
Using Personal Card File



*This manual has been written for
use with your HP Touchscreen
Personal Computer.*

**Manual Part No.
45422-90105**

Welcome to Personal Card File

Hewlett-Packard's Personal Card File (PCF) is a unique information management system that combines the convenience of traditional cardfiles with the speed, power, and accuracy of the computer.

You use PCF just as you'd use a ROLODEX Card File, except that PCF does most of the work for you. When you add a card, PCF automatically puts it in the correct place in the file. If you want to look at a specific card or a group of cards, PCF takes just a few seconds to find them and show them to you. You can have as many different cardfiles as you want, and PCF copies, prints, or erases cards and cardfiles at a touch of the screen. PCF will not only find the card with the telephone number you want to dial, it will even dial the number for you.

You can design cardfiles to meet a wide variety of business, professional, and personal needs, like:

- client information
- patient histories
- employee information
- invoices
- inventories
- convention registration
- phone messages
- personal addresses

- hotels
- restaurants
- tax records
- bibliographies
- record or book catalogs
- and many others

For your convenience, PCF comes with seven card forms that you can adapt or use as is. You can also design and create your own card forms with any items that you choose.

The Books in the Personal Card File Series

This book, *Using Personal Card File*, is your general reference guide to all the functions and features of PCF.

If you are not familiar with PCF, we suggest that you read *Setting You Free with Personal Card File* first. *Setting You Free* tells you about PCF and gives you hands-on practice with some of the exciting PCF features.

You'll also find a *Quick Reference Guide to Personal Card File* in the binder with *Using Personal Card File*. You can use the Guide as a handy memory-jogger to the basic PCF functions. The Guide opens out of the binder for easy reading, or you can take it out and set it up next to your computer.

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Table of Contents

Chapter 1:

Getting Ready to Use PCF

- 1-1 Starting PCF
 - 1-5 A Few Special Words We'll Be Using in PCF
 - 1-6 Looking at a PCF Screen
 - 1-8 Using Your Touch Screen with PCF
 - 1-9 Using the Keyboard with PCF
 - 1-10 Leaving PCF
 - 1-11 Warnings about Taking Discs out of the Disc Drives
-

Chapter 2:

Planning a PCF Cardfile

- 2-3 Planning the Cardfile for Use as a Rotating Cardfile
 - 2-4 Planning for Automatic Phone Dialing
 - 2-4 Planning for Mailing Labels
 - 2-5 Planning to Sort or Search by Name
 - 2-6 Planning to Sort or to Search by Date or Time
 - 2-6 Planning to Use PCF with Other Programs
-

Chapter 3:

Designing a New Card Form

- 3-1 Getting Ready to Create Your Card Form
- 3-2 Making the Card Larger
- 3-3 Titling Your Form
- 3-3 Drawing and Labeling the Fields
- 3-6 Telling PCF How to Sort Your Cardfile
- 3-6 Setting PCF to Automatically Dial a Phone
- 3-7 Shortening and Lengthening Your Card
- 3-8 Finishing and Saving the New Design

Chapter 4:**Adapting an Existing Card Form**

- 4-1** Getting Ready to Adapt an Existing Form
- 4-2** Calling Up the Existing Form
- 4-3** Changing Fields in Your Card Form
- 4-7** Changing the Size of Your Card
- 4-8** Finishing and Saving the New Design

Chapter 5:**Putting Cards in a Cardfile**

- 5-1** Getting Ready to Add Cards
- 5-3** Filling in Alphabetic Information
- 5-3** Filling in Numbers
- 5-5** Saving the Card and Leaving the Add Screen
- 5-7** What to Do When Your Disc Is Full

Chapter 6:**Looking at the Cards in a Cardfile**

- 6-2** Asking for a Cardfile That Is on the Disc You Are Using
- 6-3** Asking for a Cardfile That Is on a Different Disc
- 6-6** Finding Out How Many Cards a Cardfile Contains
- 6-6** Scrolling through the Cardfile
- 6-7** Pinpointing a Card
- 6-8** Reading the Information on a Single Card

Chapter 7:**Working with the Cards in a Cardfile**

- 7-1** Changing the Information on a Card
- 7-3** Printing a Card
- 7-5** Deleting a Card

Chapter 8:**Using the Autodial Feature**

- 8-1** What is Autodial?
- 8-1** What Equipment You Need
- 8-1** How Long a Number Can Be
- 8-2** Getting Ready to Dial
- 8-2** Dialing Automatically

Chapter 9:**Searching for Part of a Cardfile**

- 9-1** Getting Ready to Search
- 9-2** Setting Your Search Terms
- 9-5** Searching by Alphabetical Terms
- 9-6** Searching by Numerical Terms
- 9-10** Narrowing a Search
- 9-11** Working with the Cards You Have Found

Chapter 10:**Printing the Information in a Cardfile**

- 10-1** Understanding the Printing Procedure
- 10-2** How Your Printed Cards Look
- 10-4** Getting Ready to Print
- 10-5** Telling PCF What to Print
- 10-6** Telling PCF How Many Lines to Allow for Each Card
- 10-8** Printing the Cardfile

Chapter 11:**Copying, Dividing, Combining, and Replacing Cardfiles**

- 11-1** Getting Ready to Copy
- 11-2** Copying onto the Same Disc
- 11-2** Dividing a Cardfile
- 11-4** Combining Cardfiles
- 11-7** Replacing an Old Cardfile with a New One

Chapter 12:**Backing Up a Cardfile and Opening Up Space on a Crowded Disc**

- 12-1** Backing Up a Cardfile
- 12-1** Moving a Cardfile from a Crowded Disc
- 12-2** Tightening Up a Cardfile to Save Space
- 12-2** Getting Ready to Copy
- 12-3** Copying onto Another Disc

Chapter 13:**Changing the Card Form**

- 13-1** Understanding the Three Steps for Changing a Card Form
- 13-2** Understanding How You Can and Cannot Change Your Card Form
- 13-3** Moving the Card Information to a Holding File
- 13-7** Calling Up Your Old Card Form and Making the Changes
- 13-12** Moving the Information from the Holding File to the Cardfile with the Modified Form

Chapter 14:**Keeping Track of Cardfile Names and Renaming a Cardfile**

- 14-1** Keeping Track of Cardfile Names
- 14-2** Renaming a Cardfile
- 14-6** What to Do If You Forget the Name of a Cardfile

Chapter 15:**Deleting a Cardfile**

Chapter 16:**Reference Guide to the Function Labels**

Chapter 17: A Map of PCF

Chapter 18: Some Useful Card Forms

18-1 Card Forms on Your PCF Application Disc

18-6 Other Suggested Card Forms

Appendix A: Summary for Fixed Disc Users

Appendix B: Setting Up to Use PCF's Autodial

Appendix C: Using PCF with Other Programs

Appendix D: Copying Tricks for When Disc Space is Tight

Appendix E: Using File Manager

Appendix F: Telling PCF Which Printer to Use

Appendix G:

Reference Guide to Error Messages

Index



1

Getting Ready to Use PCF

Starting PCF

To begin using PCF, you have to bring up the screen called Personal Applications Manager, or P.A.M., that has PCF as one of the choices. Here's how you do that.

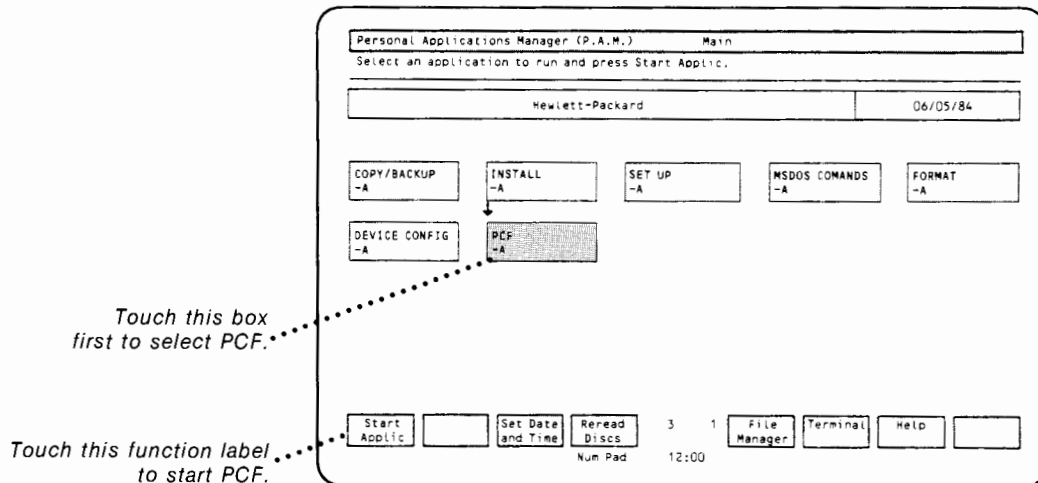
If You Have a Fixed Disc

If PCF is installed on your fixed disc, you can follow the four steps in this section. If it isn't, *Using Your HP Touchscreen Personal Computer* will tell you how to install an application. If you don't want to install PCF on your fixed disc, you can run the program from a flexible disc. Put the disc in a drive after you have done Step 1.

Follow these steps to start the program:

1. Make sure the disc drives are turned on.
2. Turn on the computer.

You will see the P.A.M. Main menu with PCF as one of the choices.



If You Have a Dual Flexible Disc Drive

3. Touch the box that says PCF; or press **Tab** until the arrow points to the PCF box, then press **Select**.
The PCF box will be highlighted.
4. Touch **Start Applic** or press **F1**.

If you have **double-sided discs** and want to keep your cardfiles on your PCF disc, you will need the following discs to start and use PCF:

- The System Work Disc, which sets up your computer
- The PCF Application Work Disc, which holds the Personal Card File program and cardfiles you create

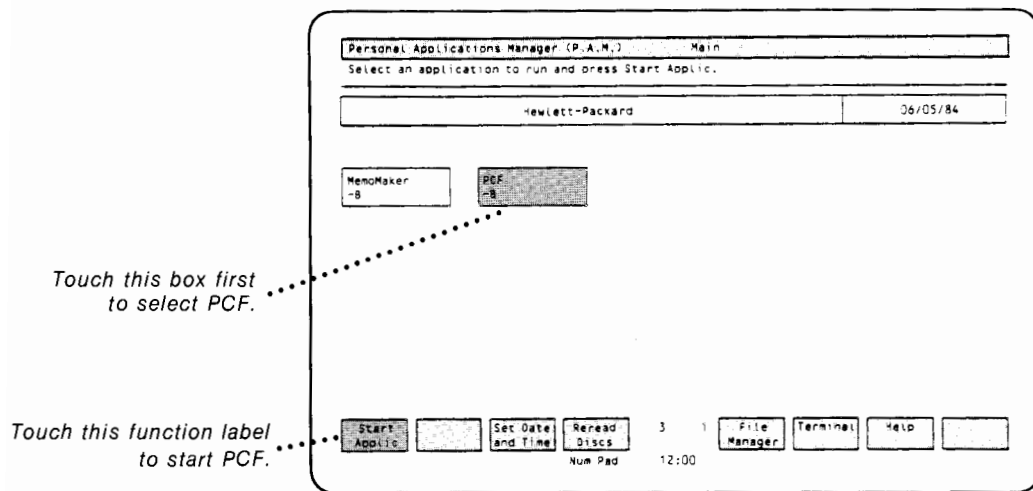


Never use the Master System and Application Discs themselves. *Using Your HP Touchscreen Personal Computer*, in the section on installing, tells you how to create a System Work Disc and an Application Work Disc.

Follow these steps to start the program:

1. Make sure the disc drive button is pushed in.
2. Put the System Work Disc in the left-hand drive (Drive A).
3. Put the PCF Application Work Disc in the right-hand drive (Drive B).
4. Turn on the computer.

You will see a P.A.M. Main menu similar to this one, with PCF as one of the choices.



5. Touch the box that says PCF; or press until the arrow points to the PCF box, then press .

The PCF box will be highlighted.

6. Touch or press .

If you have **single-sided discs**, or if you want to put your cardfiles on a **separate work disc**, you will need the following discs:

- The System Work Disc, which sets up your computer
- The PCF Application Work Disc, which contains the Personal Card File program
- A formatted personal work disc, which holds any cardfiles you create

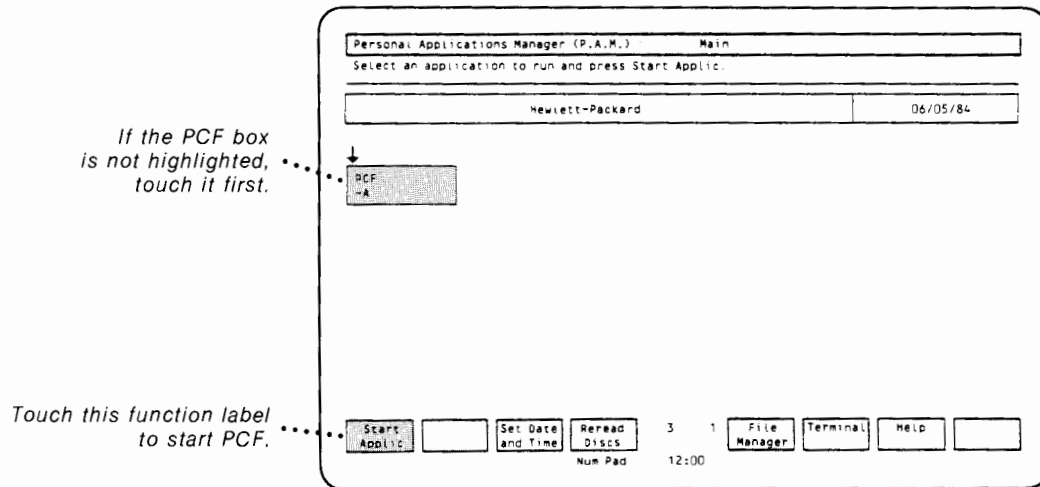


Never use the Master System and Application Discs themselves. *Using Your HP Touchscreen Personal Computer*, in the section on installing, tells you how to create a System Work Disc and an Application Work Disc.

Follow these steps to start the program:

1. Make sure the disc drive button is pushed in.
2. Put the System Work Disc in the left-hand drive (Drive A).
3. Turn on the computer.
The computer shows you the P.A.M. Main menu.
Notice that PCF does not appear among the choices.
4. Remove the System Work Disc.
5. Put the PCF Application Work Disc in the left-hand drive (Drive A).
6. Put the formatted personal work disc in the right-hand drive (Drive B).
7. Touch **Reread Discs** or press **f4**.

The computer again shows you the P.A.M. Main menu, this time with a highlighted PCF box.



8. Touch **Start Applic** or press **f1**.

1-4 Getting Ready to Use PCF

You can arrange to have PCF come up automatically, bypassing P.A.M. See the instructions in *Using Your HP Touchscreen Personal Computer* on setting an application to start automatically (autostart).

A Few Special Words We'll Be Using in PCF

Certain words and phrases are especially important in PCF. Here they are, with a brief definition of each.

card. Like one card in your ROLODEX Card File, or one index card. It holds all the information for one entry in your cardfile.

card form. The design you have created for a particular set of cards. It includes all the items and how they are placed on the card.

cardfile. A set of cards that share the same card form, and that you have grouped together under one identifying name

current cardfile. The cardfile that is showing on the screen

field. The "blank" that you fill in for each item on a card. A field can be from 1 to 80 columns wide, all on one line of the card.

field label. The name that identifies the information in a field

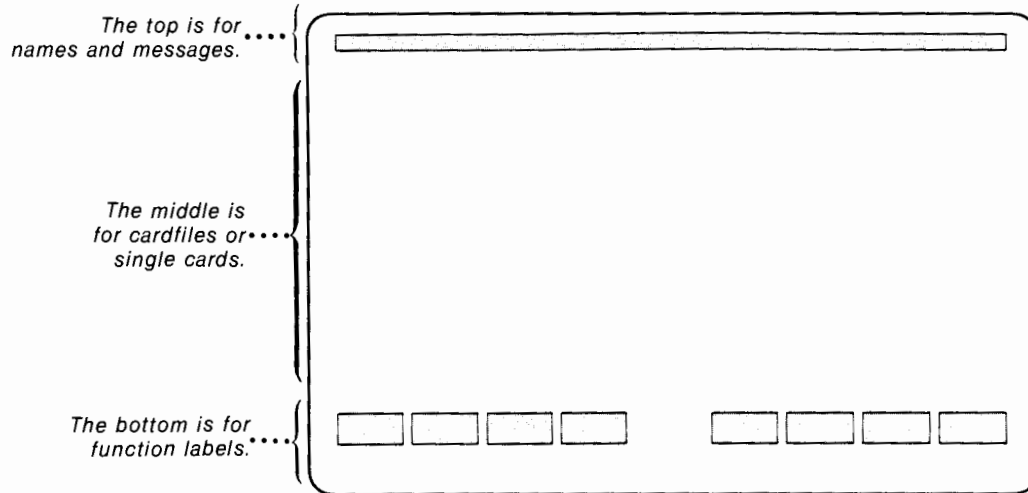
key field. The field you tell PCF to use in sorting your cards. If you designate the Last Name field as the key field, PCF will arrange your cards alphabetically by last name.

function key boxes. The eight boxes along the bottom of your screen, which correspond to the eight function keys on the keyboard. You touch a function key box to tell PCF what to do.

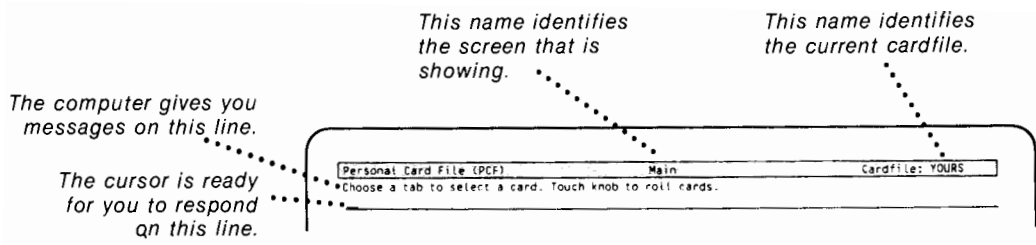
function labels. The words inside the function key box that tell you what task the function key performs. Function labels change from screen to screen.

Looking at a PCF Screen

There are three parts to each PCF screen.

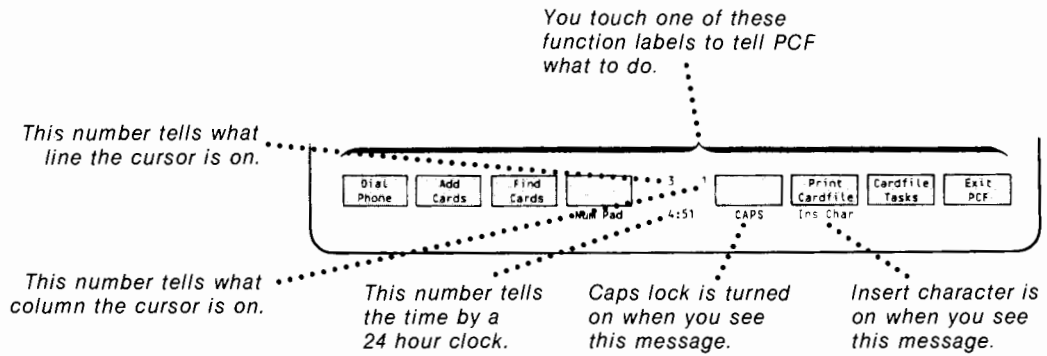


At the top you'll see: the screen name and the name of the cardfile you are currently using, a line for the computer to send you messages, and a line with the cursor ready for you to respond. (The cursor is the flashing symbol (-) that marks the spot on the screen where you start to type.)



In the middle will be the cardfile or a single card.

The boxes along the bottom of the screen are the function key boxes. You tell the computer what you want to do just by touching the appropriate box.



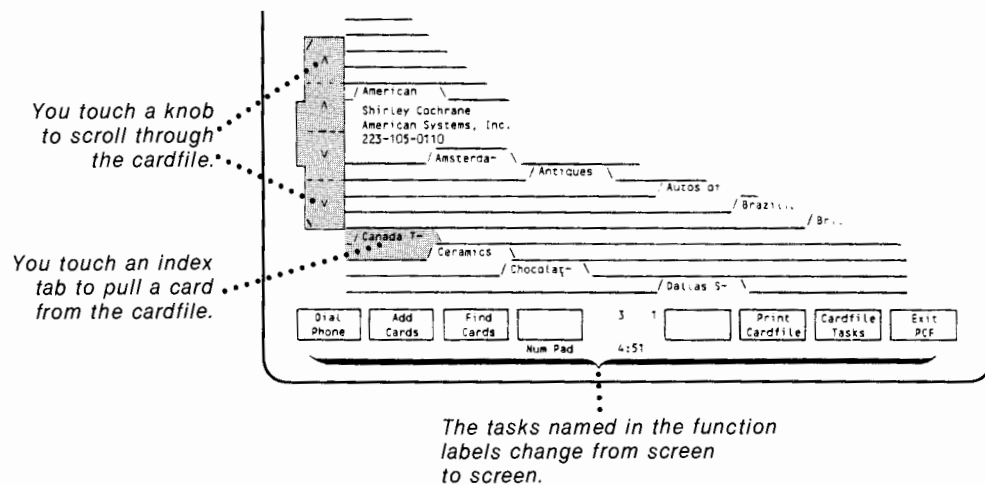
The function key box to the far right is always labeled "Exit," "Cancel," or "Cancel and Exit." The Exit label tells you where you are in the program. For example, "Exit PCF" means you are on the Main PCF screen, "Exit Tasks" means the Main tasks screen, and so forth.

At the center of the bottom, your computer tells you the current position of the cursor on the screen (line number and column number) and the time (by a 24-hour clock). If you turn on one of the special functions (for example, Insert character), you will see a reminder under one of the function key boxes.

Using Your Touch Screen with PCF

PCF is set up to take advantage of the touch screen magic of the HP Touchscreen PC. Instead of typing in commands or pressing keys, you simply touch one of the function key boxes at the bottom of the screen to tell your computer what to do. Each function key box represents a PCF task. The tasks (and the function labels) change from screen to screen.

You can scroll through your cardfile by touching the "knobs" on the screen. And you can "pull" a card from a cardfile by touching its index tab. On some screens, you can even move the cursor by touching the screen where you want the cursor to go.



1-8 Getting Ready to Use PCF















Using the Keyboard with PCF

Anything you can do by touch, you can also do from the keyboard. Here we cover only keys that you will be using in special ways in PCF.

The top row of keys on the keyboard are the function keys. They are labeled f1 through f8, and they correspond to the function key boxes at the bottom of your touch screen. Pressing the function key on the keyboard performs the same task as touching the corresponding function key box on the screen. Although the tasks change from screen to screen, the correspondence between function key boxes on the screen and function keys on the keyboard is always the same.

For a full explanation of all of the keys on your HP Touchscreen PC keyboard, see Chapter 2 of *Using Your HP Touchscreen Personal Computer*.

Key	Operation
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	The arrow keys move the cursor one character or one line at a time in the direction of the arrow. When a cardfile is showing,  and  will scroll one card at a time forward and backward through the cardfile.
  	
	
	 is the home key. It moves the cursor back to the starting position on a card form.
	When a cardfile is showing,  takes you to the first card in the cardfile. When a single card is showing,  moves the cursor to the next field. When you are creating a new card form,  moves the cursor down to the start of the next line. When you have typed an answer to a message,  tells PCF to read your reply.

- Tab** When a cardfile is showing, **Tab** moves the highlighting one card at a time forward through the file.
- When a single card is showing, **Tab** moves the cursor to the next field.
- Shift + Tab** **Shift Tab** reverses the action of **Tab**. When a cardfile is showing, **Shift Tab** moves the highlighting back one card at a time.
- When a single card is showing, **Shift Tab** moves the cursor back to the previous field.
- Select** **Select** pulls a card out of a cardfile so that you can look at all of the information on the card. Pressing **Select** is like touching the index tab of a card—you pull the card whose tab is highlighted.
- (*) The asterisk (*) is used to carry out a “wildcard search” in PCF (see Chapter 9). For example, you could enter 84* to see all the cards with dates in 1984. M* (or m*) in a name field means “find all the persons whose names begin with M.”

Leaving PCF

When you are ready to leave PCF:

1. Touch the last function key box on the far right (labeled **Exit** or **Cancel**) as many times as needed to return you to the Main PCF screen.
2. Touch **Exit PCF** or press **f8**.
PCF tells you
To confirm that you want to exit,
press 'Exit PCF' again.
3. If you do want to leave, touch **Exit PCF** or press **f8**.

If you don't want to exit PCF, simply choose another function or press `Return`.

When you exit the program, PCF will always close the current cardfile and then return to the P.A.M. Main menu.

When you see the P.A.M. Main menu, you can safely remove your PCF Application Work Disc and your personal work disc. Always take your flexible discs out of the drives before you turn off the computer.

Now you can turn off the computer if you are finished using it.

Warnings about Taking Discs out of the Disc Drives

Please follow these instructions carefully to prevent damage to your discs:

- You **must** be on the P.A.M. Main menu or in File Manager to safely remove the PCF Application Work Disc.
- If you are in File Manager when you remove the PCF Application Work Disc, and you see this message:

`PLEASE PUT THE APPLICATION DISC
BACK IN THE DRIVE AND PRESS RETURN.`

then the task you want to do is not in memory at the moment. You have not damaged your disc. Simply follow the instructions in the message.

- Do **not** take a disc out of a drive if you are using a cardfile that is on that disc.
- You can safely remove a personal work disc **only** when PCF shows you the message `You can switch discs now` or when you are in File Manager.
- If you take a disc out of the disc drive while your computer is using the disc, you may lose information or the information on your disc may be irreparably scrambled.



2

Planning a PCF Cardfile

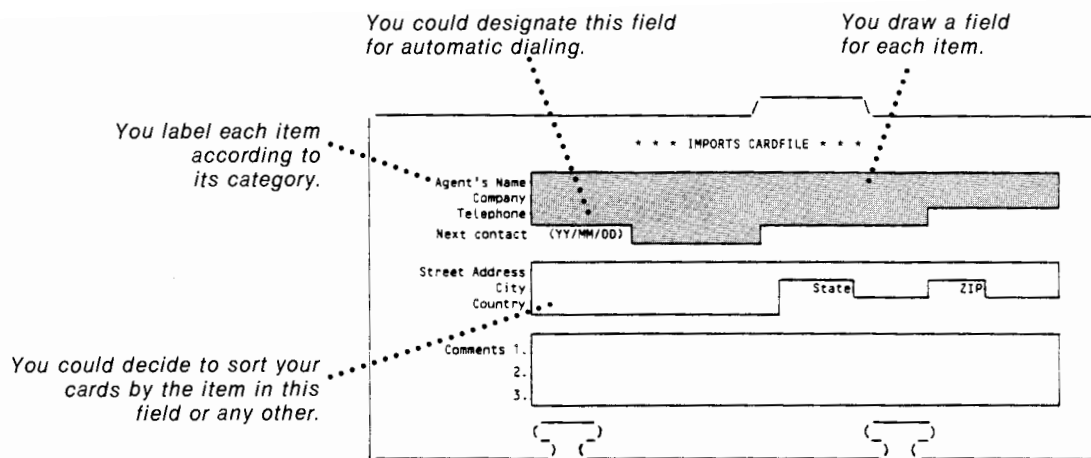
Before you can put cards in a PCF cardfile, you must have a form for the cards. You can have several cardfiles with the same form; you can have different forms for different cardfiles.

There are two ways to create a new card form: designing a form from scratch (Chapter 3) or adapting a form that already exists (Chapter 4). You can adapt a form that you've developed earlier or one that PCF provides. PCF comes with seven predesigned forms that you can adapt. Chapter 18 shows these seven forms and suggests others as models for creating your own forms.

With PCF, you have the freedom to design a form to suit your own purpose. You can have as many fields as you need, placed wherever you want on the line. You can use all 20 lines of your screen or you can shorten the card as much as you like.

Before you create your card form, however, you should do a little planning. You should decide:

- ☒ What items you need
- ☒ Where on the card to put each item
- ☒ How to label each item
- ☒ How many spaces to leave for the longest entry in each item
- ☒ Which item to use for sorting the cards
- ☒ Whether to set up a phone field to have PCF dial telephone numbers for you automatically



Until you finish creating and naming your cardfile, you can make any changes you want. Even after you have cards in your cardfile, you can make some changes (such as changing the key field, changing the autodial field, lengthening or shortening fields, adding fields at the end of the card—see Chapter 13).

With only a little thought, you can create a form that will meet your needs now and in the future. The following sections will help you design the right form for your needs. Check off the features on this list that you will be using and then read the section on planning each feature that you checked.

- rotating cardfile
- autodial
- mailing labels
- sorting or searching by name
- sorting or searching by date or time
- using other programs with PCF

2-2 Planning a PCF Cardfile

Planning the Cardfile for Use as a Rotating Cardfile

Consider these points to make your rotating cardfile easy to use:

- PCF always displays a cardfile with one card in the open card position. For this card, PCF shows the information that is in the first three field lines.

