile to the printer that you have specified in the Printer Setup menu. (See Chapter 17.)

F4 on the Print Options menu under the Print menu. Choosing **To Screen** prints the cardfile to your computer's display. You may choose this option so you may verify that everything is working properly before printing the cardfile to paper or to a disc. (See Chapter 17.)

F6 on the Adjust Block menu under the Print menu. The Adjust Block menu creates a block of text that ECM repeats across the page or down the page when printing the cardfile. Choosing **Top Edge Down** shifts the border of the repeat block down one line. The information above the repeat block is repeated at the beginning of each page, while the information within the repeat block is repeated down the page or across the page. (See Chapter 17.)

Top Edge Up

F5 on the Adjust Block menu under the Print menu. When creating a repeat block of text, you may include titles or headings by choosing Top Edge Up to include this text within the repeat block. (See Chapter 17.)

Transfer In

F6 on the Copy menu. Choose Transfer In to bring in information from other programs to ECM or to move information from a holding file into a modified ECM card form. (See Chapter 19.)

Transfer Out

F7 on the Copy menu. Choose Transfer Out to transfer the information from a cardfile for use with other programs or to be stored in a holding file while you change a ECM card form. (See Chapter 19.)

Unmark All

F4 on the Find menu. Choosing Unmark All (with confirmation) removes the asterisk from the tab of every card in the current cardfile or workset. (See Chapter 14.)

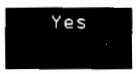
Unselect All Flds

F2 on the Get Fields menu under the Print menu. When specifying which fields ECM should include in the printed document, you may change your mind. In this case, choosing Unselect All Flds removes all the field numbers from the current list of chosen fields. (See Chapter 17.)

F4 on the Get Fields menu under the Print menu. When designing a report, you use the Get Fields menu to tell ECM which fields it should print and how it should format these fields. If you initially included a field in the printed document then changed your mind, you may move the cursor to the appropriate field and choose **Unselect Field** to remove this field from the list of chosen fields. (See Chapter 17.)

F5 on the Find menu. Choosing **View Marked** creates a workset that contains all the marked cards in a cardfile. (See Chapter 14.)

F3 on the Make/Adjust Field menu under the Create menu and the Adjust Field menu under the Print menu. Choosing **Widen Field** adds one character position to the field that contains the cursor. (See Chapters 9 and 19.)



F1 on the Set Breaks menu under the Print menu. Choosing **Yes** directs ECM to start a new page when printing the report if the value in the indicated field changes. (See Chapter 17.) This label also appears under certain tasks to confirm that you want to complete the current operation.

A ECM Specifications

Cardfile features

- Number of cardfiles limited by disc capacity
- Up to 64,000 cards per cardfile
- Free-form cardfile creation by "drawing" the form on the screen or by using an existing form
- Up to three key fields

Card features

- Up to 11 screens (255 lines) of information per card
- Automatic date and time stamping

Sorting features

- Reassignable key fields
- Temporary or permanent sorts
- Ascending or descending order
- Numeric sort

Searching features

- Search criteria include: <, >, <=, >=, =, NOT, and logical combinations of them
- Literal or numeric searches
- Wildcard searches
- Multiple-field searches
- Group-field searches
- Mark resulting subsets

Telephone features*

- Multiple number of autodial fields
- Up to 8 pre-definable phone macros
- Pulse and tone compatibility

Merge features

- Merges cardfiles with automatic card update

Report features

- User-definable report format and content
- Report width of up to 255 characters
- Retrievable report format
- Unlimited report length
- Performs totals, sub-totals, counts, averages, and page breaks
- Access to escape sequences
- Prints to screen, printer, or a file

**requires modem*

Mailing label features

- User-definable label format and content
- Multiple labels across
- Limited form-letter generation capability
- Retrievable label format
- Prints to screen, printer, or a file

Integration features

- Runs with HP Access
- Conversion utility for Personal Card File cardfiles
- Data compatibility with Lotus 1-2-3™, Executive Spreadsheet, WordStar, MailMerge, dBASE, BASIC, and Condor

B Converting PCF Cardfiles and HP 150 ECM Cardfiles

Both Executive Card Manager and Hewlett-Packard's Personal Card File (PCF) use the image of a cardfile to store information. If you attempt to use a PCF cardfile with ECM, however, ECM informs you:

```
Improper cardfile version-not an ECM cardfile.
```

The first section in this appendix describes the necessary procedures to convert your PCF cardfiles, so their information is available to ECM. (While the procedures assume you have a dual, flexible disc drive, you can easily modify the procedures if you are using a fixed disc.)

The second section in this appendix describes the procedures to convert an HP 150 ECM cardfile to an ECM cardfile for your personal computer.

Converting a PCF Cardfile

Your *Setting Up Executive Card Manager* manual describes how you install and authorize the ECM program. Since the conversion utility is an easy-to-use tool that assists you in converting your cardfiles, you needn't follow those instructions to install the conversion disc. Instead, you only have to follow these simple steps to load the conversion utility into your computer's memory and then follow the explanatory instructions on your display.

To load the conversion utility:

1. Start from the PAM menu.
2. Insert the disc that contains the conversion utility into one of your drives.
3. Choose Reread Discs.

   A box for the conversion utility appears on the PAM menu.
4. Choose PCF-TO-ECM.
5. Choose Start Applic to display the conversion utility's Main menu:
6. After the menu appears, you may remove the utility disc from its drive.

You are now ready to convert your PCF cardfiles. The next procedure describes converting cardfiles from a PCF work disc and placing them on another work disc. If you are placing the converted cardfiles on a brand new disc, remember to format the disc before you begin.

To create a new cardfile:

1. Insert the disc with your PCF cardfile into a drive.
2. Insert a disc to hold the new ECM cardfiles into the other drive.

Note

If you are using a fixed disc, you should place your PCF cardfile disc in the flexible drive and store the new ECM cardfiles in the proper directory on your fixed disc.

3. Enter the name for the PCF cardfile you want to convert. (Remember to provide the proper pathname.)
4. Press [Enter] to move the cursor to the `Destination` field.
5. Enter the full cardfile name for the new ECM cardfile.
6. Choose **Convert Cardfile**.

   ECM informs you it is:

   ```
   Converting cardfile.
   ```

7. If you decide to cancel the operation, choose **Cancel**.

Note

Only choose **Cancel** once. ECM detects the keystroke and puts your file system in order before it comes back to you for further instructions.

After ECM restores your directory, it displays the message:

```
CONVERSION CANCELLED.
```

You may now enter different names or leave the program.

8. If you allow the operation to finish, the message `CONVERSION COMPLETE` appears, and control returns

to the conversion Main menu. You may now convert another cardfile or leave the program.

9. After you finish converting your PCF cardfiles, choose Exit.

   The PAM menu appears on your display.

To replace an old cardfile:

When you are converting a PCF cardfile, you may also supply the name of an existing ECM cardfile and replace that cardfile with the PCF cardfile.

1. Start from the conversion Main menu.
2. Insert the disc that contains your PCF cardfiles.
3. Enter the full cardfile name (including pathname) of the PCF cardfile.
4. Press Enter to move the cursor to the `Destination` field.
5. Enter the full cardfile name of the ECM cardfile you want to replace.
6. Choose Convert Cardfile.

   Because an ECM cardfile exists with this name, the conversion utility requests additional information.

Caution

If you decide against replacing the PCF cardfile, you should press Cancel to cancel the operation now.

7. Choose Replace.

Once the operation is over, the message `CONVERSION COMPLETE` appears and control returns to the conversion Main menu.

If problems arise:

The conversion utility should convert your PCF cardfiles without any problems. However, if you see any of the following messages on your display, you should follow these instructions to isolate the problem.

If you see the message:

```
Can't open or read the file CONVERT.MNU. Check
your disc
```

the operating system failed to locate the necessary files to load the convert utility. This may happen if the file was accidentally deleted or trashed. In any event, insert the conversion utility master disc into a drive and follow the procedure **to load the conversion utility**.

If you see the message:

```
The cardfile could not be found
```

the conversion utility failed to locate a PCF cardfile with the name you supplied. In this case, exit the conversion utility. When the PAM menu appears, choose `File Manager` and verify that the PCF cardfile is on that disc. (You can identify a PCF cardfile as being the base name before the `.PDT`, `.PFM`, and `.PIX` extensions.) If the cardfile does exists, follow the procedure in Appendix F on **When a disc error occurs**.

Converting an HP 150 ECM Cardfile

When you use an HP 150 ECM cardfile on your personal computer, you'll notice that the border is displayed as a thick bold line. You can use the cardfile as is or, you can convert the HP 150 ECM cardfile into a new cardfile with the proper border on your personal computer.

