

Portable PLUS

Learning Executive Card Manager



Edition 1 January 1986

45555-90002

HP Computer Museum
www.hpmuseum.net

For research and education purposes only.

Notice

The information contained in this document is subject to change without notice.

Hewlett-Packard makes no warranty of any kind with regard to this material, including, but not limited to, the implied warranties of merchantability and fitness for a particular purpose. Hewlett-Packard shall not be liable for errors contained herein or for incidental or consequential damages in connection with the furnishing, performance, or use of this material.

Hewlett-Packard assumes no responsibility for the use or reliability of its software on equipment that is not furnished by Hewlett-Packard.

© 1985 by Hewlett-Packard Co.

This document contains proprietary information which is protected by copyright. All rights are reserved. No part of this document may be photocopied, reproduced, or translated to another language without the prior written consent of Hewlett-Packard Company.

ROLODEX® is a U.S. registered trademark of Rolodex Corporation.

Portable Computer Division
1000 N.E. Circle Blvd.
Corvallis, OR 97330, U.S.A.

Printing History Edition 1

January 1986

Mfg. No. 45555-90002

Contents

Introducing Executive Card Manager

- vii** Welcome to Executive Card Manager
 - viii** How to Use This Booklet
 - ix** What We Mean When We Say ...
-

Chapter 1

Getting Started With ECM

- 1-2** Starting ECM from P.A.M.
 - 1-3** Looking at an ECM Menu
 - 1-3** Tips for Finding Your Way Around ECM
 - 1-4** End of Session 1
-

Chapter 2

Browsing Through a Cardfile

- 2-2** Getting a Cardfile
- 2-3** Locating Cards in the Cardfile
- 2-5** Selecting a Card for Reading
- 2-7** Reading a Long Card
- 2-9** Printing a Card
- 2-9** End of Session 2

Chapter 3

Creating a New Cardfile

- 3-1** Drawing a Form
- 3-7** Arranging Your Cards in the Order You Want
- 3-8** Saving a New Cardfile on the Disc
- 3-9** End of Session 3

Chapter 4

Adding, Updating, and Deleting Cards

- 4-1** Adding a Card to the Cardfile
- 4-4** Updating Information in a Card
- 4-5** Deleting a Card from the Cardfile
- 4-5** End of Session 4

Chapter 5

Finding Sets of Cards

- 5-2** Finding All Cards with the Same Information in a Field
- 5-4** Finding All Cards with Similar Information in a Field
- 5-4** End of Session 5

Chapter 6

Printing Reports

- 6-2** Getting Ready to Print Reports
- 6-2** Defining a Format for a Report
- 6-10** Printing a Report on the Printer
- 6-11** Saving a Report Format
- 6-11** End of Session 6

Chapter 7

Leaving ECM

- 7-2** End of Learning Executive Card Manager

Introducing 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 those 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. Furthermore, 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 45441D) is an optional 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 This Booklet

Learning Executive Card Manager is a tutorial that teaches you how to use Executive Card Manager (ECM). In the sessions that follow, you will learn the basics of using and creating a cardfile. When you are finished, you will know enough about ECM to set up and use your own cardfiles.

The tutorial is made up of seven sessions designed to be used in order. 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.

There are three other books for ECM:

- *Software Module Installation Instructions*
- *Using Executive Card Manager*
- *Executive Card Manager Quick Reference Guide*

The *Software Module Installation Instructions* provide the details to get ECM loaded into your Portable PLUS. You must have ECM installed before you can do anything else with it.

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.

The *Executive Card Manager Quick Reference Guide* contains brief descriptions of ECM tasks.

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...

The following table tells you what our instructions mean.

When we say . . .	You should . . .
Press <code>function label</code>	Press the function key (f1–f8) that corresponds to <code>function label</code> .
Choose	Press <code>Tab</code> (or <code>Shift Tab</code>) until the item you're choosing becomes highlighted.
Press <code>(key)</code>	Press <code>(key)</code> on the keyboard. This manual will use some generic names for keys at times, with the actual keys you press following in parentheses. These generic names explain the result of pressing certain keys better than just the key names themselves do. The actual keys you would press will be enclosed in parentheses after a generic name.
Type <code>text</code>	Type <code>text</code> on the keyboard as you would on a typewriter.

1

Getting Started With ECM

Contents

Chapter 1

Getting Started With ECM

- 1-1** Before You Begin
- 1-2** Starting ECM from P.A.M.
- 1-3** Looking at an ECM Menu
- 1-3** Tips for Finding Your Way Around ECM
- 1-3** Get Familiar with the ECM Menu Organization
- 1-3** If You Get Lost, Read the Menu Name...
- 1-4** ...Then Press the Far Right Function Key...
- 1-4** ...And Use the Map to ECM
- 1-4** End of Session 1

1

Getting Started With ECM

This session shows you how to get up and running on ECM.
You will:

- Start ECM from P.A.M.
- Look at a typical ECM menu.
- Get some tips for learning ECM.

Before You Begin

You must have loaded ECM into the software drawer in your Portable PLUS. If you have not already done this, refer to the *Software Module Installation Instructions* which came in your ECM software package.

If your computer does not already have 256K total of RAM memory, you will need an HP 82981A 128K RAM drawer for your Portable PLUS. To find how much RAM memory you have, press `System Config`, and add Main Memory and Edisc.