The index tab shows the term PCF uses to sort the cards.

You can read the information on the first three lines of the open card.

The screenshot shows the PCF interface with the following elements:

- Title Bar:** Personal Card File (PCF) Main Cardfile: [IMPORTS]
- Instruction:** Choose a tab to select a card. Touch knob to roll cards
- Index Tabs:** /Swedish - /Switzerl- /Files an- /Toys Int- /wines of /wines of /Scientist- /American /Amsterda- /Antiques /Autos of /Brazilia- /British - /Canada T- /Ceramics /Chocolat- /Dallas S-
- Open Card:**
 - Shirley Cochrane
 - American Systems, Inc.
 - 223-105-0110
- Control Panel:**
 - Dial Phone
 - Add Cards
 - Find Cards
 - Num Pad
 - 3 1
 - 4:51
 - Print Cardfile
 - Cardfile Tasks
 - Exit PCF

- If you put the most useful information in the first three field lines, you can see it at a glance when the card is in the open card position.

Planning for Automatic Phone Dialing

Remember these points when you plan an autodial field:

- ❏ Create only one field for the whole phone number that you want PCF to dial. Don't create separate fields for the area code and the phone number if you want PCF to dial both.
- ❏ Remember to allow spaces for area codes, international access codes, outside-access code numbers, and a plus sign (+) each time you need a pause before a dial tone.
- ❏ Allow a space for a special symbol you may need when you search for phone numbers (see Chapter 9).
- ❏ PCF will read up to 39 characters for autodialing. (Some modems may not dial at all if there are too many readable characters in the field. See your modem manual.) However, you can make the phone field longer to include an extension or a note to yourself.

Planning for Mailing Labels

Here are some tips on designing a cardfile for use as a mailing list:

- ❏ When you print a mailing list, you can tell PCF to print some fields and not others. For example, you can print name and address and nothing else. You can even put a field you don't want to print between fields you do want to print.
- ❏ PCF will skip fields you choose not to print and organize the remaining information. It will bring the first field on the line to the left margin and close up spaces between fields on the same line.
- ❏ PCF will print the fields you choose in the order in which you have them on the card.

- ❏ PCF will not combine lines or print fields from a single line on separate lines. For example, if you want to print title, first name, and last name all on one line, be sure to draw their fields on the same line.
- ❏ Printed information must fit within the mailing label boundaries. For example, if your mailing labels have room for five lines of printing, and each line can hold only 40 characters, draw the name and address fields on five 40-character lines or fewer.

Planning to Sort or Search by Name

PCF uses all the items in the key field when it puts your cards in alphabetical order. Remember these points when you plan to alphabetize by name:

- ❏ PCF considers the first item in the key field first. For example, if your key field holds the full name with the last name first (such as Jones, Alan), PCF will file the cards by last name. But if you set up the key field with first name first (for example, Alan Jones), PCF will file the cards by first name.
- ❏ If your key field has the last name before the first name, PCF alphabetizes all the first names within the same last name. For example, you might have cards for Jones, Stephen; Jones, Barbara; and Jones, Alan. PCF would put Alan before Barbara before Stephen.
- ❏ If last name and first name are in two separate fields, PCF will use only the name in the key field to alphabetize your cards. For example, if the key field is the Last Name field, PCF will file each new Jones card before all the existing Jones cards—not alphabetically within the Jones group.

Planning to Sort or to Search by Date or Time

If you plan to sort or to search by date or time, you must enter the information in a way that allows PCF to read the numbers correctly.

- To sort or search by date, design your date field so that you can enter two digits each for year, month, and day, with a slash between the three elements (YY/MM/DD). That is, March 22, 1984, would be 84/03/22.
- To help you remember the correct date format, you might want to include it as part of your field label. For example, you can label the field: Birthdate (YY/MM/DD).
- To sort or search by time, design your time field to show times on a 24-hour clock (08:30 for 8:30 a.m.; 20:30 for 8:30 p.m.).
- Remember to make your field big enough to hold a symbol you may need when you search the cardfile (see Chapter 9).

Planning to Use PCF with Other Programs

Whether you're transferring information from other programs into PCF or vice versa, the PCF card forms and the files for the other program must be compatible.

- Numbers should be written in the same style. If the other program uses the date format (MM/DD/YY), you should set up your PCF card form in the same way.
- Fields should be long enough to accommodate the information to be transferred to another program. If the other program allows 20 characters for an address, the address field on the PCF card form should be no longer than 20 characters.
- The fields must be in the same order. If the other program has the Last Name field first, Last Name should also be the first field on the PCF card form.

2-6 Planning a PCF Cardfile

☒ You cannot transfer more fields to another program than that program is set to receive. For example, if the other program stores information in records eight fields long, you can only transfer eight fields of PCF information.

See Appendix C for more information about using PCF with specific programs.



3

Designing a New Card Form

PCF gives you the freedom to design or choose the right form for your cardfile. This chapter tells you how to design a new card form. (The next chapter tells you how to copy an existing form and use it to make a new cardfile.) And you can edit your card form as you go along.

Getting Ready to Create Your Card Form

When you start up PCF on your Touchscreen PC, you will see the Main PCF screen. As a first step in creating a card form, you must call up the Create screen. (Remember that whatever you can do by touching the screen, you can also do from the keyboard.)

To get ready:

1. Touch `Cardfile Tasks` .
PCF shows the Main tasks screen with a different set of function labels.
2. Touch `Create Cardfile` .
PCF shows the Create screen.

On the Create screen you will see the outline of a blank card similar to a card from a ROLODEX Card File. The cursor is at line 5, column 2.

You need not answer this message when you draw a new form.

The cursor is on line 5, column 2.

You can erase the side and bottom borders to get 80 lines and 20 columns. Do this before you draw the fields.

This number tells you which line the cursor is on.

This number tells you which column the cursor is on.

You are now ready to create your card form.

Making the Card Larger

Before starting to design your card form, decide whether you want to keep the index card borders. As you see it on the screen now, the card is 78 columns wide and 17 lines deep. If you remove the borders, the card can be 80 columns wide and 20 lines deep. If you want to remove the borders, do it before you draw in any fields.

To get the 80 x 20 card form:

1. Move the cursor to line 5, column 1.
2. Press .

PCF removes the side and bottom borders.

3-2 Designing a New Card Form

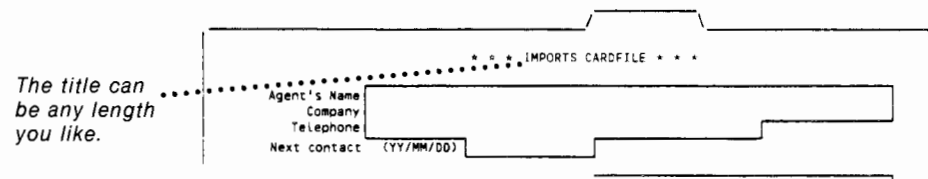
If you change your mind:

1. Touch `Redraw Border`.

PCF puts the original card borders back in.

Titling Your Form

A title (like "Clients," "Restaurants in New York City") can help you remember what kind of information is in your cardfile.



The title can be as long as you want and as many lines as you want.

To give your form a title:

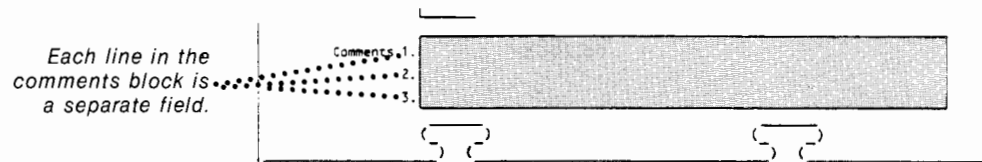
1. Move the cursor to where you want the title to begin.
2. Type the title.

(If you make a mistake while typing, simply backspace over the characters you wish to change and type the title correctly.)

Drawing and Labeling the Fields

Fields are the blanks you fill in. You need a field for each item of information you are going to have on the card (for example, Last Name, Phone Number).

- ☞ You can tailor the size of a field to fit the information you plan to put in it. You can begin the field label and field anywhere on a line. You can have the field label on the line above the field or on the line with the field. A field can be from 1 to 80 columns wide—all on one line.
- ☞ You can design a block of several lines with a single label. For example:



PCF considers each of these lines to be a separate field—a field can be only one line. When you print lists, you can decide to print only some of these lines. In searching, PCF will search each line as a separate field.

- ☞ You can label each field for reference. The field label can be as long as you have room for and can have as many words as you want.
- ☞ Using a descriptive name for each label helps when you fill in cards, read them, and search for them. (Some examples of labels are "Restaurant Name," "Shoe Size," "Salesperson," "Amount Usually Buys.")
- ☞ Every form must have at least one field, but you can have fields without labels.
- ☞ PCF counts the fields in order from top left to bottom right.

To draw and label each of the fields:

1. Position the cursor where you want to begin the first label.

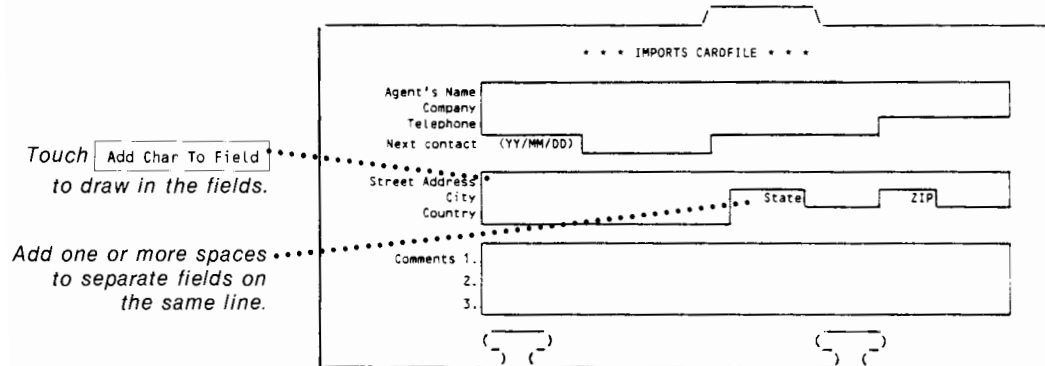
3-4 Designing a New Card Form

2. Type the label.

You will probably want to leave a space after the label. (If you make a mistake, simply backspace over the characters you wish to change and type the label correctly.)

3. Touch `Add Char To Field` once for each character you want to add to the field.

You may want to leave a space between label and field.



4. Repeat Steps 1 through 3 until you have the fields you want.

To shorten a field you have drawn:

1. Move the cursor to where you want the field to end.
2. Touch `Del From Field` once for each character you want to delete.

To keep fields separate when they are on the same line:

1. Leave at least one space between fields, or between one field and the next label.

Telling PCF How to Sort Your Cardfile

After you have designed your form, you need to tell PCF how you want to arrange the cards in the cardfile. For example, if you want to file your cards alphabetically by city, you must tell PCF to sort by city. The field PCF uses for sorting is called the **key field**.

- You can set only one key field for each card form.
- The information from the key field will be shown on the index tab of each card in the cardfile. PCF files your cards in order according to the key field.
- If you don't set a key field, PCF automatically chooses the first field (the one at the top left) to be the key field.

To set the key field:

1. Move the cursor to inside the field you want to be the key field.
2. Touch `set Key Field` .
A letter K appears in the field you have chosen.

If you change your mind:

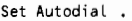
1. Move the cursor to the K.
2. Press the space bar.
3. Set a different key field.

Setting PCF to Automatically Dial a Phone

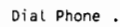
PCF will automatically dial a telephone number; this feature is called autodialing.

- You can set only one field on a card form for autodialing.
- If you set more than one autodial field, PCF chooses the first of these to be the autodial field.

To set PCF for automatic dialing:

1. Move the cursor to inside the phone field that you want to use for dialing.
2. Touch .

A letter A appears in the field you have chosen. PCF will dial the phone number in this field when you touch

.


If you change your mind:

1. Move the cursor to the A.
2. Press the space bar.
3. Set a different autodial field.


Shortening and Lengthening Your Card

If you haven't used all the lines on the card, you can make the card shorter by moving up the bottom border.

To shorten a card:

1. Move the cursor to a line between the last field line and the bottom of the card.
2. Press  repeatedly until you have shortened the card as much as you want.

To lengthen a card:

1. Move the cursor to where you want to insert more lines.
2. Press  repeatedly until you have added all the lines you want.

Lengthening a card will cause a broken side border.

To fill in the breaks:

1. Touch `Redraw Border`.

If you replace the card borders after adjusting the length of your card, you may see a double border at the bottom.

To remove the extra border:

1. Move the cursor to a line below the last field.
2. Press `Clear display`.

The computer will remove everything below the cursor.

3. Touch `Redraw Border`.

The computer will restore the original card borders.

Finishing and Saving the New Design

Here are a few points to keep in mind when you are ready to finish and save your card form. A final review of your design can show you where you might want to make further changes or where you need to remove stray marks. You can also take a moment to decide what to name your cardfile and where you want to store it.


Checking the Form

At this point, you should check your card form to make sure it is correct and complete:

- ☐ Are there any spelling errors?
- ☐ Are the fields long enough?
- ☐ Have you included all the fields you need?
- ☐ Is the card the size you want it to be?
- ☐ Have you set the key field?
- ☐ Do you want to set an autodial field?

While you are designing the form, you can make whatever changes you need. But if you finish creating and naming the card form, then discover you need another field or want to make a field longer or shorter, you can make those changes. (See the next chapter if you want to change a form when the cardfile has no cards in it. See Chapter 13 to change a form when there are cards in your cardfile.)

Cleaning Up Stray Marks

If you have pressed  to correct your form, pieces of the right side border will have been pulled inside.

To remove these marks:

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

Naming and Saving the Form

Before you can use the form for cards, you must first name it and save it on a disc.

Choosing the Name. When you name the form, you are actually naming the cardfile.

Your cardfile name can have a maximum of eight characters. It can include **only** the following characters:

- ☉ Letters A through Z
- ☉ Numerals 0 through 9
- ☉ Dollar sign \$
- ☉ Ampersand &
- ☉ Pound sign #
- ☉ Percent sign %
- ☉ Apostrophe '
- ☉ Parentheses ()
- ☉ Underscore _
- ☉ At sign @
- ☉ Caret ^

- ⦿ Braces { }
- ⦿ Tilde ~
- ⦿ Single quotation '
- ⦿ Exclamation point !



For some other programs, the first character of a name must be a letter, not a number or symbol.

Remember these points also when you name your cardfile:

- ⦿ Do not use spaces in your cardfile name.
- ⦿ Do not add an extension (a period plus three letters) to your cardfile name.
- ⦿ You can use lowercase letters, capitals, or both. PCF treats all letters in the name as capitals.

Telling PCF Where to Store the Form. When PCF asks you for a cardfile name, it shows you the names of the default drive and subdirectories (if any). When you specify only a cardfile name, PCF puts the new cardfile in the default drive and subdirectory. The following points about default drive and subdirectory will help you instruct PCF when you are ready to save the cardfile on disc:

- ⦿ The default drive and subdirectory is where PCF stores and looks for your cardfiles unless you tell it otherwise.
- ⦿ You can change the default drive and subdirectory. Appendix E tells you how.
- ⦿ If you don't want to put your cardfile in the default drive and subdirectories shown, you must erase their names and include the new information in the cardfile name. Appendix E gives more information about default drive and subdirectory.
- ⦿ If you want to know how to set up directories and subdirectories, see Chapter 7 in *Using Your HP Touchscreen Personal Computer*.

Saving the Form. If you decide that you don't want to save your card form, touching `Exit Create` erases it and shows you the Main PCF screen with the cardfile you last used.



`Create & Exit` saves your card form. `Exit Create` deletes it. Make your choice carefully.

If you do want to save your card form:

1. Touch `Create & Exit` .

The function labels change and PCF shows you the message

Type the name of the cardfile to be created.
(You can switch discs now.)

and shows you default drive and directory names.



Do not remove the PCF Application Work Disc. If you want to store your cardfile on a different personal work disc, you can put a new disc in the drive when PCF tells you that you can switch discs.

2. Look at your card form one more time to make sure it is exactly what you want.

If you **do** want to make changes, you can do so by touching `cancel` so that PCF will leave your card form on the screen.

3. When you are satisfied with your card form, type a name.

Remember to use a name of eight characters or fewer. Change drive and directory names if you don't want the default.

4. Press .

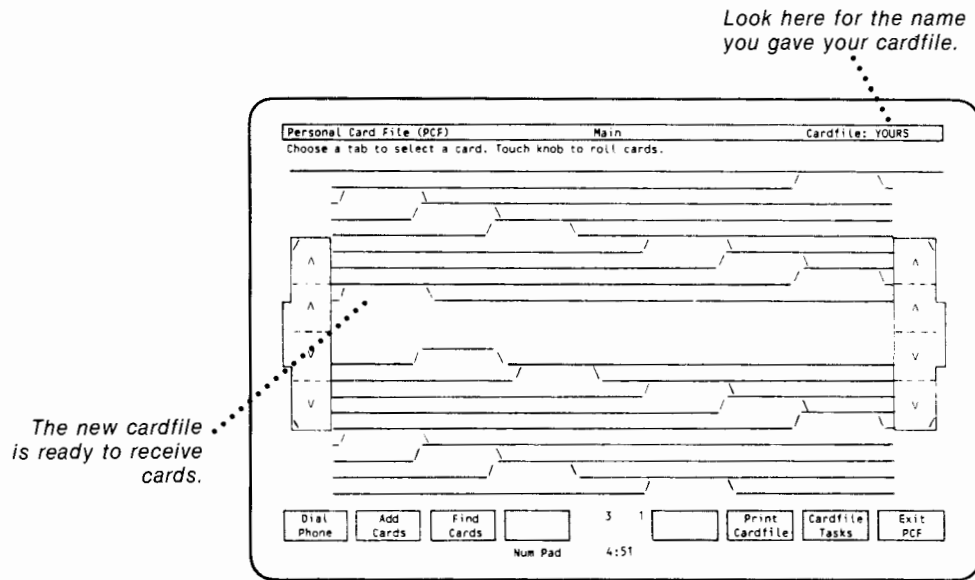
PCF will tell you that it is

Creating the cardfile

Then PCF will show the Main PCF screen and will tell you that it is

Getting cardfile

When PCF has found your cardfile, the Main PCF screen will display a cardfile with no cards in it. The cardfile will look like this one.



Now you are ready to put cards in the cardfile. Chapter 5 tells you how to add cards.



4

Adapting an Existing Card Form

PCF makes it easy for you to create a new form from a copy of an existing form. You can use a form you've created for another cardfile, or you can copy one of PCF's seven model forms from Chapter 18.

You can use this chapter only to make an empty cardfile. If you want to change the form of a cardfile that already has cards in it, see Chapter 13.

Modifying a copy of an old form is very much like creating a new one. If you don't know how to create a new card form, read Chapter 3 before reading this chapter.

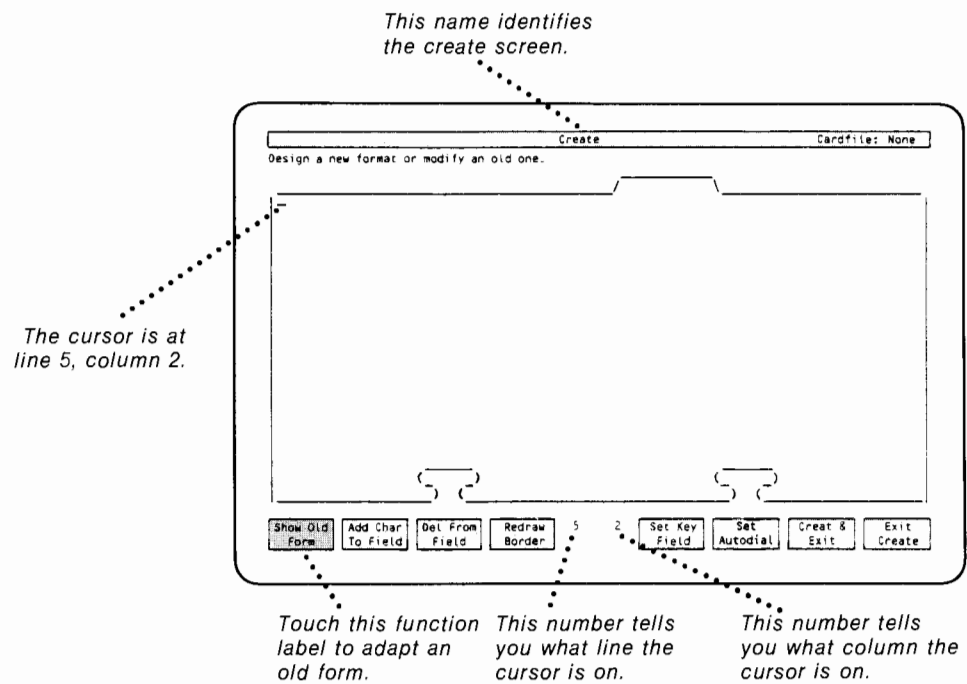
Getting Ready to Adapt an Existing Form

When you start up PCF on your personal computer, you will see the Main PCF screen. The first step in adapting an existing card form is to call up the Create screen. (Remember that whatever you can do by touching the screen, you can also do from the keyboard.)

To get ready:

1. Touch `Cardfile Tasks` .
PCF shows you the Main tasks screen.
2. Touch `Create Cardfile` .
PCF shows you the Create screen.

The Create screen includes the image of a blank card that is similar to a card from a ROLODEX Card File. The cursor is at line 5, column 2.



Calling Up the Existing Form

On the Create screen message line, PCF asks you to

Design new form or modify old form.

To tell PCF that you want to modify an existing form:

1. Touch `Show Old Form` .

PCF then asks you to

Type the name of the old cardfile.

4-2 Adapting an Existing Card Form

and shows you the default drive and subdirectories (if any).

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

If the old form is in a different drive and subdirectory, include that information.

3. Press .

PCF then tells you that it is

Getting old form

In a few seconds, PCF shows you a copy of the old form you requested.

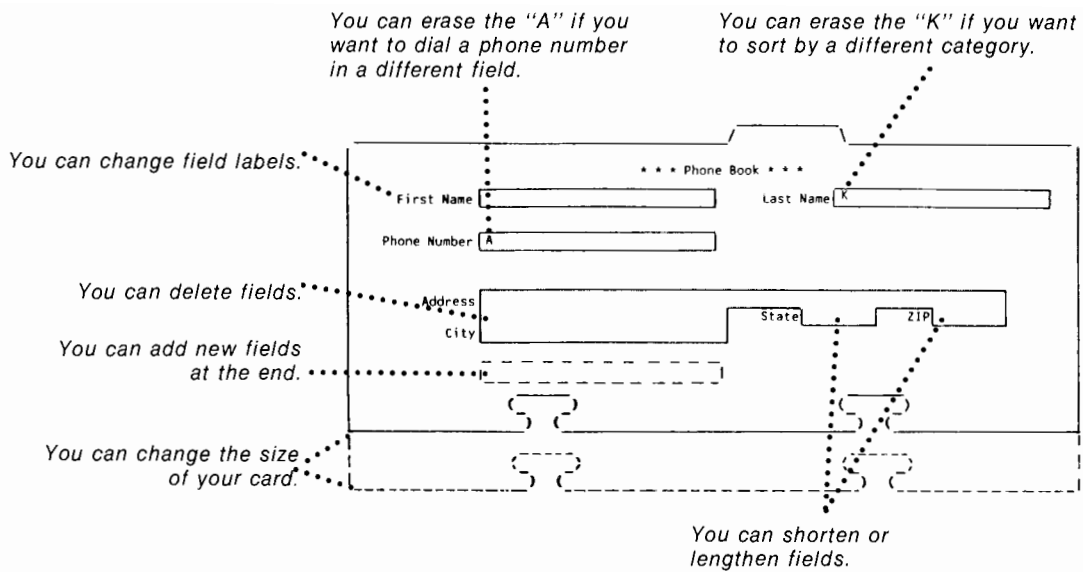
You are now ready to make changes. (When you've finished making changes, remember to go to the last section in this chapter to finish and save the new card form.)

Changing Fields in Your Card Form

You can change the form in the following ways:

- Add fields
- Delete fields
- Change field lengths
- Change the way you want to sort your cardfile
- Prepare for automatic dialing

If your existing card form includes the index card borders, you can use only to erase the borders below the last field line. If you use this key to erase all the side and bottom borders, you will also erase your fields and labels. You can, however, use the space bar to erase the side borders at the last field line and above.



The sections that follow give step-by-step instructions for making these changes.

Adding Fields To add a field:


1. Move the cursor to where you want to add a field.
2. If necessary, press or to open up the space.
3. Type the field label, if you want one.
4. Touch `Add Char To Field` to draw in the field.

If you don't want to make any more changes, turn to the last section in this chapter to finish and save the new card form.

4-4 Adapting an Existing Card Form

Deleting Fields


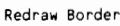
If the field you want to delete is the only field on the line:


1. Put the cursor anywhere on the line.
2. Press  once.

If there are two or more fields on the line and you want to delete only one:

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




Pressing  will move other fields on the same line and break the card border. Touch  to repair the breaks.

3. Move the cursor to the field.
4. Touch  to erase the field characters.


If you don't want to make any more changes, turn to the last section in this chapter to finish and save the new card form.

Changing Field Lengths



To shorten a field:


1. Position the cursor where you want the field to end.
2. Touch  until the unwanted field characters are gone.

To lengthen a field:

1. Move the cursor to the end of the field you want to lengthen.
2. Press  to open up space if necessary.




Pressing  will move other fields on the same line and break the card border. Touch  to repair the breaks.

1. Touch  to put in as many extra field characters as you want.

If you don't want to make any more changes, turn to the last section in this chapter to finish and save the new card form.

Changing the Way You Want to Sort Your Cardfile

To change the way your cardfile is sorted:

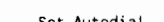
1. Position the cursor under the K that currently designates the key field.
2. Press the space bar to erase the K.
3. Move the cursor to inside the field you want to sort by.
4. Touch .

The letter K reappears in the field you have chosen.

If you don't want to make any more changes, turn to the last section in this chapter to finish and save the new card form.

Preparing for Automatic Dialing

To set or reset PCF to automatically dial a phone number:

1. Position the cursor under the A if there is one in a phone field.
2. Press the space bar to erase the A.
3. Move the cursor to the phone field you want to use for automatic dialing.
4. Touch .

The letter A appears in the field you have chosen.

If you don't want to make any more changes, turn to the last section in this chapter to finish and save the new card form.

Changing the Size of Your Card

You can change the size of your card, then change it back again.

To shorten a card:

1. Move the cursor to a line between the last field line and the bottom of the card.
2. Press repeatedly until you have shortened the card as much as you want.

To lengthen a card:

1. Move the cursor to where you want to insert lines.
2. Press repeatedly until you have added all the lines you want.

Lengthening a card will cause a broken side border.

To fill in the breaks:

1. Touch .

If you replace the card borders after you have adjusted the length of your card, you may see a double border at the bottom.

To remove the extra border:

1. Move the cursor to a line below your last field.
 2. Press .
- The computer will remove everything below the cursor.
3. Touch .

To redraw card borders on an old form that has no side or bottom borders:

1. Touch `Redraw Border`.

If you don't want to make any more changes, move on to the next section to finish and save the new card form.

Finishing and Saving the New Design

Here are a few points to remember when you are ready to finish your card form. A final review of your design can show you where you might want to make further changes or where you need to remove stray marks. You can also take a moment to decide what to name your cardfile and where you want to store it.


Checking the Form

At this point, you should check your card form to make sure it is correct and complete:

- ☞ Are there any spelling errors?
- ☞ Are the fields long enough?
- ☞ Have you included all the fields you need?
- ☞ Is the card the size you want it to be?
- ☞ Have you set the key field?
- ☞ Do you want to set an autodial field?

While you are still adapting the form, you can make whatever changes you need. But if you finish creating and naming the form and put cards in the cardfile, then discover you need another field or want to make a field longer or shorter, you can make those changes. (See Chapter 13 to change a form when there are cards in your cardfile.)

Cleaning Up Stray Marks

If you have pressed  to correct your form, pieces of the right side border will have been pulled inside.

To remove these marks:

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


Naming and Saving the Form

Before you can use the new form for cards, you must first name it and save it on a disc.

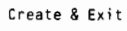
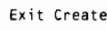
Chapter 3, in the section on “Naming and Saving the Form,” gives you the rules for naming a cardfile.

When PCF asks you for a cardfile name, it shows you the names of the default drive and subdirectories (if any). If, along with the name, you don't tell PCF where to store your new cardfile, PCF will put it in the default drive and directory. If you want to put the new cardfile someplace else, you must change these names and type in the new information. Appendix E gives you more information about default drive and directory and tells you how to change the default.

If you want to know how to set up directories and subdirectories, see Chapter 7 in *Using Your HP Touchscreen Personal Computer*.