To convert an HP 150 ECM cardfile, you must follow these procedures to redraw your cardform, then transfer the information from the HP 150 ECM cardfile into your new cardfile.

To convert an HP 150 ECM cardfile:

1. Start from the ECM Main menu.
2. Choose `Cardfile Tasks`.
3. Choose `Create Cardfile`.

   The Create menu appears.
4. Choose `Adapt Old Form`.

   ECM asks you to:

   ```
   Type a cardfile name and press ENTER.
   ```
5. Enter the full cardfile name (including pathname) of the HP 150 ECM cardfile and press Enter.

   ECM informs you it is:

   ```
   ***Getting Old Form***
   ```
6. When the cardform is displayed on your screen, choose `Redraw Border`.

7. Move the cursor onto the row for the bottom border.
8. Choose Redraw Border again. The thick bold line is replaced with the proper border form.
9. Choose Save Cardfile.

   ECM asks you to:

   ```
   Type a cardfile name and press ENTER.
   ```

10. Enter a *new* name for the cardfile (remember to provide the proper pathname), and press Enter.

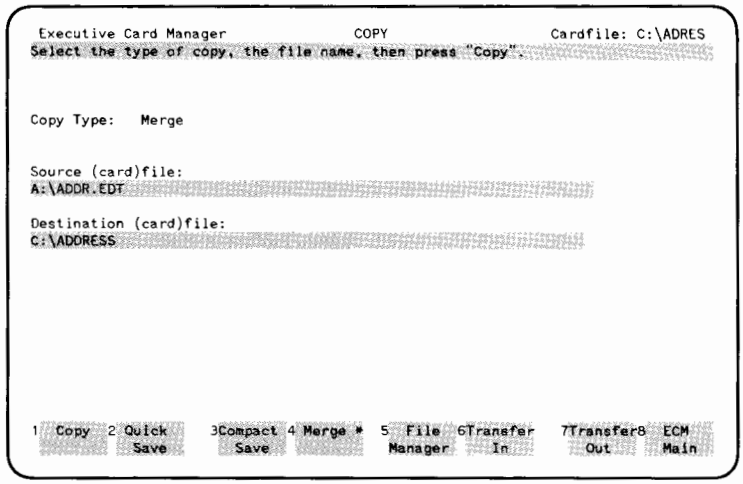
    You are returned to the ECM Main menu.

To merge information from an HP 150 ECM cardfile:

Now you are going to merge the information from the HP 150 ECM cardfile into the new cardfile on your personal computer.

1. Choose Cardfile Tasks.
2. Choose Copy Cardfile. The Copy menu appears.
3. Choose Merge on the Copy menu.

When you choose Merge, the following menu is displayed.



4. In the **Source (card)file** field, enter the name of your HP 150 ECM cardfile (remember to include the proper pathname).
5. Choose Copy.

   ECM tells you it is:

   ```
   ***Merging from cardfile on disc***
   ```

When ECM is finished copying, it displays the message:

```
***Copy complete***
```

6. Choose ECM Main to return to the Main menu.

For Fixed Disc Users

This manual describes using ECM with a dual, flexible disc drive (a typical situation for most users). If you have a fixed disc, however, this appendix explains how you should interpret portions of the manual to account for your needs.

Since a fixed disc can store more information than a flexible disc, you may create several large cardfiles and put them in subdirectories on your fixed disc (which may also hold your computer's operating system and the ECM Application program). Thus, when working with a fixed disc, you must be aware of the pathname for your cardfiles and be ready to take special steps if you want to copy a large cardfile from your fixed disc to a flexible disc. The next sections give the necessary details.

Working with ECM on a Fixed Disc

When you first connect your hard disc to your personal computer and configure your system, the operating system recognizes the flexible disc drive as drive A. (This happens because, without any additional instructions, the computer must load its operating system. Hence, it looks to drive A for this information.) Therefore, to use your hard disc, you first load the operating system from the flexible disc in drive A. After you have done this, you may then copy the operating system to your hard disc. The operating system recognizes the hard disc as drive C. See the owner's manual for your personal computer for complete instructions on setting up your hard disc and for installing application programs (such as ECM) on a hard disc.

After you install ECM on your hard disc, a box for ECM appears as one of the choices on the PAM menu. Simply highlight this box, then choose **Start Applic** or press Enter to start the ECM program.

You can put your cardfiles on your fixed disc, or you may put them on a flexible disc in drive A. Remember, however, to include the drive designator (`A:`) to identify the flexible disc drive when you want to store cardfiles on a disc in drive A.

You may also run ECM from the flexible disc drive, by inserting a work disc with the ECM Application program in drive A. Furthermore, if your computer has several disc drives, you can install ECM in any of the drives. Just remember to supply the correct pathname when you are naming your cardfiles.

The rules concerning the setting of a default pathname for fixed discs and flexible discs are the same. That is, unless you change the default settings, the drive that contains the program you are running is the default drive. For example, if you are running ECM from a flexible disc in drive A, drive A is the default drive (unless you start ECM from a different drive or until you change the default).

Copying a Large Cardfile to a Flexible Disc

Because a fixed disc stores more information than a flexible disc, you can create a cardfile on a fixed disc that is larger than a single, flexible disc can hold. To copy such a cardfile to a flexible disc, you must divide the cardfile then copy the parts onto two or more flexible discs. For example, assume that your Address Book cardfile is too large to copy to one flexible disc, but it easily fits on two discs. Therefore, if your cardfile is arranged alphabetically by last name, you could take these steps to copy the cardfile to two flexible discs:

1. Divide the cardfile into two parts (see Chapter 14).

   For example, you could create one cardfile for people whose last names begin with the letters A through M, and another cardfile for those names from N through Z. When you finish this task, you have three cardfiles on your fixed disc: your original Address Book cardfile, and two smaller cardfiles that contain a portion of the Address Book.

2. Copy the first cardfile (names A through M) to the first flexible disc. (See Chapter 18.)

3. Now copy the other cardfile (names N through Z) to another flexible disc.

Once you have finished copying both cardfiles, you can delete the cardfiles on the fixed disc if you have no further use for them. (Chapter 10 explains how you delete cardfiles.)

When a fixed disc contains a cardfile that is too large to fit on two flexible discs, just modify this procedure to divide the original cardfile into three, four, or more pieces. Then copy each piece to a separate flexible disc.

Using ECM with Other Programs

Because ECM recognizes files written in either BASIC or DIF format, you may use your ECM cardfiles with a wide variety of programs.

For example, using BASIC format, you can:

- Send the information recorded in ECM cardfiles to CONDOR or dBASEII to make your files more widely available.
- Send ECM information to MailMerge and use it with form letters and other documents prepared on WordStar.
- Put ECM information in a BASIC program and use it in computations or for other program manipulations.

Using DIF format, you can:

- Send information from ECM cardfiles to LOTUS 1-2-3 databases or VisiCalc spreadsheets.
- Move information to an ECM cardfile from a LOTUS 1-2-3 or VisiCalc spreadsheet.

This appendix gives general guidelines about using ECM with different application programs. If you desire further information about a particular program, see the manual that describes that application.

Differences in Terminology

Here are some terms that you should know before you use ECM with other programs.

When you send information from a cardfile to another program, ECM calls this task *transferring out*. When you bring information into one of your cardfiles, ECM calls this task *transferring in*. Furthermore, other programs use a different terminology to describe objects that resemble ECM cardfiles. In particular:

- a **card form** in ECM is a *form* in other programs
- a **cardfile** in ECM is a *database* in other programs

Remember that a **file** differs from a ECM **cardfile**. That is, three files constitute one ECM cardfile:

- an `.EDT` file holds the information
- an `.EFM` file holds the card form
- an `.EIX` file tells how to sort the cards

Chapter 7 provides more information about ECM cardfile names.

Character Sets

This section applies only to those that use other than the U.S. characters.

The following table shows that certain characters typed from the Standard (IBM8) or Norwegian/Danish keyboard will appear on your screen as a Roman8 equivalent character.

Numeric Value	Graphic	Description	Roman8 Equivalent
Standard (IBM8)			
158	Pt	Spanish currency symbol	P
Norway/Denmark			
158	L:	Albanian letter	L
159	l:	lowercase L:	l
171	ℓ	script l	½
172	'n	Afrikaans letter	n
174	^{3}	cube	3

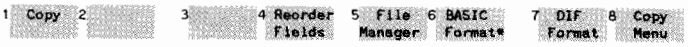
Choosing the Proper Format

ECM allows you to transfer information to and from other application programs by choosing between BASIC and DIF format. Once you choose the proper format for communicating between ECM and the other program, ECM automatically converts your cardfile information to that format when it transfers the information.

