

HEWLETT-PACKARD

Quick Reference Guide
to Executive Card Manager



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Executive Card Manager Quick Reference Guide



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Special Terms

(Chapter 1)

Autodial	The ability to dial telephone numbers automatically.
Card	An entry in a cardfile.
Card form	The layout or format of a set of cards.
Cardfile	A set of cards that have the same card form to which you have given a name.
Current cardfile	The cardfile with which you are presently working.
Field	The blanks that you fill in for each item on a card.
Field label	A name that describes the information in a field.
Group	A set of fields that ECM links together to search for information.
Key field	A field that ECM uses to sort cards.
Pathname	The information required by ECM to find a cardfile on a disc.
Workset	A temporary cardfile that ECM creates for certain tasks.

Creating a New Card Form

(Chapter 4)

To display Create menu

1. From the Main menu, choose `Cardfile Tasks`.
2. Choose `Create Cardfile`.

To remove border

1. Move cursor to row 2, column 1.
2. Press the `(Extend char)` and `(Cir dsp)` keys together.

To name the form

1. Move cursor to where the title will begin.
2. Type the title.

To write a label

1. Move cursor to where the label will begin.
2. Type the label.

To create a field

1. Move cursor to where the field will begin.
2. Choose **Make/Adj Field**.
3. Choose **Widen Field** once for each additional space you want in this field.
4. Choose **Create Menu**.

To shorten a field

1. Move cursor to the appropriate field.
2. Choose **Make/Adj Field**.
3. Choose **Shorten Field** once for each space you want to delete.
4. Choose **Create Menu**.

To set special fields

1. Choose **Field Types**.
2. Move cursor to the appropriate field.
3. Choose **Set/Clr Key1** to set the primary key field.
4. Choose **Set/Clr Key2** to set the secondary key field.
5. Choose **Set/Clr Key3** to set the tertiary key field.
6. Choose **Set/Clr Autodial** to set the autodial field.
7. Choose **Set/Clr Date** to set the auto date field.
8. Choose **Set/Clr Time** to set the auto time field.

To change the sort order

1. Choose **Field Types**.
2. Move cursor to the appropriate key field.
3. Choose **Set/Clr Descend**.

To clear a special field

1. Choose **Field Types**.
2. Move cursor to the appropriate field.
3. Choose **Set/Clr Key1** to clear the primary key field.
4. Choose **Set/Clr Key2** to clear the secondary key field.
5. Choose **Set/Clr Key3** to clear the tertiary key field.
6. Choose **Set/Clr Autodial** to clear the autodial field.
7. Choose **Set/Clr Date** to clear the auto date field.
8. Choose **Set/Clr Time** to clear the auto time field.

To group fields

1. Choose **Group Fields**.
2. Display the number for this group.
3. Move cursor to a field you want to include in this group.
4. Choose **Include Field**.
5. Repeat for the other fields you want in this group.

To remove a field from a group

1. Choose **Group Fields**.
2. Move cursor to the appropriate field.
3. Choose **Exclude Field**.

To change group number

From the Group Fields menu, choose **Previous Group** or **Next Group**.

To define another group

From the Group Fields menu, choose **New Group**.

To finish grouping fields

Choose **Create Menu**.

To shorten card form

1. On the Create menu, move cursor to line you want last.
2. Press the (Extend dsp) and (Clr dsp) keys together.
3. Choose **Redraw Border**.
4. Move cursor to bottom border line.
5. Choose **Redraw Border**.

To lengthen card form

1. On the Create menu, remove the old bottom border.
2. Choose **Redraw Border**.
3. Move cursor to new bottom border line.
4. Choose **Redraw Border**.

To save card form

1. Choose **Save Cardfile**.
2. Type a cardfile name.
3. Press (Return).

To cancel a card form

1. Choose **ECM Main**.
2. Choose **Yes**.

Adding Cards to a Cardfile

(Chapter 5)

To display the Add menu

From the Main menu, choose **Add Cards**.

To fill out a card

1. Move cursor to the appropriate field.
2. Enter your information into that field.

To edit entries

Type over erroneous characters, or use your computer's text-editing keys.

To file a card

Choose **Add This Card**.

To cancel adding a card

1. Choose **ECM Main**.
2. Choose **Yes**.

Looking at Cards

(Chapter 6)

To get a cardfile

1. From the Main menu, choose **Cardfile Tasks**.
2. Choose **Get Cardfile**.
3. Type the cardfile's name.
4. Press (Return).