If after adapting your card form, you decide that you don't want to save it, touch . PCF erases your design and shows you the Main PCF screen.



 saves your card form.  deletes it. Make your choice carefully.

If you do want to save the card form:

1. Touch `Create & Exit`.

The function labels change and PCF shows you the message

Type the name of the cardfile to be created.
(You can switch discs now.)

and shows you the names of the default drive and directory.



Do not remove the PCF Application Work Disc. If you want to store your cardfile on a different personal work disc, you can put a new disc in the drive when PCF tells you that you can switch discs.

2. Look at your card form one more time to make sure it is exactly what you want.

If you do want to make changes, you can do so by touching `Cancel` so that PCF will leave your card form on the screen.

3. When you are satisfied with your card form, type a name.

Remember to use a new name of eight characters or fewer. Change drive and directory if you don't want the default.

4. Press `Return`.

PCF will tell you that it is

Creating the cardfile

Then PCF will show you the Main PCF screen and will tell you it is

Getting cardfile

When PCF has found your cardfile, the Main PCF screen will display a cardfile with no cards in it. The cardfile will look like this one.

4-10 Adapting an Existing Card Form

Look here for the name
you gave your cardfile.

The new cardfile
is ready to receive
cards.

The screenshot shows a software interface for a Personal Card File (PCF). At the top, a title bar contains the text "Personal Card File (PCF)", "Main", and "Cardfile: YOURS". Below the title bar, a message reads "Choose a tab to select a card. Touch knob to roll cards." The main area of the screen displays a vertical stack of four card templates. Each card has a tab on the left side with the letter "A" and a tab on the right side with the letter "V". The cards are currently blank. At the bottom of the screen, there is a control panel with several buttons: "Dial Phone", "Add Cards", "Find Cards", "Num Pad", "Print Cardfile", "Cardfile Tasks", and "Exit PCF". The "Num Pad" button is currently displaying the number "3" and "1" above it, and "4:51" below it.

Now you are ready to put cards in the cardfile. Chapter 5 tells you how to add cards.



5

Putting Cards in a Cardfile

You cannot add cards to a cardfile until you have created a card form. If you haven't yet created a form for your cards, read Chapter 3, which tells you how to design a new card form, or Chapter 4, which tells you how to adapt an old card form to make a new one.

(Remember that whatever you can do by touching the screen, you can also do from the keyboard.)

Getting Ready to Add Cards

The cardfile you add cards to must be showing on the Main PCF screen.

To add cards:

1. Call up the cardfile and return to the Main PCF screen (Chapter 6 tells you how).
2. Touch **Add Cards** .
PCF shows you the Add screen.

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

Personal Card File (PCF) Add Cardfile: IMPORTS

Fill in a new card then select "Add This Card"

*** IMPORTS CARDFILE ***

Agent's Name
Company
Telephone
Next contact (YY/MM/DD)

CANCEL

The Add screen shows a blank card form, with the cursor in the first field. Now you are ready to fill in cards and put them in the cardfile.

PCF has a number of features that help you to fill in your cards.

- ☞ You can fill in the fields in any order.
- ☞ You don't have to fill in all the fields.
- ☞ If you fill in the key field, PCF puts the card in the right place in the cardfile.
- ☞ If you don't fill in the key field, PCF places the card first in the cardfile.

As you fill in your cards, remember that:

- ☞ You cannot change the fields or field labels while adding cards.
- ☞ You can write only in the fields.

PCF gives you several ways to move the cursor quickly from one field to another.

- ☞ Pressing or advances the cursor from one field to the next.
- ☞ Holding down while pressing moves the cursor back to an earlier field.
- ☞ Pressing moves the cursor back to the start of the first field.
- ☞ Touching the screen moves the cursor to the part of the screen you have touched. You can then use the arrow keys () to pinpoint the position you want.

5-2 Putting Cards in a Cardfile

Filling in Alphabetic Information

No special procedures are needed to fill in names, comments, and other details requiring alphabetic characters. However, a few hints may make it easier to find information later.

- ☛ Remember that PCF sorts by a whole key field according to the first item in the field. (For example, Bill Jones will be filed under the letter “B”; Jones, Bill, will be filed under the letter “J”.)
- ☛ If last name comes before first name in the same key field (for example, Jones, Bill), PCF will alphabetize the first names within the last name group. (For example, Bill will follow Ann but come before Donald.)
- ☛ Keep in mind that the first eight characters of your key field will show on the index tab of the card. Decide what information you’d like to see on the tab as a quick reference and place it first in the key field.

If you don’t want to fill in any more information, turn to the section on “Saving the Card and Leaving the Add Screen,” later in this chapter.

Filling in Numbers

PCF treats numbers a little differently from alphabetic information. For example, PCF treats them as running from 0 to 9. (PCF would read 07 as a number lower than 12, but would read 7 as a number higher than 12.) The following sections tell you how to fill in numbers for cases where this treatment affects sorting or finding your cards.

Filling in Dates

If you plan to use a date field as the key field for filing your cards, or as a field for searching your cardfile, the following pointers will help you fill in dates in the most useful way:

- ☛ Represent each element of the date with a two-digit number. For example, enter 84 for the year 1984; enter 06

for the month of June; enter 01 for the first day of the month.

- ☛ You can, of course, enter a four-digit year if your cardfile is set up to cover more than one century.
- ☛ Enter year, month, and day in that order and separate them by slashes. For example, enter 84/06/21 for June 21, 1984. PCF will then place your card in the cardfile correctly; that is, PCF will file your card by the year first, then by the month within that year, then by the day of the month.

If you don't want to fill in any more information, turn to the section on "Saving the Card and Leaving the Add Screen," later in this chapter.

Filling in Times

If you plan to use a time field as the key field for filing your cards, or as a field for searching your cardfile, the following pointers will help you to fill in times in the most useful way:

- ☛ Convert the time to the style used in a 24-hour clock, in which noon is 12:00 and midnight is 24:00.
- ☛ Remember to add a zero to any single-digit hour. For example, enter 08:30 for 8:30 a.m.

If you don't want to fill in any more information, turn to the section on "Saving the Card and Leaving the Add Screen," later in this chapter.

Filling in Telephone Numbers for Autodialing

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

- ☛ PCF ignores everything in the autodial field except numbers, the plus sign (+), and the letter X (or x). (We'll explain + and X shortly.) If any characters follow X (or x), PCF ignores those too. For example, if you enter a phone number as (202)876-2929, PCF will ignore the paren-

theses and the hyphen and read the number as 2028762929. Therefore, you can include such symbols or leave them out.

- ☒ Be sure to include all parts of the number that PCF will need in order to place your call correctly. For example, if you need to use an access number (such as 9 to get a dial tone), be sure you include this number in the autodial field.
- ☒ PCF pauses for two seconds during autodialing when it reads a plus sign (+). For example, you might enter 9+202/876-2929. PCF would then pause after dialing 9 to wait for the dial tone.
- ☒ PCF stops when it reads an X (or x) in the autodial field. If your autodial field includes an X (or x) before an extension, PCF will dial the number up to that point, then stop and let you take over to ask for the extension.
- ☒ PCF will read only as many as 39 characters in the autodial field (not including characters it ignores, such as parentheses). (Some modems may not dial at all if the field has too many readable characters.)

If you don't want to fill in any more information, move on to the next section to save your card.

Saving the Card and Leaving the Add Screen

After you have entered all your information, check to make sure it is complete and accurate. You can make any changes you like.

When you are satisfied that the card is ready to add:

1. Touch **Add This Card** .

PCF adds the card to your cardfile and brings up another blank card form.



Touching **Add This Card** saves your card. Touching **Exit Add** deletes it. Make your choice carefully.

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

Touch this box to file the card you have filled in.

Touch this box when you finish adding cards.

Remember, there is no need to add cards in any particular order. PCF automatically places each card in its proper place in the cardfile according to the key field you have selected.

When you are finished adding cards:

1. Touch **Exit Add**.

PCF shows your cardfile on the Main PCF screen. The last card you added will be in the open position, and all the new cards will be in proper order.

5-6 Putting Cards in a Cardfile

What to Do When Your Disc Is Full

If you try to add a card to a **cardfile** that has no more room, PCF will tell you that

```
Card can't be added-  
card limit has already been reached
```

If you try to add cards to a **disc** that is full, PCF will tell you that

```
A disc error occurred.
```

You can open up space in one of these four ways:

- Delete obsolete cards (Chapter 7) or cardfiles (Chapter 15).
- Copy some of your cardfiles onto another disc (Chapter 12).
- Split a large cardfile into parts, and copy part(s) of it onto another disc (Chapter 12).
- Use special procedures to tighten up disc space (Appendix D).



6

Looking at the Cards in a Cardfile

When PCF shows you a cardfile, you see an image similar to that of a ROLODEX Card File, showing the index tabs of up to 17 cards.

The cardfile name is in the upper right of the screen.

One card in a cardfile is an open card; its index tab is highlighted and the first three field lines are visible. The other cards show only their index tabs.

The cardfile name is here.

The index tab shows the first eight characters from the key field.

The index tab of the open card is highlighted.

The first three field lines are visible on the open card.

The screenshot displays the PCF interface. At the top, it shows 'Personal Card File (PCF)' and 'Cardfile: IMPORTS'. Below this is a navigation bar with 'Main' and 'Cardfile: IMPORTS'. A prompt reads 'Choose a tab to select a card. Touch knob to roll cards'. The main area shows a grid of index tabs for various categories like 'Swedish', 'Switzerl-', 'Tiles an-', 'Toys Int-', 'Wines of', 'Wines of', 'American', 'Shirley Cochrane', 'American Systems, Inc.', '223-105-0110', 'Amsterda-', 'Antiques', 'Autos of', 'Brazilia-', 'British -', 'Canada T-', 'Ceramics', 'Chocolat-', and 'Dallas S-'. The 'American' tab is highlighted. The open card for 'Shirley Cochrane' shows three field lines. At the bottom, there are control buttons: 'Dial Phone', 'Add Cards', 'Find Cards', 'Num Pad', 'Print Cardfile', 'Cardfile Tasks', and 'Exit PCF'. The time '4:51' is displayed.

The cardfile that is shown on the PCF screen is called the "current cardfile." If you want to use a cardfile, you must tell PCF to make it the current cardfile.

Asking for a Cardfile That Is on the Disc You Are Using

If you start up PCF and want to see a cardfile other than the current cardfile, or if no cardfile is shown on the Main PCF screen, you must call up the cardfile you want.

(Remember that whatever you can do by touching the screen, you can also do from the keyboard.)

To ask for a cardfile:

1. Touch `Cardfile Tasks`.

PCF shows you the Main tasks screen.

2. Touch `Another Cardfile`.

If the screen currently shows a cardfile, PCF tells you that it is

Closing current cardfile

PCF then asks you to

Type the name of the cardfile you want to see.
(You can switch discs now.)

You will see the name of the default drive and any sub-directories. You do not want to switch discs.

3. Type the name of the cardfile you want.

You can use capitals, lowercase letters, or both. For example, you could type imports to get the IMPORTS cardfile.

4. Press `Return`.

If the cardfile is on your work disc and you have typed the correct name, PCF lets you know that it is

Getting cardfile

Then PCF shows the cardfile you asked for.

6-2 Looking at the Cards in a Cardfile

If PCF doesn't find the cardfile, it shows you this message:

Can't find cardfile.

Check to see whether you have given the correct name, and whether the cardfile is actually in the drive and directory you are using. (See Chapter 14 if you are not sure of the correct name. See the next section if the cardfile is in a different drive and directory. See Appendix E for more information about drive and directory. If you see any other message that you don't understand, you can look it up in Appendix G.)

Pressing clears the message so that you can try again. If the cardfile is in a different subdirectory on your work disc, be sure to include the subdirectory name.

Asking for a Cardfile That Is on a Different Disc

At times you will want to see a cardfile that is not on the disc you are currently using. In one case, the disc holding your cardfile is in a different drive and directory. In the second case, the disc holding your cardfile is not in the computer. Use one of the two following sections to ask for your cardfile.

(Remember that whatever you can do by touching the screen, you can also do from the keyboard.)

Calling Up a Cardfile from a Different Drive and Directory

If you want to see a cardfile that is on a disc in a different drive:

1. Touch .

PCF shows you the Main tasks screen.

2. Touch .

If the screen currently shows a cardfile, PCF tells you that it is

Closing current cardfile

PCF then asks you to

Type the name of the cardfile you want to see.
(You can switch discs now.)

and shows you the names of the default drive and directory.

3. Hold down while pressing .

PCF erases the drive and directory names.

4. Type the letter of the drive the cardfile is in, followed by a colon, a backslash (\) for the Main directory, a name and backslash for each subdirectory (if any), and the cardfile name.

For example, you would type `a:\bob\imports` to see the IMPORTS cardfile in the subdirectory call BOB on the disc in Drive A. (See Appendix E for more information on drive and directory.)

5. Press .

If the names of the cardfile, drive, and directory are correct, PCF tells you it is

Getting cardfile

Then PCF shows the cardfile you asked for.

If PCF doesn't find the cardfile, it shows you this message:

Can't find cardfile.

Check to see whether you have given the correct name, and whether the cardfile is actually in the drive and directory you have asked for. Pressing clears the message so that you can try again.

Calling Up a Cardfile from a Disc Not in the Computer

If you want to see a cardfile that is on a disc not currently in either disc drive:

1. Touch .

PCF shows you the Main tasks screen.

2. Touch .

If the screen now shows a cardfile, PCF tells you it is

6-4 Looking at the Cards in a Cardfile

Closing current cardfile

PCF then asks you to

Type the name of the cardfile you want to see.
(You can switch discs now.)

and shows you the names of the default drive and directory.

3. Remove the disc that does not contain the PCF program.
4. Place the disc containing the cardfile you want to see in the empty disc drive.
5. Hold down while pressing .

PCF erases the drive and directory names.

6. Type the letter of the drive that contains the cardfile, followed by a colon, a backslash (\) for the main directory, a name and backslash for each subdirectory, and the cardfile name.

For example, you would type `a:\bob\imports` to see the IMPORTS cardfile in the subdirectory call BOB on the disc in Drive A. (See Appendix E for more information on drive and directory.)

7. Press .

If the names of the cardfile and drive are correct, PCF tells you that it is

Getting cardfile

Then PCF shows the cardfile you asked for.

If PCF doesn't find the cardfile, it shows you this message:

Can't find cardfile.

Check to see whether you have given the correct name, and whether the cardfile is actually in the drive and directory you have asked for. Pressing clears the message so that you can try again.

Finding Out How Many Cards a Cardfile Contains

When you want to know how many cards are in a cardfile, you can ask PCF to tell you.

To ask for the number of cards:

1. Call up the cardfile if it is not on the screen.
2. If the Main PCF screen is showing, touch
Cardfile Tasks .
PCF shows you the Main tasks screen.
3. When the Main tasks screen is showing, touch
FullName & Count .

PCF shows you the full name of the cardfile followed by the number of cards it contains—for example, B:\IMPORTS (30 cards).

Scrolling through the Cardfile

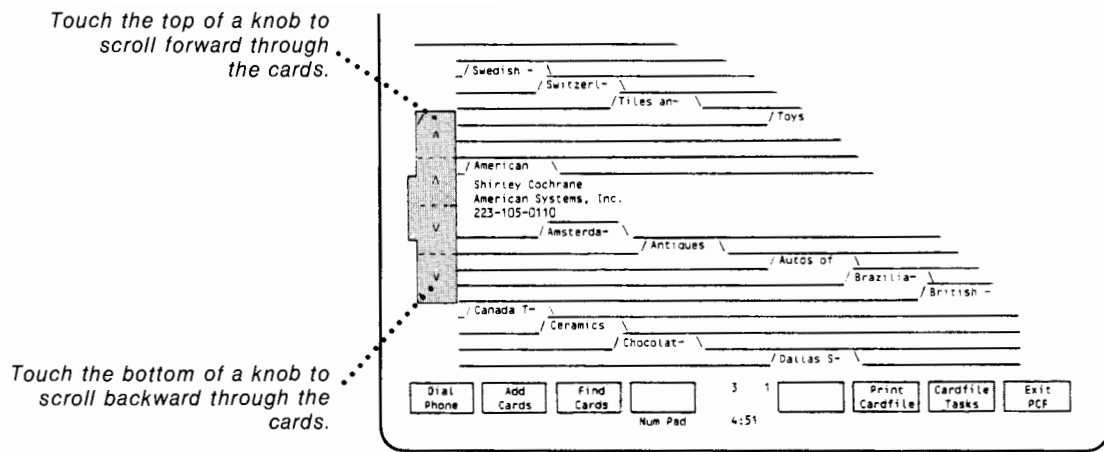
After you have called up your cardfile, PCF displays an image similar to that of a ROLODEX Card File. The tabs of up to 17 cards are visible.

If you want look through a whole cardfile or see a different section of cards, you can scroll through the cardfile. The action is similar to turning the knob on a ROLODEX Card File.

(Remember that whatever you can do by touching the screen, you can also do from the keyboard.)

When you want to scroll through a cardfile:

1. To scroll forward, touch the top of one of the knobs on the screen.
2. To scroll backward, touch the bottom of one of the knobs on the screen.



Even if your cardfile is completely full, it will take only moments to scroll continuously through the entire cardfile.

You can also hold down or to scroll through the cards.

Pinpointing a Card

PCF makes it easy to move quickly to a specific card or to a particular part of your cardfile. You simply ask for whatever is shown on the index tab.

- You can use up to nine characters to tell PCF what part of the cardfile you want. PCF ignores all characters after the first nine.
- It doesn't matter whether you use capitals or lowercase letters.
- If your cardfile is sorted by dates, a date will appear on the index tab. If there are slashes between year, month, and day (YY/MM/DD), remember to include them when

you ask for the date. (For example, if you want the first card for February 1984, you must ask for 84/02, not 8402.)

To pinpoint a card:

1. Type the first one to nine characters from the term in the key field.

For example, if you want to find the first card for Harrisonburg, type harrisonb. If you want the first of the H's, type h.

2. Press .

PCF shows you the first card whose index tab starts with whatever you typed. For example, if you ask for Smith, PCF gives you the first card with Smith on its index tab (it may be Smithers). If there is no such card, PCF gives you the next card in order.

Reading the Information on a Single Card

When a cardfile is displayed on the screen, you see the first three field lines of the card in the open card position, and the index tabs of the other cards. If you want to read the entire card, you need to pull the card out of the cardfile. PCF calls this action "selecting" a card.

When you select a card, PCF shows you the Select screen and displays your card complete with title, field labels, and fields.

Powers

* * * FRIEND'S ADDRESS BOOK * * *

Name	Title	Dr.	First	Bernice	Last	Powers	
Home phone	609-4987						
Work phone	418-8453						
Address	2001 Settler Avenue						
City	White Oak			State	MD	ZIP	20015
Spouse	Walter Rayburn						
Children							
Birthdate (YY/MM/DD)	34/04/03			Anniversary (YY/MM/DD)	60/06/21		

() ()

You can select a card from the touch screen, or you can use the keyboard.

The card you select by touch does not have to be the open card. Its index tab just has to be visible.

If you want to use the touch screen to select a card:

1. Scroll through the cardfile until you can see the index tab of the card you want to select.
2. Touch the label on the index tab.
PCF shows the Select screen, with the complete card displayed.

The card you select from the keyboard must be the open card or its index tab must be highlighted.

If you want to use the keyboard to select a card:

1. Move the card you want to select into the open card position, or press until the index tab is highlighted.
 2. Press .
- PCF shows the Select screen, with the complete card displayed.

If you now want to read other cards without leaving the Select screen:

1. Touch `Next Card` .

PCF shows you the card that comes next in order.

2. Touch `Previous Card` .

PCF shows you the preceding card.

With the Select screen showing, you can also update a card, print a card, or delete a card. Chapter 7 tells you how to perform these actions.

When you are ready to return to the Main PCF screen:

1. Touch `Exit Select` .



7

Working with the Cards in a Cardfile

This chapter will explain what you can do with the individual cards in a cardfile. All these actions take place on the Select screen.

(Remember that whatever you can do by touching the screen, you can also do from the keyboard.)


Changing the Information on a Card

The following pointers will help you to change the information on your cards:

- ☛ You can change the information in the fields in any order.
- ☛ You cannot change the field labels or the form title. (To make these changes, see Chapter 13.)
- ☛ If you don't like your changes, you can undo them by touching `Restore Original` before you return the card to the cardfile or move on to another card. Be aware, however, that PCF will undo **all** the changes.

PCF gives you several ways to move the cursor quickly from one field to another.

- ☛ Pressing `Tab` or `Return` advances the cursor from one field to the next.
- ☛ Holding down `Shift` while pressing `Tab` moves the cursor back to an earlier field.
- ☛ Pressing `⏪` moves the cursor back to the start of the first field.

☞ Touching the screen moves the cursor to the part of the screen you have touched. You can then use the arrow keys  to pinpoint the position you want.

To change the information:

1. Select the card you want to change.
2. Move the cursor to the field holding the information you want to change.
3. Type your changes.
4. Check to see if you're satisfied with the changes.
If you aren't, touching `Restore Original` puts back the original information in all the fields.
5. When you are satisfied with your changes, touch `Exit Select` to return to the Main PCF screen; or touch `Next Card` (`Previous Card`) to move to another card.

Type the changes over the old entry.

Space over information you want to erase.

The screenshot shows a terminal-style interface for a 'Personal Card File (PCF)'. At the top, it says 'Select Cardfile IMPORTS'. Below that, it prompts 'Type any changes or select a function key'. The main area is titled 'Chocolat-' and contains the following data:

- Agent's Name: Theo VanCleeef
- Company: Chocolates of Belgium
- Telephone: 74-09-72
- Next contact: (YY/MM/DD) 84/09/16
- Street Address: 41 Avenue Hamoir
- City: Brussels
- Country: Belgium
- Comments: 1. Excellent quality. 2. Dark and light chocolate. 3.

 At the bottom, there is a menu with buttons: Dial Phone, Previous Card, Next Card, Lines Per Card (8 19), Num Pad, Delete Card, Print Card, Restore Original, and Exit Select.

Type new information in blank fields.

Touch this function label to undo your changes.

7-2 Working with the Cards in a Cardfile

If you change the information in the key field, this change will probably affect the placement of the card in the cardfile. For example, if Ms. Jones gets married and uses her husband's last name, Smith, her card would need to be refiled under the letter "S." PCF puts the card in its new position automatically when you change key field information.

Printing a Card

If your HP Touchscreen PC has an integral thermal printer, PCF can print your card as it appears on your screen—with the card borders, the form title, the field labels, and field contents. (You can also use PCF with other printers. Appendix F explains telling PCF what printer to use.)

- ☒ The fields will be underlined in the printout. The information in the fields will be in boldface characters.
- ☒ The card border may not appear as a solid line, but rather as a series of dots and dashes.

```

                                     *****
                                     *** FORMER PROFILE ***
Agent's Name Machado de Rocha
Company Brazilian Coffee Corporation
Telephone 2520169
Last Contact (YY-MM-DD) 83/04/15

Street Address 161 Epitacio Pessoa Avenue, Ipanema
City Rio de Janeiro State _____ Zip _____
Country Brazil

Comments 1: Beans, ground blends
         2: Excellent quality, reasonable prices
         3: _____

```

The maximum size for any card is 22 lines, including index tab and label, and PCF adds 11 lines of spacing and allows 33 lines for each card that it prints. (You could fit two cards on a standard 8½ x 11 sheet of paper.) However, when you need a different number, you can change that instruction. You can tell PCF to allow anywhere from 1 to 66 lines for each card.

To specify other than 33 lines per card:

1. Touch `Lines Per Card` .

PCF shows you the Select cancel screen and asks you to

Type the number of lines
you want to print for each card (1-66).

and tells you it is ready to print 33 lines per card. The cursor is under the first 3 in 33.

2. Type the number of lines you want (from 1 to 66).
If you type a one-digit number, press the space bar to erase the second 3 in 33.
3. If you decide you don't want to change the number, you can touch `Cancel` to return to the Select screen.
4. If you do want to change the number, press `Return` .

To print a full card (or cards):

1. Select the card you want to print.
2. Touch `Print Card` .
PCF prints the card and the card remains on the screen.
3. To print another card, touch `Next Card` or `Previous Card` .
4. Touch `Print Card` after each card is called up.
5. When you have finished printing, touch `Exit Select` .
PCF shows you the Main PCF screen with your cardfile showing.

7-4 Working with the Cards in a Cardfile

When you want to print several cards in order, you can speed up the process:

1. Touch `Next Card` , `Print Card` , `Next Card` , `Print Card` several times without waiting for each card to be printed.
PCF will store these commands in its memory and carry them out in sequence.

You can also print a whole cardfile so that only the information within the fields is shown in the printout. Such printouts will look like lists, not actual cards. (See Chapter 10.)

Deleting a Card

To delete a card from your cardfile:

1. Select the card you want to delete.
PCF shows you the card on the Select screen.
2. Check carefully to be sure this card is the one you want to delete.

Once you delete a card, you cannot retrieve it.

3. Touch `Delete Card` and watch the message line.
PCF lets you verify that you really want to delete this card. PCF shows you this message
If OK, select the same function key again.
If not, press RETURN.
4. If you are certain that you want to delete the card, touch `Delete Card` again.
PCF deletes the card and shows you the next card in the cardfile.



8

Using the Autodial Feature

What is Autodial?

Autodial is a PCF feature whereby you can ask the computer to place a call to someone for whom you have a card.

You must have an autodial field as part of your card form to use autodial. If you are creating a new cardfile, see the section in Chapter 3 on "Setting PCF to Automatically Dial a Phone." If you have already set up a cardfile but there are no cards in it, see the section in Chapter 4 on "Preparing for Automatic Dialing." If you have a cardfile with cards in it and want to add or change an autodial field, see the section in Chapter 13 on "Changing the Autodial Field."

What Equipment You Need

To use PCF's autodial feature, you need to connect your HP Touchscreen PC to a Hayes™ or Hayes-compatible modem that is then connected to the phone line. You also need true touch-tone telephone lines. (See Appendix B for information on how to connect the modem and configure your system. See your modem manual for other information about your modem.)

How Long a Number Can Be

When PCF dials, it will read a maximum of 39 characters in an autodial field. This number does not include characters that PCF ignores. For example, if the phone number includes parentheses, slashes, or hyphens, PCF will ignore these. (Some modems may not dial a number if there are too many readable characters. See your modem manual.)

Getting Ready to Dial

Before you select a number for automatic dialing, check to see that:

- You have a Hayes or Hayes-compatible modem hooked up to your computer and set up according to the instructions in Appendix B.
- The modem is properly connected to the phone.
- You have turned on the modem.

Dialing Automatically

You can use autodial either from the Main PCF screen or from the Select screen.

To have PCF automatically dial a phone number:

1. Call up the cardfile containing the card with the number you want to automatically dial.
2. Return to the Main PCF screen.
3. Move the card you want into the highlighted position.
If you don't need to read the whole card, you can skip Step 4.
4. Touch the index tab of the card or press to select the card.
PCF shows you the card on the Select screen.
5. Touch `Dial Phone`.

If your modem has a speaker, you will hear PCF dialing the phone number. If you don't hear anything, check to make sure that the volume on the modem is turned up.



If you use a Hayes-compatible modem that does not have a speaker, you will not hear the dial tones, dialing, or ringing.

6. Pick up the phone and wait for an answer.

If you don't pick up the phone, PCF will automatically hang up 7 seconds after you touch `Dial Phone`.



Some phone numbers may need more than 7 seconds for dialing. Be sure to pick up the phone before PCF hangs up.

7. If you are using the Select screen, touch `Exit Select` when you are finished autodialing.

PCF will show the Main PCF screen again.



9

Searching for Part of a Cardfile

There will be times when you want to use only certain cards in your cardfile, not the whole cardfile. For example, you may want to find all the people who live in California.

With a traditional desktop cardfile, you would have to look at every card to find the ones for people in California. With PCF, the computer does the reading for you, then shows you the cards you want in a “workset.”

A workset is a group of cards that you have temporarily pulled from a cardfile to meet specified criteria. All the cards in a workset have one or more characteristics in common, such as the same city, the same date, or both.

(Remember that whatever you can do by touching the screen, you can also do from the keyboard.)

Getting Ready to Search

As a first step in searching for a workset, you must call up the Find screen.

To get ready:

1. Call up the cardfile you want to search and return to the Main PCF screen.
2. Touch `Find Cards` .

PCF shows the Find screen with the card form for that cardfile.

Setting Your Search Terms

Next you must tell PCF which cards you want to find.

- You can use a whole word (California), part of a word (Sm* for everyone whose name begins with Sm), or a phrase.
- You can use a complete number (84/01/25) or part of a number (* /01/ * for all the birthdays in January).
- When you search by part of a word or number (such as Sm* or * /01/ *), the asterisk (*) is a “wildcard” symbol to stand for the characters that you leave out of the term.
- A wildcard symbol can appear only before or after the term you use—not between characters.
- You can search for all the cards before or after a given number (for example, all the cards with prices lower than \$100).
- You can search in as many fields as you want, but you can specify only one term in each field.
- You can even mix types of search categories. For example, you can search by a wildcard in one field and by a whole term in another. You can search by numbers in one field and by letters in another.
- You can fill in the fields you want to search in any order.