Since transferring information is a copy operation, you tell ECM how to transfer information from the Copy menu.

When the Copy menu appears, the function labels have the following values:

If you choose either Transfer In or Transfer Out, ECM displays the following function labels:



ECM normally uses BASIC format, but you may explicitly choose DIF format if the program you are transferring information to or from uses this format. (Consult the reference manual for your application program to see what format it uses.)

Using BASIC Format

In BASIC format, ECM writes the information in a cardfile as an ASCII file of quoted strings, where double quotation marks appear around each string and a carriage return character separates each record.

Note

Since BASIC format depends so heavily on double quotation marks, you should avoid using quotation marks within the text of a field. (If you want to quote information within a field, use an apostrophe as a single quotation mark.)

Each string represents the contents of one field on your card form. If ECM encounters a blank field, it sends an empty string (" ") for this field.

For example, suppose you have a card form with the following fields:

- a title field
- a first name field
- a last name field
- a street address field
- an apartment field
- a city field
- a state field
- a zipcode field

Then, two BASIC records (where each record contains the information in one card form) might appear as:

"Mr.", "Artie", "Shaw", "189 Broadway", "Apt. 6C", "New York", "NY", "10036"

"Mr.", "Louis", "Armstrong", "1789 Bourbon St.", "", "New Orleans", "LA", "70130"

Note

BASIC format uses a carriage return character to separate each record in the resulting ASCII file.

Notice that Louis Armstrong's card has no apartment number. Hence, a blank field (shown as " ") reserves space for this field. It is mandatory that this empty field appear; otherwise, ECM becomes confused and interprets "New Orleans" as the apartment number, "LA" as the city, and "70130" as the state.

Other application programs may distinguish between character fields (those containing words) and numeric fields and not put quotation marks around these fields. In fact, certain application programs only use quotation marks to avoid confusion when a comma appears within a field. For example, in a CONDOR record, the ZIP code field may be separated from the state field by a comma, rather than quotes, as in "NY", 10036.

ECM treats each field as if it were a character field; thus it places double quotes around the contents of every field. Considering the same example used above, ECM would send the state and ZIP code fields as "NY", "10036". Nevertheless, ECM correctly interprets the CONDOR file because of the way ECM determines the limits of a field. ECM reads a record one character at a time. It opens a field at the beginning of a record or when it encounters a double quotation mark. When a field opens with a double quotation mark, ECM closes the field at the next double quotation mark that is followed by a comma or (if the field is the last field in that record) by a carriage return. When a field begins without a double quotation mark, ECM closes the field at the next comma or carriage return character.

Other application programs can read ECM's all-quoted format, since they also determine where a field begins and ends in essentially the same manner.

Using DIF Format

If you are transferring information with ECM, choosing DIF Format selects DIF format. (ECM removes the asterisk for the BASIC Format* label and places it in the DIF Format* label.)

The DIF format is another standard file format that permits different application programs to share information. When you save a file using DIF format, it becomes a text file that other DIF-supporting programs can read.

To ease the transfer of information between programs, DIF format uses several simplifying techniques:

- The first part of the file gives the file's size.
- Records are kept as short as possible.
- The format explicitly declares whether a piece of information is a character string or a number.
- Character strings are stored one per line.
- Strings that contain special characters are enclosed in quotation marks.
- The file ends with an explicit End-Of-Data record.

Since ECM automatically constructs the DIF file for you, you needn't concern yourself with these details unless you are writing your own programs to read a DIF file. If you want additional information on using DIF, you may write to:

DIF Clearinghouse
P.O. Box 527
Cambridge, MA 02139

Transferring Information to Another Program

When you transfer information to another application program, ECM first makes a copy of the information contained in your original cardfile so the information in that cardfile remains unchanged. Then, during the copying process, ECM translates the information using a specific format that the target program can understand. When you are specifying how ECM should copy a file, unless you explicitly tell ECM to translate the cardfile in DIF format, ECM passes the information in BASIC format.

You can send all the information in your cardfile to another program, or only a portion of it. Furthermore, you may rearrange the order in which ECM transfers the information. (Refer to Chapter 19 for details on the Transfer copy operation.) Please refer to this chapter for full details. In general, though, transferring information to another program involves two operations:

- First you enter ECM and transfer out the information to a holding file.
- Then you enter the other application program and read in the information so you can use it.

Caution

For some programs, the holding file becomes a permanent file. For others, you can delete the holding file after you finish the transfer. The following sections provide the necessary information for each application program.

Remember these points when you plan to transfer information to another program.

- You must transfer the information from your ECM card form so it corresponds to the fields in the file where you are transferring them.
- Make sure that the fields in the destination file are the same length (or longer) than the corresponding fields in your ECM card form. Otherwise, any information that doesn't fit in the destination fields is lost.
- Applications vary in the way they treat information when the card form contains a different number of fields. Most transfer operations work if the destination form has at least as many fields as the ECM card form. Some applications, however, allow the destination file to have fewer fields. Consult the manual for the program you are using to see what stipulations apply.

Note

The following text places angled brackets (< >) around parameters within a command line. You should supply the appropriate name for the descriptive term that appears within these brackets.

Transferring Information to CONDOR

Follow this procedure to transfer information from an ECM cardfile to a CONDOR program.

1. Enter ECM and get the cardfile you want to transfer.
2. Follow the instructions in Chapter 19 to transfer the necessary information, using BASIC format, to a holding file.
3. Enter the CONDOR program.
4. When you are transferring dates from fields where you used a YY/MM/DD format, type the command:

   ```
   SET DATE YY/MM/DD
   ```

   This step is necessary because CONDOR normally reads dates in a MM/DD/YY format.
5. Then, to direct CONDOR to transfer the information, type:

   ```
   READ <database> <holding file>
   ```

   For example, assume that you transferred the information from a cardfile called CLIENTS into a holding file named CLIENTS.BXF and that you are now ready to transfer it to a CONDOR database named CONTACTS. In this case, you would type:

   ```
   READ CONTACTS CLIENTS.BXF
   ```

After you finish transferring the information, you can delete the holding file (CLIENTS.BXF) if you wish.

Transferring Information to dBASEII

Follow this procedure to transfer information from an ECM cardfile to a dBASEII program.

1. Enter ECM and get the cardfile you want to transfer.
2. Follow the instructions in Chapter 19 to transfer the necessary information, using BASIC format, to a holding file.
3. Enter the dBASEII program.
4. To direct dBASEII to transfer the information, type:

   ```
   APPEND FROM <holding file> DELIMITED
   ```

   For example, assume you transferred the information from a cardfile called CLIENTS to a holding file named CLIENTS.BXF, and you are now ready to transfer it to your dBASEII database. In this case, you would type:

   ```
   APPEND FROM CLIENTS.BXF DELIMITED
   ```

After you finish transferring the information, you may delete the holding file if you wish.

Transferring Information to MailMerge

Follow this procedure to transfer information from an ECM cardfile to a WordStar program.

1. Enter ECM and get the cardfile you want to transfer.
2. Follow the instructions in Chapter 19 to transfer the necessary information, using BASIC format, to a holding file. (This becomes your **permanent** WordStar datafile.)
3. Enter the MailMerge program.
4. Insert this command in your master WordStar document:

   ```
   .DF <filename>
   ```

   For example, assume you transferred the information from a cardfile called CLIENTS to a holding file named CLIENTS.BXF. The holding file becomes a permanent Wordstar datafile named CLIENTS.BXF., so you should insert:

   ```
   .DF CLIENTS.BXF
   ```

5. Now insert this command:

   ```
   .RV <variableA>, <variableB>,
   <variableC>, ... <variableZ>
   ```

   Each variable is a field that you transferred to MailMerge. For example, if you transferred five fields for a person's name and address from your cardfile, <variableA> is the first field (for example, Name), <variableB> is the second field (Street), and so forth. That is, for this example, you could enter:

   ```
   .RV NAME, STREET, CITY, STATE, ZIPCODE
   ```

6. Then, in the master document, include `&<variableA>&, &<variableB>&,` and so on, wherever you want the information in those fields to appear.

   For example, you would refer to the five fields that you transferred by entering: `&NAME&, &STREET&, &CITY&, &STATE&,` or `&ZIPCODE&` at the appropriate place.

See your WordStar/MailMerge manual for information on setting up your master document.

Transferring Information to a BASIC Program

Follow this procedure to transfer information from an ECM cardfile to a BASIC program.