You must also partition the memory in your Portable PLUS to allow ECM enough room to run. Follow these instructions:

1. Go to the Main P.A.M. menu
2. Press `System Config`.

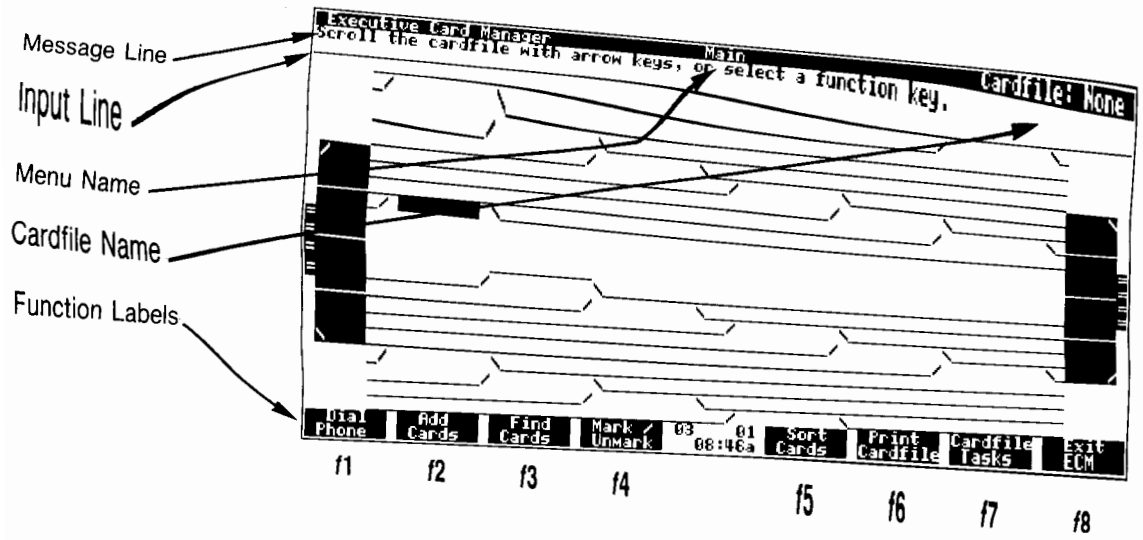
Your computer shows you the System Configuration screen with a list of parameters and settings. The first parameter, labeled `Main Memory/Edisc` shows how your memory is currently divided between main memory and electronic disc.

3. Press `Next Choice` or `Previous Choice` until the value for Main Memory reads at least 128K.
4. Press `Exit` to lock in that setting and return to P.A.M.

Starting ECM from P.A.M.

1. On the P.A.M. Main screen, make sure that **ECM** appears in the list of applications.
2. If **ECM** isn't marked with an arrow, move the arrow to it.
3. Press **Start Applic.**

The P.A.M. Main screen goes away and ECM displays its *Main menu*:



- 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.

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 picture in the previous section and locate the information as it actually appears on your display.



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 **Starting ECM from P.A.M.**, please do before you begin the next session.)

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 Press the Far Right Function Key...

The far right 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 Add, 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 press 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 to ECM**, located inside the back cover of this booklet, 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.

End of Session 1

If you want to exit ECM at this time, refer to Session 7: **Leaving ECM**, page 7-1, for instructions.

2

Browsing Through a Cardfile

Contents

Chapter 2

Browsing Through a Cardfile

- 2-1** Before You Begin
- 2-2** Getting a Cardfile
- 2-3** Locating Cards in the Cardfile
- 2-4** Scrolling the Cardfile
- 2-4** Asking for a Card by Name
- 2-5** Selecting a Card for Reading
- 2-5** Selecting a Card with the Keyboard
- 2-6** Reading Adjacent Cards in the Select Screen
- 2-7** Reading a Long Card
- 2-7** Flipping Pages of a Long Card
- 2-8** Rolling a Long Card
- 2-9** Printing a Card
- 2-9** End of Session 2
- 2-9** If You Want to Exit ECM

2

Browsing Through a Cardfile

In this session, you will:

- Get the cardfile you want to use.
- Locate cards.
- Select a card for reading.
- Read a card.
- Print a card.

Before You Begin

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

A cardfile may be either on a flexible disc or on the electronic disc (Edisc). This booklet will show examples on Edisc.

IMPORTS is a sample cardfile that will be used in the following exercises.

To load the IMPORTS cardfile from the flexible disc onto Edisc:

1. From P.A.M. select **DOS Commands**
2. Type `COPY C:IMPORTS.* A:.`
3. Type `EXIT` to return to P.A.M.

The IMPORTS cardfile will stay on the Edisc until you specifically delete it.

If you don't want to copy the IMPORTS cardfile to Edisc, simply substitute the whole pathname anywhere this booklet tells you to type IMPORTS. That is, type `C:\IMPORTS` instead of IMPORTS.