To search for a workset:

1. Call up the Find screen if you have not done so.
2. Move the cursor to the field you want to search by.
3. Type what you want to search for (for example, Smith or Sm*).
4. If you want to search by additional fields, repeat Steps 2 and 3.

To search by zip code, type the number in this field.

To search by country, type the name in this field.

Personal Card File (PCF) Find Cardfile: IMPORTS
Fill in what you wish to find, then select "Find and View".

*** IMPORTS CARDFILE ***

Agent's Name
Company
Telephone
Last contact (YY/MM/DD)
Street Address
City
Country usa State ZIP 20015
Comments 1.
2.
3.

Find Num Pad 8 22 7:46 Exit Find

5. Touch Find & View .

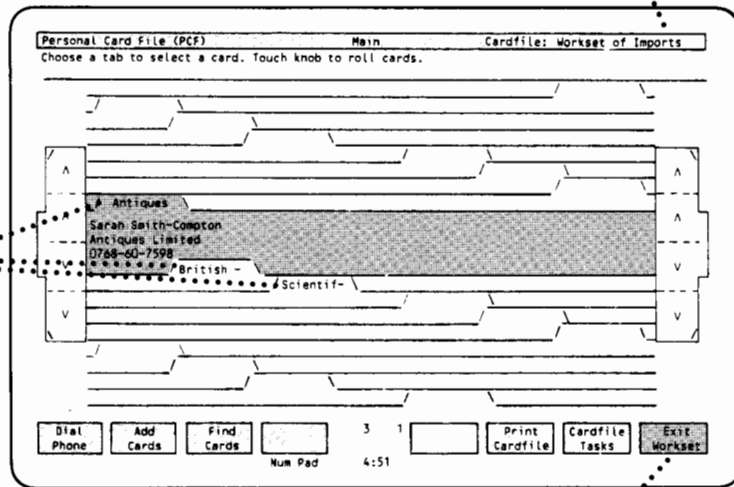
PCF tells you it is

Searching the cardfile

PCF then shows you the Main workset screen. The workset will include only the cards that have the characteristics you asked for.

*This workset is from the
IMPORTS cardfile.*

*These cards are a workset of
cards for England.*



*When you touch this function
label PCF returns the cards to
the whole cardfile and shows
the Main PCF screen.*

The cardfile name in the upper right-hand corner of the screen tells you that you are seeing a workset of your cardfile.

Now that you have created a workset, you might want to search for particular cards in your workset. For example, from a workset for California, you could ask for cards for San Francisco. (See the section on "Narrowing a Search," later in this chapter.)

You can scroll through the workset, print the workset, and perform many other tasks just as if the workset were the whole cardfile. (See the section on "Working with the Cards You Have Found," later in this chapter.)

9-4 Searching for Part of a Cardfile

If you change the workset, the changes will still be reflected when the cards in the workset are again part of the whole cardfile. (For example, if you delete a card from the workset, you delete it from the whole cardfile.) However, you can make the workset into a separate cardfile by making a copy of it. Then you will have two independent copies of each card in the workset—one in the original cardfile and one in the new (workset) cardfile. Therefore, changes you make in either card will not affect the other. (See the section, later in this chapter, on “Making the Cards into a New Cardfile.”)

When you have finished using the workset and want to return to the whole cardfile:

1. Touch `Exit Workset`.

PCF then shows the Main PCF screen with the whole cardfile.

Searching by Alphabetical Terms

When you conduct an alphabetical search, you can search by a whole word or by part of a word (by wildcard).

- If you want to find all the cards for people in San Francisco, type the entire city name in the city field.
- If you want to find all the cards for people in cities that begin with San, type `San *` in the city field. PCF will find the cards for San Antonio, San Bernardino, San Francisco, and so on. However, if you don't leave a space between San and *, PCF will also find the cards for cities such as Sandusky and Santa Barbara.
- Always enter the term exactly as it appears in the field. For example, if you want to search for doctors and your card form shows `Dr.` in the title field, you must search by `Dr.` (or `dr.`) and not `Doctor` (or `doctor`).

Searching by Numerical Terms

When you know all the elements in a number, you can search numerically by simply typing the number you want in the appropriate field. For example, typing 20015 in a Zip Code field will give you all the cards for addresses in that zip code. If you know that all your cards show the date with slashes between the elements, you can type 76/07/04 and see all the cards with the Bicentennial date of July 4, 1976.

If you want all the cards with dates in the year 1976, you can type 76/*. The asterisk (*) is the "wildcard" symbol that stands for the information you leave out.

Searches of this kind are straightforward; you might call them regular number searches. In regular number searches, PCF treats letters, numbers, and symbols in the same way. PCF reads each symbol or character; it ignores nothing. For example, in a regular number search PCF considers 2000 to be different from 2,000, because one number has a comma and the other does not.

But what if you don't remember whether you put in a comma or whether you used slashes in the date? PCF provides a way to search numerically even if you know only the numbers and are not sure what symbols (if any) the number field includes. You can ask PCF to compare only the numbers, and ignore any symbols. You can also use this same comparative method to find numbers greater than or less than a given number.

To search by the comparative method, you type one of three keyboard symbols (=, <, or >) before you type the number.

- If you type = (equals) before a number, PCF will give you only the cards having that number in the field you have chosen. For example, you would type =1000 in the price field to see all the cards of items that cost exactly \$1,000 (or \$1000).

9-6 Searching for Part of a Cardfile

- If you type < (less than) before a number, PCF will give you all the cards with a lower number in the field you have chosen. For example, you would type < 1000 in the price field to see all the cards of items that cost less than \$1,000 (or \$1000).
- If you type > (greater than) before a number, PCF will give you all the cards with a higher number in the field you have chosen. For example, you would type > 1000 in the price field to see all the cards of items that cost more than \$1,000 (or \$1000).

Whenever you use one of the three symbols to search by the comparative method, you will want to remember the following points:

- You can use only one of the symbols in each search term. For example, you cannot ask for all the salaries greater than \$20,000 but less than \$50,000. You would need to make two searches for this purpose. (See the section on “Narrowing a Search,” later in this chapter.)
- PCF reads only the numerals, the first decimal point, and a minus sign (–) before the first numeral or after the last. Therefore, if you type = 2000, PCF will give you all the cards having those four numerals in that order in the field you have chosen; for example, you would see cards for \$2,000 or 2,000, but not for \$20.00 or – 2,000.
- You cannot use a wildcard symbol (*) when you search by the comparative method. You must account for all the numerals in the number.

Searching by Times

Use regular number searches to find exact times or parts of times. Remember to type the time or part of the time exactly as it is written on your cards.

- To find a specific time—for example, all meetings scheduled for 10:00—type the time as 10:00, not 10.

- To find a part of a time, type the part of the time you want to search for (minutes or hour) and then add an asterisk (*), the wildcard symbol. For example, to find all the meetings beginning at half past the hour, type *:30. To find all the meetings beginning sometime between 10:00 and 11:00, type 10:.* (be sure to include the colon).

When you search for times by the comparative method, you must use a whole term, not just part of a term. That is, if the clock time is shown with both the hour and the minutes, you must use both elements.

- Because you must use the whole time, you cannot search by wildcard when you use the comparative method. For example, you cannot type > *:30 to find all times later than half past the hour.
- Use < (less than) or > (greater than) to find all times before or after a given time. For example, to find all meetings scheduled after 2 p.m., type > 1400 in the appropriate field. (Remember, when you use =, <, or >, PCF ignores the colon.)

Searching by Dates

Use regular number searches to find exact dates or parts of dates. Remember to use the date or part of the date exactly as it is written on your cards.

- To find a complete date that is shown as YY/MM/DD, type the date in the same style. For example, type 84/02/16.
- To find all the dates in a certain year, use the first part of your date (YY/) and include the slash and a wildcard symbol (*). For example, type 84/* to find all the 1984 cards.
- To find all the dates in a given month, use the second part of your YY/MM/DD date. Surround the month by slashes and wildcard symbols to show that you are searching for the second part of the date, the month. For example, type */04/* to find all the April cards.

9-8 Searching for Part of a Cardfile

- To find all the dates on a given day of the month, use the third part of the YY/MM/DD date. Include the slash and wildcard symbol (*). For example, type */13 to find all the cards with a date on the 13th day of a month.

When you search for dates by the comparative method, you must use the whole date, including two digits each for year, month, and day. For example, type 840218. (PCF ignores the slashes in dates written as YY/MM/DD.)

- Because you must use the whole date when you use the comparative method, you cannot use a wildcard as part of your search. For example, you cannot use > 64/* to find all dates after 1964.
- To find all the dates before or after a given date, use < (less than) or > (greater than) followed by all the numerals in the date. For example, to find all the people with birthdays after 1950, you would move the cursor to the birthday field and type > 501231. To find all the people with birthdays after July 1950, type > 500731.

Searching by Telephone Numbers

Use regular number searches to find telephone numbers when you know what symbols (if any) the numbers include; for example, (323) 505-3212 as opposed to 323/505-3212.

- You can use regular number wildcard searches to find parts of telephone numbers. For example, to find all numbers with a 212 area code, type *212* in the Phone field. PCF then finds all the phone numbers whether they have 212 area codes written as (212) or 212/.
- However, be aware that PCF would also produce a card with the phone number 528-2120, because *212* tells PCF to find the combination 212 wherever it appears—no matter what is in front of or behind it. On the other hand, typing 212*, would not turn up the (212) cards, since there's no wildcard symbol to tell PCF to look for characters in front of the 212.

- ☛ You can use the same procedure to find all the phone numbers with a given exchange.

You can type an equal sign (=) before a telephone number when you don't know what style the number was written in on the card. For example, typing =2329098854 will find the card whether the number was written as (232) 909-8854 or as 232/909-8854.

Narrowing a Search

If after you have searched for a workset of your cardfile, you decide you want to further define your needs, PCF makes it easy to search for a workset of that workset. (For example, you might find all the people who live in California who make over \$30,000 and went to Harvard and then decide that you want to narrow your search even more and find those people who meet the above criteria but who also have the title "Dr.")

To narrow the search:

1. With the workset of the cardfile showing on the screen, touch `Find Cards` .
PCF shows the Find screen.
2. Enter any additional search terms you want.
3. Press `Return` .

PCF eliminates all the cards that don't meet the new conditions and leaves only the cards that do. The cardfile name still reads `Workset of (cardfile name)`.

When you are finished searching and you no longer want to use the workset:

1. Touch `Exit Workset` .
PCF returns the cards to the whole cardfile and shows the Main PCF screen.

9-10 Searching for Part of a Cardfile

There is no way to return to an earlier workset. When you touch `Exit Workset`, PCF will always refile the cards and take you back to the original cardfile on the Main PCF screen.

Working with the Cards You Have Found

After you have searched your cardfile, the workset you have found is in most ways just like any other cardfile. You can scroll through the workset, pinpoint a card, read the information on a card, print a single card, print the whole workset, or use the workset with other programs.

A workset is different from a whole cardfile mainly in that a workset is temporary. It is composed of cards that have been temporarily pulled out of the original cardfile. When you leave the workset, those cards are put back in their usual place. Therefore, if you make any changes to the workset (adding cards, deleting cards, or updating cards), you also change the original cardfile.

If you want to add cards to a workset, delete cards from it, or update cards in it without changing the original cardfile, you must make the workset into a permanent cardfile. Chapter 11, in the section on "Dividing a Cardfile," tells you how to copy the workset to make a new cardfile.

After the workset of your cardfile has been copied, the copy becomes a separate permanent cardfile. The cards in the workset are still part of the original cardfile as well. You can change the new cardfile and still have the old one intact.



10

Printing the Information in a Cardfile

There are two ways to print in PCF. You can either print the individual cards themselves (including card borders, fields, and field labels) or you can print cardfile information only.

Chapter 7 explains how to print individual cards one card at a time. This chapter explains how to print the information from some or all of the cards in one set of instructions to PCF. Use this chapter if you want to print mailing labels or lists (either on paper or on a disc file).

When you print cardfile information, you can tell PCF to print certain fields and to ignore others. For example, you can leave out phone numbers, remarks, and dates when you print mailing labels. You can also tell PCF how to space between cards.

Understanding the Printing Procedure

There are four basic steps involved in printing the information in a cardfile:

- Getting ready to print a cardfile
- Telling PCF which information you want to print
- Telling PCF how many lines to allow for each printed entry
- Selecting the medium for printing (whether to print on paper or on a disc file)

Before we discuss these steps in detail, let's see how your cards will look in printed form.

How Your Printed Cards Look

When you print the information from a cardfile, PCF follows the style of the form you have created in the following ways:

- PCF prints the fields in the same order as on the form. You cannot tell PCF to change the order. For example, if the Last Name field comes before the First Name field, you can't ask PCF to print the first name first.
- If fields are on one line on the form, PCF prints them on a single line.
- If fields are on separate lines on the form, PCF prints them on separate lines.

However, when you use this printing method, there are a few cases where PCF does not exactly duplicate the style of the form:

- Even if your field lines don't line up on the left on the form (that is, if they don't start at the same column), PCF will line them up on the printout.
- PCF prints the first character on a line at the left margin, no matter how far from the left border of the card that character appears. For example, even if your first field begins at the center of the card, PCF starts that field at the left margin of the printout.
- PCF ignores lines that do not contain fields. For example, if you have a blank line between field lines on your form, PCF will close up this space.
- PCF only prints information contained in a field. It doesn't print card borders, cardfile titles, fields, or field labels. (If you do want to include these elements in your printout, see Chapter 7.)
- PCF prints only one character space between fields on the same line. If you have left two or more spaces between fields, PCF closes them to one.
- If there are two or more fields on a line, and one of the fields is empty, PCF closes up the space that it occupies.

☒ If a whole field line that you have marked for printing is empty, PCF leaves a blank line on the printout.

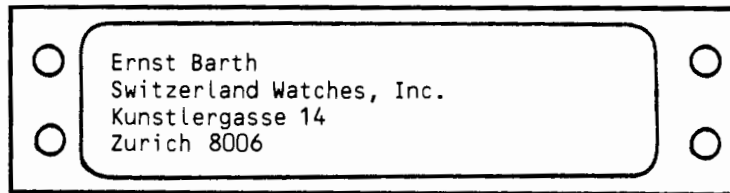
For example, this card

Switzerl-		
*** IMPORTS CARDFILE ***		
Agent's Name	Ernst Barth	
Company	Switzerland Watches, Inc.	
Telephone	052-644237	
Next contact (YY/MM/DD)	85/02/05	
Street Address	Kunstlergasse 14	
City	Zurich	
Country	Switzerland	
	State	
	ZIP	8006
Comments 1.	Jewelled watches, stop-watches, specialty time-pieces.	
2.		
3.		

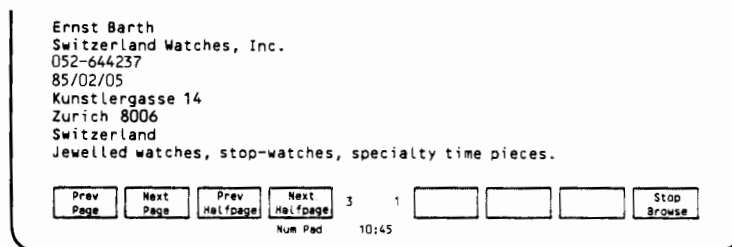
would produce this printed listing

```
Ernst Barth
Switzerland Watches, Inc.
052-644237
85/02/05
Kunstlergasse 14
Zurich 8006
Switzerland
Jewelled watches, stop-watches, specialty time-pieces.
```


this mailing label



or this disc file



Now that you've seen how your printed cardfile will look, you're ready to begin following the steps. (Remember that whatever you can do by touching the screen, you can also do from the keyboard.)

Getting Ready to Print

To get ready to print a cardfile:

1. Call up the cardfile that you want to print.
2. Touch `Print Cardfile` .
PCF shows you the Print screen.

10-4 Printing the Information in a Cardfile

Telling PCF What to Print

When PCF first shows you the Print screen, you will see a letter P in each field of your blank card form. This letter tells PCF to print the information in the field.

If you want to print all the information, just go on to the next section, "Telling PCF How Many Lines to Allow for Each Card."

If you only want to print the information in some of the fields:

1. Touch **Print Options**.

PCF shows you the Print options screen.

The screenshot shows the 'Personal Card File (PCF) Print' screen. At the top, it says 'Cardfile: IMPORTS' and 'Select the print format.' Below this is a card form titled 'IMPORT-EXPORT CARDFILE'. The fields on the card are: Agent's Name (P), Company (P), Telephone (P), Next contact (YY/MM/DD) (P), Street Address (P), City (P), Country (P), State (P), ZIP (P), and Comments (1. P, 2. P, 3. P). At the bottom of the screen is a control panel with buttons: 'Print To Printer', 'Print To File', 'Transfer Out Num Pad', 'Print Field', 'Do Not Print', 'Lines Per Lbl', and 'Exit Options'. The 'Print Field' button is highlighted. A dotted line points from the text 'Remove the "P" if you don't want to print a field.' to the 'P' in the 'Next contact' field. Another dotted line points from the text 'Touch this function label to put a "P" in a field you want to print.' to the 'Print Field' button. A third dotted line points from the text 'Touch this function label to remove the "P" from a field you don't want to print.' to the 'Do Not Print' button.

Remove the "P" if you don't want to print a field.

Touch this function label to put a "P" in a field you want to print.

Touch this function label to remove the "P" from a field you don't want to print.

2. If you want to print the field that the cursor is in, press `Return` .
PCF moves the cursor to the next field, leaving the letter `P`.
3. If you do not want to print the field that the cursor is in, touch `Do Not Print` .
PCF erases the `P` from that field and moves the cursor to the next field.
4. Repeat Step 2 or 3 for each field.
5. If you change your mind after removing a `P`, move the cursor back to the field and touch `Print Field` .
The `P` reappears.

Telling PCF How Many Lines to Allow for Each Card

You can set PCF to put the printed information on your lists or mailing labels correctly by telling PCF how many lines to allow for each card. PCF calls this instruction "lines per label," whether you're actually printing mailing labels or not. The number of lines per label equals the number of lines between the first line of one printed entry and the first line of the next.

For example, if your mailing labels will hold six lines (five lines of print and one line for space between labels), you must tell PCF to leave six lines between the top line of one card and the top line of the next (six lines per label). Even if you intend to print only three or four lines on each label, you will still need to specify six lines per label so that the name and address will be printed in the right place. (For larger labels, you may have to allow 10 lines.)

PCF allows 33 lines per label. (This number is enough to print two full cards, as described in Chapter 7, on one 8½ x 11 page.) However, when you need a different number, you can change that instruction. You can tell PCF to allow anywhere from 1 to 66 lines per label. For example, if you want to print eight lines from each card, with no blank line

between cards, specify eight lines per label. If you want to leave one blank line between cards, specify nine lines per label.

When deciding how many lines per label you want:

- ☐ Count only field lines that contain a letter P. PCF ignores blank lines between fields and other areas outside the fields. For example, if the card form has a blank line between the line for Address and the line for City, State, and Zip Code, PCF will close up the space. Address will be printed on one line and City, State, and Zip Code will be printed on the next.
- ☐ Allow at least as many lines per label as you have field lines to be printed. For example, if you are printing eight field lines, don't specify seven lines per label. If you do, any lines after seven will be cut off.

To specify other than 33 lines per label:

1. If the Print screen is showing, touch `Print Options` .
PCF shows you the Print options screen.
2. When the Print options screen is showing, touch `Lines Per Lbl` .
PCF asks you to
Type the number of lines
you want in each label (1-66).
and tells you it is ready to print 33 lines per label. The cursor is under the first 3 of the 33.
3. Type the number of lines you want (from 1 to 66).
If you type a one-digit number, press the space bar to erase the second 3 in 33.
4. Press `Return` .
5. Touch `Exit Options` .
PCF returns you to the Print screen.

Printing the Cardfile

With PCF, you can print a cardfile either on paper or on a disc.

Printing on Paper

If you plan to print on paper, you should first make sure that your HP Touchscreen PC is set up for the printer you plan to use. Appendix F tells you how.

You should also make sure that the printer is ready to go. Check these points:

- Make sure the printer is turned on and has enough paper to finish your printing.
- Use only continuous feed paper or paper in roll form. Once printing starts, it does not pause for paper changes. Therefore, your paper must be fed automatically.

When you are ready to print, make sure you have the cardfile you want and that you have given the instructions you want. (If you need to change instructions, reread the section on "Telling PCF What to Print," earlier in this chapter.)

If you decide you don't want to print after all:

1. Touch `Exit Options` to return to the Print screen.
2. Touch `Exit Print`.
PCF returns you to the Main PCF screen.

When you are satisfied with your instructions:

1. Touch `Exit Options`.
PCF returns you to the Print screen.
2. Touch `Print & Exit`.
PCF tells you it is
Printing

Once PCF starts printing, you can touch `cancel` to stop printing. (In some cases, printing will continue for a brief time after you touch `cancel`.) When printing is finished, PCF returns you to the Main PCF screen.

Printing Mailing Labels

Printing mailing labels is one of the most popular uses of the PCF printing feature.

- Standard mailing labels come in strips, usually with six lines between the top of one label and the top of the next. Each label usually has room for five lines of printing.
- You must use mailing labels in strip form. Once printing starts, it keeps going to the end of the cardfile or until you touch `cancel`. PCF is not set up for paper that is fed one sheet at a time.
- You must use single-strip mailing labels, not strips two or three labels wide.
- If your mailing labels have room for five lines of printing, you can choose no more than five lines to be printed from your card form.
- If space for six lines is allowed between the top of one label and the top of the next, tell PCF that you want six lines per label.
- Remember that your longest printed line must be shorter than the label is wide. For example, if your label holds only 40 characters per line, your longest field line should have no more than 40 characters. Otherwise, all the characters after the fortieth will simply be cut off.

When you are ready to print labels, follow the instructions for printing on paper in the preceding section.

Printing on a Disc

You can print information from your cardfiles on a disc. PCF calls this feature "printing to file."

You can print to file to create lists from your cardfile information. With word processing programs such as WordStar® you can then edit the lists. You can even incorporate the lists

in other documents. For example, you could make a list of the names and addresses of all the persons attending a conference and then insert the list in the conference proceedings.

Appendix C tells you how to use your cardfile information with programs such as WordStar. PCF can print your list to file in a format that is compatible with nearly every word processor and text editor.

When you are ready to print on a disc, make sure you have the cardfile you want, and that you have given the instructions you want. (If you need to change instructions, reread the section on "Telling PCF What to Print," earlier in this chapter.)

If you decide you don't want to print after all:

1. Touch `Exit Options` to return to the Print Screen.
2. Touch `Exit Print` .

PCF returns you to the Main PCF screen.

When you are satisfied with your printing instructions:

1. Touch `Print To File` .

PCF shows you the default drive and any subdirectories, and asks you to

Choose `pcf.out` or type a different file name,
then press RETURN.

PCF suggests "pcf.out" as an example of a filename you might use. We recommend that you use the name of your cardfile followed by a period and the extension `ptf` (for print to file) to help you identify the print file when you need it. For example, a print file for `IMPORTS` could be named `IMPORTS.ptf`.

If you want to use the default drive and directory, skip Steps 2 and 3.

- 2.** If you don't want the default drive and directory, hold down `[Shift]` while pressing `[Clear line]`. PCF erases the default information and the example cardfile name.
- 3.** Type the new drive and directory.
- 4.** Type the cardfile name followed by a period and ptf. Don't press `[Return]` yet. Check the name once more, as well as the drive and directory.
- 5.** If you want to make any changes, backspace over the parts you want to change and retype them.
- 6.** If you decide that you don't want to print after all, touch `Cancel`, then `Exit Options`, then `Exit Print` to return to the Main PCF screen.
- 7.** When you are satisfied with your filename, press `[Return]`. PCF returns you to the Print options screen. You will see an asterisk in the Print To File box on the screen, which means that PCF is set to print your cardfile on a disc.
- 8.** To print to file, touch `Exit Options` to return to the Print screen. Then touch `Print & Exit`. PCF tells you it is

Printing

When PCF is printing, you can touch `cancel` to stop the printing process.

After your cardfile has been printed to file, you return to the Main PCF screen.

Copying, Dividing, Combining, and Replacing Cardfiles

PCF makes it easy to divide one cardfile into two or more smaller cardfiles, combine two cardfiles to make one, or get rid of an old cardfile and replace it with a new one. All of these operations involve copying a cardfile or part of a cardfile.

You can copy, divide, combine, or replace cardfiles on the same disc or on a different disc. This chapter tells you how to copy onto the same disc. See the section on “Copying onto Another Disc” in Chapter 12 if you want to put the copy on a different disc.

(Remember that whatever you can do by touching the screen, you can also do from the keyboard.)

Getting Ready to Copy

As a first step in copying a cardfile, you must get to the Main copy screen.

To get ready:

1. Call up the cardfile or part of the cardfile you want to copy.
2. If the Main PCF screen is showing, touch
Cardfile Tasks .
PCF shows you the Main tasks screen.
3. When the Main tasks screen is showing, touch
Copy Cardfile .
PCF takes you to the Main copy screen.

Copying onto the Same Disc

To copy the current cardfile onto the same disc:

1. From the Main copy screen, touch `Copy To PCF`.
PCF shows you the default drive and any subdirectories, and asks you to
Type name for copy of cardfile and press RETURN.
If you want to put the copy in a different subdirectory, you can hold down `Shift` while pressing `Clear line` to erase drive and subdirectory names. Then you can retype the drive name with the new subdirectory.
2. Type a name for the copy.
The name must be different from any other cardfile name in the same subdirectory of your disc.
3. Press `Return`.
PCF tells you it is
Copying current cardfile to cardfile on disc.
When the cardfile has been copied, PCF returns you to the Main tasks screen.
4. Touch `Exit Tasks` to return to the Main PCF screen.

Dividing a Cardfile

If you want to make several smaller cardfiles out of one cardfile, you can divide the cardfile. For example, if you have a Members cardfile, you may want also to have separate cardfiles for the various categories of membership, such as Individual Member, Family Member, Charter Member, and so on.

You divide a cardfile by creating a workset for each set of cards you want to be a separate cardfile, and then copying the workset to make it a permanent cardfile. Chapter 9 tells you how to create a workset. This section tells you how to copy it.

Here is what happens when you divide a cardfile:

- ☛ You call up the cardfile you want to divide and create a workset that you want to be a separate cardfile. Because the workset is only temporary, you copy it to make it a permanent and separate cardfile. The original cardfile remains unchanged. (See Chapter 9.)
- ☛ You can search for as many worksets as you want. After you create each workset, you copy it, return to the original cardfile, and continue creating and copying worksets until you have created as many cardfiles as you want.
- ☛ You now have the original cardfile plus as many cardfiles as the worksets you copied. For example, if you created the CHARTMEM cardfile from a workset of MEMBERS, you have two cardfiles: the original MEMBERS, which contains all types of members; and CHARTMEM, which contains only charter members.

(Remember that whatever you can do by touching the screen, you can also do from the keyboard.)

To copy the workset:

1. From the Main copy screen, touch `Copy To PCF`.
PCF shows you the default drive and any subdirectories, and asks you to
Type name for copy of cardfile and press RETURN.
If you want to put the copy in a different subdirectory, you can erase the default names by holding down `Shift` and pressing `Clear line`.

2. Type a name for the copy.

The name must be different from any other cardfile name in the same subdirectory on that disc. You may need to include drive and subdirectory with the name.

3. Press .

If you have chosen a name that already exists in the subdirectory you are using, PCF tells you that

Cardfile already exists.

Select "Append to File" or "Replace File."

Simply touching takes you back to the Main tasks screen, where you can start over.

If the new cardfile name is valid, PCF tells you it is

Copying current cardfile to cardfile on disc

Once PCF copies the workset, it becomes a permanent cardfile. After the cardfile has been copied, PCF returns you to the Main tasks screen, with the workset you just copied showing on the screen.

4. Touch to return to the Main workset screen.

Touch to return to the Main PCF screen.

Combining Cardfiles

If you have two separate cardfiles that you want to put together, you can combine them by making a copy of one cardfile and then inserting the copied cards into the other cardfile. You can use this procedure to combine whole cardfiles or to make two or more worksets into a single permanent cardfile.

Combining Whole Cardfiles

Here is what happens when you combine two cardfiles:

- ☛ The first cardfile (the one you copy) is the current cardfile. The original of the current cardfile remains unchanged, and the copy is merged with the second cardfile. For

example, if you copy a current cardfile named WASHDC and combine the copy with another cardfile named CALIF, you still have the original WASHDC.

