
Setting You Free with Executive Card Manager



**Manual Part No.
45421-90004**

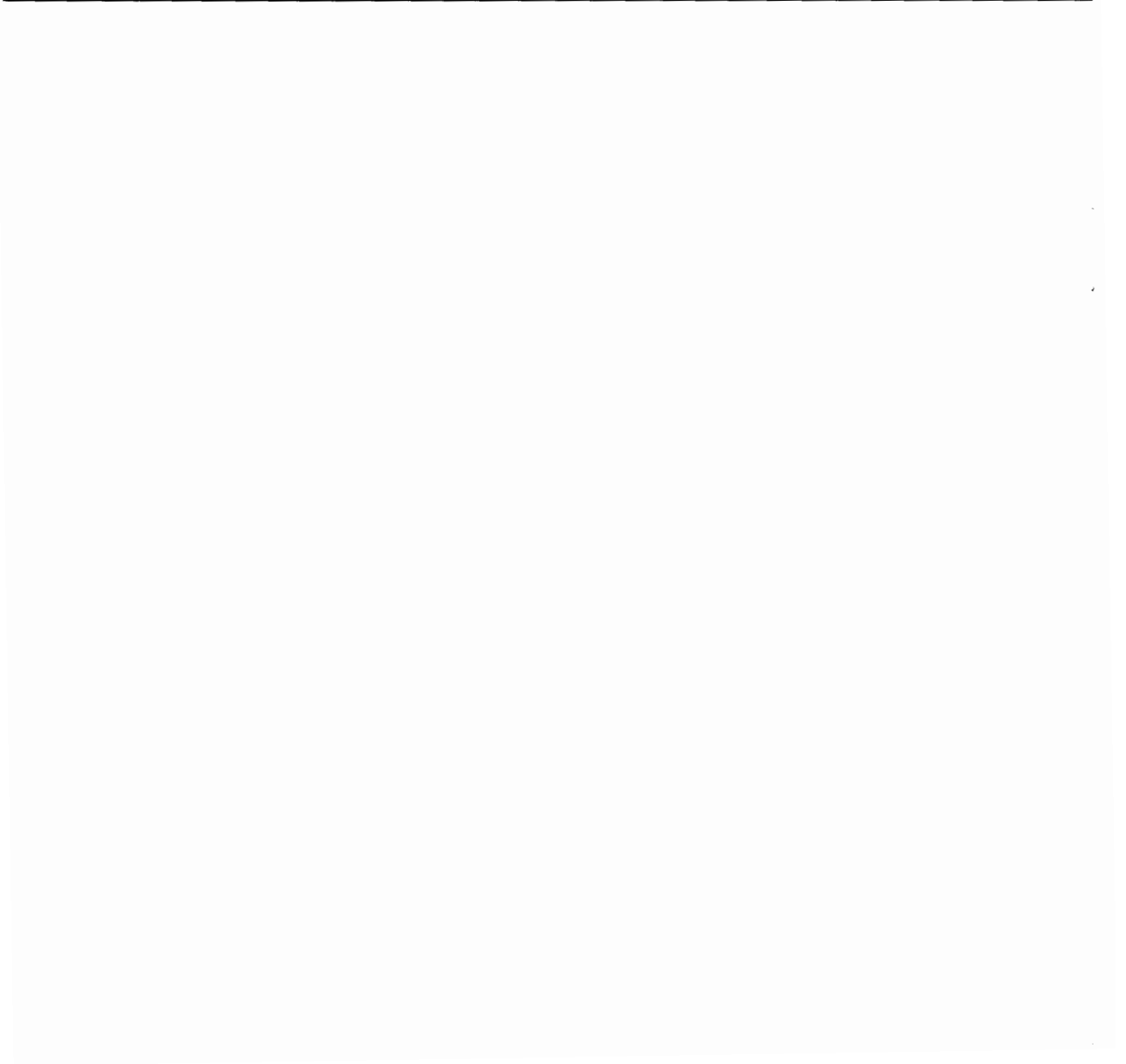


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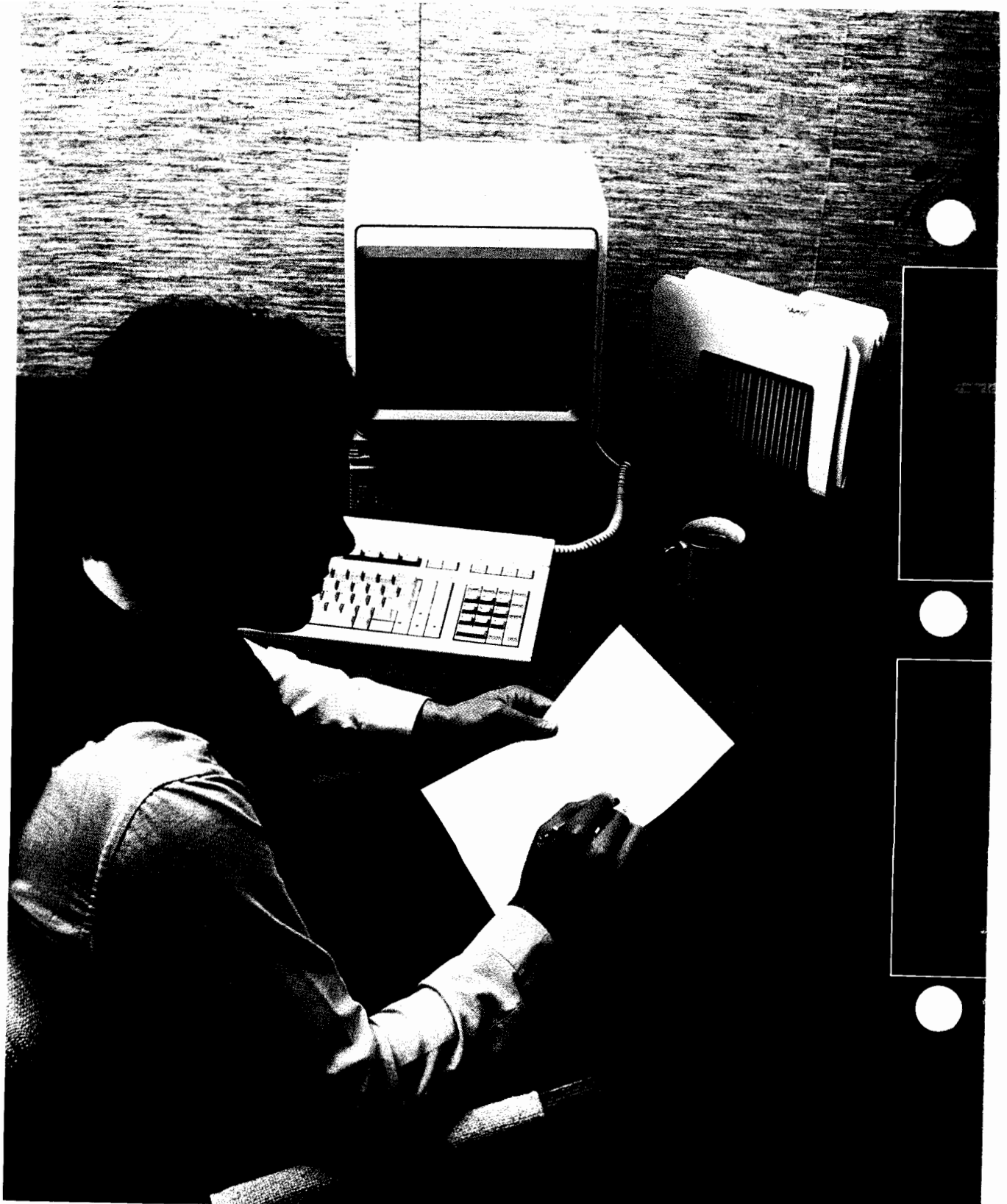
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Introducing Executive Card Manager