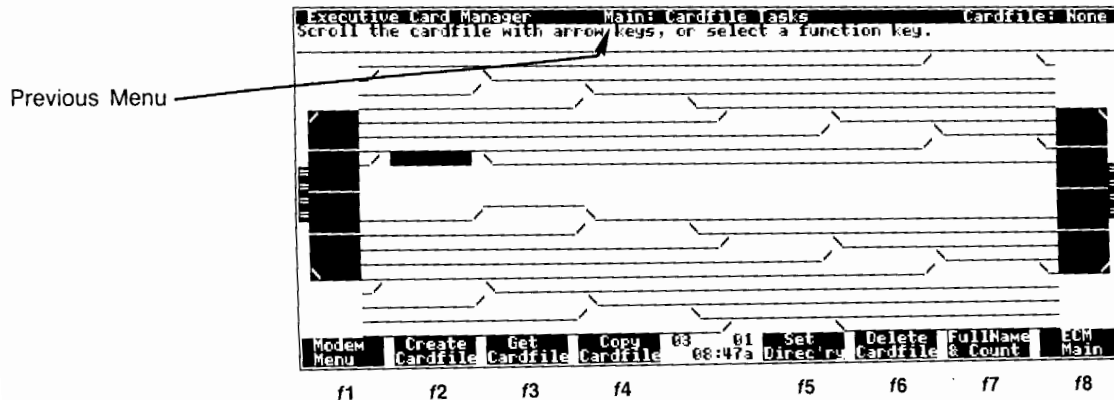
Getting a Cardfile

In these exercises you use a sample cardfile named IMPORTS.

To get the IMPORTS cardfile:

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

ECM displays the Cardfile Tasks menu:



2. Press **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.

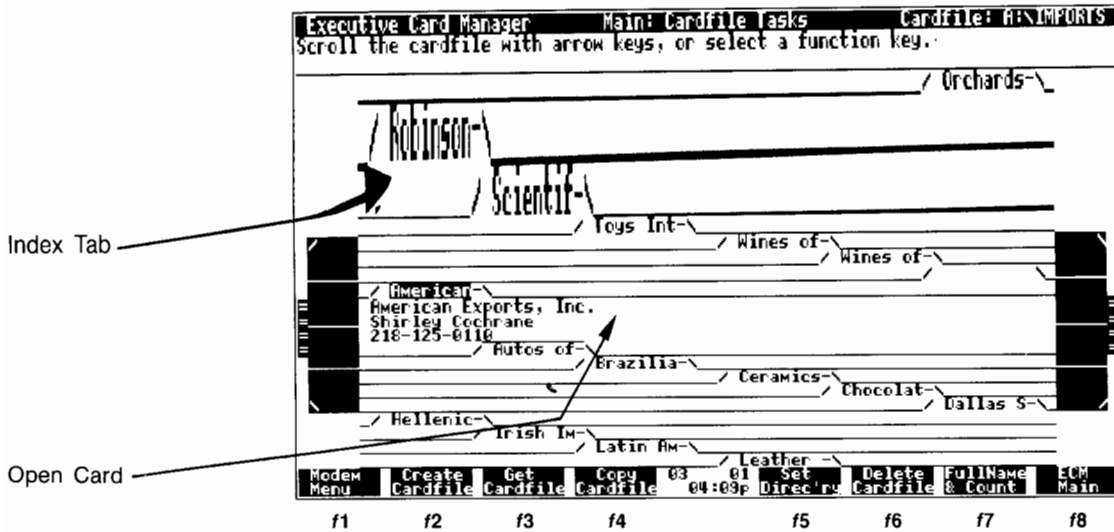
3. Type `imports`, checking the input line for the text as you type it.

If you make a typing mistake, just back up to the incorrect letters and type over them. You may use either the **Back space** or **←** keys.

Notice that you can type capitals, small letters, or a combination of the two.

4. Press `(Return)`.

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



Notice the cards are arranged alphabetically.

5. Press `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.

Note



Whenever the rotary cardfile appears on the display you can locate cards.

Scrolling the Cardfile

Scrolling the Cardfile with Cursor Keys:

1. Locate the and keys on your keyboard:
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.

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 .

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.

Pinpointing with Partial Names: You can use this pinpointing technique to help you locate cards even if you're not sure of how to spell the name. You can use just the first few letters, or even the first letter alone. Try it with only the first letter.

To locate cards that begin with "s":

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

2. Press `Return`.

ECM pinpoints Scientific Books, Ltd., the first card beginning with "s". Now you can scroll through the cards that begin with "s" to find the one you want.



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 `Select` on the keyboard.

4. Press **Select**.

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

```
Executive Card Manager                               Cardfile: K 5 C 22
Type any changes or choose a function key.          Chocolat-
Chocolates of Belgium                               *** IMPORTS CARDFILE ***

Company Chocolates of Belgium
Agent's Name Theo Van Cleef
Telephone 74-89-72
Next Contact 06/06/85 (YY/MM/DD)
Street Address 41 Avenue Hamoir
City Brussels
Country Belgium
State
Zip
Card Last Updated Date 06-06-85 Time 10:01:00 PM
Specialties Dark and light chocolate
Cream, fruit, nut centers

Via Previous Next Mark / 08 22 Delete Print Restore ECM
Phone Card Card Unmark 04:16p Card Card Original Main
f1 f2 f3 f4 f5 f6 f7 f8
```

Now, return this card to the cardfile:

5. Press **ECM Main**.

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

Reading Adjacent Cards in the Select Screen

You can read the card in front of or behind the selected card without leaving the **Select** menu.

To read cards adjacent to the Chocolates of Belgium card:

1. With the rotary cardfile appearing on your display, select the Chocolates of Belgium card.

2. Press **Next Card**.

ECM shows you Dallas Scientific Instruments, Inc., the card immediately after Chocolates of Belgium.

3. Press **Previous Card**.

Now you're back to the Chocolates of Belgium card.

- Return the card to the cardfile by pressing **ECM Main**.
ECM brings up the Main 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.