- However, the cardfile that receives the cards you copied from the current cardfile is changed; it no longer exists in its original form. For example, after you copy WASHDC and add its cards to CALIF, you still have a cardfile named CALIF but it has more cards in it. (If you now want to rename this cardfile, Chapter 14 tells you how.)
- If you want to leave the second cardfile, CALIF, unchanged, just copy it first; then add the cards copied from WASHDC to the copy (see the section on “Copying onto the Same Disc,” earlier in this chapter). (You might name the new combined cardfile CALIFDC). Then you have the two original cardfiles, WASHDC and CALIF, plus a third cardfile, CALIFDC, which contains cards from both cardfiles.

The following guidelines will help you to combine your cardfiles successfully:

- The card forms of the two cardfiles must have the same key field and the same number of fields.
- The fields of both card forms must be in the same order (left to right and top to bottom) and of the same length. For example, each first field must be 9 columns, each second field 5 columns, and so on.

(Remember that whatever you can do by touching the screen, you can also do from the keyboard.)

To combine cardfiles:

1. From the Main copy screen, touch `Copy To PCF` .
PCF shows you the default drive and any subdirectories, and asks you to
Type name for copy of cardfile and press RETURN.

If you want to put the copy in a different subdirectory, you can erase the default names by holding down **Shift** and pressing **Clear line**.

2. Type the name of the cardfile you want to combine the current cardfile with.

For example, if WASHDC is the current cardfile and you want to combine a copy of it with CALIF, type CALIF. You may need to include drive and subdirectory with the name.

3. Press **Return**.

PCF tells you that

```
Cardfile name already exists.  
Select 'Append to File' or 'Replace File.'
```

4. Touch **Append To File**.

PCF tells you it is

```
Appending current cardfile  
to cardfile on disc
```

After PCF combines the cardfiles, it shows you the Main tasks screen, with the current cardfile still showing.

5. Touch **Exit Tasks** to return to the Main PCF screen.

Combining Worksets into One Cardfile

You can create several worksets, then combine them into a single cardfile. Suppose, for example, you have a USA cardfile and you want to create a separate cardfile with only New England cards. Here's what would happen:

- ☛ You would make a workset for Connecticut, then copy it as a permanent cardfile (named NEWENG, perhaps).
- ☛ You would make a workset for Maine, copy it, and combine the copy with the NEWENG cardfile.
- ☛ You would continue making worksets and copying them until all the New England states were in the NEWENG cardfile.

Chapter 9 tells you how to make a workset. Use the procedures for combining whole cardfiles (in the preceding section) to copy and combine worksets.

Replacing an Old Cardfile with a New One

When you replace a cardfile, you actually erase an old cardfile and substitute a copy of the current cardfile in its place.

(Remember that whatever you can do by touching the screen, you can also do from the keyboard.)

To replace an old cardfile with a revised one:

1. From the Main copy screen, touch `Copy To PCF`.
PCF shows you the default drive and directory, and asks you to
Type name for copy of cardfile and press RETURN.
If the cardfile you are replacing is in a different subdirectory, you can erase the default names by holding down `Shift` and pressing `Clear line`.
2. Type the name of the cardfile that you want to replace (the one that will be erased).
Do not press the Return key yet. Check to make sure that the name you have typed is the name of the cardfile you no longer want. You may need to include drive and subdirectory if you have replaced the old ones.
3. If you made a mistake when typing the name of the cardfile, backspace over the name and correct it.
4. If you decide you don't want to replace anything, touch `Cancel & Exit`, then `Exit Tasks` to return to the Main PCF screen.
5. When you are satisfied that the cardfile name is correct and is the one you want to replace, press `Return`.

PCF tells you that

Cardfile already exists.

Select "Append to File" or "Replace File."

(If you don't see this message, there is no cardfile with this name and PCF creates a new one.)

6. Touch `Replace File` .

PCF tells you it is

Deleting cardfile

After PCF has deleted the cardfile you named in Step 2, it tells you it is

Copying current cardfile
to cardfile on disc

After PCF has copied the current cardfile, it returns you to the Main tasks screen.

7. Touch `Exit Tasks` to return to the Main PCF screen.

Your old cardfile is now gone and has been replaced by a copy of the current cardfile.

11-8 Copying, Dividing, Combining, and Replacing Cardfiles

12

Backing Up a Cardfile and Opening Up Space on a Crowded Disc



This chapter tells you how to:

- Back up a cardfile
- Move a cardfile from a crowded disc
- Tighten up a cardfile to save space

All these operations involve copying a cardfile. Backing up a cardfile and moving a cardfile from a crowded disc always mean copying a cardfile onto another disc. Tightening up a cardfile can be done on the same disc if there is room to hold the copy.

Backing Up a Cardfile

Perhaps one of the most important reasons for copying cardfiles is to back them up for safekeeping. When you make a backup copy of your cardfiles on a separate disc, your valuable information is safe even if the original disc is damaged or lost. You should make a regular practice of backing up to avoid problems later.

Moving a Cardfile from a Crowded Disc

As your discs begin to fill up, you may find that you need to move one or more cardfiles to a fresh disc.

How many cards you can add before the disc is full will depend on three things: the kind of disc you are using, what else is on the disc, and the size of the cards in the cardfile. The chapter on "Handling and Using Discs" in *Using Your*

HP Touchscreen Personal Computer gives you more information on disc space. The size of the cards depends on how many fields the card form has.

If you don't realize you are out of room and you try to add cards, PCF tells you that

A disc error occurred.

This chapter tells you how to copy cardfiles to another formatted work disc so that you can delete the originals from the crowded disc.

Tightening Up a Cardfile to Save Space

If you have used a cardfile for a while, you have probably added, deleted, and updated cards in the cardfile. Each time you perform one of these actions, the cardfile may take up more room on the disc. In other words, your cardfile takes up more room than if you had created it in one session.

To tighten up a cardfile to save disc space, follow the procedure described in the section on "Copying onto the Same Disc" in Chapter 11, if you have enough room. After you have your streamlined copy, your next step would be to delete the original cardfile. Chapter 15 tells you how to delete a cardfile. If you don't have enough room to copy onto the same disc, follow the procedure explained in "Copying onto Another Disc," later in this chapter. Then you can copy the streamlined version back onto the first disc to replace the original cardfile. Chapter 11 tells you how to replace an old cardfile with a new one.

Getting Ready to Copy

No matter what type of copying you are doing, the first step is to get to the Main copy screen.

12-2 Backing Up a Cardfile and Opening Up Space on a Crowded Disc

To get ready:

1. Call up the cardfile or part of a cardfile you want to copy.
2. If the Main PCF screen is showing, touch `Cardfile Tasks .`
PCF shows you the Main tasks screen.
3. When the Main tasks screen is showing, touch `copy Cardfile .`
PCF takes you to the Main copy screen.

Copying onto Another Disc

Copying onto another disc involves three steps. (If your HP Touchscreen PC has a fixed disc, see Appendix A.)

- Copying the cardfile from Drive B to a temporary location in Drive A
- Making a copy the current cardfile and switching discs
- Recopying the cardfile from Drive A onto the new disc in Drive B

The following instructions work if you have enough room in Drive A to temporarily hold a copy of the cardfile. If you don't, PCF tells you

A disc error occurred.

when you try to copy. Appendix D tells you how to copy cardfiles when there isn't enough room to use the procedures described in this chapter.

(Remember that whatever you can do by touching the screen, you can also do from the keyboard.)

To make the copy:

1. From the Main copy screen, touch `Copy To PCF .`
PCF shows you the default drive and any subdirectories, and asks you to
Type name for copy of cardfile and press RETURN.
2. If Drive A is not the default, hold down `Shift` while pressing `Clear line`.
PCF erases the default drive and any subdirectory names.
3. Type a name for this copy of the cardfile.
If you have erased the default, be sure to type A and any subdirectory names before the cardfile name. For example, you might type A:\subdirectory\imports. (You can use the same cardfile name if it doesn't already exist in the subdirectory of A that you plan to copy to.)
4. Press `Return`.
PCF tells you it is

Copying current cardfile
to cardfile on disc

When the cardfile has been copied from the disc in Drive B onto the disc in Drive A, PCF returns you to the Main tasks screen.

Before you can safely switch the discs in Drive B, you must call up the copy that you put in Drive A and make it the current cardfile.

To call up the copy in Drive A:

1. From the Main tasks screen, touch `Cardfile Tasks .`
2. Touch `Another Cardfile .`
PCF shows you the default drive and any subdirectories, and asks you to
Type the name of the cardfile you want to see.
(You can switch discs now.)

12-4 Backing Up a Cardfile and Opening Up Space on a Crowded Disc

Although the message applies to the cardfile in Drive A, you are not using Drive B so you can switch discs in that drive.



Do not switch discs until PCF tells you it is safe to do so.

3. Remove the disc from Drive B and insert a different disc.
Make sure that the disc you insert has been formatted. (See *Using Your HP Touchscreen Personal Computer* for information on formatting.)
4. Type the name of the copy of the cardfile that you temporarily stored on the disc in Drive A.
If Drive A is not shown as the default, you will need to change the drive name (and subdirectory, if any).
5. Press .

PCF tells you it is

Getting cardfile

The copy of the cardfile is now the current cardfile and is ready to be recopied onto the disc in Drive B.

The copy in Drive A is now the current cardfile.

To recopy the cardfile onto the disc in Drive B:

1. Touch .
PCF shows you the default drive and any subdirectories, and asks you to
Type name for copy of cardfile and press RETURN.
2. Type a name for this copy.
If Drive B is not the default, remember to type B and any subdirectories before the cardfile name. For example, you could type B:\subdirectory\imports.

3. Press `Return`.

PCF tells you it is

Copying current cardfile
to cardfile on disc.

4. When the cardfile has been copied, PCF shows the Main tasks screen.
5. Touch `Exit Tasks` to return to the Main screen.

You now have three copies of your cardfile—the original cardfile on the disc you removed from Drive B, the copy you temporarily stored on the disc in Drive A, and the copy on the second disc you put in Drive B. You no longer need the copy in Drive A, so you can now delete it. (You may also want to delete the cardfile from the disc you removed from Drive B.) Chapter 15 tells you how to delete a cardfile.

12-6 Backing Up a Cardfile and Opening Up Space on a Crowded Disc



13

Changing the Card Form

This chapter tells you how to change the card form of a cardfile that has cards in it. If your cardfile is empty, see Chapter 4 for instructions on changing the card form.

(Remember that whatever you can do by touching the screen, you can also do from the keyboard.)

Understanding the Three Steps for Changing a Card Form

When you need to change the card form of a cardfile that has cards in it, there are three steps to follow. You must:

- Move the card information to a holding file.
- Call up your old card form and make the changes.
- Move the card information from the holding file to the cardfile with the modified form.

When you perform these three steps, here's what happens:

When you move information to a holding file, what you really move is a copy of the information. For example, for a cardfile of names and addresses, you really move a copy of this information. Therefore, the original cardfile remains unchanged. (You move only the information from fields you plan to keep on the modified card form.)

Next, you call up a copy of the card form and modify it (according to the guidelines outlined below). For example, on the original card form, Last Name was the key field, but you want to file your cards by zip code so you change the key field. Again, this change in no way changes the original card form.

After you have adapted the old form, you then move the copy of the cardfile information from the holding file into the modified form. For example, you move the name and address information into the form that has Zip Code as the key field. You now have two cardfiles: the original cardfile, which is sorted by last name, and a new cardfile, which is sorted by zip code. You can keep the original cardfile or you can erase it.

Understanding How You Can and Cannot Change Your Card Form

Before you begin to change the form, you need to be aware of the kinds of changes you can and cannot make. You **can**:

- Change and move labels, titles, and other writing outside the fields. For example, you can change the title of your cardfile.
- Add fields at the end of the form.
- Move the fields, if you are careful to keep them in exactly the same order, reading from left to right, top to bottom.
- Make the fields shorter or longer.
- Get rid of fields you don't need anymore, if you have not moved their information to the holding file.
- Change the key field to sort your cards by a different category. For example, you can tell PCF to arrange the cards by zip code instead of by last name.
- Change the autodial field so that PCF will place your calls to the phone number in a different field.
- Change the size of your card.

There are only a few changes you cannot make to your card form:

- You can't move the fields so that they appear in a different order. For example, you can't move one field from the end of your form and put it at the beginning.
- You can't add fields anywhere except at the end of the form. For example, you can't insert a phone field between a name field and an address field.
- You can't shorten a field so much that it will no longer hold its original information. For example, if you have cards for Poughkeepsie and you shorten the City field to eight characters, the last four characters will be cut off.
- You can't delete a field unless you have told PCF not to store its information in the holding file.
- You can't use to erase card borders above the last field line without also erasing the fields and their labels.

If the changes you want to make are allowed by PCF, follow the procedure in this chapter.

Moving the Card Information to a Holding File

When you move information out of your cardfile to store or use elsewhere, PCF calls the operation "transferring out."

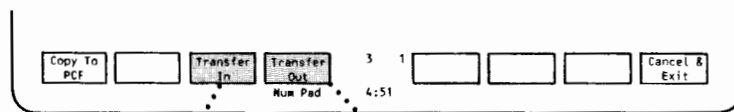
When you change the card form, you can choose to move all the information to a holding file, or to move only some of it. The next two sections tell you how to carry out these operations.

- Move all the information only if you plan to keep all the fields on the modified form.
- Move only some of the information if you want to keep some fields and delete others. For example, if you plan to delete a home telephone field from your form, don't put the home telephone information in the holding file.

Use only one or the other of the next two sections.

To move all the information from your cardfile and put it in a holding file:

1. Call up the cardfile whose card form you want to change.
2. From the Main PCF screen, touch `Cardfile Tasks` .
PCF shows you the Main tasks screen.
3. From the Main tasks screen, touch `Copy Cardfile` .
PCF shows you the Main copy screen and asks you to
Select a function key.



Touch this function label to move the information from the holding file to the modified card form.

Touch this function label to put a copy of your information in a holding file.

4. Touch `Transfer Out` .
PCF shows you the default drive and any subdirectories, and asks you to

Type name of transfer file
to be produced and press RETURN.

(If you don't want the defaults, hold down `Shift`
while pressing `Clear line` to erase the information.)

13-4 Changing the Card Form

5. Type a filename.

(Remember to include drive and any subdirectories if you have erased the defaults.) Use a name that will help you find the information when you want it. You might type the cardfile name followed by a period and the extension "out" because you are transferring information out (for example, imports.out). (You can use any valid filename. Chapter 14 explains filenames with extensions.)

6. Press .

PCF tells you it is

Copying current cardfile to disc file

PCF then returns you to the Main tasks screen.

If you are going to delete a field that is on the original card form, don't put that information in the holding file with the information from the fields you plan to keep.

To move only part of the information to your holding file:

- 1.** Call up the cardfile whose card form you want to change.
- 2.** If the Main tasks screen is showing, touch to return to the Main PCF Screen.
- 3.** From the Main PCF screen, touch .
PCF shows you the Print screen.
- 4.** Touch .
PCF shows you the Print options screen.
- 5.** Touch to eliminate the P's from any fields you plan to delete when you change the form.
PCF will not transfer information from these fields.

6. Touch `Transfer Out` .

PCF shows you the default drive and any subdirectories, and asks you to

Choose `pcf.out` or type a different file name, then press RETURN.

(If you don't want the defaults, hold down `Shift` while pressing `Clear line` to erase the information.)

7. Type a filename.

(Remember to include drive and any subdirectories if you have erased the defaults.) Use a name that will help you find the information when you want it. You might type the cardfile name followed by a period and the extension "out" because you are transferring information out (for example, `imports.out`). (You can use any valid filename. Chapter 14 explains filenames with extensions.)

8. Press `Return` .

You will see an asterisk in `Transfer Out` which means that PCF is ready to transfer the information from fields marked with a P.

9. Touch `Exit Options` .

PCF returns you to the Print screen.

10. Touch `Print & Exit` .

PCF tells you it is

Printing

When the information has been transferred, PCF returns you to the Main PCF screen.

Calling Up Your Old Card Form and Making the Changes

After you have moved your cardfile information, your next step is to call up the old form and then make the changes you want.

You may find it helpful to make a list of the changes, then check them off as you finish them.

To call up your old card form after you have transferred information out:



1. From the Main PCF screen, touch `Cardfile Tasks` .
PCF shows you the Main tasks screen.
2. From the Main tasks screen, touch `Create Cardfile` .
PCF shows you the Create screen and asks you to
`Design a new form or modify an old form.`
3. Touch `Show Old Form` .
PCF shows you the default drive and any subdirectories, and asks you to
`Type the name of the old cardfile.`
4. Type the name of the cardfile.
Remember to change drive (and subdirectory, if any) if you need to.
5. Press `Return` .
PCF shows you the card form.

To add a field to the end of the form:

1. Move the cursor to a place after your last field.
2. If you need space after the last field, press `Insert line` or `Insert char` .
3. Type the field label, if you want one.
4. Touch `Add Char To Field` enough times to draw in the field.

If you want to delete a field, you can only do so if you told PCF not to put information from that field in the holding file.


To delete a field:

- 1.** If the field you want to delete is the only field on the line, put the cursor anywhere on that line and press  once.
(Remember that this action will raise the bottom of the card border.)
- 2.** If there are two or more fields on the line and you want to delete only one, use the space bar to erase the field label.
(Pressing  will move the other fields and break the card border.)
- 3.** Touch `Del From Field` to erase the field.


To shorten fields:

- 1.** Position the cursor one space after where you want the field to end.
(Remember that the field must still be long enough to hold all the information you need.)
- 2.** Touch `Del From Field` until the unwanted part of the field is gone.

To lengthen fields:

- 1.** If there are no other fields on the line, move the cursor to the end of the field and touch `Add Char To Field`.
PCF adds a character each time you touch the function label.
- 2.** If there is another field to the right on the same line, move the cursor to the first letter of that field's label.
- 3.** Press .

13-8 Changing the Card Form

4. Press the space bar once for every space you want to open up.
(This action will break the card border. You can repair the border by touching `Redraw Border .`)
5. Move the cursor back to the end of the field you want to lengthen.
6. Touch `Add Char To Field` to add extra field characters.
(When you have finished, remember to press  again to remove the “insert” instruction.)

To change the way PCF sorts your cards:

1. Position the cursor under the K that currently designates the key field.
2. Press the space bar to erase the K.
3. Move the cursor to the field you want to sort by.
4. Touch `Set Key Field .`
A letter K appears in the new key field.

To set or reset PCF to automatically dial a phone number:

1. Position the cursor under the A that currently designates the autodial field.
2. Press the space bar to erase the A.
3. Move the cursor to the phone field you want to use for automatic dialing.
4. Touch `Set Autodial .`
A letter A appears in the new autodial field.

To shorten your card:

1. Move the cursor to a line between the last field line and the bottom of the card.

2. Press repeatedly until you have removed as many lines as you want.

To lengthen a card that has been shortened:

1. Move the cursor to where you want to insert lines.
Press repeatedly until you have added all the lines you want.

Lengthening a card will cause a broken side border.

To fill in the breaks:

1. Touch .

If you replace the card borders after you have adjusted the length of your card, you may see a double border at the bottom.

To remove the extra border:

1. Move the cursor to the first line below the last field line.
 2. Press .
 3. Touch .
- The computer will remove everything below the cursor.

To redraw card borders on an old form that has no side or bottom borders:

1. Touch .

If you press to eliminate all the side and bottom borders from an old card form, you will erase fields and field labels below the cursor as well. If you accidentally erase the old form, simply touch and start over.

Finishing and Saving the Modified Card Form

To finish and save the modified form you have made:

1. Touch .

PCF shows you the default drive and any subdirectories, and asks you to

Type the name of the cardfile to be created.
(You can switch discs now.)

Remember, if you want to put the modified card form in a different place, you can change drive and subdirectory.

2. Give the cardfile a new name.

Remember, don't choose a name that already exists in the drive and subdirectory you plan to use. For example, if your old cardfile was named IMPORTS, you might name the modified one IMPORTS2. (For more information on cardfile names, read Chapter 3, the section on "Naming and Saving the Form.")

3. Press .

PCF tells you it is

Creating the cardfile

PCF then returns you to the Main PCF screen. The new cardfile is now the current cardfile. It is ready to receive the card information.

Moving the Information from the Holding File to the Cardfile with the Modified Form

As a final step in changing a card form, you must put the information from the holding file in the new form. PCF calls this operation "transferring in."

To move the information from the holding file and put it in your modified form:

1. From the Main PCF screen, touch `Cardfile Tasks` .
PCF shows you the Main tasks screen.
2. From the Main tasks screen, touch `Copy Cardfile` .
PCF shows you the Main copy screen and asks you to
Select a function key.
3. Touch `Transfer In` .
PCF shows you the default drive and any subdirectories,
and asks you to
Type name of file to transfer into
current cardfile and press RETURN.
4. Type the same name you gave to the holding file when
you moved the information out (for example,
imports.out).
Remember to change drive and subdirectory, if you
need to.
5. Press `Return` .
PCF tells you it is
Copying from disc file
to current cardfile
This step puts the information from the original cardfile
in the cardfile with the modified card form. PCF then
returns you to the Main tasks screen, with the new
cardfile showing on the screen.

If you have changed the key field, your cards will be re-ordered according to the new key field. If you have changed the placement of the fields on the first three lines of the old form, the open card area might look different.

You now have two cardfiles: the original cardfile just as it was before you started this whole procedure; and a second cardfile, which has a card form based on the original form and which contains whatever information you chose to transfer from the original cardfile.

14

Keeping Track of Cardfile Names and Renaming a Cardfile

Whenever you ask for a cardfile, you must know the name you gave it when you created it. (Chapter 3, in the section on "Naming and Saving the Form," explains how you name a cardfile.)

If the cardfile is not in the drive and directory you are using (the default drive and directory), you must also specify drive and directory. (Appendix E gives more information about drive and directory.)



Keeping Track of Cardfile Names

Here are some hints for keeping track of the names you have given your cardfiles:

- Write the cardfile names on the label of the disc that contains them.
- Create a cardfile that contains all your cardfile names (including drive and directory). When you create a new cardfile, call up your "cardfile of cardfile names" and add a card for the new cardfile name.
- Use names that immediately suggest the contents of the cardfile. For example, you might use Clients, Hotels. If you use a word longer than eight characters, PCF will use only the first eight. For example, if you type Restaurants for a cardfile name, PCF will shorten the name to RESTAURA.

Renaming a Cardfile

When you want to change a cardfile name, you can copy the cardfile. The copy then has a different name, and you can delete the original. (See Chapter 11 for information on copying cardfiles.) You can also use File Manager to rename a cardfile. In this case, you need to be aware of how PCF stores your cardfile.

When you create a cardfile, you give it a name of eight or fewer characters, and you ask for it by that name. (See Chapter 3, the section on "Naming and Saving the Form.") However, PCF stores your cardfile under three names, not just one, and it lists these three filenames on the File Manager screen.

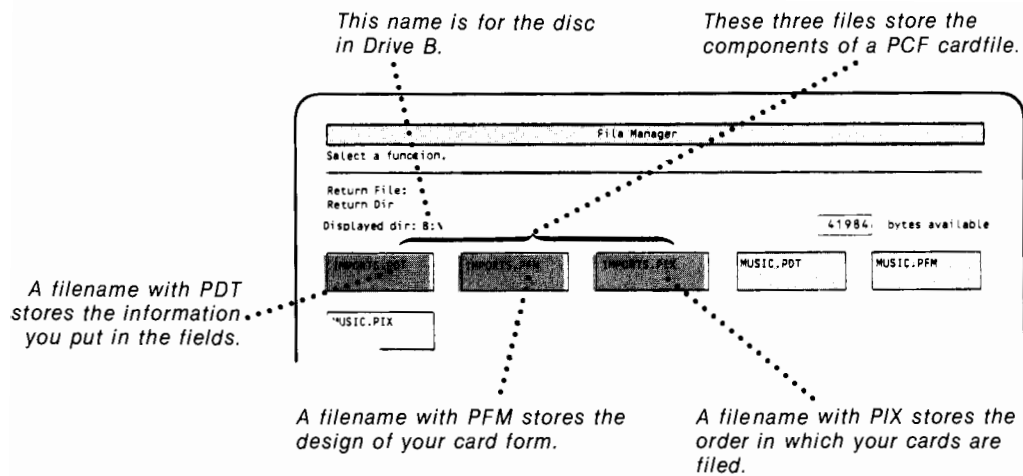


A PCF **file** is different from a PCF **cardfile**. A cardfile is made up of three files. Therefore, a **cardfile name** is made up of three **filenames**.

Each of the three filenames is made up of the cardfile name followed by a dot and a three-letter extension. For example, for a cardfile named IMPORTS, the File Manager screen shows **IMPORTS.PDT**, **IMPORTS.PFM**, and **IMPORTS.PIX**. "IMPORTS" identifies the cardfile and:

- "PDT" identifies the information you entered in the fields (names, addresses, phone numbers, and so forth).
- "PFM" identifies the card form you designed.
- "PIX" is the index that tells PCF in what order to arrange the cards.

14-2 Keeping Track of Cardfile Names and Renaming Cardfiles



To rename the cardfile, you call up File Manager and rename each of the files that makes up that cardfile. (Remember that whatever you can do by touching the screen, you can also do from the keyboard.)

To call up File Manager from the Main PCF screen:

1. Touch **Cardfile Tasks** .
PCF shows you the Main tasks screen.
2. Touch **File Manager** .
You will see the File Manager screen, with a list of the files that are in the drive and directory you are using (the default drive and directory).
3. Look for the three filenames that identify your cardfile.

If you see the three filenames on this screen, you are ready to rename the files.

If you **don't** see the three filenames, they may be on another screen full of names, or they may be in a different subdirectory.

To look for files on another screen full of names:

1. Press .

You will see the next screen with the names of more subdirectories and files. (returns you to an earlier screen.)

To look for files in a different subdirectory:

1. Touch .

File Manager will show the Choose Directory screen and ask you to

Select or type the directory name to display.

2. Type the name of the drive and directory you want to see.

3. Press .

(If you have an early version of P.A.M., you may need to touch .) You will see the directory you have asked for. If you change your mind about this directory, repeat Steps 2 and 3.

When you have found the names of the three files that make up your cardfile, you are ready to change the name. (If you are not on the screen named File Manager, touch

.)

To change the name:

1. Touch .

You will see the File Functions screen.

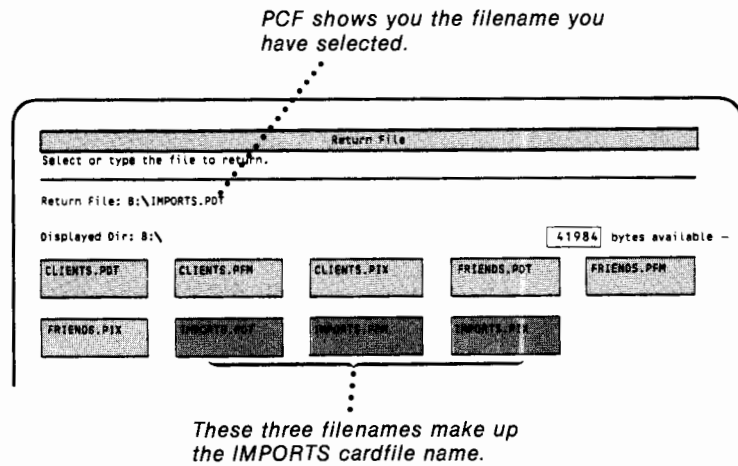
2. Touch .

You will see the Rename screen, with this message

Select or type the file to rename.

14-4 Keeping Track of Cardfile Names and Renaming Cardfiles

3. Touch the first of the three filenames that make up your cardfile (for example, IMPORTS.PDT).



4. Type in the new cardfile name followed by a dot and the same three-letter extension.

Do not space between elements of the filename. (For example, if you chose to rename IMPORTS.PDT in Step 3, you might want to rename it IMPORTS2.PDT.)

5. Press .

File Manager shows you the new name and asks you to Press Start Rename if information is correct.

If the information is not correct, touching lets you begin again. If you decide that you don't want to rename your cardfile, skip Steps 6 and 7.

6. When you are satisfied that your information is correct, touch .

File Manager then tells you it is

Renaming the selected file

7. Follow the procedure in Steps 3, 4, and 6 to rename the other two files that make up your cardfile.

To end this function and return to PCF:

1. Touch **Exit Rename** .
You will see the File Functions screen.
2. Touch **Exit FileFctn** .
You will see the File Manager screen.
3. Touch **Back to PCF** .
You will see the Main PCF screen, with the last cardfile you worked with showing.

What to Do If You Forget the Name of a Cardfile

If you forget the name of a cardfile, you can always go to File Manager and look for the three filenames PCF uses to store it (for example, IMPORTS.PDT, IMPORTS.PFM, and IMPORTS.PIX). Whenever you see that grouping, you know you've found a cardfile. (If you are not familiar with the three-name grouping, see the section, earlier in this chapter, on "Renaming a Cardfile.")

Once you know the correct name, you can send it back to PCF. PCF calls this operation returning a file to PCF.

(Remember that whatever you can do by touching the screen, you can also do from the keyboard.)