Executive Card Manager is a powerful yet easy-to-use tool for personal information management. It's designed for the business professional, so you can pick up the basics in a lunch hour—and get that hour back in increased productivity.

On the surface, it's very simple. As a computerized look-alike of your desktop rotary cardfile, ECM lets you organize your information for quick and convenient access. Use it as you would the desktop version to locate a card immediately, or to browse through the file, card by card.

Now, try adding a card— ECM automatically files it in the right place. Or look up a phone number— and ECM can dial it for you. You get the feeling that this is just the tip of the iceberg of ECM's power. And it is.

For example, ECM can:

- Store up to eleven screens worth of information on a single "long" card.
- Search for cards that contain information you specify
- Re-sort the cardfile in the order you specify
- Print address labels and simple form letters with a minimum of set up and without a word processor
- Create columnar summary reports—up to 255 characters wide —that contain totals, subtotals, averages, and counts of information
- Reorganize the information in the card as you like

- Remember your telephone access codes (such as Sprint and MCI) and insert them into phone numbers that ECM dials for you
- Share data with other applications, including WordStar® and MailMerge™, Lotus 1-2-3™, Deluxe VisiCalc®, dBASE II®, Condor®, and BASIC.

ECM does more than simply store information. It *manages* it. So you can monitor travel expenses, track inventories, or schedule appointments with ECM just as easily as you file addresses and phone numbers in your desktop cardfile.

And with **Executive Card Manager: Templates**, a companion product to ECM, you get the convenience of ready-made card forms with accompanying report formats. You'll find over 20 different forms to help you manage business and personal information. Whether it's clients or contests you want to keep track of, all you have to do is "fill in the blanks" with ECM: Templates—and that's instant productivity.

Executive Card Manager Specifications

Cardfile features

- Number of cardfiles limited by disc capacity
- Up to 65,530 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 10 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

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 under Execudesk
- Conversion utility for PCF cardfiles
- Data compatibility with Lotus 1-2-3™, Deluxe VisiCalc® , WordStar® , MailMerge™, dBASE II® , BASIC, and Condor®

How to Use This Booklet

Setting You Free with 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.

For Experienced PCF Users

While Executive Card Manager is very much like Personal Card File, there are some differences. If you are familiar with PCF, you should review the following sections in this booklet to help you use ECM:

- **Reading a Long Card**, in Session 2, page 2-14
- Session 3: **Creating a New Cardfile**, page 3-1
- Session 6: **Printing Reports**, page 6-1

What We Mean When We Say...

ECM works with three input devices: your computer's keyboard, HP Touch, and HP Mouse (or a compatible mouse). The following table tells you what our instructions mean for the different input devices.

When we say . . .	And you're using . . .	You should . . .
Press function label	the keyboard	Press the function key that corresponds to function label .
	HP Touch	Touch function label on the display.
	HP Mouse	Move the Pointer to function label on the display, then press and release the left button of the mouse.
Choose	the keyboard	Press Tab (or Shift Tab) until the item you're choosing becomes highlighted.
	HP Touch	Touch the item on the display that you're choosing.
	HP 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, HP Touch, or HP Mouse	Press key on the keyboard.
Type text	the keyboard, HP Touch, or HP Mouse	Type text on the keyboard as you would on a typewriter.

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 should be using a *work disc* of the ECM software instead of its Application Master disc. If you don't have a work disc, refer to *Setting Up Executive Card Manager* for instructions.

Caution



You may hear some clicks from your disc drive and see its red light come on while ECM performs tasks. *Don't press, touch, or type until the red light turns off.*

Starting ECM from P.A.M.

1. If you have a dual flexible disc drive, insert the ECM work disc into drive A.
2. On the P.A.M. Main screen, make sure that **Exec Card Mgr** appears in the list of applications.
(If the message **Press Next/Prev to see more applications** appears in the lower right corner of the display, press **Next** and continue checking the list.)

If **Exec Card Mgr** doesn't appear in the list, press **Reread Discs**, then check again.