To scroll

Hold down the (▲) or (▼) key.

To see another page

Hold down the (Extend char) key and the (Next) or (Prev) key.

To request a card

1. Type the first one to eight characters that appear on the index tab of the card you want.
2. Press (Return).

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To pull a card

1. Highlight the index tab of the card you want to see.
2. Press the **(Select)** key.

To read other cards

Choose **Next Card** or **Previous Card**.

Working with Cards

(Chapter 7)

To display the Select menu

1. Highlight the index tab of the card you want to see.
2. Press the **(Select)** key.

To change a card

1. Type the new information over the old.
2. Choose **ECM Main**, **Next Card**, or **Previous Card** when you are finished.

To mark a card

With the card you want on display, choose **Mark/Unmark**.

To delete a card

1. With the card you want to delete on display, choose **Delete Card**.
2. Choose **Yes** to confirm.

Searching for Cards

(Chapter 8)

To display the Find menu

From the Main menu, choose **Find Cards**.

To find specific cards

1. Move cursor to the field you want to search.
2. Type the appropriate information into that field.
3. Repeat above steps for any other fields you want to search.
4. Choose **Find and View**.

To enter a search string in a short field

1. Move cursor to that field.
2. Choose **Edit Field**.
3. Type in the required information.
4. Press **(Return)**.

To mark a cardfile

Choose **Mark All** to mark every card in a cardfile.

To mark a workset

1. Display the Find menu.
2. Remove all the old marks.
3. Create the workset you want to mark.
4. Choose **Mark All** to mark all the cards in the workset.
5. Use **Mark/Unmark** from the Main or Select menu when you only want to mark some of the cards.

To see a marked workset

Choose **View Marked**.

To return a workset to its cardfile

1. Choose **Exit Workset**.
2. Choose **Yes**.

Literal Searches

Symbol

Symbol	Meaning
A=	Exact match
A>	Following
A<	Preceding
A>=	From and after
A<=	Up to and including

Wildcard Searches

Symbol

Symbol	Meaning
*	Match any characters at start or end of field in literal search

Negative Searches

Symbol

Symbol	Meaning
~	NOT function

Numeric Searches

Symbol

Symbol	Meaning
N=	Equal to
N>	Greater than
N<	Less than
N>=	Greater than or equal to
N<=	Less than or equal to

Rearranging a Cardfile

(Chapter 9)

To display the Sort menu

From the Main menu, choose **Sort Cards**.

To set key fields

1. Move cursor to the appropriate field.
2. Choose **Set/Clr Key1** to set a new primary key field.
3. Choose **Set/Clr Key2** to set a new secondary key field.
4. Choose **Set/Clr Key3** to set a new tertiary key field.

To change the sort order temporarily

1. Move cursor to the key field you want to change.
2. Choose **Set/Clr Descend**.

Using Autodial

(Chapter 10)

To dial from the Main menu

1. Move the card with the number you want to dial into the open-card position.
2. Choose **Dial Phone**.

To select the number to dial

1. Display the appropriate card on the Select menu.
2. Choose **Dial Phone**.
3. Move cursor to the telephone field you want to dial.
4. Choose **Dial Phone**.

Printing Information from a Cardfile

(Chapter 11)

To choose cards to print

Use **Get Cardfile** to display cardfile or Find menu to create a workset.

To print cards in a different order

Use Sort menu to rearrange the cards in new order.

To print using an existing format

1. From the Main menu, choose **Print Cardfile**.
2. Choose **Get Format**.
3. Type name of file that holds the format.
4. Press **(Return)**.
5. Choose **Print Options**.
6. Choose **Print All Crds**.
7. Choose **Print Menu**.

To select fields

1. From Print menu, choose **Get Fields**.
2. Move cursor to the appropriate field.
3. Choose **Select Field**.
4. Repeat for each field in the order you want.

To place fields in Label format

1. From Get Fields menu, choose **Label Format**.
2. Choose **Place Fields**.

To place fields in Report format

1. From Get Fields menu, choose **Report Format**.
2. Choose **Place Fields**.

To move a field

1. Display print format on Print menu.
2. Move cursor to field you want to move.
3. Choose **Adjust Field**.
4. Use cursor-control keys to move field to new position.
5. Choose **Print Menu**.