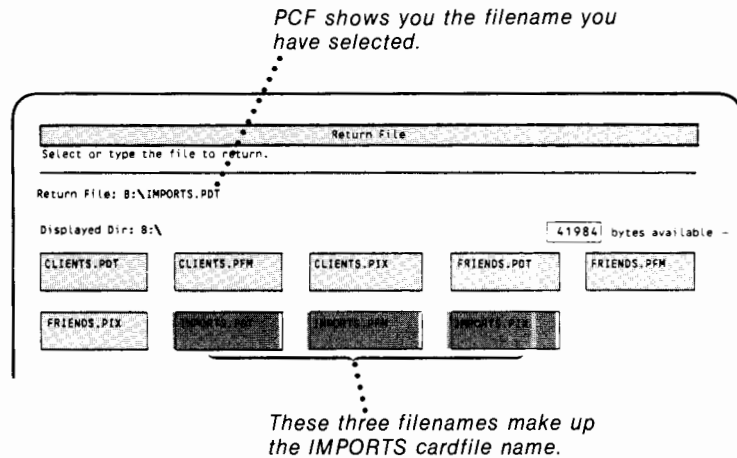
To call up a cardfile from File Manager:

1. If the Main PCF screen is showing, touch **Cardfile Tasks** .
2. When the Main tasks screen is showing, touch **Another Cardfile** .
3. Now touch **File Manager** .
You will see the File Manager screen.

4. Touch .

File Manager shows the Return File screen and asks you to

Select or type the file name to return.



5. Look for the screen labels for the three files that make up the cardfile you want to see.

If you see the three filenames on this screen, you are ready to rename the files.

If you don't see the three filenames, they may be on another screen full of names, or they may be in a different subdirectory.

To look for files on another screen full of names:

1. Press .

You will see the next screen with the names of more subdirectories and files. (returns you to an earlier screen.)

To look for files in a different subdirectory:

1. Touch `Cancel` .
You will see the File Manager screen.
2. Touch `Choose Dir` .
File Manager will show the Choose Directory screen and ask you to
Select or type the directory to display.
3. Type the name of the drive and directory you want to see.
4. Press `Return` .
(If you have an early version of P.A.M., you may need to touch `Start Display` .) You will see the directory you have asked for. If you change your mind, repeat Steps 3 and 4.
5. Touch `Exit Choose` .
You will see the File Manager screen again.
6. Touch `PCF File` .
You will see the Return File screen.

When you have found the three files that make up your cardfile, you are ready to send the cardfile back to PCF.

To send the cardfile to PCF:

1. Touch any one of the three filenames that make up your cardfile (for example, IMPORTS.PDT).
File Manager shows the filename you have selected and tells you to
Press Return File if selection is correct.
2. Check to make sure you have selected a file from the cardfile you want to see.
If you made a mistake, touch another screen label.

14-8 Keeping Track of Cardfile Names and Renaming Cardfiles

3. When you are satisfied with your choice, touch

`Return File`.

File Manager shows the full name for that file (for example, `Return File: B:\IMPORTS.PDT`, which tells you that the IMPORTS cardfile is in the main directory on the disc in Drive B).

4. Touch `Back to PCF`.

PCF shows you the Main tasks screen, with the name of the file still showing in the upper left. PCF asks you to

Type the name of the cardfile you want to see.
(You can switch discs now.)

You need not type anything, because a filename is already typed in.

5. Press `Return`.

PCF tells you it is

Getting cardfile

and in a few seconds the cardfile you asked for is showing on the screen.

Notice that PCF looks for a **cardfile name**, not a **filename**, and so it ignores the extension. That is, PCF reads `B:\IMPORTS.PDT` as if it were `B:\IMPORTS`.

15



Deleting a Cardfile

You can get rid of any obsolete cardfiles to open up room on your discs. When you no longer need a cardfile, you can delete it.

If you are unsure about whether you will need the cardfile again, make a backup copy first and then delete the copy on your work disc. (See Chapter 12 for instructions on making a backup copy.)

The cardfile you want to delete does not have to be the current cardfile.

(Remember that whatever you can do by touching the screen, you can also do from the keyboard.)

To delete a cardfile:

1. If the Main PCF screen is showing, touch `Cardfile Tasks`.
PCF shows you the Main tasks screen.

2. When the Main tasks screen is showing, touch `Delete Cardfile`.

PCF shows you the default drive and any subdirectories, and asks you to

Type the name of the cardfile to be deleted.
(You can switch discs now.)

If the cardfile is in a different drive and directory, you can erase the default names by holding down `Shift` and pressing `Clear line`.

You can switch personal work discs if the cardfile you want to delete is not on a disc in the computer.



Do not remove the PCF Application Work Disc.

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

Do not press the Return key yet. To avoid naming the wrong cardfile, and because you may have the same cardfile name on different discs, type the full cardfile name, including drive and any subdirectory (for example, A:\subdirectory\phone).



Once you delete a cardfile, you cannot retrieve it.

4. Check to see that the name you have typed is correct. If you made a mistake when typing, backspace over the name and correct it.

5. If you change your mind about deleting the cardfile, touch `Exit Tasks` to return to the Main PCF screen.

6. If you are sure that you want to delete this cardfile, press `Return`.

PCF asks you to confirm that this cardfile is the one you want to delete. PCF shows you this message

If OK, select the same function key again.

If not, press RETURN.

7. If you are still sure that you want to delete the cardfile, touch `Delete Cardfile` again.

(If you change your mind, just press `Return`.) If you are deleting the current cardfile, PCF tells you that it is

Closing current cardfile

PCF then tells you it is

Deleting cardfile

Then the cardfile displayed will be emptied and all the index tabs will go blank.

15-2 Deleting a Cardfile

8. If you are deleting a cardfile other than the current cardfile, PCF tells you it is

Deleting cardfile

The current cardfile remains on the screen. It has not been affected by the deletion of the other cardfile.



16

Reference Guide to the Function Labels

This chapter lists the PCF function labels in alphabetical order. Each entry tells:

- What screen the function label is on
- Its position on the screen (1-8) and how it corresponds to the function keys on the keyboard
- What task it performs

Add Cards	f2 on the Main PCF screen. Use Add Cards to put cards in the current cardfile. When you choose Add Cards , PCF shows the Add screen with a blank card form to be filled in.
Add Char To Field	f2 on the Create screen. Use Add Char To Field to draw in the fields when you design or modify a card form. Field characters appear on your screen as highlighted rectangles that are one column wide and one row high.
Add This Card	f1 on the Add screen. Use Add This Card after you have filled in the information for the card on your blank card form. When you choose Add This Card , PCF puts the card in the proper place in your cardfile according to the key field you have chosen.
Another Cardfile	f3 on the Main tasks screen. Use Another Cardfile when you want to look at a cardfile other than the current cardfile displayed on the screen (or if no cardfile is displayed). When you choose Another Cardfile , PCF asks you to type the name of the cardfile you want to see. When

you have typed the name and pressed `Return`, PCF shows you the cardfile you asked for.

**Append
To File**

f1 on the Main copy cancel screen. Use `Append To File` when you are copying the current cardfile to combine it with another cardfile. When PCF asks you to name the copy, use the name of the cardfile that will receive the cards in the current cardfile. PCF tells you that the cardfile name already exists and asks you to select `Append To File` OR `Replace File`. When you choose `Append To File`, PCF combines the cards copied from the current cardfile with those of the cardfile you named.

Cancel

f8 on the Create cancel, Main copy options, Print options cancel, Print cancel, and Select cancel screens. Use `cancel` on the Main copy options screen if you accidentally choose an existing name for the copy, if you make a mistake in typing the name, or if you change your mind about copying. Choosing `cancel` takes you back to the Main tasks screen.

Use `cancel` on the Print cancel screen to stop the printing process and return to the Print screen. Use `cancel` on the Print options cancel screen to return to the Print options screen without completing an operation. Use `cancel` on the Create cancel screen when you change your mind about the name you have given your cardfile. Use `cancel` on the Select cancel screen to return to the Select screen without changing the number of lines per card.

**Cancel &
Exit**

f8 on the Main copy screen. Use `Cancel & Exit` if you have selected `copy Cardfile` and then decide to cancel the copy instruction. Choosing `Cancel & Exit` returns you to the Main tasks screen.

16-2 Reference Guide to the Function Labels

Cardfile Tasks	f7 on the Main PCF screen. Use <code>Cardfile Tasks</code> if you want to create a cardfile, display a different cardfile, copy a cardfile, delete a cardfile, find out how many cards are in the current cardfile, or go into File Manager. When you choose <code>Cardfile Tasks</code> , PCF shows you the Main tasks screen with a function label for each of those operations.
Copy Cardfile	f4 on the Main tasks screen. Use <code>Copy Cardfile</code> if you want to copy the whole cardfile. When you choose <code>Copy Cardfile</code> , PCF shows you the Main copy screen.
Copy To PCF	f1 on the Main copy screen. Use <code>Copy To PCF</code> when you copy a cardfile, rather than a disc file—for example, to back up a cardfile, move a cardfile from a crowded disc, combine cardfiles, divide a cardfile, tighten up a cardfile, or replace a cardfile.
Create & Exit	f7 on the Create screen. Use <code>Create & Exit</code> after you have designed a card form to lock it in as a finished design. When you choose <code>Create & Exit</code> , PCF asks you to name your cardfile, the final step in making and saving the card form, and returns you to the Main PCF screen.
Del From Field	f3 on the Create screen. Use <code>Del From Field</code> to remove unwanted fields or field characters when you are designing or modifying a card form.
Delete Card	f5 on the Select screen. Use <code>Delete Card</code> to delete the card that is showing on the Select screen. When you choose <code>Delete Card</code> , PCF asks you to confirm your choice. Pressing <code>Return</code> cancels the deletion. Choosing <code>Delete Card</code> a second time deletes the card and brings up the next card in the cardfile. (If you want to delete a whole cardfile, see <code>Delete Cardfile</code> .)

Delete
Cardfile

f6 on the Main PCF screen. Use `Delete Cardfile` to delete an entire cardfile, which doesn't have to be the current cardfile. When you choose `Delete Cardfile`, PCF asks you for the name of the cardfile you want to delete. After you type the name and press `Return`, PCF asks you to confirm your choice. Pressing `Return` cancels the deletion. Choosing `Delete Cardfile` again deletes the cardfile. (If you want to delete one or more individual cards, see `Delete Card`.)

Dial
Phone

f1 on the Main PCF and Select screens. Use `Dial Phone` to automatically dial the phone number in an autodial field. From the Main PCF screen, use `Dial Phone` to dial a number on the highlighted card. From the Select screen, use `Dial Phone` to dial a phone number on the card you have selected. (Chapter 8 tells you what equipment you need for autodialing. Appendix B tells you how to set up your computer for this feature.)

Do Not
Print

f6 on the Print options screen. Use `Do Not Print` to tell PCF not to print the information in a field on the card form. Choosing `Do Not Print` removes the letter P from that field and advances the cursor to the next field.

Exit
Add

f8 on the Add screen. Do not use `Exit Add` to save a card that you have filled in. Use `Exit Add` only after you have finished adding cards to a cardfile. Choosing `Exit Add` returns you to the Main PCF screen.

Exit
Create

f8 on the Create screen. Do not use `Exit Create` to save a card form that you have created. Use `Exit Create` only if you decide you don't want to create a cardfile. Choosing `Exit Create` wipes out any design on the Create screen and returns you to the Main tasks screen.

16-4 Reference Guide to the Function Labels

Exit Find	f8 on the Find screen. Use <code>Exit Find</code> to leave the Find screen without searching your cardfile. Choosing <code>Exit Find</code> returns you to the Main PCF screen.
Exit Options	f8 on the Print options screen. Use <code>Exit Option</code> when you have finished giving PCF your printing instructions. Choosing <code>Exit Options</code> returns you to the Print screen.
Exit PCF	f8 on the Main PCF screen. Use <code>Exit PCF</code> to exit the program. When you choose <code>Exit PCF</code> , PCF asks you to confirm that you want to exit the program. Choosing another function cancels the exit request. Choosing <code>Exit PCF</code> again takes you out of the program and brings up the P.A.M. screen.
Exit Print	f8 on the Print screen. Use <code>Exit Print</code> if you decide that you don't want to print a cardfile. (If you have already chosen <code>Print & Exit</code> , however, you must touch <code>Cancel</code> to stop the printing process.) Choosing <code>Exit Print</code> returns you to the Main PCF screen.
Exit Select	f8 on the Select screen. Use <code>Exit Select</code> when you have finished looking at or changing individual cards in a cardfile. Choosing <code>Exit Select</code> saves any changes you have made and returns you to the whole cardfile on the Main PCF screen.
Exit Tasks	f8 on the Main tasks screen. Use <code>Exit Tasks</code> to return to the Main PCF screen, from which you can add cards, find cards, print a cardfile, or exit the program.
Exit Workset	f8 on the Main workset screen. Use <code>Exit Workset</code> when you no longer need the workset you have searched for. Choosing <code>Exit Workset</code> returns you to the Main PCF screen, with the whole cardfile showing.

File Manager	f5 on the Main tasks screen. Use <code>File Manager</code> to: set default drive and directory; find files in any drive and directory; return files to PCF; and rename, delete, and browse files. Choosing <code>File Manager</code> brings up the File Manager screen.
Find & View	f1 on the Find screen. Use <code>Find & View</code> after you have told PCF what kind of cards you want to search for. When you choose <code>Find & View</code> , PCF searches the current cardfile and finds all the cards that meet your criteria. PCF shows you these cards in a temporary smaller cardfile. This temporary cardfile is called a "workset," and it appears on the Main workset screen.
Find Cards	f3 on the Main PCF screen. Use <code>Find Cards</code> when you want to search your cardfile for cards that meet particular criteria. When you choose <code>Find Cards</code> , PCF shows the Find screen with a blank card form. You enter your search criteria in the fields on this form.
FullName & Count	f7 on the Main tasks screen. Use <code>FullName & Count</code> when you want to know how many cards the current cardfile contains. When you choose this function, PCF shows you the name of the cardfile, the drive and any subdirectories, and the number of cards in the cardfile.
Lines Per Card	f4 on the Select screen. Use <code>Lines Per Card</code> when you want to change the number of lines allowed for each printed card. You can specify any number from 1 to 66 lines per card.
Lines Per Lbl	f7 on the Print options screen. Use <code>Lines Per Lbl</code> when you want to change the number of lines allowed for each printed entry. This function is especially useful for printing mailing labels. You can specify any number from 1 to 66 lines per label.

16-6 Reference Guide to the Function Labels

Next Card	f3 on the Select screen. Use <code>Next Card</code> to see the card following the card that is currently on the Select screen. This function also saves any changes you have made. If the last card is showing, choosing <code>Next Card</code> brings up the first card in the cardfile.
Previous Card	f2 on the Select screen. Use <code>Previous Card</code> to see the card before the card that is currently on the Select screen. This function also saves any changes you have made. If the first card is showing, choosing <code>Previous Card</code> brings up the last card in the cardfile.
Print & Exit	f7 on the Print screen. Use <code>Print & Exit</code> to start the printing process after you are satisfied with your printing instructions. When printing is finished, PCF returns you to the Main PCF screen.
Print Card	f6 on the Select screen. Use <code>Print Card</code> to print one or more individual cards one at a time. When you choose <code>Print Card</code> , PCF prints the card currently showing on the Select screen complete with card borders, title, field labels, and underscores for the fields.
Print Cardfile	f6 on the Main PCF screen. Use <code>Print Cardfile</code> when you want to print all or some of the information from the cards in the current cardfile. Choosing <code>Print Cardfile</code> brings up the Print screen with a Print Options function label that lets you enter your printing instructions.
Print Field	f5 on the Print screen. Use <code>Print Field</code> to put a P in a field when you want to print the information in that field. If the field already has a P, <code>Print Field</code> will advance the cursor to the next field. If you have erased the P in a field, <code>Print Field</code> will put it back.

Print Options	f3 on the Print screen. Use <code>Print Options</code> to tell PCF what information you want to print, how many lines to allow per printed entry, and what print medium you want. Choosing <code>Print Options</code> brings up the Print options screen with a function label for each of these instructions.
Print To File	f2 on the Print options screen. Use <code>Print To File</code> when you want to print a cardfile on a disc instead of on paper. When you choose <code>Print To File</code> , PCF asks you to name the file. You type a name and press <code>Return</code> , which returns you to the Print screen. An asterisk appears in the Print To File function key box, which means that PCF is ready to print to a disc file.
Print To Printer*	f1 on the Print options screen. Use <code>Print To Printer</code> when you want to print on paper. The asterisk in the Print to Printer function key box means PCF is already set to print on paper. However, you can change that instruction by choosing <code>Print To File</code> OR <code>Transfer Out</code> .
Redraw Border	f4 on the Create screen. Use <code>Redraw Border</code> to put the index card borders back in if all or part of them were erased on the card form.
Replace File	f3 on the Main copy cancel screen. Use <code>Replace File</code> when you want to replace one cardfile with a copy of the current cardfile. When PCF asks you to name the copy, use the name of the cardfile you want to replace. PCF tells you that the cardfile name already exists and asks you to select <code>Append To File</code> OR <code>Replace File</code> . When you choose <code>Replace File</code> , PCF deletes the cardfile you named and puts the copy of the current cardfile in its place.

16-8 Reference Guide to the Function Labels

Restore Original	f7 on the Select screen. Use <code>Restore Original</code> if after updating a card you want to erase the changes. If you want to erase your changes, you must choose this function before you choose any other function label.
Set Autodial	f6 on the Create screen. Use <code>Set Autodial</code> to tell PCF which phone field will hold the phone number you want to automatically dial.
Set Key Field	f5 on the Create screen. Use <code>Set Key Field</code> to tell PCF which field to use when it puts your cards in order.
Show Old Form	f1 on the Create screen. Use <code>Show Old Form</code> when you want to copy and adapt an existing card form to make a new one. When you choose <code>Show Old Form</code> , PCF asks for the name of the card form you want to use, then shows you the form you specify.
Transfer In	f3 on the Main copy screen. Use <code>Transfer In</code> to bring in information from other programs to PCF or to move information from a holding file into a modified PCF card form.
Transfer Out	f4 on the Main copy and Print screens. On the Main copy screen, use <code>Transfer Out</code> to transfer the information from a cardfile, either for use with other programs or to be stored in a holding file while you change a PCF card form. Use <code>Transfer Out</code> on the Print screen if you want to transfer out only some of the information from all of the cards. When you make this choice from the Print screen, an asterisk appears in the Transfer Out function key box, which means that PCF is ready to carry out the transfer.



18

Some Useful Card Forms

This chapter shows you 19 card forms that you may find helpful when you create new cardfiles.

You will find seven of these card forms on your PCF Application Disc—ready for you to use whenever you need them. These seven are grouped together in the first section of this chapter.

The second section of this chapter shows several forms that you may find useful as models in planning and designing new card forms.

Card Forms on Your PCF Application Disc

The card forms in this section are stored on your PCF Application Disc. Except "Imports Cardfile," they have not yet been made into cardfiles to which you can add cards. Chapter 4 tells you how to call up any of these forms to create your own cardfile.

Imports Cardfile

Although this card form is designed for information that might be used by an import-export company, PCF stores it under the name GETSTART because it is used in the practice sessions of *Setting You Free with Personal Card File*. When you call up this form, ask for GETSTART. Give it a different name when you use it to create a cardfile.

British -	
*** IMPORTS CARDFILE ***	
Agent's Name	Robbin Blake
Company	British Textiles, Ltd.
Telephone	01-734 9262
Last Contact	(YY/MM/DD) 84/03/21
Street Address	112 Abingdon Road
City	London N.W.3
Country	England
	State Zip
Comments 1.	Fine woven products
2.	Wools, Linens
3.	Garments and household items

The Company field is set as the key field in the original card form, but you might want to change it and sort by a different field—Country or Last Contact, for example. You might add a field for the agent's home telephone number, or one for the date when you plan the next contact. If you have a modem and are using autodial, you may not need to have the phone number visible on the open card. In that case, you could move it and make room for something you do want to be visible.

18-2 Some Useful Card Forms

Address Book

This name and address card form is set up for personal rather than business information. Notice that the friend's title, first name, and last name are in three separate fields. You can search such a cardfile for birthdays and anniversaries. Ask for this card form by the name FRIENDS.

MacNeil

* * * FRIENDS' ADDRESS BOOK * * *

Name: Title First Last

Home phone

Work phone

Address

City State ZIP

Spouse

Children

Remember: 1.

2. Birthday (YY/MM/DD) Anniversary (YY/MM/DD)

Client Information

A card form for an attorney's clients could be adapted for a physician's or dentist's records. This card form is designed to help with billing. Ask for it by the name LAWYER.

Boyd

R. ANACLERICO, Attorney at Law

Name

Address

City State Zip code

Country Phone

Case

Court

Filing date Next court appearance

Hours through = Next client appointment

Fee at \$ /hour = \$

Contingency fee: % of award if more than \$

% of award if less than above amount

Stock Inventory

Here is a card form set up for merchandise inventory control. Only a few changes will make it suitable for recording office or laboratory equipment. Ask for this card form by the name INVENT.

101-877-

* * * INVENTORY * * *

Our Product No. 101-877-b Product Name Skipper's Shirt
 Description Long-sleeved, white, size 12
 No. in Stock 2 New Shipment Due 11/01/84
 Warehouse Location of Stock East Wing, Bay B, Tier 9, Drawer 2
 Price: Retail 1. \$30 per each 2. \$57.95 per two
 Wholesale 1. \$25 per each 2. \$48.95 per dozen

Name Islanders Design Ltd.
 Address Long Wharf
 City Nantucket State MA Zip Code 20099
 Price to Us 1. \$20 per each 2. \$ per
 Discounts none Shipping Terms Shipping additional
 Billing Terms On delivery Expect to
 Last ordered on (YY/MM/DD) 06/15/84 reorder on (YY/MM/DD)

Shipping Invoice

When you create a cardfile from this card form you can print the cards and use them as invoices with shipments or at billing time. A professional office can use a similar form for client or patient billing. Ask for it by the name INVOICE.

Warmerda-

SHIPPING INVOICE

CLIENT: Title Mr. First name Cornelius Last name Warmerdam
 Address University of Minnesota
 City Minneapolis State MN Zip Code 55400
 Phone 9 + (612) 309-7643 Date shipped 84/09/25

Item #	Qty.	Size	Description	Each	Total
1560	2	11	Running shoe--training	\$ 70.00	\$ 140.00
1695	1	11	Running shoe--racing	85.00	85.00
				Subtotal \$	225.00
				Sales tax	NA
				Shipping	10.00
				Total \$	235.00

Invoice # 106-9830 Shipped by UPS
 Credit AA Payment due by 45 days
 Credit card number NA

Membership Record

Business groups, associations, social or athletic clubs could use a Membership Record cardfile. The form has room to record the members' special interests, so an organization could print labels for mailings targeted to those interests. Ask for the form by the name MEMBERS.

Rayburn			
ASSOCIATION MEMBERS			
Name: Title	Mr.	First	Walter
		Last	Rayburn
Membership category	Senior		
Areas of interest/expertise	Small business marketing		
Address	1610 River Avenue		
City	Chicago	State	IL
Phone	828/202-9833	Zip Code	38839
Date Joined (YY/MM/DD)	78/07/01		
Annual Dues	\$50	Paid (Yes/No)	Yes

Music Catalog

A PCF cardfile can be used to catalog libraries and other collections of all kinds—business, scientific, or personal. If you lend items from your collection—for example, to special exhibitions—you can include a field to record that information. Ask for this form by the name MUSIC.

Ninth Sy-			
MUSIC LIBRARY			
Title	Ninth Symphony		
Artist	Phoenix Symphonic and Choral Ensemble		
Composer	Beethoven		
Category	Classical		
Record Title	Home Concert Series, Volume 6		
Record Company	Superb		
Year (YYYY)	1980	LP, 8track, cassette	Cassette
Catalog No.	C-60051a		
Comments	Rare recording by regional group; best volume in the series. Soloists are excellent.		

Other Suggested Card Forms

The card forms in this section are intended as models. Some—such as the one for a Phone Message—you may want to copy just as you see them here or with only a little modification. Others—such as the form for a Diving Log—are highly specialized, but they can suggest other ways of using PCF to manage information.

Chapter 3 gives you step-by-step instructions that you can use to copy these card forms to create new cardfiles.

Employee Information

This name and address card form includes fields designed for information a personnel department might want—Social Security and tax deduction information, hiring date, salary, and so forth.

Anderson

* * * EMPLOYEE INFORMATION * * *

Name: Title	Mr.	First	Wayne	Last	Anderson			
Job title	Marketing manager, NY State			Phone	9 + (914) 919-3456			
Plant and office number	Westchester County Plant, Room 242							
Name of supervisor	Oscar Romero							
Address	583 East Post Road				State	NY	ZIP	10600
City	White Plains							
Date of birth	56/03/14	SSN	004-26-8536	Date hired	79/07/01			
Salary	\$35,000	per	year	Exemptions	2			
Home address	1690 Amsterdam Ave., Apt. 3-F							
City	New York			State	NY	ZIP	10040	
Home phone	9 + 705-3468							

18-6 Some Useful Card Forms

Convention Registration

The card form suggested for Convention Registration can easily be adapted for other kinds of meetings. For example, a registration cardfile could be used for on-the-spot registration at a trade show.

Pedalik			
* * * CONVENTION REGISTRATION * * *			
Title	Mr.	First Name J.	Last Name Pedalik
Organization	Cheetah Shoe Company		
Hotel	Royal Waikiki	Phone	715-9431 Room 1221
Arrive (MM/DD)	10/03	Depart (MM/DD)	10/07
Mailing Address	1720 Fifth Avenue, Suite 8000		
City	New York	State	NY Zip Code 10020
Country	USA		
Specialty	Athletic shoes		Telephone (212) 106-7946

Suppliers and Their Products

Retail shops, laboratories, clinics, and many others could use this card form to keep track of sources of items they sell or use. For example, a business office could record information on sources of office supplies.

Fashion -			
---- SUPPLIERS ----			
Supplier	Fashion Laces of California		
Contact	Fred Jobert	Phone	9 + (805) 617-1378
Reliability	8	Order	6 weeks before needed.
Emergency contact	Jerry Williams	Phone	9 + (805) 617-1326
Address	2860 Via Golete		
City	Santa Barbara	State	CA ZIP 93100
Item #	Description	Cost	
3624	Shoelaces-24"	.37	
3628	Shoelaces-28"	.39	
Advance	None	Payment within	30 days. Overdue interest 18 %
Comments	Cost per pair		

Contractor Estimate

Contractors can use a card form like this one to record estimates. They can print the cards and give them to potential clients.

Irish IM -

/// RESNIK DESIGNS ///

Job	Remodel offices		
Location	See below		
Beginning date	84/10/22	Completion date	84/11/23

Customer	Irish Import-Export Service		
Address	225 Avenue of the Americas		
City	New York	State	NY
Phone	173-5263	ZIP	10012

ESTIMATE

Labor	\$32,000
Materials	18,000
Expenses	5,000
Taxes	1,500
TOTAL	\$56,500

Daily Receipts

Restaurants, gift shops, repair services—businesses such as these can keep track of the day's receipts on a simple form like this one.

84/05/09

RECEIPTS

Date 84/05/09

	Cash	Credit
Shoes	\$ 389.27	\$ 1103.19
Accessories	27.65	212.13
Repairs	75.00	24.00
Taxes	31.97	87.06
Subtotals	\$ 523.89	\$ 1426.38
TOTAL	\$ 1950.27	

Phone Message

This form is designed for sorting by the caller's last name. If you want to use the cardfile to record messages for several persons, you can add a field for the name of the person called and make that field the key field.

Zatopek		
While you were out...		
Emil	Zatopek	
of Prague Distance Runners called.		
Date	84/05/09	Time 4:30 pm
Phone	9 + 818-6020	
Message	Staying at the Parkside Arms Hotel through Friday. Wants to see our new Ultra shoe.	

Wine Cellar

Like the Music Catalog card form stored on your PCF Application Disc, this form is designed to help a collector keep track of treasured possessions. You can design the best form for your own collections—just follow your imagination.

1977 Cab-		
•S•S• The Cellar at My Estate •S•S•		
Vintage and varietal	1977 Cabernet Sauvignon	Bottles 12
Region	Napa Valley	Country USA
Winery	Laguna Seca	
Purchased: When	1981	Where Midi Wine Shop
Price \$	11.00	
Current value \$	15.00	Ready to drink 1984-1994
Tasting: Sight	Tawny red	
Smell	Clean and corky	
Taste	Dry, well balanced	
Overall quality	Outstandingly harmonious	

Tax Deduction

With a simple card form like this one, you can record all your tax deductible expenses—medical costs and gifts to charity, for example. A big help when tax time comes around!

Medical			
TAX DEDUCTIONS			
Type of Expense	Medical		
Category/Description	Prescription		
Amount	\$25.96	Date (MM/DD)	05/22
Recipient	Friendly Drug		
Method of payment	ChargeCard	Check Ref #	

Automobile Maintenance

You can adapt this card form to keep track of maintenance services for office or laboratory equipment. Or you can use a similar form for household service records.