3. If **Exec Card Mgr** isn't highlighted, choose it.

4. Press **Start Applic**.

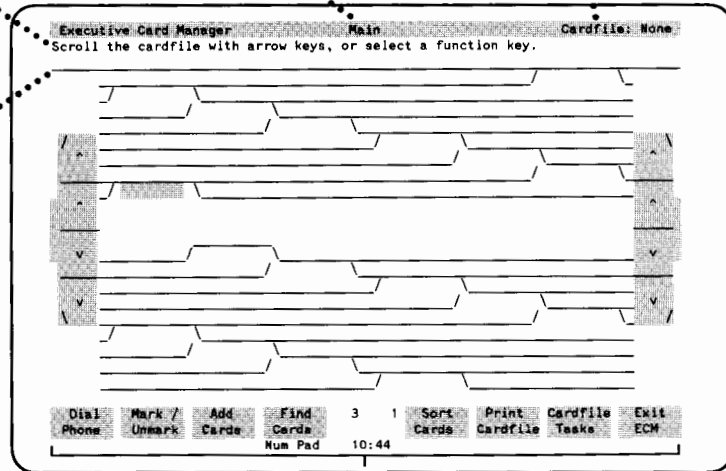
The P.A.M. Main screen goes away, and after a while, ECM displays its *Main menu*:

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.

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.



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, , 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 menus).

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 in 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

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.)

Getting a Cardfile

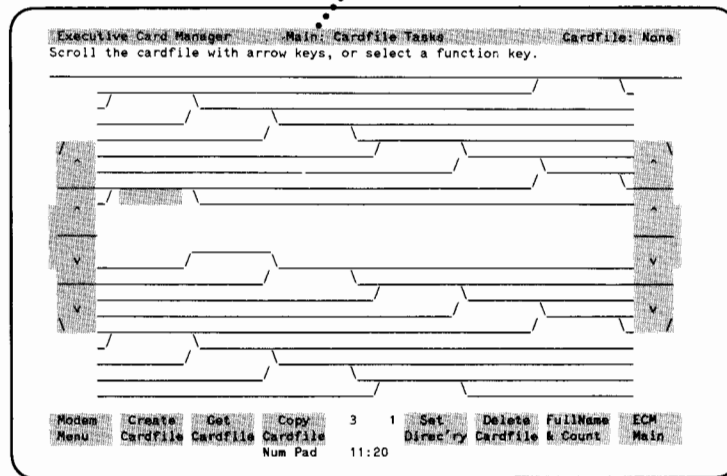
In these exercises you use a sample cardfile named IMPORTS.

To get the IMPORTS cardfile:

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

ECM displays the Cardfile Tasks menu:

This part of the menu name tells you which menu was on the display before the current one.

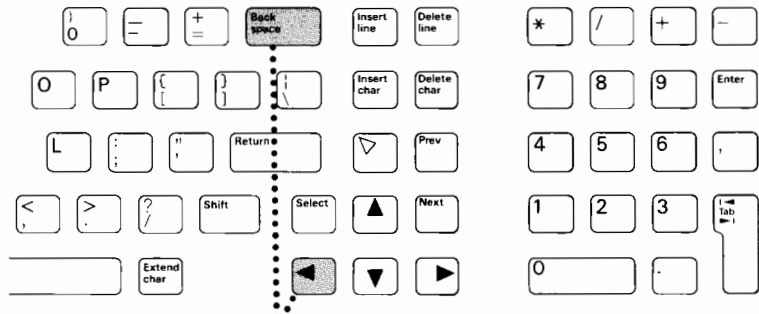


2. Press **Get Cardfile**.

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:



If you make a typing mistake, use either key to backup to the incorrect letters

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:

Each card has an **index tab** with information that identifies it.

The cards are arranged alphabetically.

This is the **open card**, or the one in **open-card position**.

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

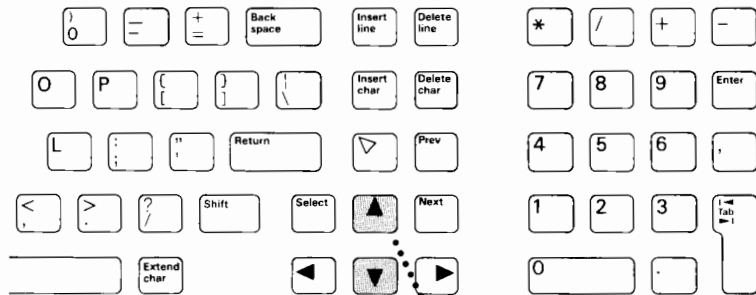


Whenever the rotary cardfile appears on the display you can locate cards.

Scrolling the Cardfile

Scrolling the Cardfile with Cursor Keys

1. Locate the  and  keys on your keyboard:



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 **▼**.

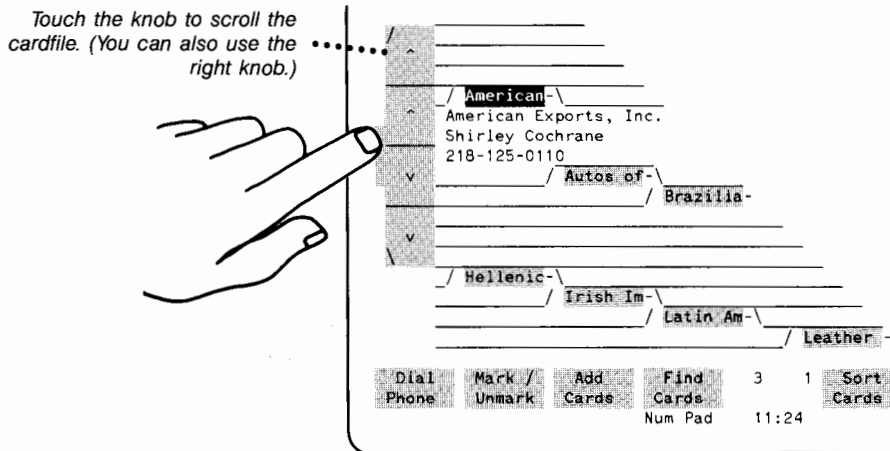
Now the cardfile scrolls down.

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

Scrolling the Cardfile with HP Touch

If your computer doesn't have HP Touch, continue to the next section titled, **Scrolling the Cardfile with HP Mouse**.