To change the size of a field

1. Display print format on Print menu.
2. Move cursor to the appropriate field.
3. Choose **Adjust Field**.
4. Choose **Shorten Field** to shorten only the field.
5. Press **(Extend char)** and **(.char)** together to shorten both the field and the line.
6. Choose **Widen Field** to widen only the field.
7. Press **(Extend char)** and **(+char)** together, then choose **Widen Field** to widen both the field and the line.
8. Choose **Print Menu**.

To remove a field

1. Display print format on Print menu.
2. Move cursor to the appropriate field.
3. Choose **Adjust Field**.
4. Choose **Remove Field**.

To add text

1. Display print format on Print menu.
2. Move cursor where text will start.
3. Type text.

To print text in a heading

1. Display print format on Print menu.
2. Move cursor to top of form.
3. Press **(Extend char)** and **(+line)** together to create necessary space.
4. Type text.

To print fields in a heading

1. Display print format on Print menu.
2. Select fields from Get Fields menu.
3. Position fields from Adjust Field menu.
4. Choose **Adjust Rpt Blk**.
5. Choose **Top Edge Down** or **Top Edge Up**.
6. Choose **Save Changes**.

To print sum, count, or average fields

1. Display print format on Print menu.
2. Choose **Break Options**.
3. Move cursor to the appropriate field.
4. Choose **Sum Field**, **Count Field**, **Average Field**, **Right Justify**, and/or **Hidden Field**.
5. Repeat for the other fields you want to set.
6. Choose **Print Menu**.

To identify break fields

1. Display print format on Print menu.
2. Choose **Break Options**.
3. Choose **Set Breaks**.
4. Move cursor to the appropriate field.
5. Choose **Yes** or **No** to choose the proper actions.
6. Choose **BreakOpt Menu**.
7. Choose **Print Menu**.

To change size of repeat block

1. Display print format on print menu.
2. Choose **Adjust Rpt Blk**.
3. Choose **Smallest Width**.
4. Move cursor to right edge.
5. Choose **Smallest Depth**.
6. Move cursor to lower edge.
7. Choose **Define Block**.
8. Choose **Save Changes**.

Copying Information from a Cardfile

(Chapter 12)

To display the Copy menu

1. From the Main menu, choose **Cardfile Tasks**.
2. Choose **Copy Cardfile**.

To make a duplicate copy

1. Choose **Compact Save** (more space efficient) or **Quick Save** (faster).
2. Type a name for the duplicate copy.
3. Choose **Copy**.

To replace a cardfile

1. Choose **Compact Save** (more space efficient) or **Quick Save** (faster).
2. Type the full cardfile name of the cardfile you want to replace.
3. Choose **Copy**.
4. Verify the cardfile name in the destination box.
5. Choose **Replace**.

To combine two cardfiles

1. Get the cardfile that you want left unchanged.
2. Display the Copy menu.
3. Type the name of the destination cardfile.
4. Choose **Copy**.
5. Verify the cardfile name in the destination box.
6. Choose **Append**.

To update a cardfile

1. Get the cardfile you want to update.
2. Display the Copy menu.
3. Choose **Merge**.
4. Type the name of the source cardfile.
5. Choose **Copy**.

Changing a Cardfile Once It Contains Cards

(Chapter 13)

To display the Transfer Options menu

1. From the Main menu, choose **Cardfile Tasks**.
2. Get the cardfile that you want to change.
3. Choose **Copy Cardfile**.
4. Choose **Transfer Out**.

To transfer out information

1. Type the name of the destination file.
2. Choose **Copy**.

To transfer information into the new card form

1. Choose **Cardfile Tasks**.
2. Choose **Copy Cardfile**.
3. Choose **Transfer In**.
4. Type the name of the holding file.
5. Choose **Copy**.

To reorder fields

1. From the Transfer Options menu, choose **Reorder Fields**.
2. Number the fields in the order they are to be sent.
3. Choose **Copy Main** to return to the Transfer Options menu.

Deleting a Cardfile

(Chapter 14)

To delete a cardfile

1. From the Main menu, choose **Cardfile Tasks**.
2. Choose **Delete Cardfile**.
3. Type the name of the cardfile you want to delete.
4. Press **(Return)**.
5. Choose **Yes** to delete the cardfile.