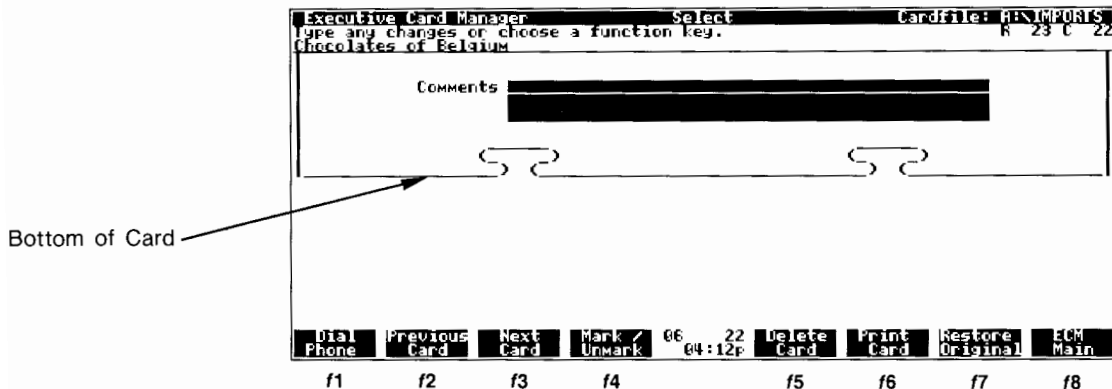
Flipping Pages of a Long Card

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

The card you chose appears in the Select menu.

- Locate **(Extend char)**, **(Next)**, and **(Prev)** on the keyboard.
- Press **(Extend char)** and **(Next)** simultaneously.

ECM shows you the second page of your card:



- Press **(Extend char)** and **(Prev)** simultaneously.
ECM brings back the previous page of your card.

Rolling a Long 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 if a card is long: the first page won't have a bottom.

1. Make sure that the Select menu appears on your display.
2. Locate **Shift**, **▲**, and **▼** on your keyboard.
3. Hold down **Shift** and press **▲** once.

The card rolls up by one line,

4. Now hold down **Shift** and hold down **▲** 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.

Next, try rolling the card back to its first page:

5. Hold down **Shift** and **▼** until the computer starts to beep.

ECM rolls down the lines of the card until the top of the card shows.

Now return the card to the cardfile:

6. Press **ECM Main**.

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

Printing a Card

*If your computer doesn't have a working printer attached, continue to the next section titled **End of Session 2**.*

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. Press **Print Card**.

ECM prints the entire card.

3. Press **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 multi-page card. Or you can print reports and mailing labels. (In Session 6, you'll see how to print reports).

End of Session 2

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.*

If You Want to Exit ECM

If you want to exit ECM at this time, refer to Session 7: **Leaving ECM**, page 7-1, for instructions.

3

Creating a New Cardfile

Contents

Chapter 3

Creating a New Cardfile

- 3-1 Before You Begin
- 3-1 Drawing a Form
- 3-2 Moving the Cursor As You Draw a Form
- 3-3 A Sample Form: BIRTHDAYS
- 3-3 Giving Your Form a Title
- 3-3 Creating Fields on Your Form
- 3-5 Modifying Fields on Your Form
- 3-6 Practice Creating Fields and Labels
- 3-7 Arranging Your Cards in the Order You Want
- 3-8 Saving a New Cardfile on the Disc
- 3-9 End of Session 3
- 3-9 FYI: Other Ways to Create a New Cardfile



3

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. 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 2, start the program again. (For a refresher on starting ECM, reread **Starting ECM from P.A.M.**, page 1-2.)*

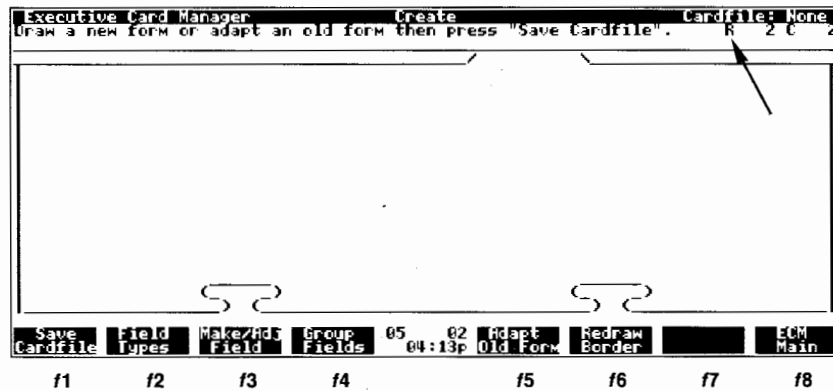
Drawing a Form

To begin drawing a card form:

1. From the Main menu, press **Cardfile Tasks**.
ECM shows you the Cardfile Tasks menu.

2. Press **Create Cardfile**.

In a few moments, ECM shows you the Create menu:



The message line will contain the cursor's row and column numbers *within the card form*. The cursor's row and column numbers *on the display* appear at the bottom of the display. Notice they are different.