1. Touch an up arrow on the left knob:



ECM scrolls up the cardfile continuously until you take your finger off the knob.

2. Touch a down arrow on the left knob.

Now the cardfile scrolls down.

Scrolling card-by-card with HP Touch. Instead of touching the knob continuously, you tap it to scroll one card.

Scrolling the Cardfile with HP Mouse

If your computer doesn't have HP Mouse, continue to the next section titled, **Asking for a Card by Name**.

1. Move the Pointer to an up arrow on the left knob, then press the left button of the mouse.
ECM scrolls up the cardfile continuously until you release the button.
2. Now move the Pointer to a down arrow and press the left button of the mouse.
Now the cardfile scrolls down until you release the button.

Scrolling card-by-card with HP Mouse. Instead of pressing the left button continuously, you press and release it to scroll one card.



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 `[Return]`.

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 .

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.

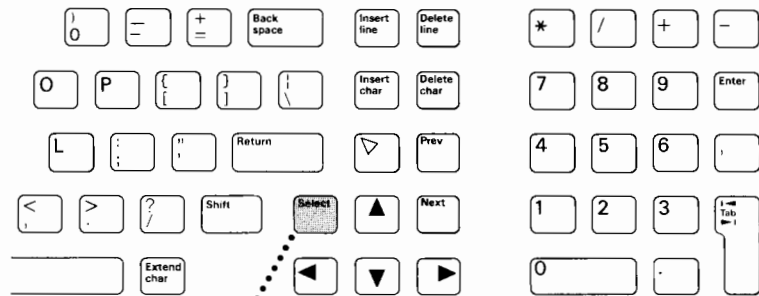
Selecting a Card for Reading

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:



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

4. Press **Select**.

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

```
Executive Card Manager          Select          Cardfile: A:\IMPORTS
Type any changes or choose a function key.      R  5 C 22
Chocolates of Belgium

/ Chocolat-

*** IMPORTS CARDFILE ***

Company Chocolates of Belgium
Agent's Name Theo Van Cleef
Telephone 74-09-72

Next Contact 85/09/16 (YY/MM/DD)

Street Address A1 Avenue Hamoir
City Brussels          State      Zip
Country Belgium

Card Last Updated      Date 02-26-85      Time 04:54:17 pm

Specialties Dark and light chocolate
             Cream, fruit, nut centers

Dial Previous Next Mark / 8 22 Delete Print Restore ECM
Phone Card   Card Unmark Num Pad 11:26
             Original Main
```

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.

Selecting a Card with HP Touch

If your computer doesn't have HP Touch, continue to the next section titled, **Selecting a Card with HP Mouse**.

1. With the rotary cardfile appearing on your display, locate any card you want to select.
2. Touch this card's index tab so that it becomes highlighted.

ECM shows you the card in the Select menu.

3. Return this card to the cardfile by pressing **ECM Main**.

ECM is back at the Main menu.

Selecting a Card with HP Mouse

If your computer doesn't have HP Mouse, continue to the next section titled, **Reading Adjacent Cards in the Select Screen**.

1. With the rotary cardfile appearing on your display, locate any card you want to select.
2. Move the Pointer to the card's index tab.
3. Press and release the left button of the mouse so that this index tab becomes highlighted.

ECM shows you the card in the Select menu.

4. Return this card to the cardfile by pressing **ECM Main**.

ECM is back at the Main menu, ready for another task.

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.
4. 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.

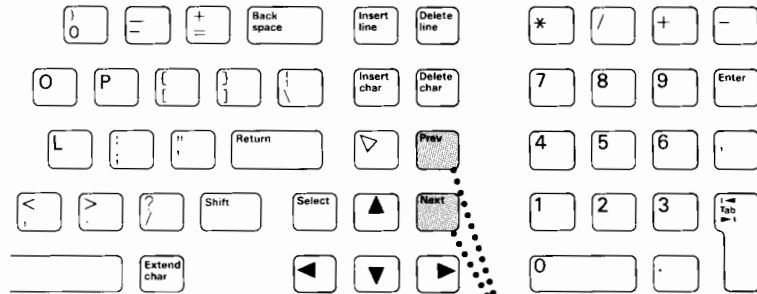
To read the entire card, you can flip the pages back and forth. Or, you can roll the card up or down one line at a time.

Flipping Pages of a Long Card

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

The card you chose appears in the Select menu.

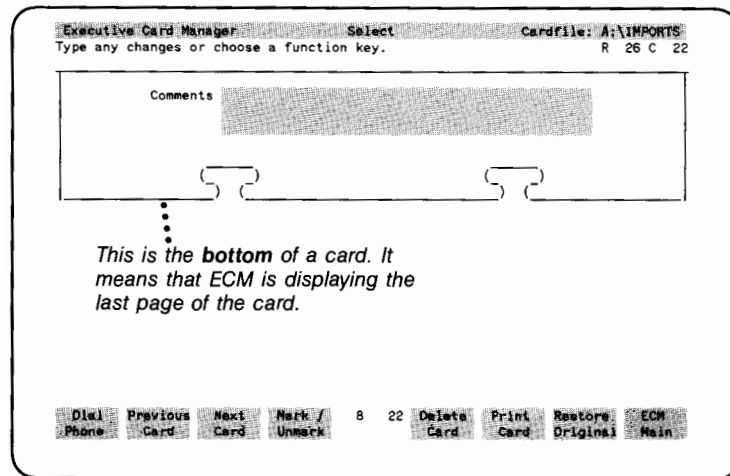
2. Locate **Next** and **Prev** on the keyboard:



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

3. Press **Next**.

ECM shows you the second page of your card:



4. Press **Prev**.

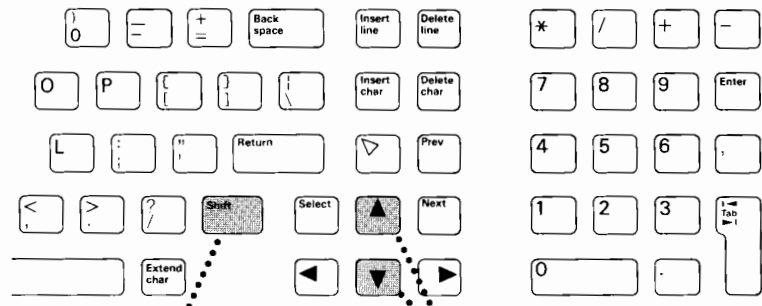
ECM brings back the previous page of your card.