1. Enter ECM and get the cardfile you want to transfer.
2. Follow the instructions in Chapter 19 to transfer the necessary information, using BASIC format, to a holding file. This becomes your **permanent** BASIC data file.
3. Enter the BASIC program.
4. Because BASIC treats the data file from step 2 as a sequential access file, you may use it as such in your BASIC programs. (Consult your BASIC manual for more information.)

Transferring Information to LOTUS 1-2-3

LOTUS 1-2-3 allows you to specify a task by typing a series of commands (where each command determines what additional commands are appropriate). The following procedure describes one possible sequence. See your LOTUS 1-2-3 owner's manual for more information.

1. Enter ECM and get the cardfile you want to transfer.
2. Follow the instructions in Chapter 19 to transfer the necessary information, using DIF format, to a holding file.
3. Enter the LOTUS 1-2-3 program.
4. To direct LOTUS to transfer the information, enter the following sequence of commands:

   `File Import`
   `Numbers`
   then enter the file's name

Note

The Numbers format looks for the quoted strings that the BASIC format supplies.

You may also use the Translate utility to create a worksheet from a DIF file by specifying `DIF to WKS`. (See your LOTUS 1-2-3 manual for further information.)

Transferring Information to VisiCalc

Follow this procedure to transfer information from an ECM cardfile to a VisiCalc program.

1. Enter ECM and get the cardfile you want to transfer.
2. Follow the instructions in Chapter 19 to transfer the necessary information, using DIF format, to a holding file.
3. Enter the VisiCalc program.
4. To direct VisiCalc to transfer the information, enter the following sequence of commands:

   STORE
   # (to indicate DIF format)
   LOAD
   then type the file's name

Transferring Information from Another Program

Reading information into an ECM cardfile from another program is also a two-part procedure:

- First you use the application program to place the information in a holding file.
- Then you use ECM to transfer in the information to the cardfile where you want to use it.

You should remember these points when you are transferring information from another program to a ECM cardfile:

- After transferring the information to a holding file, you can specify the sequence in which ECM should transfer the fields so they correspond to the fields in your card form.
- When a field in the source file is longer than the corresponding field in your card form, ECM only copies that information which fits. Thus, you must ensure that the fields are long enough to hold the information you are transferring. When the source field is shorter, ECM pads the remaining room in the card's field with blanks.

- When the source file contains more fields than your card form, ECM ignores the information from the extra fields. That is, if the source file has seven fields while the ECM card form has only five, ECM uses the information from the first five fields and ignores the information in the last two.
- When the source file contains fewer fields than your card form, ECM copies the information from the source fields then leaves the remaining fields blank. That is, if the source file has five fields while the ECM card form has seven fields, ECM transfers information into the first five fields then leaves the last two fields blank.
- To simplify sorting and searching, you may have entered dates in your ECM cardfiles as year, month, day (YY/MM/DD). Even though other programs may give dates in the order of month, day, and year (MM/DD/YY), you can still transfer in dates from such programs. However, you must later reenter the dates if you plan to use the dates for sorting and searching.
- Remember that a very large database may contain more information than can fit in your cardfile or on a flexible disc. See the manual for the particular program you are using for more information on dividing a large database into two or more smaller files.

Transferring Information from CONDOR

Follow this procedure to transfer information from a CONDOR database to an ECM cardfile.

1. Using CONDOR, enter this command:

   ```
   WRITE <database> <holding file> B
   ```

   For example, assume you want to transfer information from a CONDOR database named INVOICES to a holding file called DEBTS.NEW for transfer to ECM. You would enter:

   ```
   WRITE INVOICES DEBTS.NEW B
   ```

   (The `B` instructs CONDOR to transfer the information in BASIC format.)

2. Enter ECM.

3. Follow the instructions in Chapter 19 to transfer the information, using BASIC format, into your ECM cardfile. (Remember to reorder the fields, if necessary).

Transferring Information from dBASEII

Take these steps to transfer information from a dBASEII database to an ECM cardfile.

1. Using dBASEII, enter this command:

   ```
   COPY TO <transferfile> DELIMITED WITH "
   ```

   For example, suppose you want to put information from a dBASEII database you are using in a holding file named RECEIPTS.NEW so you may transfer the information to an ECM cardfile. You would enter:

   ```
   COPY TO RECEIPTS.NEW DELIMITED WITH "
   ```

   (`DELIMITED WITH "` instructs dBASEII to transfer the information as quoted strings in BASIC format.)

2. Enter ECM.

3. Follow the instructions in Chapter 19 to transfer the information, using BASIC format, to your ECM cardfile.

   Remember to give ECM the order in which it should transfer the fields, if the sequence numbers of fields in the holding file differs from the order of fields on the ECM card form.

Transferring Information from a BASIC Program

Follow this procedure to transfer information from a BASIC program to an ECM cardfile.

1. Using BASIC, with the information you want to transfer stored in memory, enter this command:

   ```
   SAVE "<datafile>", A
   ```

   For example, if you want to put information from a BASIC data file called STATS in a holding file called RESULTS.NEW, you would enter:

   ```
   SAVE "RESULTS.NEW", A
   ```

   (The letter `A` instructs BASIC to transfer the information as ASCII strings rather than using a compressed binary format.)

2. Enter ECM.

3. Follow the instructions in Chapter 19 to transfer the information, using BASIC format, to your ECM cardfile.

   Remember to give ECM the order in which it should transfer the fields, if the sequence numbers of fields in the holding file differs from the order of fields on the ECM card form.

Transferring Information from LOTUS 1-2-3

Follow this procedure to transfer information from a LOTUS 1-2-3 database to an ECM cardfile.

1. Using the LOTUS 1-2-3 Translate Utility, create a DIF file by using the command `WKS to DIF`.
2. Enter ECM.
3. Follow the instructions in Chapter 19 to transfer the information, using DIF format, to your ECM cardfile.

   Remember to give ECM the order in which it should transfer the fields, if the sequence numbers of fields in the holding file differs from the order of fields on the ECM card form.

Transferring Information from VisiCalc

Follow this procedure to transfer information from a VisiCalc spreadsheet to an ECM cardfile.

1. Enter the VisiCalc program and create a DIF file by entering the following sequence of commands:

   STORE
   # (to indicate DIF format)
   SAVE
   then type the file's name

2. Enter ECM.

3. Follow the instructions in Chapter 19 to transfer the information, using DIF format, to your ECM cardfile.

   Remember to give ECM the order in which it should transfer the fields, if the sequence numbers of fields in the holding file differs from the order of fields on the ECM card form.

Using File Manager

As its name implies, File Manager manages the three files that make up your ECM cardfile (as well as the files you create with other application programs).

You may use File Manager in the following ways:

- to look at a list of files under a different pathname
- to change the default pathname
- to set up subdirectories
- to delete a file or directory
- to copy a file
- to rename a file

This appendix describes how you may use File Manager to set a different pathname, to rename a cardfile, and to locate a cardfile. Appendix G explains how you use File Manager to copy the files in a cardfile. See the owner's manual for your personal computer for information on the other tasks that File Manager performs.

You may enter File Manager from the PAM menu or from the `File Manager` label on some ECM menus. When you enter File Manager from PAM, the File Functions menu appears directly. However, when you enter from ECM, ECM first displays the File Manager Main menu. From here, you choose `File Funct'ns` to reach the File Functions menu.

How File Manager Stores Your Files

ECM breaks a cardfile into three disc files and gives each file a name that consists of the cardfile name, a period (.), and a three-letter extension. For example, if you named a cardfile IMP0RTS, ECM creates three files:

- IMP0RTS.EDT
- IMP0RTS.EFM
- IMP0RTS.EIX

Then, if you use File Manager to display the names of your files, you see the names for these three files; not your cardfile's name: IMP0RTS.

Each of these files also has a pathname that tells where it is stored. (See Chapter 7 for more information.) Remember that the form of the pathname may vary depending on your personal computer's operating system. For example, with the DOS operating system, a pathname consists of a drive name and a series of directory names.

File Manager displays the drive name as a letter, followed by a colon, then a backslash (for example, A:\ or B:\). The backslash (\) indicates the Main directory for the disc in that drive. For example, when you are using drive A and the disc contains no subdirectories, the File Manager Main menu lists: Displayed Dir: A:\.

File Manager identifies the Main directory with a single backslash. One or more subdirectories can follow the Main directory, and each subdirectory is followed by another backslash. For example, A:\JEFF\BUSINESS\ identifies Jeff's business subdirectory on the disc in drive A.

Working with Pathnames

ECM always assumes you want to store your cardfiles under a particular pathname. With an DOS operating system, ECM breaks the pathname into a *default drive* and a *default directory*. Unless you tell ECM otherwise, ECM always searches for or stores your cardfiles in this location.