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:

The screenshot shows the 'Executive Card Manager' software interface. At the top, a menu bar contains 'Executive Card Manager', 'Create', and 'Cardfile: None'. Below the menu bar, a status line reads 'Draw a new form or adapt an old form then press "Save Cardfile".' and 'R 1 C 2'. The main window displays a form titled 'BIRTHDAYS'. The form contains four fields: 'First Name', 'Last Name', 'Birthdate (MM/DD/YY)', and 'Phone'. Labels are placed to the left of each field. The software interface includes a menu bar with options like 'Save Cardfile', 'Field Types', 'Make/Adt Field', 'Group Fields', '04 02 09:03a', 'Adapt Old Form', 'Redraw Border', and 'ECh Main'. A status bar at the bottom shows function keys f1 through f8.

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. Press `Make/Adj Field`.

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

```
Executive Card Manager      Create: Make/Adj.      Cardfile: None
Adjust field using function labels and cursor keys then press "Create Menu".
Row 7 Start Col 16 End Col 16

BIRTHDAYS

First Name \

Shorten  Widen  16  16  Remove  Create
Field   Field  04:17P Field   Menu
f1      f2      f3      f4      f5      f6      f7      f8
```

The third line of the display will show the row number, starting column, and ending column of the field being created.

ECM will start the field wherever the cursor is located. The backslash (\) shows you what columns are being included in the field.

5. Watching the `End Col` indicator, press `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.

3-4 Creating a New Cardfile

6. Press **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. Press **Make/Adj. Field** to bring up the Make/Adjust menu.
3. Press **Shorten Field** once.
Notice that End Col = 35.
4. Press **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

▲, ▼, ◀, ▶

widen the field

Widen Field

delete the field

Remove Field

(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 table to help you position the fields at the proper row and column numbers:

BIRTHDAYS title	Row 3 Column 35
First Name label	Row 7 Column 5
First Name field	Row 7 Start Col 16 End Col 35
Last Name label	Row 7 Column 38
Last Name field	Row 7 Start Col 48 End Col 67
Birthdate label	Row 9 Column 5
Birthdate field	Row 9 Start Col 26 End Col 33
Phone label	Row 11 Column 5
Phone field	Row 11 Start Col 11 End Col 23

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, press **Field Types**.

The Field Types menu appears with the BIRTHDAYS form:

Executive Card Manager Create: Field Types Cardfile: None
Assign the field types desired. R 7 C 18

BIRTHDAYS

First Name _____ Last Name _____
Birthdate (MM/DD/YY) _____
Phone _____

f1 f2 f3 f4 f5 f6 f7 f8
Set/Clr Autodial Set/Clr Key1 Set/Clr Key2 Set/Clr Key3 10 16 Set/Clr Descend 04:25p Set/Clr Date Set/Clr Time Create Menu

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

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

Executive Card Manager Create: Field Types Cardfile: None
Assign the field types desired. R 7 C 18

BIRTHDAYS

First Name _____ Last Name K1 _____
Birthdate (MM/DD/YY) _____
Phone _____

f1 f2 f3 f4 f5 f6 f7 f8
Set/Clr Autodial Set/Clr Key1 Set/Clr Key2 Set/Clr Key3 10 16 Set/Clr Descend 04:25p Set/Clr Date Set/Clr Time Create Menu

The **K1** in the Last Name field tells you it is the *primary key field*.

The up arrow (**^**) tells you that ECM will arrange the cards in *ascending order*—that is, from A to Z.

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. Press **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. Press **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 as 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, press **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 **Return**.

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 3

FYI: Other Ways to Create a New Cardfile

If you want to exit ECM at this time, refer to Session 7: **Leaving ECM**, page 7-1, for instructions.

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 (HP 45441D) for ready-made forms. 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 *Using Executive Card Manager*, Chapter 12: **Copying Information from a Cardfile**.)
- Copy just the card form of an existing cardfile, then adapt the form to create a new cardfile. (Refer to *Using Executive Card Manager*, Chapter 4: **Creating a New Card Form**.)



4

Adding, Updating, and Deleting Cards

Contents

Chapter 4

Adding, Updating, and Deleting Cards

- 4-1 Before You Begin
- 4-1 Adding a Card to the Cardfile
- 4-3 Practice Adding Cards
- 4-4 Updating Information in a Card
- 4-5 Deleting a Card from the Cardfile
- 4-5 End of Session 4



4

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. *If you're continuing directly from Session 3, go to the next section titled, **Adding a Card to the Cardfile**. Otherwise, proceed with step 2.*
2. Start ECM. (If you need help, refer to **Starting ECM from P.A.M.**, page 1-2.)
3. *If **Cardfile:** is the one you created in Session 3 (it's named after you), go to the next section titled, **Adding a Card to the Cardfile**. Otherwise, proceed with step 4.*
4. Get the cardfile you created in Session 3 (it's named after you).
5. 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, press **Add Cards**.

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

Executive Card Manager Add Cardtitle: BIRTHDAYS
Fill in the card information then press "Add This Card".

BIRTHDAYS

First Name _____ Last Name _____
Birthdate (MM/DD/YY) _____
Phone _____

f1 f2 f3 f4 10:04:28p f5 f6 f7 f8 ECM Main

2. Type John.

If you make a mistake, backspace to the error and type over the incorrect letters. Notice that you type information in the fields using capitals and small letters—exactly as you want it to look on the card.

3. Press **Return**.

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

4. Type Doe.

5. Press **Tab**.

Tab, like **Return**, 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 `(Return)` 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. Hold down `(Shift)` and press `(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. Press `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. Press `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**, page 2-5.)
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. Press **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 re-type the new phone number.
6. Make sure the information in the card is what you want saved.