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

Rolling a Long Card

Rolling a Long Card with the Keyboard

1. Make sure that the Select menu appears on your display.
2. Locate **Shift**, **▲**, and **▼** on your keyboard:



Hold down this key
(or the left **Shift**).

... and press one of these keys to
roll a long page by one line.

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.

Rolling a Long Card with HP Mouse

If your computer doesn't have HP 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 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 pressing `ECM Main`.



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

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

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

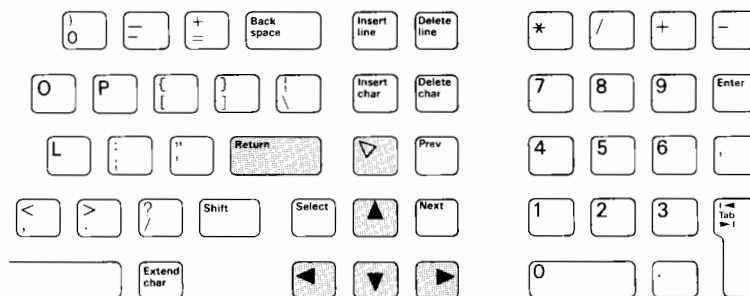
You draw the card form specifications in here.

Executive Card Manager Create Cardfile: None
Draw a new form or adapt an old form then press "Save Cardfile". R 2 C 2

Save Cardfile Field Types Make/Adj Field Group Fields 5 Num Pad 2 Adapt Old Form 2 Redraw Border ECM Main

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 diagram shows a rectangular form with a title 'BIRTHDAYS' at the top center. Below the title, there are four fields: 'First Name', 'Last Name', 'Birthdate (MM/DD/YY)', and 'Phone'. The fields are arranged in a staggered fashion. 'First Name' and 'Last Name' are on the top line, 'Birthdate (MM/DD/YY)' is on the second line, and 'Phone' is on the third line. The fields are shaded with a grid pattern. A dotted line labeled 'Fields' points to the shaded areas. A dotted line labeled 'Title' points to the word 'BIRTHDAYS'. A dotted line labeled 'Labels' points to the text labels 'First Name', 'Birthdate (MM/DD/YY)', and 'Phone'. The form has a tab at the top right and a tab at the bottom right.

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.

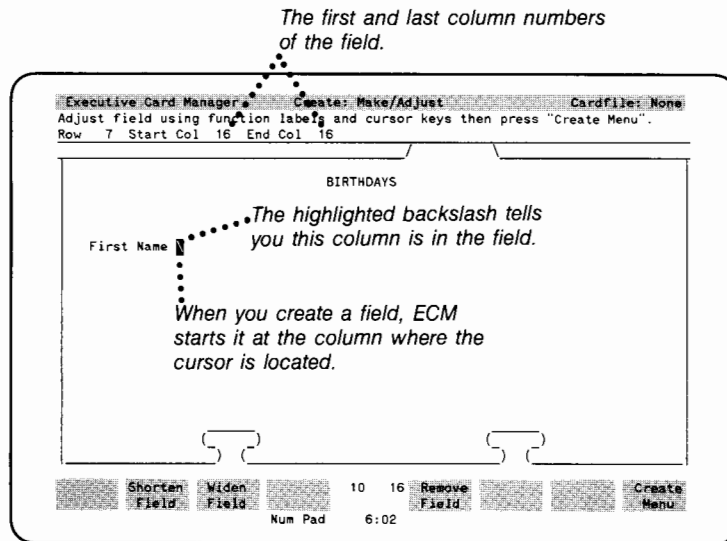
If you make a mistake while typing the label, backspace to the incorrect letters, then type over them.

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:



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.

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:

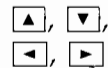
1. Make sure the cursor is in the First Name field.
The cursor must be in the field you want to modify.
2. Press **Make/Adj Field** to bring up the Make/Adjust menu.
3. Press **Shorten Field** once.
Now End Col 35.
4. Press **Create Menu**.
ECM saves the change and returns to the Create menu.

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 . . .

move the field

Use this in step 3 . . .



With HP Touch: touch the field and leaving your finger on it, move your finger to where you want the field positioned, then let go.

With HP Mouse: position the Pointer on the field, hold down the left button, move the field, then release the button.

widen the field

Widen Field

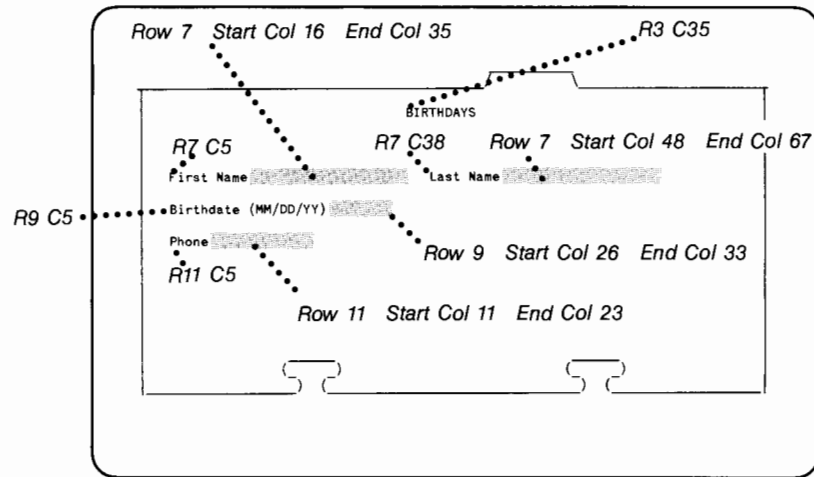
delete the field

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:

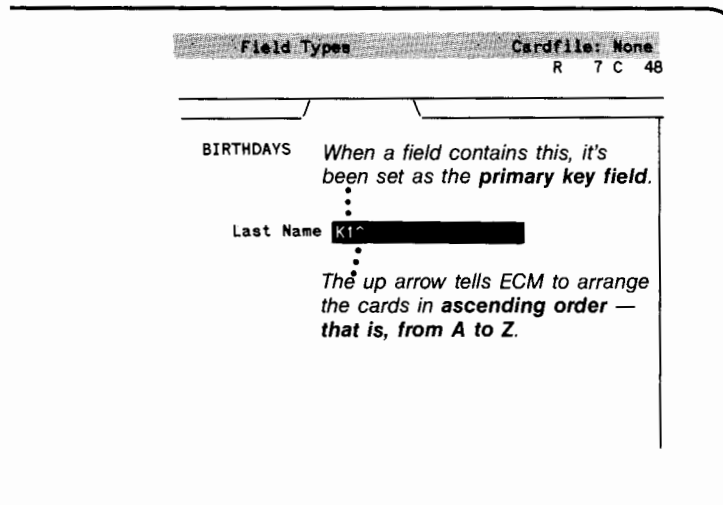
1. In the Create menu, press **Field Types**.
The Field Types menu appears with the BIRTHDAYS form:

The screenshot shows the 'Executive Card Manager' interface. At the top, it displays 'Create: Field Types' and 'Cardfile: None'. Below this, the text 'Assign the field types desired.' is visible. The main area is titled 'BIRTHDAYS' and contains four input fields: 'First Name', 'Last Name', 'Birthdate (MM/DD/YY)', and 'Phone'. The 'Last Name' field is highlighted with a cursor. At the bottom, there is a control panel with several buttons: 'Set/Clr Autodial', 'Set/Clr Key1', 'Set/Clr Key2', 'Set/Clr Key3', 'Num Pad', '14', '11', 'Set/Clr Descand', 'Set/Clr Date', 'Set/Clr Time', and 'Create Menu'. The time '6:05' is displayed in the bottom right corner.

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*:



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

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

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 45441D). 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

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.

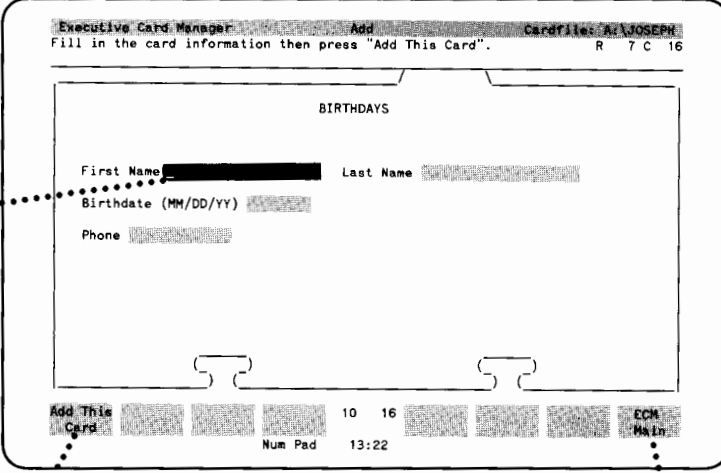
Adding a Card to the Cardfile

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:



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

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

Press 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. 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 2-9.)
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 retype 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

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.
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:

The screenshot shows the Executive Card Manager (ECM) interface. At the top, it displays "Executive Card Manager" and "Find" with "Cardfile: A:\IMPORTS". Below this, it says "Type criteria or select function label." and "0 marked cards." with "R 5 C 22". The main area is titled "*** IMPORTS CARDFILE ***" and contains a form with the following fields: Company, Agent's Name, Telephone, Next Contact (YY/MM/DD), Street Address, City, State, Zip, Country, Card Last Updated (Date and Time), and Specialties. At the bottom, there is a menu bar with options: Find & View, Mark All, Unmark All, Num Pad, 8 22, View Marked, Edit Field, and ECM Main. The time 13:27 is displayed at the bottom right.

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

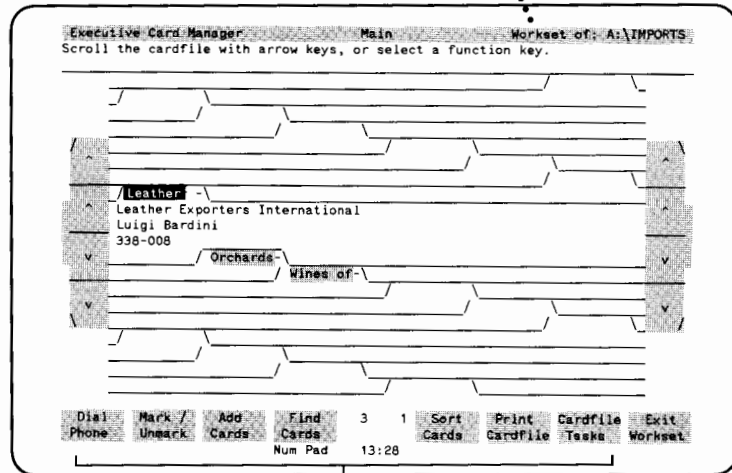
If you make a typing mistake, backspace to the incorrect letters and type over them. Notice that you can type the information in capitals, small letters, or a combination of the two.

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:

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.