Floating the Default Drive

When you start ECM, the default drive is the one that contains the ECM Application disc. Furthermore, the directory in which you have installed ECM becomes the default directory. For example, if you put your working copy of the ECM Application disc in drive A (and ECM is installed in the Main directory of your disc), then A is the default drive and the Main directory is the default directory. If you later put the ECM Application disc in drive B, then B becomes the default drive. That is, the default drive floats with the ECM Application disc. However, the Main directory remains the default directory until you change it.

When working with ECM, if you call File Manager to set a different default drive or directory, ECM remembers this change even after you exit the program. Therefore, the default drive no longer floats with the Application disc; rather when you enter ECM again, ECM sets the default drive and directory to the last values you used.

If you want to return to the floating default drive, simply enter ECM again and change the default drive to the one that currently holds the ECM Application disc.

Changing the Pathname

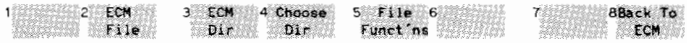
When you want to access several cardfiles with another pathname, you may use File Manager to change the default settings. In situations where you are required to enter a cardfile name, a function label appears for `File Manager`. However, if you want to change the default pathname and this label does not appear, you may access this label by choosing the `Set Direc'ry` label on the Cardfile Tasks menu.

To set a new default drive or directory:

1. Choose `File Manager`.

   The File Manager Main menu appears, with a list of the files that are found under the pathname you are currently using.

   Furthermore, the function labels assume these values:



2. Choose `ECM Dir`.

   File Manager displays the Return Directory menu and asks you to:

   ```
   Select the directory name to return.
   ```

   If you want to change both drive and directory, skip steps 3 and 4.

3. If you want to change only the drive, type the new drive name.

   For example, to change from drive B to drive A, type:

   ```
   A:
   ```

4. If you want to change just the directory's name, type the old drive name then the new directory name.

   For example, to keep B as the default drive while choosing a different default directory, you might type:

   ```
   B:\BOP\
   ```

5. To change both the drive and directory settings, type the appropriate new name for each.

   For example, to change from drive B to drive A and enter a new subdirectory, you might type:

   ```
   A:\LULA
   ```

6. Pressing Enter ends the pathname and directs File Manager to continue.

   File Manager asks for verification:

   ```
   Press F1 (Return Dir) if selection is
   correct.
   ```

7. Choose **Return Dir**.

   At this point, the pathname you returned becomes the default pathname until the next time you change it. Even if you leave the ECM program and turn off your computer, ECM remembers the pathname you are using.

8. Choose **Back To ECM** to return to the ECM Main menu.

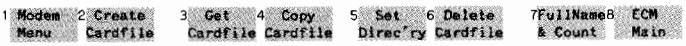
Renaming a Cardfile

Using File Manager to rename a cardfile requires renaming each of the three disc files which comprise that cardfile. For example, to rename an IMPORTS cardfile to EXPORTS, you must:

- change IMPORTS.EDT to EXPORTS.EDT
- change IMPORTS.EFM to EXPORTS.EFM
- change IMPORTS.EIX to EXPORTS.EIX

To call up File Manager:

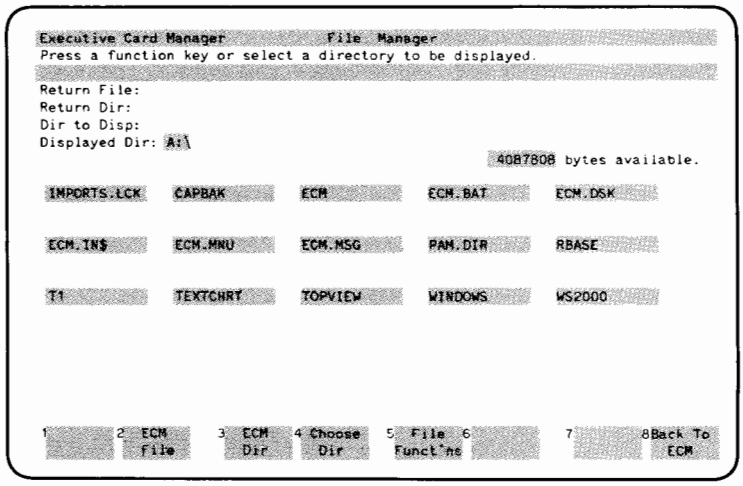
1. Start from the Main menu.
2. Choose Cardfile Tasks to display the Cardfile Tasks labels:



3. Choose Set Direc'ry.

4. Choose File Manager.

   This displays the File Manager Main menu.



Looking for File Names

The File Manager Main menu consists of a series of names with a listing of the files that appear under the pathname you are currently using. Remember, however, File Manager works with *file* names; not *cardfile* names.

Since you want to change the file names for a particular cardfile, your first task is finding the appropriate file names.

If you can see the three files for your cardfile, you may proceed directly to the section on **Changing the File Name**.

If you don't see the names, one of two situations has occurred:

- If your disc contains more files than File Manager can display at one time, you must cycle through the list until the names appear.
- If your disc contains several subdirectories, the files may be in another subdirectory.

To display other files:

1. Press the Pg Dn key.

   File Manager updates the display with the next screen-full of names.

2. Pressing the Pg Up key returns the display to the previous screen-full of names.

To look for your files in another subdirectory:

When the File Manager Main menu appears, the function labels assume these values:

1. Choose Choose Dir.

   File Manager displays the Choose Directory menu and asks you to:

   ```
   Select the directory name to display.
   ```

2. Type the pathname for the directory you want to see.
3. Pressing Enter ends the pathname and directs File Manager to continue.

   File Manager displays the requested directory. (If you want to see the contents of another directory, repeat steps 2 and 3.)

4. Choose Exit Choose to return to the File Manager Main menu after you have found the proper files.

Changing the File Name

After displaying the necessary files, you must change the name for each of these files.

To change a file's name:

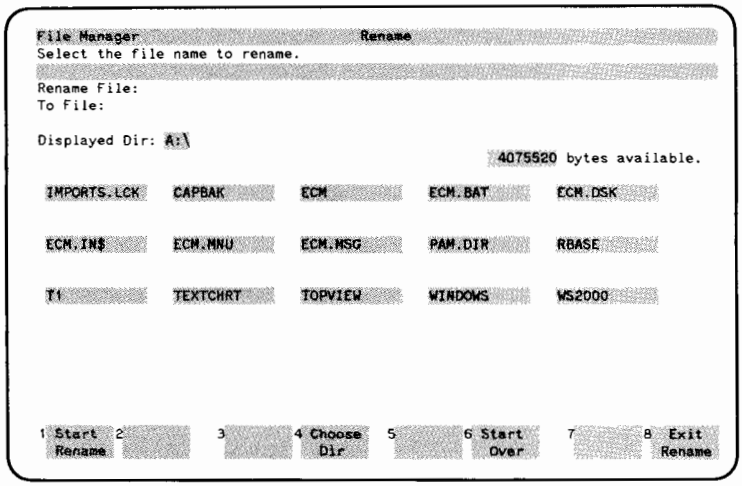
1. Start from the File Manager Main menu.

   The function labels have these values:

2. Choose `File Funct'ns`.

   The function labels assume these values:

3. Choose Rename File to display the Rename File menu.



4. Move the pointer to one of the three file names that make up your cardfile.

   For example, you could position the pointer to IMPORTS.EDT.

5. Press the F10 key to choose this file.

Note

You may use touch to choose the appropriate file, if your personal computer supports this feature.

Computer Museum

6. Type the new cardfile name, followed by a period (.), and the same three-letter extension.

   For example, if you are renaming IMPORTS.EDT, you would type `EXPORTS.EDT`.

Caution

Type the different parts of the file's name (that is, the cardfile name, the period, and the extension) with no intervening spaces.

7. Press Enter to end the name.

   File Manager displays the new name and asks you to:

   ```
   Press F1 (Start Rename) if selection is
   correct.
   ```

8. If you change your mind, choosing **Start Over** allows you to enter a different name.
9. When you are satisfied with the name, choose **Start Rename**.

   File Manager informs you it is:

   ```
   Renaming the selected file.
   ```

10. Repeat steps 4 through 9 to rename the other two files that make up this cardfile. Remember to use the appropriate extension in each case.

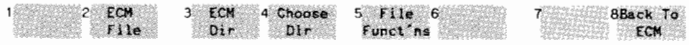
To return to ECM:

After you finish renaming all three files, you must unravel yourself from the Rename File menu.

1. Choose Exit Rename.

   The File Functions menu appears, and the function labels assume these values:

2. Choose Exit FileFctn to display the File Manager menu:



3. Choose Back To ECM.

   The Main menu appears, and ECM displays the cardfile with which you were working.