Note



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

7. Press **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. Press **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, press **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. Press **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 4

If you want to exit ECM at this time, refer to Session 7: **Leaving ECM**, page 7-1, for instructions.

5

Finding Sets of Cards



Contents

Chapter 5

Finding Sets of Cards

- 5-1 Before You Begin
- 5-2 Finding All Cards with the Same Information in a Field
- 5-3 Exiting a Workset
- 5-4 Finding All Cards with Similar Information in a Field
- 5-4 End of Session 5
- 5-5 FYI: Other Kinds of Searches

5

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. If you left ECM after Session 4, start the program again. Otherwise, proceed with step 2.
2. Get the IMPORTS cardfile. (If you don't remember how, refer to **Getting a Cardfile**, page 2-2.)
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, press **Find Cards**.

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

```
Executive Card Manager      Find      Cardfile: R:IMPORTS
Type criteria or select function label.  0 marked cards.      R 5 C 22

*** IMPORTS CARDFILE ***

Company      _____
Agent's Name _____
Telephone   _____
Next Contact _____ (YY/MM/DD)
Street Address _____
City        _____ State _____ Zip _____
Country     _____
Card Last Updated      Date _____ Time _____
Specialties _____

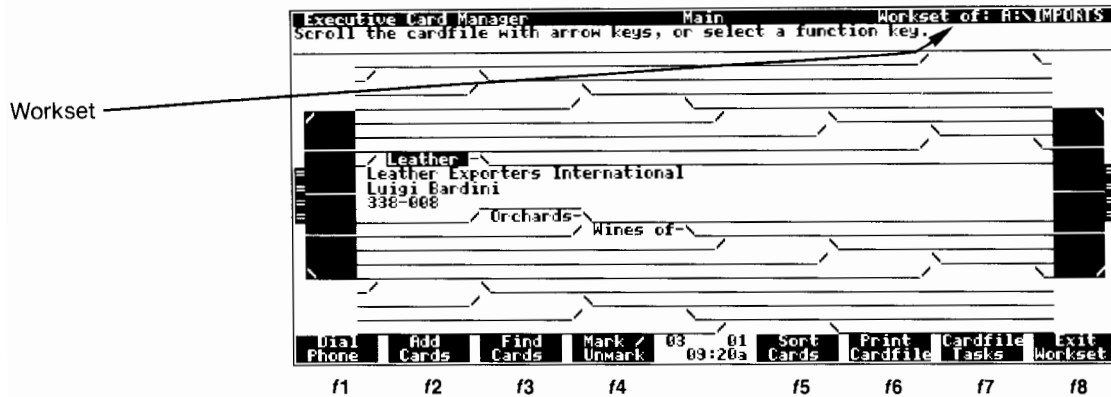
Find &      Mark      Unmark      08      22      View      Edit      ECM
View       All      All      04:30p  Marked   Field   Main
f1         f2         f3         f4         f5         f6         f7         f8
```

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. Notice that you can type the information in capitals, small letters, or a combination of the two.

4. Press **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:



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.

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, press **Exit Workset**.
ECM asks you to confirm that you want to exit the workset.
2. Press **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. Press **Find Cards**.
2. Move the cursor to the field labeled **Next Contact**. Notice the date has the year first, then the month and day.

3. Type **86***.

The asterisk tells ECM to search only for 86 and ignore the rest of the date.

4. Press **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 5

If you want to exit ECM at this time, refer to Session 7: **Leaving ECM**, page 7-1, for instructions.

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 *Using Executive Card Manager*, Chapter 8: **Searching for Specific Cards**.

6

Printing Reports

Contents

Chapter 6

Printing Reports

- 6-1** Before You Begin
- 6-2** Getting Ready to Print Reports
- 6-2** Defining a Format for a Report
- 6-2** Getting Fields for a Report
- 6-4** Adjusting Fields for a Report
- 6-6** Adding Titles
- 6-7** Setting Up the Printer for a Report
- 6-10** Printing a Report on the Printer
- 6-11** Saving a Report Format
- 6-11** End of Session 6
- 6-11** FYI: Sample Formats



6

Printing Reports

This 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.

Before You Begin

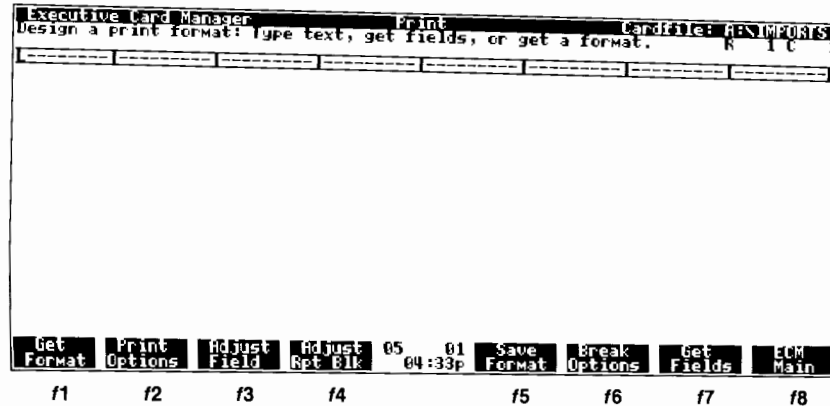
1. *If you're continuing directly from Session 5, go to the next section titled, **Getting Ready to Print Reports**. Otherwise, proceed with step 2.*
2. Start ECM.
3. *If the cardfile appearing is IMPORTS, go to the next section titled, **Getting Ready to Print Reports**. Otherwise, proceed with step 4.*
4. Get the IMPORTS cardfile. (If you don't remember how, refer to **Getting a Cardfile**, page 2-2.)
5. Return to the Main menu.