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

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

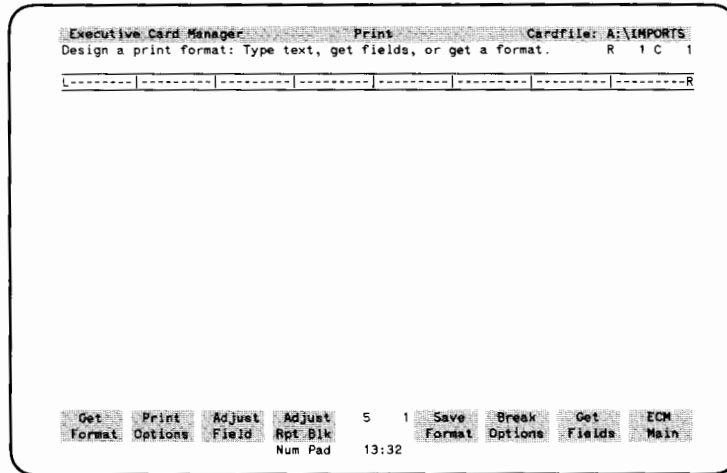
1. *If you're continuing directly from Session 5, go to the next section titled, **Getting Ready to Print Reports**. Otherwise, proceed with step 2.*
2. Start ECM.
3. *If the cardfile appearing is IMPORTS, go to the next section titled, **Getting Ready to Print Reports**. Otherwise, proceed with step 4.*
4. Get the IMPORTS cardfile.
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 **Get Fields**.

The Get Fields menu with the IMPORTS card form appears:

ECM gives each field an identification number.

This tells you the fields you've selected so far.

Executive Card Manager Print: Get Fields Cardfile: A:\IMPORTS

Selected Fields: 1

*** IMPORTS CARDFILE ***

Company 1 [REDACTED]

Agent's Name 2 [REDACTED]

Telephone 3 [REDACTED]

Next Contact 4 [REDACTED] (YY/MM/DD)

Street Address 5 [REDACTED]

City 6 [REDACTED] State 7 [REDACTED] Zip 8 [REDACTED]

Country 9 [REDACTED]

Card Last Updated Date 10 [REDACTED] Time 11 [REDACTED]

Specialties 12 [REDACTED]

13 [REDACTED]

14 [REDACTED]

15 [REDACTED]

Select Unselect Select Unselect 8 22 Label Report Place Print

All Flds All Flds Field Field Num Pad 13:34 Format* Format Fields Menu



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. Press **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:

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

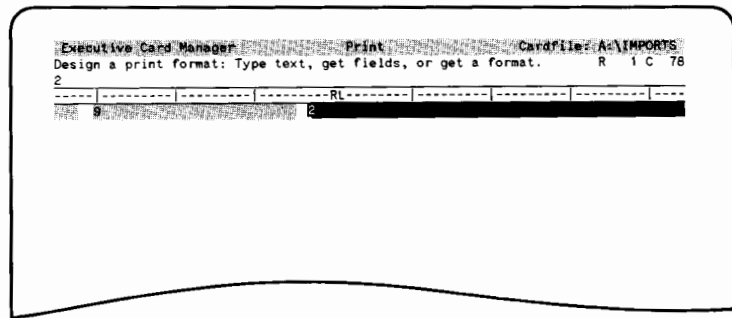
6. Check to make sure the selected fields are in order:

Selected Fields: 1,9,2

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

7. Press **Place Fields**.

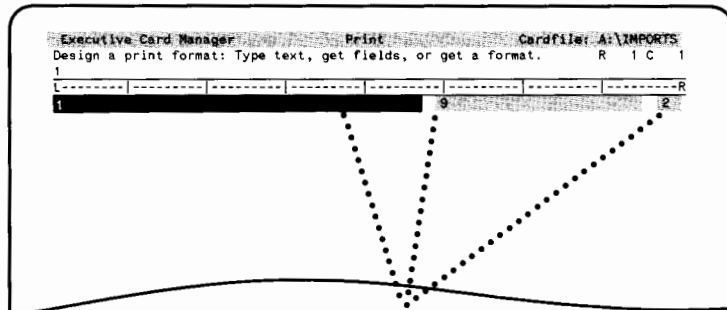
ECM returns to the Print menu with the fields you've gotten. The cursor is in field 2, the last field you selected for inclusion in the report:



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

8. Press .

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.

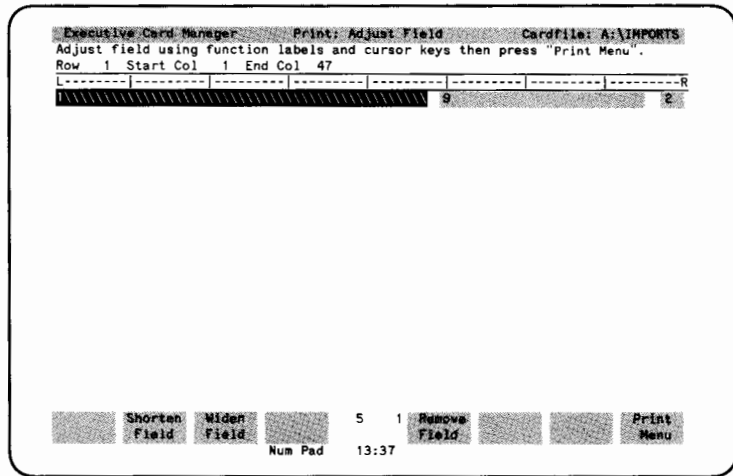
To do this, you will shorten each of the three fields. By doing so, you will also shorten the amount of information printed in each field. For example, if you shorten field 1 (**Company**) to 32 columns, you will only print the first 32 characters of each company's name.

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.

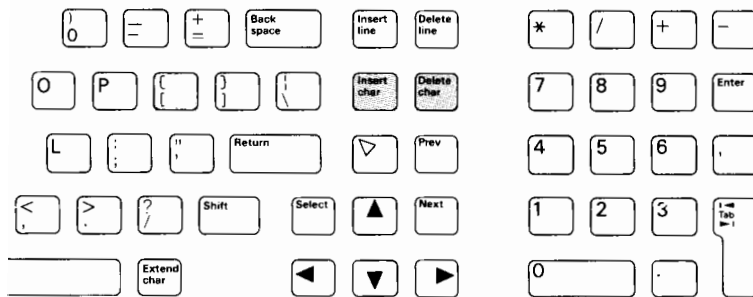
To adjust the print width of fields 1, 9, and 2:

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

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



2. Locate **Delete char** and **Insert char** on your keyboard:



4. Watching the End Col indicator, press **Delete 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:

5. Press **Insert Char**.

This turns on insert-character mode. The **Ins Char** indicator now appears on your display below the function label for **F6**. Using **Widen Field** with insert-character mode will automatically shift the other fields to the right.