Getting a Cardfile with File Manager

If ECM requests a cardfile's name then rejects the name you supplied, you may use File Manager to inspect your directory to see if that cardfile exists.

1. Start from the Main menu.
2. Choose `Cardfile Tasks` to display the Cardfile Tasks labels:

3. Choose `Get Cardfile`.

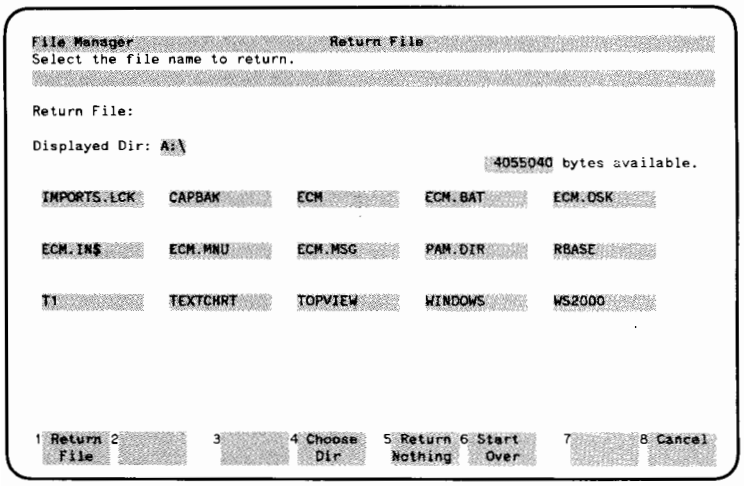
   ECM requests the name for a cardfile.

   If you want to see what cardfiles exist under the default pathname, take the following steps.

4. Choose `File Manager` to display the File Manager menu:

5. Choose ECM File.

This displays the Return File menu:



6. Look for the names of the three files that make up the cardfile you want.

If you see the names on this screen, you are ready to pass this information back to ECM.

If you don't see the three file names, they may be on another screen or in a different subdirectory.

To display other files:

1. Press the Pg Dn key.

   File Manager updates the display with the next screen-full of names.

2. Pressing the Pg Up key returns the display to the previous screen-full of names.

To look for files in another subdirectory:

1. Choose Choose Dir.

   File Manager displays the Choose Directory menu and asks you to:

   ```
   Select the directory name to display.
   ```

2. Type the pathname of the directory you want to see.

3. Pressing Enter ends the pathname and directs File Manager to continue.

   File Manager displays the requested directory. (If you want to see the contents of another directory, repeat steps 2 and 3 until you find the required files.)

4. Choose Exit Choose.

   The File Manager Main menu appears with a listing of the last directory you were inspecting.

To send the cardfile to ECM:

Since you have found the files that make up your cardfile, you are now ready to send this information to ECM.

1. Move the pointer to the name of one of the three files that make up your cardfile.
2. Press the F10 key to choose this file.

   File Manager displays that file's name and asks you to:

   ```
   Press F1 (Return File) if selection is
   correct.
   ```

3. Be sure you have chosen a file from the cardfile you want to see.

   If you made a mistake, choose Start Over and choose another file name.

4. When you are satisfied with your choice, choose Return File.

   This displays the File Manager Main menu where the full name for that file is given as the Return File (for example, `Return File: B:\IMPORTS.EDT`).

5. Choose Back To ECM.

   Since you left ECM while getting a cardfile, ECM returns to the Cardfile Tasks menu, and the name for the cardfile appears on the input line. Furthermore, ECM still requests that you:

   ```
   Type a cardfile name and press ENTER.
   ```

Note

Because ECM ignores extensions, it will interpret `B:\IMPORTS.EDT` as if it were `B:\IMPORTS`.

---

6. As the cardfile's name already appears, press Enter to direct ECM to continue.

   ECM informs you it is:

   ```
   Opening the cardfile.
   ```

   In a few seconds ECM displays the cardfile you requested on the Main menu.

F Reference Guide to Error Messages

This appendix lists the various messages that ECM provides to alert you that something has gone wrong. Most messages fall into one of two categories:

- user-input errors
- hardware-related errors

Most user-input errors have simple solutions. In many cases, the diagnosis of the problem (for example, `Can't create cardfile--no fields were defined`) suggests the solution (that is, define a field).

The solution to other user-input errors may be less obvious. For example, when initiating an operation, you may have given ECM incomplete or inaccurate information. Although the message explains why ECM can't continue (for example, `Can't copy to the current cardfile`), you should consult this appendix for an analysis of the condition under which this message appears and the corrective action (or remedy) to take.

The other major category identifies system problems. In some cases, ECM fails to communicate with a supporting device. For example:

- `Can't dial--check your modem`
- `Can't print ... Check your printer`

In these situations, you should refer to the owner's manual for that device to ensure that you have connected the device properly.

Another system problem that may occur is the failure of ECM to read a disc. This may indicate that the information on the disc has been scrambled or that the disc itself is faulty.

Caution

Since disc errors can occur, you should routinely back up the work discs that contain your cardfiles and use a working copy of the ECM Application disc and keep the master application disc in a safe place.

When a disc error occurs:

When ECM displays a message suggesting a disc error has occurred, you should take the following steps to try and isolate the problem.

1. Use File Manager to inspect the contents of the questionable disc. (See Appendix E.)
2. When the message involves a name, verify that the disc contains the cardfile (or file) within the directory and pathname you used.
3. If the operation requires disc space, be sure that sufficient room exists to complete the operation.
4. Check that the disc is not write-protected.
5. If the disc is not write-protected, try using another disc.
6. If none of these steps work, get the back-up copy of the suspect disc, make a new copy of that disc, then continue the task you were doing.

Note

If you must go to your back-up disc to continue, you should check your cardfiles to see how up-to-date they are.

Message: `Can't complete getting this format. Check your disk.`

Condition: ECM encountered a problem when attempting to access a previously saved print format.

Remedy: Use File Manager to verify that the disc you are accessing contains the required file.

Message: `Can't complete the Load. Check your disk.`

Condition: ECM encountered a problem when attempting to access values that were previously stored for the Modem menu.

Remedy: Use File Manager to verify that the disc you are accessing contains the required file.

Message: `Can't complete the Save. Check for a full disk.`

Condition: When you attempted to save a print format or values from the Printer Setup or Modem menu, ECM failed to complete the task.

Remedy: ECM requires a certain amount of disc space for its own use. Therefore, use File Manager to determine how much space remains on the disc you are using. If sufficient room exists, follow the steps under **When a disc error occurs**.

Message: `Can't copy to the current cardfile.`

Condition: You have attempted to replace or append a copy of the current cardfile onto itself.

Remedy: If you want to append a copy of a cardfile onto itself, first make a copy of the current cardfile using another name, and then append a second copy of the cardfile to the new cardfile.

Message: `Can't create cardfile--no fields were defined.`

Condition: When creating the form for a new cardfile, you failed to include any fields in the final design.

Remedy: Place at least one field on the card form. ½next; next

Message: `Can't dial--check your modem.`

Condition: ECM failed to establish contact with your modem when you attempted to place a telephone call.

Remedy: Check that the modem is connected properly, and all switches are set correctly.

Message: `Can't dial--invalid use of code names and/or substitution values.`

Condition: When you attempted to place a phone call, ECM used information from the Modem menu, only to find that an inconsistency exists.

Remedy: Consult Chapter 16 for the proper way to use "Dial Codes".

Message: `Can't dial--modem instructions do not include a place for the phone number.`

Condition: When you attempted to place a telephone call, ECM sent the information you supplied in the Modem menu but you omitted placing a substitution character for the phone number.

Remedy: When you enter the Modem Instructions in the Modem menu, be sure to include an exclamation point (`,`) after the dial code (`ATD`). When placing the call, ECM substitutes the proper number for this symbol.

Message: `Can't find file.`

Condition: ECM can't find a disc file with the name you supplied.

Remedy: Follow these steps:

1. Be sure you have spelled the name correctly and provided the proper pathname.
2. If you have, use File Manager to determine if the file is on this disc.
3. If it is, follow the steps under **When a disc error occurs**.

Message: `Can't finish copying to the disc file.`

Condition: When you attempted to transfer out information to a holding file, ECM couldn't write to the destination file.

Remedy: Follow the steps under **When a disc error occurs**.

Message: `Can't Merge or Append-cardfile forms do not match.`

Condition: ECM cannot merge or append data from one cardfile to another unless card forms have these characteristics:
1. same key field,
2. same number of fields,
3. same order of fields,
4. same length of fields.

Remedy: Use TRANSFER IN & TRANSFER OUT copying to get information from cardfiles with dissimilar forms.