Getting Ready to Print Reports

You need to get to the Print menu:

1. From the Main menu, press **Print Cardfile**.

In a few moments, 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, press

The Get Fields menu with the IMPORTS card form appears:

Identification Number →

```
Executive Card Manager      Print: Get Fields      Cardfile: A:\IMPORTS
Selected Fields:
1
*** IMPORTS CARDFILE ***
Company 1
Agent's Name 2
Telephone 3
Next Contact 4 <YY/MM/DD>
Street Address 5
City 6 State 7 Zip 8
Country 9
Card Last Updated      Date 10      Time 11
Specialties 12
13
14
15
Select All Flds  Unselect All Flds  Select Field  Unselect Field  08:22  Label Format*  Report Format*  Place Fields  Print Menu
f1      f2      f3      f4      04:34p      f5      f6      f7      f8
```

2. If no asterisk is in **Report Format**, press 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:

- a. **Country**, field 9
- b. **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, press **Unselect All Flds** and start again from step 3.

7. Choose **Place Fields**.

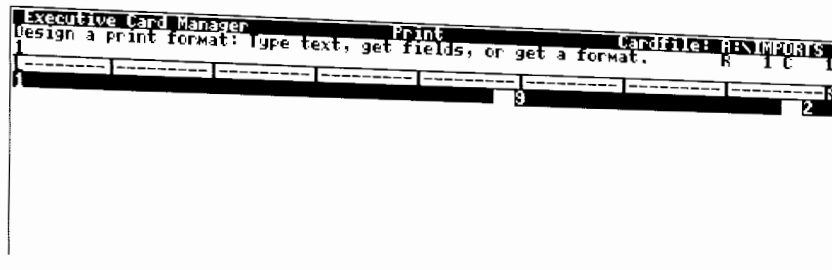
ECM returns to the Print menu with the fields you've gotten. The cursor is in field 2, the last field you selected for inclusion in the report:



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

8. Press **Home** (**Extend char** **▶**).

Now you can examine the *default* report layout:



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

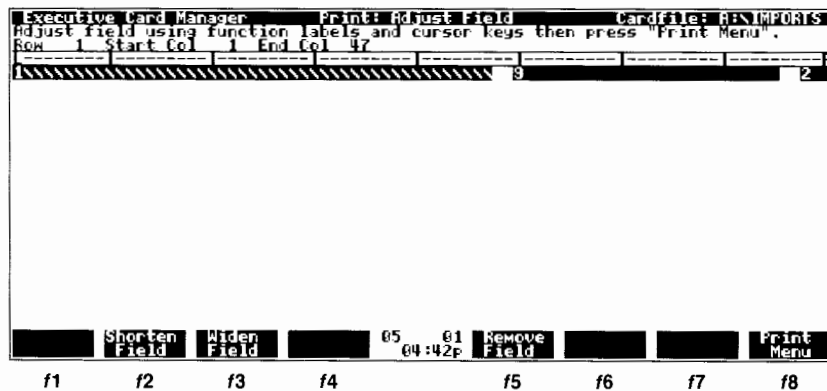
Notice that field 2 (**A**g**e**n**t**'**s** **N**a**m**e) runs past the end of the display. This is normal if you are making a 132-column report. In the following example you will adjust the fields to fit in an 80-column report.

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, press **Adjust Field**.
ECM displays the Adjust Field menu with field 1 chosen for adjusting:



2. Watching the End Col indicator, press **Delete char** (**Extend char** **- char**) until End Col 31.

Notice that the other fields automatically shifted to the left by one column each time you pressed **Delete char**. (If you had pressed **Shorten Field** instead of **Delete char**, 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:

3. Press **Insert char** (**Extend char** **+ char**). Watching the fields, press **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**.

Press **Insert char** again to get out of Insert mode.

4. Press **Print Menu**.

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

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

6. 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** (**Extend char** **▶**) to move the cursor to the beginning of the report.

3. Press **Insert line** (**Extend char** **+ line**) four times to insert four lines.

4. Move the cursor to R1 C37 and type
IMPORTS REPORT.
5. Move the cursor to R3 C1 and type Company.
6. Move the cursor to R3 C35 and type Country.
7. Move the cursor to R3 C57 and type Agent's Name.

Your report layout now looks like this:

Executive Card Manager		Print		Cardfile: R1 IMPORTS	
Design a print format: type text, get fields, or get a format. R 18 C 09					
IMPORTS REPORT					
Company	Country	Agent's Name			
1	2	3			

Get Format	Print Options	Adjust Field	Adjust Rpt Blk	22 1 89 04:57p	Save Format	Break Options	Get Fields	ECM Main
f1	f2	f3	f4		f5	f6	f7	f8

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.