09			
AUTO MAINTENANCE INFORMATION			
Car No.	09	Make	Fireline
		Model	83 Traveler
		Driver	Abbie
Date (YY/MM/DD)	84/11/20	Mileage:	This checkup 12,500
			Next scheduled
Service items:	<ol style="list-style-type: none">1. Oil change2. Oil filter change3. Chassis lub4. Points, plugs, cond.5. Engine tuneup6.7.8.	Total cost: Estimated	\$75
			Actual \$66.30
		How paid	Check #1125
		Shop	Turner's Auto Shop
		Address	66 Broad Street
		Phone	205-3377
		Mechanic	Jerry

Restaurants

Favorite dishes, atmosphere, average prices—information about your favorite restaurants is at your finger tips. A travel agent might consult such a cardfile when a client asks for personal recommendations, then print cards for the client to take along.

Ping Yue-			
*** GOURMET DINING ***			
Restaurant	Ping Yue	Cuisine	Chinese--Szechuan
Address	563 Telegraph Hill Ct.		
City	San Francisco	State	CA ZIP 94100
Hours	11-2 and 4-10	Phone	9 + (415) 908-3121
Ask for	Larry Wong	Average bill for two \$15	
Bar?	No	Best wines	None
Favorite dish	Madarin Mu Shu Pork		
Next dish to try	Ginger Chicken		
Comments	Friendly, family-run place--closed on Tuesdays No reservations needed--slight wait on weekends		

Running

Athletes and others can use a modified version of this card form to keep track of exercise routines. If you are a runner, for example, a quick search will tell you how many days you ran more than 4 miles in the last 6 months.

84/03/01			
**** RUNNING ****			
Date	84/03/01	Day	Thursday
Time	hours 36	minutes 19	seconds
Distance	4.3 miles		
Conditions (hills, temperature, wind)	Flat--55, partly cloudy-- stiff breeze, west		
Route	West on Post Road		
Comments	Noon run with Wayne		

Diving Log

This form has a picture of the activity it records. The diver submerges and comes back up, and the form shows that movement. Notice that groups of fields that logically go together—buddies, for example—are not interrupted by any other fields.

83/07/17

Date 83/07/17	D I V E L O G		Dive: 2 of 3
Buddies: 1 Fred 2 Jerry 3	Location: Santa Barbara Chan.--Santa Cruz Island		
	Time: 10:30 am	Temp: 65	Tank: 2100 psi
Notes: Huge scallop beds Red abalone Kelp beds	RNT: 29		
	D: 0000000	J: 0000000	2'40"'
	start	finish	surface
	group	group	interval
	50'	45"'	
	depth	bottom	time



A

Summary for Fixed Disc Users

Working with PCF on a Fixed Disc

When you have followed the instructions on configuring in *Getting Started with Your HP Touchscreen Personal Computer*, Appendix A, your fixed disc drive will be A and the flexible disc drive will be B. This configuration is the same as that for dual flexible discs. Therefore, the instructions in this book will apply whether you use a fixed disc or dual flexible discs.

Follow the instructions in *Using Your HP Touchscreen Personal Computer* to install PCF on your fixed disc. When you have done so, PCF will be one of the choices on the P.A.M. Main menu whenever you start your computer. Then simply touch the box labeled **PCF** to highlight the box, and touch `start Applic` to start the program.

You can put your cardfiles on your fixed disc, or you can put them on a flexible disc in Drive B. Remember, however, to include B: to identify the drive when you name cardfiles and want to put them on a disc in Drive B.

You can run PCF from a flexible disc if you prefer. Just insert a PCF Application Work Disc in Drive B. If your computer has multiple disc drives, you can install PCF in any of the drives. Just remember that you can **only** start the computer from Drive A.

The rules for default drive and directory are the same for a fixed disc as for dual flexible discs. That is, the drive that contains the program you are running is the default drive, unless you change the default. For example, if you are run-

ning PCF from a flexible disc in Drive B, then B is the default drive until you start PCF from a different drive or until you change the default. Appendix E tells you how to make this change.

Copying a Large Cardfile from a Fixed Disc onto a Flexible Disc

Because a fixed disc can hold much more than a flexible disc, you might create a cardfile larger than a single flexible disc can hold. To copy such a cardfile onto a flexible disc, you need to divide the cardfile and copy the parts onto two or more flexible discs. For example, assume that your address book cardfile, which is sorted alphabetically by last name, is too large to copy onto one flexible disc, but it will easily fit on two.

Follow these steps to copy the cardfile onto two flexible discs:

- 1.** Use Copy to PCF to make two copies on the fixed disc. (Chapter 11 tells you how to copy to PCF.) Make more copies if you need more flexible discs. The number of copies you make must match the number of flexible discs you need to hold the cardfile.
- 2.** Delete the first half of the cards (for example, A-M) from one cardfile.
Or delete two thirds of the cards if you made three copies, one fourth if you made four copies, and so forth.
- 3.** Use Copy to PCF to copy the rest of this cardfile onto one flexible disc.
Chapter 12 tells you how to copy to a different disc.
- 4.** Now delete the other half of the cards (for example, N-Z) from the second copy.
Or delete the second third of the cards, if you made three copies, and so forth.

5. Copy the rest of this cardfile onto a second flexible disc.

If you are copying onto more discs, repeat these steps until you have copied the whole cardfile.

When you have finished copying, you can delete the copies you made on the fixed disc.

B-4 Setting Up to Use PCF's Autodial

B

Setting Up to Use PCF's Autodial

Before you set up to use PCF's autodial, you should make sure your HP Touchscreen PC is properly equipped. To use autodial you need:

- A Hayes Smartmodem™ or a Hayes-compatible modem
- Touch-tone telephone lines and a telephone
- A standard HP U.S. modem cable
- A modular T-connector for your telephone line

Then you must perform these tasks:

- Set up the modem.
- Configure the operating system.
- Configure the modem port.

Setting Up the Modem

To start setting up if you have a Hayes Smartmodem or a Hayes-compatible modem with a comparable set of configuration switches:

1. Check to see whether the eight configuration switches inside the modem are set as follows:
 - 1: Down
 - 2: Up
 - 3: Down
 - 4: Up
 - 5: Down

- 6: Down
- 7: Up
- 8: Down

2. If they are not, flip the switches to set them accordingly.

If you have a Hayes-compatible modem that does not have these switches, check your modem manual for any special set-up procedures.

To finish setting up your modem:

1. Use a standard HP U.S. modem cable to connect the modem to the back of your computer at either of the two ports—"DATACOMM (PORT 1)" or "DATACOMM (PORT 2)."
2. Attach a modular T-connector to your telephone. Connect the modem phone line to one plug and the incoming phone line to the other.

Configuring the Operating System

With a box labeled Device Config on the P.A.M. Main menu:

1. Touch the box that says Device Config to highlight it.
2. Touch Start Applic .
You will see the Device Configuration Main screen.
3. Touch the field to the right of COM2:.

If you connected the modem cable to DATACOMM (PORT 1), the setting must say Port1. If you connected the modem cable to DATACOMM (PORT 2), the setting must say Port2.



Be sure to select COM2: when you configure for autodial.

4. If you need to change the setting, touch `Next Choice` until you see the setting you want.
5. Touch `save config` to lock in your choice.
You will see this message
`Device configuration has been saved.`
6. Touch `EXIT CONFIG` to return to the P.A.M. Main menu.

Configuring the Modem Port

After you have configured the operating system, you must configure the modem port:

1. From the P.A.M. Main menu, touch `Terminal` .
2. Now, from the keyboard, press `User System` until you see `config keys` as one of the function labels.
3. Touch `config keys` .
4. Touch either `port1 config` or `port2 config` , depend-upon the port to which you connected the modem.
5. Touch `config menus` .
6. Now touch `FULL DUP HRDWIRED` .
You will see `FULL DUPLEX HARDWIRED` on the top line of the screen along with the name of your modem port (Port 1 or Port 2).
7. Touch `system defaults` .
8. Next touch `DEFAULT VALUES` .
This action sets all values correctly for your modem, except baud rates, which you need to set separately.

The baud rate for your modem will be either 300 or 1200. Your modem manual will tell you which rate to use.

To set the baud rate and save the configuration:

- 1.** Touch the field to the right of **BaudRate**.
- 2.** Touch `Previous Choice` OR `Next Choice` until you see the proper baud rate for your modem.
- 3.** Touch `SAVE CONFIG` to lock in the modem port configuration.
- 4.** Hold down `Shift` and press `Stop` to return to the P.A.M. Main menu.

Now you are ready to start up PCF and use autodial to place your telephone calls.



C

Using PCF with Other Programs

PCF works with CONDOR[®], dBASEII[™], MailMerge[™] (WordStar[®]), and programs written in BASIC. You can use PCF with these programs in several ways. You can:

- Send the information recorded in PCF cardfiles to CONDOR or dBASEII to make your files more widely available.
- Send PCF information to MailMerge and use it with form letters and other documents prepared on WordStar.
- Put PCF information in a BASIC program and use it in computations or for other program manipulations.
- Move information into a PCF cardfile from CONDOR, dBASEII, or a BASIC program.

When you send information to another program, PCF calls the task "transferring out." When you bring information in, PCF calls the task "transferring in." This appendix gives general guidelines for transferring information between programs and tells you how to use PCF with each specific program. If you would like more information about a particular program, see the manual that explains that program.

Some of the words used in other programs are different from the words used in this book.

- A **card form** in PCF is a **form** in other programs.
- A **cardfile** in PCF is a **database** in other programs.

Transferring Information to Another Program

When you transfer information to another program, you actually send a copy of the information from your cardfile. The information you transfer out is translated from PCF language to a language the other program can understand, and the information in your original cardfile remains unchanged. You can send all the information in your cardfile to another program, or only some of it. There are two parts to the procedure.

- First you must put the information in a holding file.
- Then you must transfer the information to the program with which you want to use it. (For some programs, the holding file becomes a permanent data file. For others, you can delete the holding file after you finish this transfer.)

Remember that a PCF file is not the same as a PCF cardfile. That is, it takes three files to make up a PCF cardfile: (cardfile).PDT holds the information; (cardfile).PFM holds the card form; and (cardfile).PIX tells PCF how to sort the cards. (See Chapter 14 for more information about PCF cardfile names and filenames.)

You should also remember these points when you plan to transfer information to another program:

- The fields in your PCF card form must be in the same order as the corresponding fields in the file to which you are transferring the information (the destination file).
- It is wise to make sure that the fields in the destination file are the same length or longer than the corresponding fields in your PCF card form. Otherwise your field information will not fit in the destination fields.
- Other programs vary as to how they receive information from a PCF card form with a different number of fields. Transfers to most programs will work if the destination form has at least as many fields as the PCF card form, but for some programs the destination file can have fewer. See the manual for the program to which you are transferring to make sure.

Transferring Information to CONDOR

To transfer information from PCF to CONDOR:

1. Using PCF, follow the instructions in Chapter 13 to put the information in a holding file.

Chapter 13 has a section on "Moving All the Information" and one on "Moving Only Some of the Information." See the section that fits your purpose.

If you are transferring dates into CONDOR, be sure to enter the command Set date YY/MM/DD before you perform the next step. (CONDOR usually reads dates as MM/DD/YY.)

2. Using CONDOR, enter this command: Read database transferfile.

For example, assume you put the information from a cardfile named YOURFILE (the source) in a holding file named YOURFILE.OUT (the transferfile), and you are ready to transfer it to a CONDOR database named NEWFILE (the destination). You would enter: Read newfile yourfile.out.

After you have finished the transfer, you can delete the holding file (for example, YOURFILE.OUT) if you want to.

Transferring Information to dBASEII

To transfer information from PCF to dBASEII:

1. Using PCF, follow the instructions in Chapter 13 to put the information in a holding file.

Chapter 13 has a section on "Moving All the Information" and one on "Moving Only Some of the Information." See the section that fits your purpose.

2. Using dBASEII, enter this command: Append from transferfile delimited.

For example, assume you put the information from a cardfile named YOURFILE (the source) in a holding file named YOURFILE.OUT (the transferfile), and you are ready to transfer it to the dBASEII database you are using (the destination). You would enter: Append from yourfile.out delimited.

After you have finished the transfer, you can delete the holding file if you want to.

Transferring Information to MailMerge

To transfer information from PCF to MailMerge:

- 1.** Using PCF, follow the instructions in Chapter 13 to put the information in a holding file, which becomes your permanent WordStar datafile.

Chapter 13 has a section on "Moving All the Information" and one on "Moving Only Some of the Information." See the section that fits your purpose.

- 2.** Using MailMerge, insert this command in your master WordStar document: `.df filename`.

For example, assume you used the information from a cardfile named YOURFILE (the source) to make a WordStar datafile named YOURFILE.OUT. You would insert: `.df yourfile.out`.

- 3.** Now insert this command: `.rv variableA, variableB, variableC...variableZ`.

Each variable is a field that you transferred to MailMerge. For example, if you transferred only five fields for name and address from your cardfile, variableA would be the first field (Name), variableB would be the second field (Street), and so forth. That is, you would insert: `.rv name,street,city,state,zipcode`.

- 4.** Then use `&variableA&`, `&variableB&`, and so forth, in the master document in whatever places you want the information in those fields to appear.

For example, you would use `&name&`, `&street&`, and so forth.

See your WordStar/MailMerge manual for information on setting up your master document.

Transferring Information to a BASIC Program

To transfer information from PCF to a BASIC Program:

1. Using PCF, follow the instructions in Chapter 13 to put the information in a holding file, which becomes your permanent BASIC datafile.

Chapter 13 has a section on "Moving All the Information" and one on "Moving Only Some of the Information." See the section that fits your purpose.

2. Using BASIC, treat the resulting data file as a sequential access file, and use it in your programs. Consult your BASIC manual for more information.

Here, the PCF cardfile on the screen is the source and the BASIC datafile is the destination.

Transferring Information from Another Program

Bringing information to PCF from another program is a two-part procedure.

- First you must put the information in a holding file.
- Then you must transfer the information to the cardfile in which you want to use it.

You should remember these points when you plan to transfer information from another program into a PCF cardfile:

- The fields in your PCF card form must be in the same order as the corresponding fields in the file from which you are transferring the information (the source file).
- When a field in the source file is longer than the corresponding field in your card form, PCF prints only the information that will fit. If the source field is shorter, PCF adds blanks. Be sure to make your fields long enough to hold all the information you transfer in.

- When the source file has more fields than are in your card form, PCF ignores the extra information from the extra fields. That is, if the source file has seven fields and the PCF card form has only five, PCF uses the information in the first five source fields and not the information in the last two.
- When the source file has fewer fields than are in your card form, PCF prints the information from the source fields and leaves its own extra fields blank. That is, if the source file has five fields and the PCF card form has seven, PCF prints the source information in the first five PCF fields and leaves the last two blank. (You can fill in the blank fields later.)
- To simplify sorting and searching, you may want to enter dates in PCF in the order year,month,day (YY/MM/DD). Many other programs use the order month,day,year (MM/DD/YY), but you can still transfer in dates from such programs. You can re-enter the dates later to change the order if the dates are important for sorting and searching.
- Remember that a very large source file may contain more information than can fit in your cardfile or on a flexible disc. See the manual for the particular program for information on dividing a large database into two or more smaller ones.

Transferring Information from CONDOR

To transfer information from CONDOR to PCF:

- 1.** Using CONDOR, enter this command: write database transferfile [B].

For example, assume you want to put information from a CONDOR database named OLDFILE (the source) in a holding file named YOURFILE.NEW for transfer to PCF. You would enter: write oldfile yourfile.new [B]. (The [B] translates the information so that PCF understands it.)

- 2.** Using PCF, follow the instructions in Chapter 13 to transfer the information into the PCF cardfile on the screen.

(See the section in Chapter 13 called "Moving the Information from the Holding File to the Cardfile with the Modified Form.")

Transferring Information from dBASEII

To transfer information from dBASEII to PCF:

1. Using dBASEII, enter this command: copy to transferfile delimited with "".

For example, assume you want to put information from a dBASEII database you are using (the source) in a holding file named YOURFILE.NEW for transfer to PCF. You would enter: copy to yourfile.new delimited with "" (delimited with "" translates the information so that PCF understands it.)

2. Using PCF, follow the instructions in Chapter 13 to transfer the information into the PCF cardfile on the screen.

(See the section in Chapter 13 called "Moving the Information from the Holding File to the Cardfile with the Modified Form.")

Transferring Information from a BASIC Program

To transfer information from a BASIC program to PCF:

1. Using BASIC, with the information you want to transfer stored in memory, enter this command: save "datafile", A.

For example, assume you want to put information from a BASIC database named OLDFILE (the source) in a holding file named YOURFILE.NEW for transfer to PCF. You would enter: save "yourfile.new", A. (The letter A translates the information so that PCF understands it.)

2. Using PCF, follow the instructions in Chapter 13 to transfer the information from the holding file to the PCF cardfile on the screen.

(See the section in Chapter 13 called "Moving the Information from the Holding File to the Cardfile with the Modified Form.")



D

Copying Tricks for When Disc Space is Tight

This appendix tells you how to copy, transfer, and combine cardfiles when there isn't enough room to use the copy procedures described in Chapters 11 and 12 or the transfer procedures described in Chapter 13. It also tells you what to do if you run out of room while combining cardfiles or transferring information.

Why Copying Tricks Are Necessary

You may need these tricks because:

- You must not remove your personal work disc from a drive if you are using that disc as a source for copying, printing, or transferring.
- You may remove the PCF Application Work Disc from a drive only if you are in File Manager or if PCF is not running.

(See the section on "Warnings about Taking Discs Out of the Disc Drives" in Chapter 1.)

It is always safe to try to copy, print or transfer information. If you don't have enough room, PCF will show you one of these messages:

Can't finish printing cardfile.

or

Can't finish copying to the disc file.

or

A disc error occurred.

If you don't have enough room to finish copying, PCF will delete the incomplete copy. If you tried to print or transfer information, PCF will put as much information as will fit into the print file or transfer file. You can then delete the incomplete print or transfer file copy and begin again with a destination disc that has more space or with a smaller source cardfile. Or you can use one of the tricks described later in this appendix.

How to Use File Manager to Estimate Cardfile Size

You can estimate the room you'll have for these operations by entering File Manager. Remember, however, that your copy may not need as much room as the original cardfile if you have added and deleted cards.

To use File Manager to find out whether you might have room to copy:

1. If you are on the Main PCF screen, touch
Cardfile Tasks .
2. When you are on the Main tasks screen, touch
File Manager .

You see the File Manager screen for the disc in the default drive. The number in the highlighted box to the right tells you how much memory (measured in bytes) is available on this disc. If this disc is the one you want to check for how much memory you need to copy your cardfile, you have your answer.

3. If this disc is the one your cardfile is on, touch
Choose Dir .

If your cardfile is not on this disc, skip Steps 4 through 6.

D-2 Copying Tricks for When Disc Space is Tight

4. Now touch `Expanded Dir` .
You see the first few filenames in longer boxes with numbers after them.
5. Find the three filenames that make up your cardfile.
If you don't see them on this screen, press `Next` until you see the screen that contains them. The first number just to the right of the filename tells you how many units of memory that file uses.
6. Add the number of units for the three files that make up your cardfile and compare the total with the amount of memory available on the disc to which you want to copy.
7. If you want to check another disc, then from File Manager, touch `Choose Dir` .
8. Type the name of the drive that contains the disc you want to check.
(If your cardfile is in a subdirectory of that disc, include the subdirectory name.)
9. Press `Return` .
The number in the highlighted box to the right tells you how much memory is available on **this** disc. If this is the disc you want to check for the amount of available memory, you have your answer.
10. If your cardfile is on this disc, follow Steps 3 through 6.

Copying Tricks to Overcome Space Limitations

If a message tells you that you are out of room when you try to copy, print, or transfer a cardfile, the following sections offer alternative methods. The first section tells you how to copy cardfiles using File Manager instead of using Copy To PCF. The last four sections tell you how to combine cardfiles in progressively tighter situations.

The sections on combining cardfiles assume that the two cardfiles you want to combine are on separate discs. If your cardfiles are so large that you can't combine them using `Append To File`, it is doubtful that even these copying tricks will work when the cardfiles are on the same disc. You can try using these tricks, going on to the next one if the first doesn't work, or you can simply start with your two cardfiles on separate discs.

Copying from Drive B to Drive A Using File Manager

In this example, the cardfile you want to copy is on a disc in Drive B and the PCF Application Work Disc is in Drive A. Because PCF occupies space on the Application Work Disc, the disc in Drive A may not have room for the copy. By going to File Manager, you can put a different disc in Drive A to hold the copy.

In File Manager you work with the three files that make up a cardfile, so you need to copy all three of these files. In the steps that follow you will be using File Manager from PCF, but you can also enter File Manager from P.A.M. When you enter from P.A.M., you go directly to the File Functions screen. But when you enter from PCF you first see a File Manager screen and you must touch `File Funct'ns` to reach the File Functions screen.

To copy a cardfile using File Manager (from PCF):

1. If the Main PCF screen is showing, touch `Cardfile Tasks`.
PCF shows the Main tasks screen.
2. When the Main tasks screen is showing, touch `File Manager`.
You will see the File Manager screen.

D-4 Copying Tricks for When Disc Space is Tight

If you don't see the three files that make up your cardfile, they may be on the next screen or in another subdirectory. Press **Next** to look at the next screen. If you need instructions for looking in a different directory, see the section on "Renaming a Cardfile" in Chapter 14. When you have found the files, be sure to return to the File Manager Main screen.

3. From the File Manager Main screen, touch

File Funct'ns .

You will see the File Functions screen.

4. Remove the PCF Application Work Disc from Drive A and insert a disc with more space open.

5. Touch **Copy File** .

You see the File Manager Copy screen and this message

Select or type the file to copy.

6. Touch the screen label of the file you want to copy.

You see the full name of the file you selected, including the drive and directory. For example, if you selected FRIENDS.PDT from a subdirectory of B, the full name will be **B:\subdirectory\FRIENDS.PDT**. (If you made a mistake when you selected the file, touch **Start Over** and repeat this step.)

You also see this message

Select or type the file to copy to.

7. Type the full name for the copy.

You are copying to Drive A, so you will need to include that information and any subdirectory. You must also include the three letter extension (.PDT, .PFM, or .PIX). For example, to put FRIENDS.PDT in a subdirectory of A, you would type **a:\subdirectory\friends.pdt**. (If you don't name the file, the copy will have the same filename.)

8. Press **Return** .

The full name you have typed is displayed and you see this message

Press Start Copy if information is correct.

9. When you are satisfied with your instructions, touch `Start Copy` .

You see this message

Copying the selected file.

After the file has been copied, you still see the Copy screen.

10. Follow Steps 6 through 9 to copy the remaining two files (.PFM and .PDT) that make up the cardfile you are copying.
11. When you have copied all three files, remove the disc from Drive A and insert the PCF Application Work Disc.
12. Touch `Exit Copy` to return to the File Functions screen.
13. Touch `Exit FileFctn` to return to the File Manager screen.
14. Touch `Back to PCF` to exit File Manager.

Combining Cardfiles Using File Manager

If you don't have enough room to combine two cardfiles as described in Chapter 12, you can use File Manager to combine them if both cardfiles will fit on one disc, with enough room to combine them into a single large cardfile.

(If your cardfile is too large for this method, go on to the next section.)

In this example you start with two cardfiles, called cardfile A and cardfile B.

In the steps that follow you will be using File Manager from PCF, so you start with the File Manager Main screen and then touch `File Funct'ns` . (When you enter File Manager from P.A.M., you go directly to the File Functions screen.)

To combine cardfiles using File Manager (from PCF):

1. Place the disc containing cardfile B in Drive B.

D-6 Copying Tricks for When Disc Space Is Tight

2. Follow the steps in the preceding section (Steps 1-11) to copy the cardfile from Drive B to Drive A.

At Step 4, be sure to replace the Application Work Disc with the disc containing cardfile A.

When you have finished copying, cardfile A and a copy of cardfile B will be on the same disc, and cardfile B is now the destination cardfile. Be sure to replace the disc in Drive A with the PCF Application Work disc.

3. Return to PCF.
4. From the Main tasks screen, touch `Another Cardfile` .
PCF tells you to

Type the name of the cardfile you want
to see. (You can switch discs now.)

5. Remove the disc in Drive B and replace it with the disc that contains the destination cardfile.
6. Type the name of cardfile A.
It is now in Drive B. If that drive is not the default, you will need to include the drive name. Remember to include any subdirectories.
7. Press `Return` .
Cardfile A is now the current cardfile.
8. Now you can combine this cardfile with the destination cardfile using the procedures in Chapter 11.

Combining Cardfiles Using Transfer Out and Transfer In

If you don't have room on one disc to use the method described in the last section, you can still use File Manager to combine cardfiles if:

- You have room on one disc for the combined cardfile.
- You have room on the PCF Application Work Disc for the transfer file.

In this method you copy the field information from cardfile A in Drive B to the Application Work Disc in Drive A, then combine this copy with a copy of cardfile B in Drive B.

To combine cardfiles using the transfer functions:

1. Use File Manager to make a copy of cardfile A on another disc.
This copy becomes the destination disc.
2. If the Main PCF screen is showing, touch `Cardfile Tasks` to get to the Main tasks screen.
3. If cardfile A is not the current cardfile, call it up.
4. From the Main tasks screen, touch `Copy Cardfile` to get to the Copy screen.
5. Touch `Transfer Out` .
PCF asks you to
Type the name for the transfer file to be produced and press RETURN.
6. Type a name for the transfer file.
Remember to include the drive (A) and any subdirectories. If you like, you can add a three-letter extension. (Do not use .pfm, .pdt, or .pix.) For example, if you are transferring from FRIENDS to a subdirectory of A, you might type a:\subdirectory\friends.out.
7. Press `Return` .
PCF tells you it is
Transferring current cardfile to disc file.
PCF returns you to the Main tasks screen.
8. Touch `Another Cardfile` and type the name of the destination cardfile but **don't press the Return key yet**.
9. Remove the disc from Drive B and replace it with the disc containing the destination cardfile.
10. After you have made the switch, press `Return` to display the destination cardfile.
11. Touch `Copy Cardfile` to get to the Copy screen.
12. Touch `Transfer In` .
PCF asks you to
Type name of file to transfer into current cardfile and press RETURN.

D-8 Copying Tricks for When Disc Space is Tight

13. Type the name of the file you transferred out.

Remember to include the drive name (A) and any sub-directories. For example, you might type
a:/subdirectory/friends.out.

14. Press `[Return]`.

PCF tells you it is

Copying from disc file to current cardfile

When the transfer file has been copied into the current cardfile, PCF shows you the combined cardfile on the Main tasks screen.

Combining Cardfiles Using File Manager and the Transfer Functions

If the PCF Application Work Disc doesn't have room for the transfer file, you can combine the cardfiles using File Manager and the transfer functions if:

- The destination disc has room for the combined cardfile and a transfer file.
- The disc holding cardfile A has room for a transfer file of cardfile A.

To combine cardfiles using File Manager (from PCF) and the transfer functions:

1. Use File Manager to make a copy of cardfile B on another disc.

This copy is now the destination cardfile.

2. Return to PCF.

3. From the Main tasks screen, touch `Another Cardfile`.

PCF asks you to

Type the name of the cardfile you want to see.
(You can switch discs now.)

4. Replace the disc in Drive B with the disc that contains cardfile A.

- 5.** Type the name of cardfile A.
This cardfile is now in Drive B, so if that drive is not the default you will need to include the drive. Remember to include any subdirectories.
- 6.** Press .
Cardfile A is now the current cardfile.
- 7.** From the Main tasks screen, touch .
- 8.** Touch .
PCF asks you to
Type the name for the transfer file to be produced and press RETURN.
- 9.** Type a name for the transfer file.
Remember to include a three-letter extension. You want to put the transfer file on the disc in Drive B (the disc that holds cardfile A). If that drive is not the default, remember also to include the drive name and any subdirectories. For example, to transfer from a cardfile named FRIENDS to a subdirectory of B, type
b:\subdirectory\friends.out.
- 10.** Press .
When PCF has created the transfer file, it returns you to the Main tasks screen.
- 11.** Enter File Manager from PCF.
- 12.** Replace the PCF Application Work Disc with the disc that contains the copy of cardfile B (the destination cardfile).
- 13.** Copy the transfer file from Drive B to Drive A.
- 14.** Remove the disc in Drive A and replace it with the PCF Application Work Disc.
- 15.** Touch .
- 16.** Touch to return to the Main tasks screen.
- 17.** Touch .

D-10 Copying Tricks for When Disc Space is Tight

- 18.** When PCF has closed the current cardfile, type the name of the destination cardfile, but **do not press the Return key yet.**
- 19.** Remove the disc in Drive B and replace it with the disc containing the destination cardfile and the copy of the source transfer file.
- 20.** After you have made the switch, press to display the destination cardfile.
- 21.** Follow Steps 10 through 13 in the section on “Combining Cardfiles Using File Manager,” earlier in this chapter, to transfer in the transfer file.