Message: `Can't open or read the file ECM.MNU. Check your disk.`

Condition: Something has gone wrong with the application disc.

Remedy: Make another copy of the ECM Application program from the Master disc, then use this new copy.

Message: `Can't print. Check your printer.`

Condition: When trying to print the information from a cardfile, something happened to cause the printer to stop (i.e. out of paper).

Remedy: ECM will pause and wait for you to correct the problem by ensuring that your printer is connected, turned on, supplied with paper, and ready to print. When you have done so, press Enter and ECM will attempt to continue printing.

Message: `Can't print. Printing cancelled.`

Condition: ECM made a second try at printing but was still unsuccessful.

Remedy: Check the device Config menu to see that the printer setting is the one you want (see Appendix C). Check to see whether the system is configured correctly for the printer. If none of these steps work, follow the steps under **When a disc error occurs.**

Message: `Can't read, or write to, the error file. Check your disk.`

Condition: While you are printing a cardfile, ECM places any error messages into an error file. ECM encountered problems in trying to access this file.

Remedy: Use File Manager to determine the amount of available space. If sufficient room exists, follow the steps under **When a disc error occurs**.

Message `Cardfile already exists.`

Condition: You have supplied the name for a cardfile that already exists.

Remedy: Choose a different name or provide another pathname.

Message: `DATA ERROR -- file is not ''Basic'' format. Transfer halted.`

Condition: The "Basic" format expects data as one card per line with commas *between* fields, and (opt.) double quotes around each field.

Remedy: Browse the file to be sure it is not in a "DIF" format, or incorrect "Basic" format.
1. If it is in "DIF" format, change the transfer type to "DIF" format, then transfer files.
2. If there are double quotes *within* a *field* in a "Basic" format file, remove them.

Message: `DATA ERROR -- file is not ''DIF'' format. Transfer halted.`

Condition: The "DIF" format starts with the word, TABLE, on the first line of the file, and specific ordering of data following.

Remedy: Browse the file to be sure it is not in a "Basic" format. If it is in a "Basic" format, change the transfer type to "Basic" format, then transfer files.

Message:	`DISC ERR0R-unable to close the cardfile.`
Condition 1:	No disc resides in the specified drive.
Remedy 1:	Put the proper disc in that drive and make sure the drive is turned on.
Condition 2:	A disc or a disc drive is not working properly.
Remedy 2:	Follow the steps under **When a disc error occurs**.
Message:	`DISC ERR0R-unable to close the file.`
Condition 1:	No disc resides in the specified drive.
Remedy 1:	Put the proper disc in that drive and make sure the drive is turned on.
Condition 2:	A disc or a disc drive is not working properly.
Remedy 2:	Follow the steps under **When a disc error occurs**.

Message: `DISC ERROR-unable to create the cardfile.`

Condition 1: No disc resides in the specified drive.

Remedy 1: Put the proper disc in that drive and make sure the drive is turned on.

Condition 2: A disc or a disc drive is not working properly.

Remedy 2: Follow the steps under **When a disc error occurs**.

Message: `DISC ERROR-unable to create the file.`

Condition 1: No disc resides in the specified drive.

Remedy 1: Put the proper disc in that drive and make sure the drive is turned on.

Condition 2: A disc or a disc drive is not working properly.

Remedy 2: Follow the steps under **When a disc error occurs**.

Message: `DISC ERROR-unable to create the workset.`

Condition 1: No disc resides in the specified drive.

Remedy 1: Put the proper disc in that drive and make sure the drive is turned on.

Condition 2: A disc or a disc drive is not working properly.

Remedy 2: Follow the steps under **When a disc error occurs**.

Message: `DISC ERROR-unable to delete cardfile.`

Condition 1: No disc resides in the specified drive.

Remedy 1: Put the proper disc in that drive and make sure the drive is turned on.

Condition 2: A disc or a disc drive is not working properly.

Remedy 2: Follow the steps under **When a disc error occurs**.

Message: `DISC ERROR-unable to delete the card.`

Condition 1: No disc resides in the specified drive.

Remedy 1: Put the proper disc in that drive and make sure the drive is turned on.

Condition 2: A disc or a disc drive is not working properly.

Remedy 2: Follow the steps under **When a disc error occurs**.

Message: `DISC ERROR-unable to get the card from the cardfile.`

Condition 1: No disc resides in the specified drive.

Remedy 1: Put the proper disc in that drive and make sure the drive is turned on.

Condition 2: A disc or a disc drive is not working properly.

Remedy 2: Follow the steps under **When a disc error occurs**.

Message: `DISC ERROR-unable to open cardfile.`

Condition 1: No disc resides in the specified drive.

Remedy 1: Put the proper disc in that drive and make sure the drive is turned on.

Condition 2: A disc or a disc drive is not working properly.

Remedy 2: Follow the steps under **When a disc error occurs**.

Message: `DISC ERROR-unable to open the file.`

Condition 1: No disc resides in the specified drive.

Remedy 1: Put the proper disc in that drive and make sure the drive is turned on.

Condition 2: A disc or a disc drive is not working properly.

Remedy 2: Follow the steps under **When a disc error occurs**.

Message:	`DISC ERR0R-unable to read the file.`
Condition 1:	No disc resides in the specified drive.
Remedy 1:	Put the proper disc in that drive and make sure the drive is turned on.
Condition 2:	A disc or a disc drive is not working properly.
Remedy 2:	Follow the steps under **When a disc error occurs**.
Message:	`DISC ERR0R-unable to save the card data.`
Condition 1:	No disc resides in the specified drive.
Remedy 1:	Put the proper disc in that drive and make sure the drive is turned on.
Condition 2:	A disc or a disc drive is not working properly.
Remedy 2:	Follow the steps under **When a disc error occurs**.
Message:	`Disc removal detected; when correct disc is inserted, press ENTER to continue.`
Condition:	ECM detected that you have removed a disc from its drive.
Remedy:	Insert the proper disc into the drive and continue the task you were doing.

Message: `ECM is out of memory space.`

Condition: ECM lacks sufficient memory space to continue operation.

Remedy: Exit the ECM program, do a hard reset of your computer, then get back into ECM and try the task over again.

Message: `Error. Attempt to do arithmetic on non-numeric field.`

Condition: One of the fields that you directed ECM to sum or average while printing contains textual information or is blank. Note that these fields are ignored for the purposes of sum or average calculations.

Remedy: Ensure that all fields used in calculations contain only numbers.

Message: `File already exists.`

Condition: The name you supplied for a file name is already in use within that directory.

Remedy: Use a different name or provide another pathname.

Message: `Improper cardfile version-not an ECM cardfile.`

Condition: You attempted to use a PCF cardfile with Executive Card Manager.

Remedy: Use the convert utility to change the PCF cardfile to a form that Executive Card Manager can use.

Message: `Internal error #N. Press a key to ATTEMPT TO CONTINUE.`

Condition: An error with the number shown (represented by `#N`) has occurred.

Remedy: Follow these steps:

1. Press any key to clear the message.
2. Follow the steps under **When a disc error occurs** to ensure that the disc is working properly, then try the same action again.
3. If the message appears repeatedly, record the steps that preceded it together with the error number and call your HP support person.

Message: `Invalid number entered.`

Condition: When you specified the order on the Reorder Fields menu that ECM should use to transfer information, one of the values you gave is inappropriate.

Remedy: Inspect the Reorder Fields menu and make sure that all fields contain proper values.

Message: `No cardfile is open.`

Condition: You tried to add or find cards or print a cardfile when there is no current cardfile.

Remedy: Get the cardfile you want and try again.

Message: `No fields have been selected. Press ''Reorder'' to select fields.`

Condition: You blanked out all the numbers on the Reorder Fields menu, and then failed to enter a number in any of the fields.

Remedy: Display the Reorder Fields menu and enter the appropriate numbers into the fields to specify the transfer order.

Message: `Not a valid directory name.`

Condition: You gave an incorrect response for a directory's name.

Remedy: Follow these steps:
1. Be sure you spelled the name correctly and provided the proper pathname.
2. Use File Manager to see if that directory exists on the disc you are using.

Message: `Not a valid file name.`

Condition: You are asked to name a new file

Remedy: Follow the rules for file names given in Chapter 7, the section on **Naming a Cardfile**.

Message: `Note that the cardfile is open for reading only.`

Condition: The cardfile disc is write protected.

Remedy: Change the write protection on the cardfile disc.

Message: `Please put the application disc back in the drive and press ENTER.`

Condition: You have removed the ECM application disc from its drive, and the program must access this disc to continue.

Remedy: Insert the ECM Application disc back into its drive.