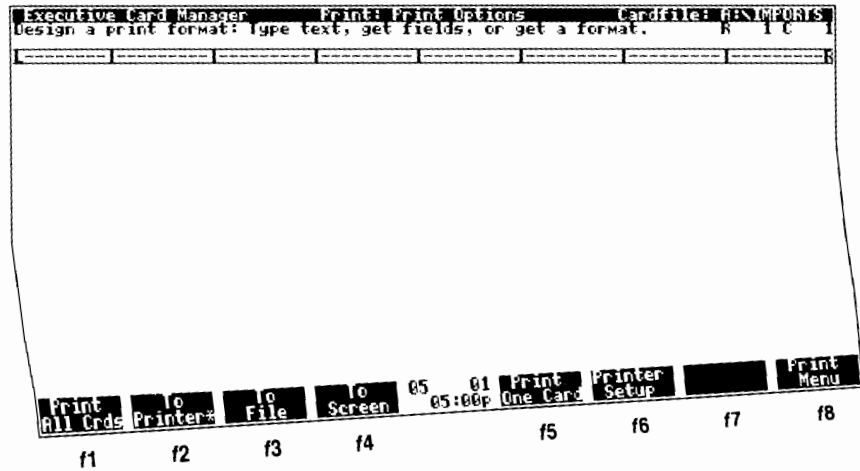
For this exercise, you'll create a typical report. However, if your printer is either an *HP LaserJet* or a *sheet-feed printer* (such as the *HP 2601* and *HP 2602* printers), it requires special setup values which you'll need to set in the Printer Setup menu.

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, press **Print Options**.

The Print Options menu appears:



- From the Print Options menu, press **Printer Setup**.
ECM shows the Printer Setup menu:

default printer
setup values →

```

Executive Card Manager      Print: Printer Setup      Cardfile: RSNIMPD0A5
Set the proper values for your printer

Top Margin  ████ 0
Bottom Margin ████ 0
Left Margin ████ 0
Right Margin ████ 0
Print Width ████ 80
Lines Per Page ████ 60
Printer ████ PRN
Auto Feed ████ YES
Compress Print ████ NO
Lines Per Inch ████ 6

Printer Setup String ████

Print Blocks Across Page ████ 1

Print Date ████ NO
Print Page Numbers ████ NO
Lines Per Card ████ 60 (Select Screen Only)

Get Values Previous Value Next Value ████ 05 26 Save Values Default Values PrintOpt Menu
f1 f2 f3 f4 f5 f6 f7 f8
  
```

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.

- Check the picture above to locate the value that you need to change for your printer. Move the cursor to that field.
- Press **Previous Value** or **Next Value** until the field contains the proper value.
- Press **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 press **Save Values**, ECM will use those new values until you exit ECM. Then when you start ECM, the old values will be in effect.



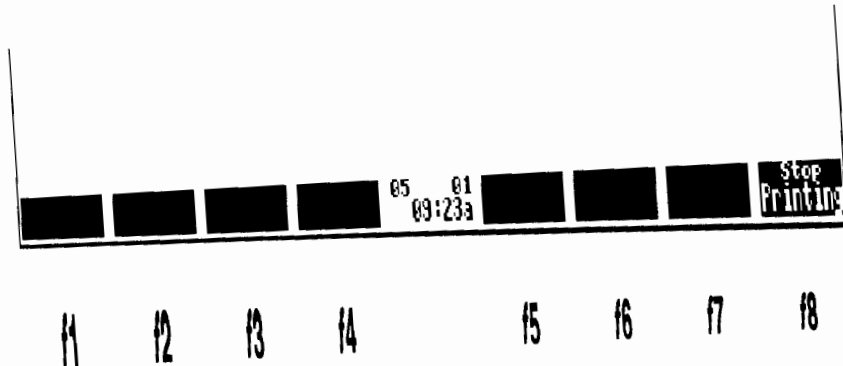
6. Press **Print Opt Menu**.
7. In the Print Options menu, press **Print Menu**.
ECM returns to the Print menu.

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, press **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. Press **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.

When ECM is finished printing, press **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, press **Save Format**.

ECM prompts for a file name.

2. Type your last name and press **Return**.

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

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

End of Session 6

You're nearly finished with *Learning Executive Card Manager*. Continue to the last session, **Leaving ECM**.

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** contains report format files designed to work with its forms.

For more information on printing labels and reports, refer to *Using Executive Card Manager*, Chapter 11: **Printing Information from a Cardfile**.

7

Leaving ECM

Contents

Chapter 7

Leaving ECM

7-2 End of Learning Executive Card Manager



7

Leaving ECM

1. Make sure the Main menu appears on your display.

If the Main menu isn't there, use the **Map to ECM** on the

inside of the back cover to help you return to the Main menu.

2. Press **Exit ECM**.

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

3. Press **Yes**.

After a few moments, the P.A.M. screen appears:

```
Personal Applications Manager (P.A.M.) Main 337920 bytes free on A:
Move the pointer to the desired application, then press Start Applic.

Hewlett-Packard Battery:100% 10-8-85
↓
DGS Commands ECM
B B

Start File Time & Reread 03 01 Datacom System
Applic Manager Date Discs 09:50a Config Off

f1 f2 f3 f4 f5 f6 f7 f8
```

End of Setting You Free with Executive Card Manager

If you've completed all of the sessions in this booklet, 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 *Using Executive Card Manager* will be the best reference tool to use.

We hope you've enjoyed this tutorial!

A Map of

Find

Find & View

Main (with

Add

Add This Card

Sort

Sort & View

Print

Get Format

Print: Adjust

Save Changes

Print: Adjust

Print: Print C

Print All Cards

Print: Printer

Get Values

Print: Break

Sum Field

Print: Set Br

Yes

Print: Get Fi

Select All Fields

(Print to scre

Press to Continue