6. 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.

7. Press **Insert Char** to turn off insert-character mode.

The **Ins Char** indicator disappears. You're finished adjusting the width of field 1.

8. Press **Print Menu**.

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

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



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

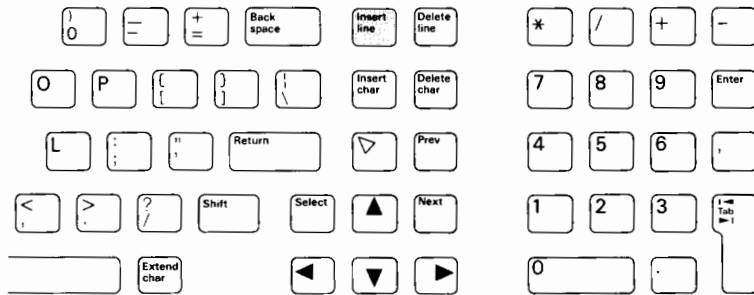
When you're finished adjusting the fields, you're back at the Print menu.


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  to move the cursor to the beginning of the report.
3. Locate  on the keyboard:



4. Press  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:

```

Executive Card Manager          Print          Cardfile: A:\IMPORTS
Design a print format: Type text, get fields, or get a format.      R 3 C 69
-----R
IMPORTS REPORT
Company          Country          Agent's Name
1-----9-----2-----

Get  Print  Adjust  Adjust  7  69  Save  Break  Get  ECM
Format Options Field Rpt Bk Num Pad 13:40
Format Options Field Rpt Bk Num Pad 13:40

```

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.

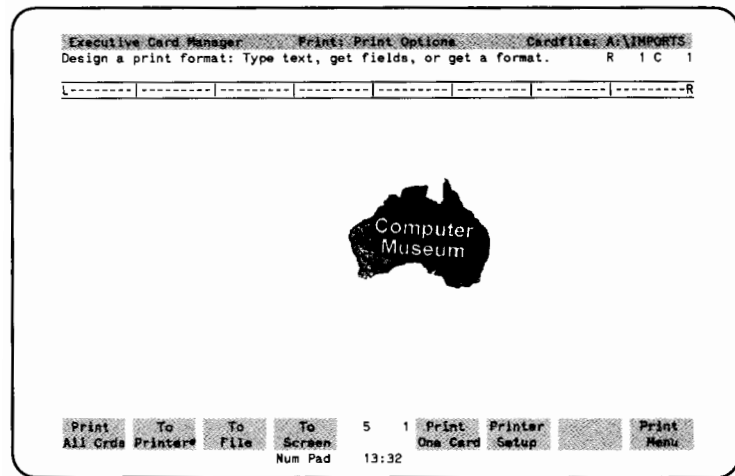
For this exercise, you'll create a typical report. However, if your printer is either an *HP LaserJet* or a *sheet-feed printer* (such as the *HP 2601* and *HP 2602 printers*), it requires special setup values which you'll need to set in the Printer Setup menu.

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:

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

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

Executive Card Manager Print: Printer Setup Cardfile:AA:\IMPORTS
Set the proper values for your printer R 1 C 1

Top Margin	0	Printer	PRN
Bottom Margin	0	Auto Feed	YES
Left Margin	0	Compress Print	NO
Right Margin	0	Lines Per Inch	8
Print Width	80		
Lines Per Page	66		
Printer Setup String			

Print Blocks Across Page	1		
Print Date	NO		
Print Page Number	NO		
Lines Per Card	66	(Select screen use only)	

Get Values Previous Value Next Value 5 26 Save Values Default Values PrintOpt Menu
Num Pad 13:33

For the HP LaserJet, this value should be 60.

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.

5. 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

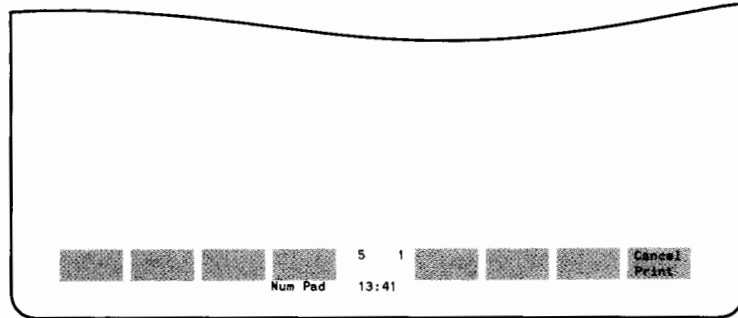
If your computer doesn't have a working printer attached, continue to the next section titled, **Saving a Report Format**.

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.

5. 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 *Setting You Free with 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 (HP Product Number 45441D) 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

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.

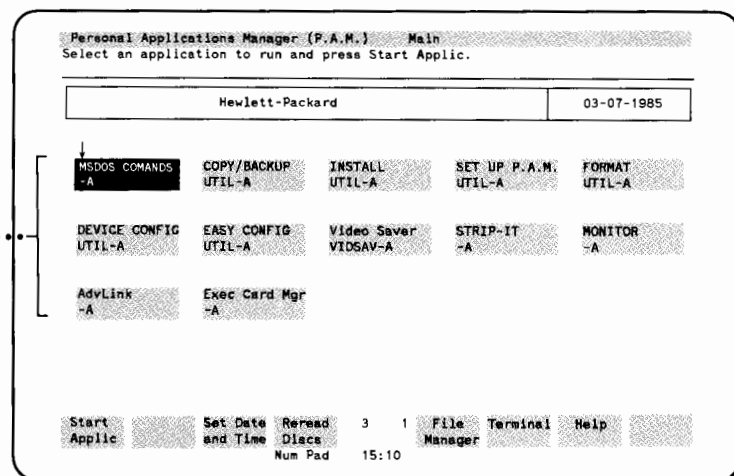
2. Press **Exit ECM**.

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:

These may be different on your display.



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!