Message: `Printer configuration information is missing.`

Condition: ECM failed to load the values stored in the Printer Setup menu, so it used the default settings instead.

Remedy: Display the Printer Setup menu, enter the proper settings, then save these values.

Message: `Replace the cardfile disc in drive #.`

Condition: You have removed a disc with which you were working to access a file on another disc and then forgot to replace the original disc.

Remedy: Return the work disc to its disc drive.

Message: `The card form cannot be displayed.`

Condition: ECM could not display the requested card on the Select screen.

Remedy: Exit the ECM program, and then restart ECM and try the operation over again.

Message: `The cardfile could not be found.`

Condition: ECM can't find a cardfile under the name you have requested.

Remedy: Follow these steps:

1. Ensure that you have spelled the name correctly.
2. If you have, ensure that you have provided the proper pathname.
3. If you have, use File Manager to see if the cardfile is in the directory you are using.
4. If it is, follow the remaining steps under **When a disc error occurs.**

Message: `The cardfile is empty.`

Condition: You tried to print, find cards, or dial a number but the cardfile contains no cards.

Remedy: Put at least one card in the cardfile.

Message: `The cardfile is full-no more cards may be added.`

Condition: You tried to add a card but no more room exists in that cardfile.

Remedy: Delete all unnecessary cards; or divide the cardfile by creating worksets and copying them into separate cardfiles.

Message: `The data for the card cannot be created.`

Condition: You try to create or copy a cardfile, and ECM couldn't accomplish the task.

Remedy: Use File Manager to determine how much room is available. If sufficient room exists, follow the steps under **When a disc error occurs**.

Message: `The field is improperly positioned.`

Condition: When creating a form for a new cardfile or a printout, you have positioned two fields so they overlap or have attempted to place a field on the tab row.

Remedy: Use the Make/Adjust or Adjust Fields menu to move one of the fields to another position.

Message: `The File Manager is not available.`

Condition: You try to use File Manager from the ECM program but you started ECM by bypassing PAM.

Remedy: Exit ECM then start PAM and return to ECM, or continue the current task without using File Manager.

Message: `The form cannot be saved.`

Condition: When you attempted to save the form for a cardfile or printout, ECM could not complete the task.

Remedy: Use File Manager to determine how much room is available. If sufficient room exists, follow the steps under **When a disc error occurs**.

Message: `The form information cannot be loaded into memory.`

Condition: When you tried to display a card form, ECM couldn't complete the operation.

Remedy: Use File Manager to see if the cardfile exists. If it does, follow the steps under **When a disc error occurs**.

Message: `The maximum number of fields has been reached.`

Condition: When creating a form for a new cardfile or a printout, you have exceeded the maximum number of fields.

Remedy: Redesign your form so it uses a fewer number of fields. In print, try moving fields around to make more room at the bottom of the form.

Message: `The order number #N cannot be specified more than once.`

Condition: You have attempted to use the same transfer number more than once on the Reorder Fields menu.

Remedy: Remove the duplicate number and use another number in its place.

Message: `There are no fields in the print block.`

Condition: You have requested ECM to print a document that contains text but no fields.

Remedy: Press "Yes" if you want to print only the text. Otherwise, return to the Print menu and include some fields in the printout.

Message: `This cardfile cannot be modified-changes will not be saved.`

Condition: You tried to change a cardfile which is read-only.

Remedy: Either unwrite-protect your disc and reopen the cardfile, or make more room available on your disc.

Message: `This cardfile does not have an autodial field.`

Condition: You tried to place a phone call from the Main menu, but the current card form has no Autodial field.

Remedy: Use the Select menu to choose the phone number that you want to call.

Message: `This field has been selected already.`

Condition: When using Get Fields to design a printout, you have selected the same field twice.

Remedy: Place the fields you have selected; then return to the Get Fields menu and select another copy of that field.

Message: `This field was not selected.`

Condition: When using the Get Fields menu, you tried to unselect a field that was not selected.

Remedy: If you don't want to include this field, simply continue selecting the fields you do want.

Message: `Too many blocks across page.`

Condition: You have specified printing more than one block across a page, but that amount of information won't fit on a page.

Remedy: Provide the proper numbers so the width of the repeat block times the number of blocks is less than the width of the paper.

Message: `Unable to reopen the last cardfile.`

Condition: ECM attempted to access the cardfile you were using last, but you have removed that disc from its drive.

Remedy: Put the appropriate disc back into its drive. If the disc is already in the drive, follow the steps under **When a disc error occurs**.

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First Initial Last

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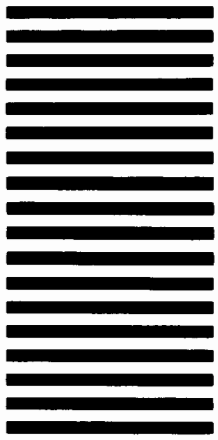

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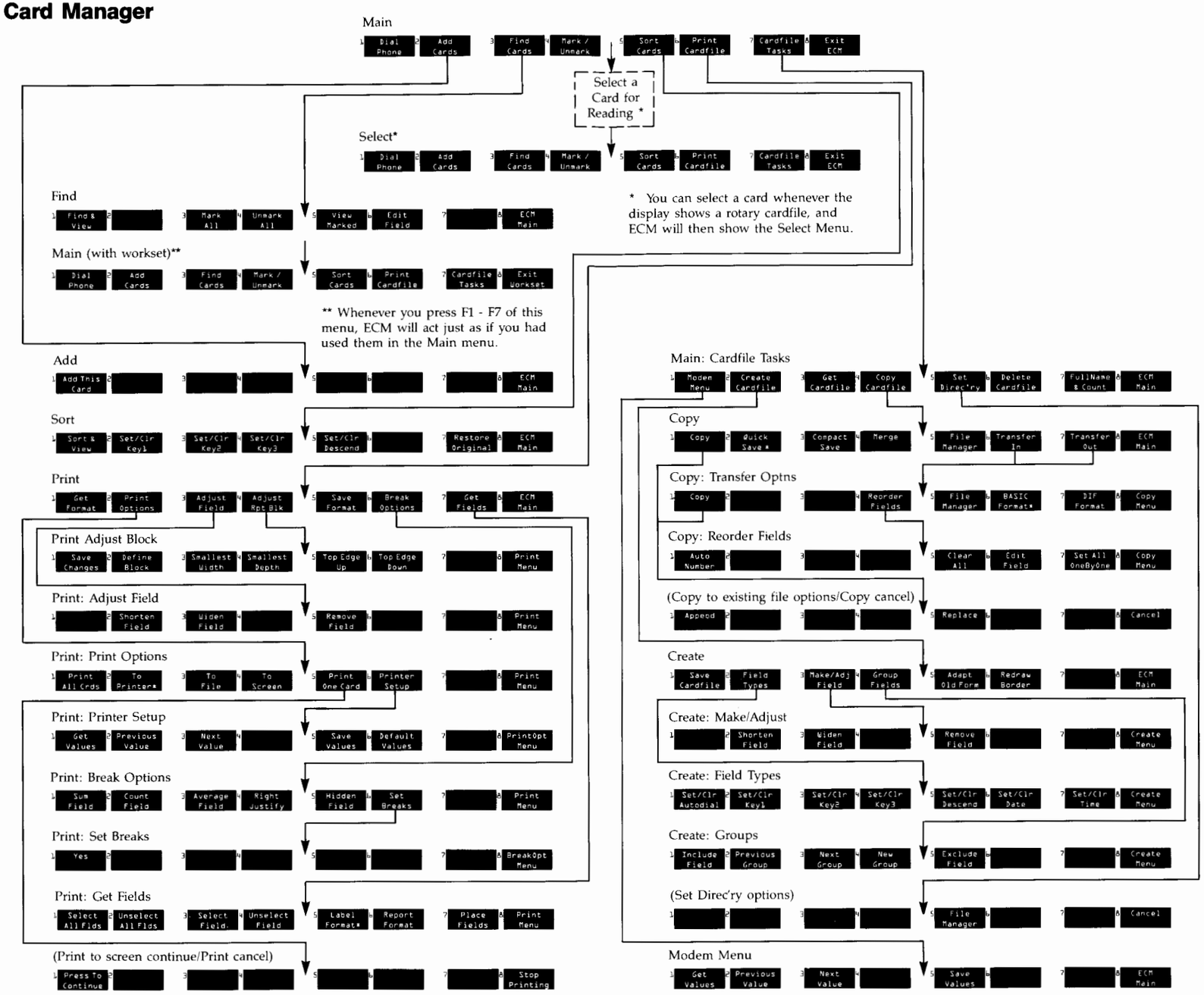
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