Remember that in this case the transfer file is in the same drive as the cardfile you are transferring to. When the transfer file has been copied into the current cardfile, PCF shows you the combined cardfile on the Main tasks screen.

Combining Cardfiles Using Worksets with the Transfer Functions

If you don't even have enough room to copy the whole transfer file from Drive B to Drive A using File Manager, you need to split the cardfile into worksets and then transfer in the worksets one by one. (Chapter 9 tells you how to create a workset.)

In outline, here is the procedure:

- 1.** Create a workset of the source cardfile.
- 2.** Transfer out the contents of the workset from Drive B to Drive A.
- 3.** Transfer the file back into the destination cardfile to combine the two cardfiles.
- 4.** Delete the transfer file you just appended to make room for the next transfer file.
- 5.** Repeat Steps 1 through 4 until you have transferred all the information in the source cardfile.

If the PCF Application Work Disc doesn't have enough room to hold the transfer file, you will need to create the transfer file on the source disc and then use File Manager to copy it directly to the destination disc.

When you design a card form, you might want to consider a possible need to split up the cardfile later on—especially if the cardfile seems likely to become very large. For example, the card form might include a field that contains one of two or three items—perhaps a location field with in-state or out-of-state. Or you might set up a field for an alphabet range. Cards A through M would show **A-M** in that field, and cards N through Z would show **N-Z**. Then you could search for a workset for A-M and later for a workset for N-Z.

If you have a field for numbers, such as dates, you can use the greater than (>) and less than (<) signs to search for the worksets. For example, you could make a workset for all the cards for 1980 and before by using < 81/01/01 (earlier than January 1, 1981). Then you could make a second workset for cards for 1981 and after by using > 80/12/31 (later than December 31, 1980).

What to Do if You Run Out of Room while Combining Cardfiles or Transferring Information into a Cardfile

If you are combining two cardfiles or transferring a data file into a cardfile, the destination disc may fill up before all the information has been received from the source disc. In this case, PCF lets you know by giving you one of two error messages:

Can't finish printing cardfile.

or

A disc error occurred.

Your first step is to find out how far you got by examining the destination cardfile. Then delete the cards that made it and start the whole process over again using a destination

disc with more room. You can make more room either by deleting other files from the destination disc or by copying the destination cardfile to a fresh disc.



E

Using File Manager

File Manager looks after the three files that make up your PCF cardfile, as well as any files that you create using other applications.

You can enter File Manager from either the P.A.M. Main menu or the PCF Main tasks screen. When you enter from P.A.M., you go directly to the File Functions screen. But when you enter from PCF you first see a File Manager screen and you must touch `File Funct'ns` to reach the File Functions screen.

How You Can Use File Manager

You can use File Manager in the following ways:

- Look at a list of files in another drive and directory.
- Change the default drive and directory.
- Set up subdirectories.
- Print one or more files or a whole directory.
- Delete a file or directory.
- Copy a file.
- Rename a file.
- Browse through the contents of a file.

If you have read Chapter 14 and Appendix D, you already know about some of these uses. This appendix explains the default drive and directory and tells you how to change the

default. *Using Your HP Touchscreen Personal Computer* discusses using File Manager in P.A.M. and tells you how to perform all these actions.

How File Manager Stores Your Files

Each of the three files that make up your cardfile has its own filename (see Chapter 14). Each file also has an address that tells where it is stored. The address includes a drive name and a pathname, which consists of one or more directories. The drive name tells where the disc is. The pathname tells which directory (and subdirectories, if any) the file is in. A fully specified filename includes the drive name and the pathname. For example, assume a file named YOURS.PDT is stored in a subdirectory called YOURDIR on a disc in Drive B. Its fully specified filename would be B:\YOURDIR\YOURS.PDT, and you would need to ask for it by that name.

Drive Names

The drive name indicates which drive has the disc that contains the files. If you have set up your computer according to the instructions in *Using Your HP Touchscreen Personal Computer*, the drives are named as follows:

- If you are using dual flexible discs, the drive on the left is Drive A and the drive on the right is Drive B.
- If you are using a fixed disc, the fixed disc is in Drive A and the drive on the left (for a flexible disc) is Drive B.

PCF and File Manager show you the drive name as **A:** or **B:**. The backslash (\) indicates the Main directory of that drive. For example, if the drive is A, there are no subdirectories on that drive, and you have the File Manager screen, you would see **Displayed Dir: A:**

Directory Names

A directory is a grouping of files, just as a phone directory is a grouping of phone numbers. Every disc starts out having one Main directory. But if you want to keep groups of files separate from one another or if you don't want one very large directory, you can also create subdirectories. For example, if two people using the same disc want to keep their cardfiles separate, you can create a subdirectory for each person.

The Main directory follows the drive name and is identified by a backslash. One or more subdirectories can follow the Main directory, and each is followed by a backslash. Each subdirectory can have up to eight characters. For example, **A:\Bob** identifies Bob's subdirectory on the disc in Drive A.

Default Drives and Directories

There is always a drive and directory in which PCF assumes you want to store your cardfiles. These are called the default drive and the default directory. Unless you tell PCF otherwise, it will always look for and store your cardfiles there.

Whenever PCF asks you for a name, it shows you the default drive and directory with the cursor ready for you to type a filename or cardfile name. If you want to use the defaults, all you have to do is specify the name.

If you don't want to use the default drive and directory, you can give PCF a different address in one of two ways:

- You can hold down **Shift** and press **Tab** to erase the default drive and directory when PCF shows them to you, then type the address you want to use.
- You can use File Manager in PCF to change the default drive and directory.

How to Tell Which Is the Default Drive and Directory

When you first start using PCF, the default drive is the one that contains the PCF Application Disc. The default directory is the one in which you have installed PCF. For example, if you put the PCF Application Work Disc in Drive A and PCF is installed in the Main directory of your disc, then A is the default drive and the Main directory is the default directory. If you later put the PCF Application Work Disc in Drive B, then B becomes the default drive. In this sense, the default drive floats with the PCF Application Disc. However, the Main directory remains the default directory until you change it.

When you use File Manager in PCF to choose a new default drive or directory, PCF remembers your choice even after you exit the program. The default drive no longer floats with the Application Disc; default drive and directory are always the last ones you have chosen.

If you want to return to the floating default drive, you can do that too. You enter again and change the default drive to the one that currently holds the PCF Application Disc.

Changing the Default Drive and Directory

If you want to store or call up cardfiles in a different drive, directory, or both, you can use File Manager to choose new defaults. Then you won't need to change the drive and directory each time you are asked for a filename or cardfile name.

To choose a new default drive, directory, or both:

1. If the Main PCF screen is showing, touch `Cardfile Tasks`. PCF shows you the Main tasks screen.

2. When the Main tasks screen is showing, touch

File Manager.

You will see the File Manager screen, showing the names of the default drive and directory.

3. Touch **PCF Dir**.

File Manager shows you the Return Directory screen and asks you to

Select or type the directory to return.

4. If you want to change **only the drive**, type the new drive name followed by a backslash to indicate the Main directory of that drive.

For example, to change from B to A, type a:\.

5. To change **both** drive and directory, type new names for both.

For example, to change from B to A with a new sub-directory, you might type a:\ bob\.

6. If you want to change **only the directory**, type the old drive name and the new directory name.

For example, to keep B as the default but choose a different default directory, you might type b:\bob\.

7. After you have typed your instructions, press **Return**.

File Manager asks you to

Press Return Dir if information is correct.

8. Touch **Return Dir**.

9. Touch **Back to PCF**.

You return to the Main tasks screen in PCF.

The drive and directory that you chose are now the defaults and will remain so until you change them.

F

Telling PCF Which Printer to Use

What the PCF Printer Settings Are

PCF gives you a choice of three printers:

- `PRN:` —the primary printer
- `LST:` —the secondary printer
- `INT:` —the integral thermal printer

`PRN:` and `LST:` can be any printer you want, even the integral thermal printer. `INT:` is always the integral thermal printer. See *Getting Started with Your HP Touchscreen Personal Computer* for instructions on how to set the values for `PRN:` and `LST:`.

PCF is already set to print to `PRN:` —the printer you have designated as the primary printer. If that's what you want when you print in PCF, you're all set.

If you want to choose a different printer, you need to change the setting. If you want to designate a secondary printer, you will also need to set the `LST:` value.

How to Set the Printer for PCF

To tell PCF which printer to use:

1. If the Main PCF screen is showing, touch `Cardfile Tasks`.
2. When the Main tasks screen is showing, touch `File Manager`.

- 3.** Touch **File Funct'ns** .
You see the File Functions screen.
- 4.** Touch **Print File/Dir** .
You see the Print screen.
- 5.** Touch **Set Printer** .
You see the Set Printer screen.
- 6.** Touch **INT:** , **PRN:** , or **LST:** , depending on which printer setting you want.
When you make your choice, an asterisk appears by the function label you have chosen to indicate the new printer setting.
- 7.** When you are satisfied with the printer setting, touch the "Exit" function label four times to return to PCF.

F-2 Telling PCF Which Printer to Use



G

Reference Guide to Error Messages

- Message: A disc error occurred.
- Condition 1: There is no disc in the specified drive.
- Remedy 1: Put the disc in the drive and make sure the drive is turned on.
- Condition 2: A disc or a disc drive is not working properly.
- Remedy 2: Follow these steps:
1. Check with File Manager to see whether there is enough space on the disc (see Appendix D, the section on "How to Use File Manager to Estimate Cardfile Size").
 2. If there is, see that the disc is not write-protected.
 3. If it is not, try using a different disc.
 4. If none of these steps work, exit to the Main PCF screen and try again.
- Message: An unexpected error occurred.
- Condition: Within the PCF program, a difficulty that PCF designers did not foresee has blocked what you tried to do.
- Remedy: Follow these steps:
1. Try the same action again.
 2. If the message appears a second time, exit PCF and restart your computer by pressing / / , then try again.

3. If the message appears repeatedly, record the steps that preceded it together with the error number (if any) and call your support person as listed in the *Series 100 Support Guide*.

Message:	At least one of the three files that comprise a cardfile is missing.
Condition:	You can't call up a cardfile or combine cardfiles because at least one of the three files (.pdt, .pfm, .pix) that make up a cardfile has been lost or was not created.
Remedy 1:	If you have a backup copy of the cardfile, copy that one.
Remedy 2:	Create the cardfile again from scratch.
Message:	Can't create cardfile--too many fields were defined.
Condition:	You can't name and save a cardfile because your card form has more than 252 fields—the maximum number.
Remedy:	Delete fields until you have no more than 252.
Message:	Can't create data files--a disc error occurred.
Condition:	When you try to create a cardfile, PCF can't create the index file (.pix), the data file (.pdt), or both.
Remedy:	Follow the steps outlined under the message A disc error occurred.
Message:	Can't create format (.pfm) file--a disc error occurred.
Condition:	When you try to create a cardfile, PCF can't create the file for the card form (.pfm).
Remedy:	Follow the steps outlined under the message A disc error occurred.

G-2 Reference Guide to Error Messages

Message: Can't dial--no Autodial field was defined.
Condition: You try to dial automatically but your card form has no field with an A in it (autodial field).
Remedy: Change your card form and set an autodial field (see Chapter 13).

Message: Can't find cardfile.
Condition: PCF can't find a cardfile under the name you have asked for.
Remedy: Follow these steps:

1. See that you have spelled the name correctly.
2. If you have, see that you have correctly specified the drive and directory.
3. If you have, check with File Manager to see whether this cardfile is in the default drive and directory (or in the drive and directory you have specified).
4. If it is, follow the steps outlined under the message A disc error occurred.

Message: Can't find file.
Condition: PCF can't find a disc file under the filename you have asked for.
Remedy: Follow these steps:

1. See that you have spelled the filename correctly.
2. If you have, see that you have correctly specified the drive and directory.
3. If you have, check with File Manager to see whether this disc file is in the default drive and directory (or in the drive and directory you have specified).
4. If it is, follow the steps outlined under the message A disc error occurred.

Message: Can't finish copying to the disc file.
Condition: You try to transfer out but PCF can't copy to the destination disc file.
Remedy: Follow the steps outlined under the message A disc error occurred.

Message: Can't finish printing cardfile.
Condition: You try to print your cardfile, but some or all of it does not print.
Remedy: Follow these steps:

1. Make sure that your printer is connected, turned on, supplied with paper, and otherwise ready for printing.
2. If it is, check with File Manager to see that the printer setting is the one you want (see Appendix F).
3. If it is, check to see whether the system is configured correctly for the printer (see Chapter 10 in *Using Your HP Touchscreen Personal Computer*).
4. If none of these steps works, follow the steps outlined under the message A disc error occurred.

Message: Can't print--no print fields were selected.
Condition: You try to print when there are no P's in any fields in the card form on the Print screen.
Remedy: Go to the Print screen and touch **Print Field** to put P's in the fields you want to print.

Message: Can't print to the current printer.
Condition: You try to print, but the printer doesn't work.
Remedy: Follow Steps 1 through 3 under the message Can't finish printing cardfile.

G-4 Reference Guide to Error Messages

Message: Can't reopen the last cardfile.
Condition: When you return from File Manager to PCF, the current cardfile is not available.
Remedy: Follow the steps outlined under the message A disc error occurred.

Message: Can't transfer in from current cardfile.
Condition: PCF asks you for the name of the disc file you want to transfer from and you type the name of the current cardfile or of one of the three files that make it up.
Remedy: Type the name of the file (other than the current cardfile) you want to transfer from.




Message: Can't transfer out to current cardfile.
Condition: PCF asks you for the name of the disc file you want to transfer to and you type the name of the current cardfile or of one of the three files that make it up.
Remedy: Type a new name for the disc file you want to create.

Message: Can't use cardfile form--error found.
Condition: You try to call up a cardfile, but PCF can't find the file that contains the card form (**pfm**).
Remedy: Follow the steps outlined under the message A disc error occurred.

Message: Card can't be added--card limit has already been reached.
Condition: You tried to add a card and the cardfile is full.
Remedy 1: Delete cards you don't want any more.
Remedy 2: Start a new cardfile with this card.

Remedy 3:	Divide the cardfile by creating worksets and copying them (see Chapter 11, the section on "Dividing a Cardfile").
Message:	Cardfile already exists.
Condition:	PCF asks you to name a new cardfile or a copy and you type a name that has been given to another cardfile in the same drive and directory.
Remedy:	Choose a different name.
Message:	Cardfile contains no cards.
Condition:	You try to print, find cards, or dial a telephone using a cardfile that has no cards in it.
Remedy:	Put at least one card in the cardfile.
Message:	File Manager available only when you use P.A.M.
Condition:	You try to enter File Manager from PCF but you are running PCF without P.A.M., so you do not have File Manager.
Remedy:	Exit PCF and start up P.A.M. or continue without using File Manager.
Message:	File already exists.
Condition:	PCF asks you to name a new disc file or a copy of one and you type a name that has been given to another file in the same drive and directory.
Remedy:	Type a different name or specify a different drive and directory.
Message:	Incorrect file format.
Condition:	You try to transfer in from another program but the source file is not in a format that PCF recognizes (see Appendix C).

G-6 Reference Guide to Error Messages

Remedy:	Follow these steps: <ol style="list-style-type: none"> 1. Use Browse File in File Manager to see whether the file is in a format that PCF can understand and whether it has fewer than 2,000 characters per record. If so, try again. 2. If not, transfer in a file that meets the conditions in Step 1.
Message:	Internal error # N. Press RETURN to exit PCF.
Condition:	An error with the number shown (represented by #N) has occurred in the System Library.
Remedy:	Follow these steps: <ol style="list-style-type: none"> 1. Exit PCF and restart your computer by pressing  /  /  then try the same action again. 2. If the message appears repeatedly, record the steps that preceded it together with the error number and call your HP support person as listed in the <i>Series 100 Support Guide</i>.
Message:	Invalid pathname specified for file, directory, or disc drive.
Condition:	You ask for a cardfile (or a file) by a name that PCF (or File Manager) can't find.
Remedy:	Follow these steps: <ol style="list-style-type: none"> 1. Check to see whether you have spelled the name correctly, and put in backslashes correctly. 2. Check with File Manager to see whether the cardfile or file does exist and whether you have specified the correct drive and directory.

Message:	Choose from 1 to 66 lines.
Condition:	You try to set lines per label or lines per card and you type a number other than 1 to 66.
Remedy:	Type a number from 1 to 66 and try again.
Message:	No cardfile is open.
Condition:	You try to add or find cards or print a cardfile when there is no current cardfile.
Remedy:	Call up the cardfile you want and try again (see Chapter 6).
Message:	Not a valid file name.
Condition 1:	You are asked to name a new file and you type a name that PCF doesn't permit.
Remedy 1:	Check to see whether you have specified the correct drive and directory, whether sub-directories you specified do exist, and whether the filename has eight characters or fewer and follows the rules for filenames given in Chapter 3, the section on "Naming and Saving the Cardfile."
Condition 2:	You try to create a cardfile when there is no disc in the drive you designate.
Remedy 2:	Put a disc in the drive.
Condition 3:	You try to create a cardfile on a write-protected disc.
Remedy 3:	See that your disc is not write-protected.

G-8 Reference Guide to Error Messages

Index

A

- 4-1/4-11**
 - 5-1, 16-1, map**
 - 3-5, 4-4, 13-7/13-9,**
 - 16-1, map**
 - 5-1/5-7**
 - 5-1/5-2**
 - 5-3/5-7**

 - 13-7/13-8**
 - 4-4**
 - 18-3**
 - 5-5, 16-1, map**

 - 2-5, 5-3**
 - 5-3**
 - 9-5**
 - 6-2/6-4, 12-4, 14-6,**
 - 16-1/16-2, App D, map**
 - map**
 - 16-2**
 - 11-6**
 - 3-6**
 - 1-9**

 - 6-3/6-4**
 - 6-4/6-5**
 - 6-2/6-3**

 - 9-2, 9-5/9-9**
 - 9-2**
 - 1-10**
- Adapting existing card form
- Add Cards**
 - Add Char To Field**
- Adding cards to cardfile
- getting ready to add cards
 - steps for adding cards
- Adding fields to existing card form
- cardfile with cards in it
 - empty cardfile
- Address book, card form
- Add This Card**
- Alphabetic information
- planning to fill in names as
 - putting into key field
 - searching by
- Another Cardfile**
- Append To File**
 - defined
 - for combining cardfiles
- Arranging cards in cardfile
- Arrow keys, defined
- Asking for a cardfile
- from different drive and directory
 - from disc not in computer
 - on present disc
- Asterisk (*)
- as a wildcard symbol
 - as part of search term
 - defined



Autodial
13-2, 13-9 changing field on card form
8-2 checking equipment before using
8-1 defined
8-1 equipment needed
5-4/5-5 filling in telephone numbers
2-4, 8-1 length of numbers for
2-4 planning for
4-6 resetting for cardfile with no cards
App B setting up and configuring modem for
3-6/3-7 setting up for in new cardfile
8-2 steps for dialing
18-10 Automobile Maintenance, card form

B

Backing up cardfile
12-1 explained
12-1/12-6 steps for
App D, App E Back to PCF
App C BASIC and PCF
Border
3-7/3-8, 4-7/4-8, 13-10 fixing broken border on card
3-8, 4-10, 13-10 restoring original card border

C

Calling up
6-3/6-4 cardfile from different drive and directory
6-4/6-5 cardfile from disc not in computer
14-6/14-7 cardfile from File Manager
6-2/6-3 cardfile on present disc
4-2/4-3 existing card form
13-7 old card form after transferring out

Index-2

1-7, 16-2, map
1-7, 16-2, map
5-1/5-7
5-7
5-7
7-1/7-3
7-4
13-2, 13-9/13-10
4-7/4-8
3-9
1-5
5-6, 7-5
9-1/9-11
9-8/9-9
9-9/9-10
9-7/9-8
6-6
6-7/6-8
3-7/3-8, 3-10, 4-7/4-8
6-1/6-10
13-10
3-7
13-9/13-10
3-7
7-4, 10-6/10-7
6-1
3-6
10-2/10-4
7-3/7-5
10-1/10-11
7-5
6-8/6-9
5-5/5-6
9-4/9-5, 9-10
5-1/5-7
6-3/6-4
6-4/6-5
6-2/6-3
12-1/12-6, 15-1

Cancel
Cancel & Exit
Card
adding to cardfile
adding to full cardfile
adding to full disc
changing information on
changing number of lines for printing
changing size or card form for file with cards in it
changing size to adapt existing card form
cleaning up stray marks on after correcting form defined
deleting from cardfile
finding
finding by dates
finding by phone number
finding by time
finding out number in cardfile
finding particular cards or parts of cardfile
fixing broken border or restoring borders
looking at
making longer when changing card form
making longer when designing card form
making shorter when changing card form
making shorter when designing card form
number of lines each for printing
open card, defined
order within cardfile
printed appearance of
printing
printing information from
printing several in order
reading individual
saving
searching for in workset
Cardfile
adding cards to
asking to see from different drive and directory
asking to see from disc not in computer
asking to see on present disc
"backing up" file

9-5	changing by changing workset
13-1/13-13	changing form when there are cards
4-1/4-11	changing form when there are no cards
4-6	changing way sorted
12-3/12-6	combining on different disc
11-1, 11-4/11-7	combining on same disc
App D	combining using File Manager and transfer functions
App D	combining using worksets and transfer functions
App D	combining when disc space is tight
12-3/12-6	copying on different disc
11-1/11-2	copying on same disc
App D	copying tricks when disc is full
11-6/11-7	creating by combining worksets
6-2	current, defined
1-5	defined
15-1/15-3	deleting
7-5	deleting cards from
12-3/12-6	dividing on different disc
11-1, 11-2/11-4	dividing on same disc
11-3	effects of dividing on new and old
App D	estimating size
6-6	finding out number of cards
6-7/6-8	finding particular cards or parts of cardfile
11-1, 12-2/12-3	getting ready to copy
5-7	making space when full
12-1/12-6	moving to new disc
3-9/3-10	naming
2-3	planning as rotating cardfile
2-4/2-5	planning mailing list
App D	planning to split
10-4	preparing to print
1-3	putting on separate work disc
6-8/6-10	reading individual cards from
14-1/14-9	renaming
11-1, 11-7/11-8	replacing
App D	running out of room while combining or transferring information
6-6/6-7	scrolling through
9-1/9-11	searching for part
3-6	sorting or arranging cards in
12-4	temporary location while copying to another disc

12-1/12-6	tightening up space on
App D	using File Manager and transfer functions to combine
	Cardfile name
14-2/14-6	changing
14-1	eight characters
11-2/11-4	for copy of file
4-9	for modified card form
3-9/3-10	for newly designed card form
14-1	keeping track of
14-1/14-6	rules for
14-6/14-9	what to do if you forget
14-1	Cardfile of cardfile names
16-3, map	Cardfile Tasks
	Card form
4-1/4-11	adapting existing to make new form
13-1/13-13	changing when there are cards
3-1/3-12	creating new form
1-5	defined
13-12/13-13	moving information into from holding file
2-1/2-2	planning
2-6/2-7, App C	planning to be compatible with other programs
13-2/13-3	what you can change when there are cards in cardfile
	Card form names
18-3	Address Book
18-10	Automobile Maintenance
18-3	Client Information
18-8	Contractor Estimate
18-7	Convention Registration
18-8	Daily Receipts
18-12	Diving Log
18-6	Employee Information
18-2	Imports Cardfile
18-5	Membership Record
18-5	Music Catalog
18-9	Phone Message
18-11	Restaurants
18-11	Running
18-4	Shipping Invoice
18-4	Stock Inventory
18-7	Suppliers and Their Products
18-10	Tax Deduction

18-9	Wine Cellar
3-2/3-3	Card size, enlarging
13-2/13-3	Changes you can make in cardfile with cards in it
13-9	Changing autodial field
14-2/14-6	Changing cardfile name
13-1/13-13	Changing card form of cardfile with cards
7-4	Changing card size for printing
App E	Changing default drive and directory
7-1/7-3	Changing information on card
4-6, 13-2, 13-9	Changing key field
App D	Choose Dir
18-3	Client Information, card form
11-1, 11-4/11-7	Combining cardfiles
App D	running out of room while
App D	using File Manager and transfer functions
App D	using transfer out and transfer in
App D	using worksets with transfer functions
App D	when disc space is tight
App D	with File Manager
9-6/9-7	Comparative method of searching numbers (greater than, less than)
App C	CONDOR and PCF
18-8	Contractor Estimate, card form
18-7	Convention Registration, card form
11-2, 12-3, 13-4, 13-12, 16-3, App D, map	Copy Cardfile
App D	Copying a cardfile
11-2, 11-4	estimating space on new disc
11-1, 12-2/12-3	filename for
11-1, 11-2	getting ready
12-3/12-6	on same disc
12-1/12-6	to another disc
14-2/14-6	to back it up
11-4/11-7	to change name
12-1/12-6, App D	to combine with another
App D	to tighten up disc space
App D	tricks for when disc space is tight
App D	using File Manager
11-2/11-4	Copying File
	Copying workset as permanent cardfile

11-2, 11-3, 11-5, 11-7,
16-3, map
3-11, 4-10, 13-11,
16-3, map
3-1, 4-1, map
2-1/2-2

12-1/12-6, App D
12-1/12-6, App D

12-4/12-5
1-5, 6-2

1-6
5-2
7-1/7-2
1-8

Copy To PCF

 Create & Exit

 Create Cardfile
 Creating cardfile, planning for
 Crowded disc
 making space by tightening cardfiles
 opening space by moving cardfiles
 Current cardfile
 creating while copying to another disc
 defined
 Cursor
 defined
 moving between fields
 moving from field to field when changing information
 position of

D

18-8 Daily Receipts, card form
2-7, 5-3/5-4 Date, setting up to sort or search by
2-6, 5-3/5-4 Date field, designing
 Dates
 9-9 searching for all earlier than or later than
 9-8 searching for all in one month
 9-8 searching for all in one year
 9-9 searching for all on one day of month
App C dBASEII and PCF
3-10, App E Default drive and directory
 App A defined
 App E fixed disc
 App E how to change
 App E how to tell the defaults
1-5/1-6 Definitions of words and phrases in PCF
7-5, 16-3, map Delete Card
15-1, 16-4 Delete Cardfile
 Deleting
 7-5 card

15-1/15-3	entire cardfile
4-5	fields from card form to adapt card
13-8	fields from card form to change card
App E	file or directory with File Manager
3-5, 4-5, 13-8, 16-3,	Del From Field
map	
3-7, 16-4, 8-2, map	Dial Phone
	Directory
App E	defined
App E	Main
App E	names
	Disc
12-3/12-6	copying from one to another
App D	estimating space on
5-7, App D	making space on when full
12-1/12-6	moving cardfiles to new
10-9/10-11	printing on
1-11	removing from drive
12-1/12-6	tightening cardfile to make space on
1-11	warnings about removing
App D	what to do when space is tight
	Dividing cardfile
11-4	effects on new and original files
11-1, 11-2/11-4	on same disc
18-2	Diving Log, card form
10-6, 13-8, 16-4, map	Do Not Print
1-2/1-3	Double-sided discs, starting on
1-9	Down arrow key, defined
3-3/3-5	Drawing and labeling fields
	Drive name
App E	defined
App E	for dual flexible discs
App A, App E	for fixed discs

E

18-6	Employee Information, card form
	Enlarging card
4-7/4-8	when adapting card form

Index-8

3-2/3-3 when designing card form
9-6 Equals (=)
8-1, App B Equipment for autodialing
Erasing
4-9 adapted card form
3-2, 4-3, 4-7 card borders
3-11 card form
App G Error messages, causes and responses
5-6, 16-4, map Exit Add
App D Exit Copy
3-11, 16-4, map Exit Create
App D Exit FileFctn
16-5, map Exit Find
10-7/10-11, 16-5, map Exit Options
1-7, 1-10, 16-5, map Exit PCF
10-8/10-11, 16-5, map Exit Print
6-10, 16-5, map Exit Select
16-5, map Exit Tasks
9-5, 9-10/9-11, 11-4, Exit Workset
16-5, map Expanded Dir
App D

F

Fields
4-4 adding to adapt existing card form
13-7 adding to change card form
13-2/13-3, changing in card form
13-7/13-9
13-8/13-9 changing lengths in card form
4-3/4-6 changing to adapt card form
1-5, 3-3/3-4 defined
4-5 deleting to adapt card form
13-8 deleting to change card form
3-3/3-5 drawing and labeling to design card form
2-4 for automatic phone dialing
11-5 for combining cardfiles
2-4/2-5 for mailing list

10-2/10-4	how PCF prints
3-5	keeping separate
4-5/4-6	lengthening to adapt card form
4-5	shortening to adapt card form
3-5	shortening to design card form
10-5/10-6	telling PCF which to print
	File
App E	address of
App E	browsing through with File Manager
App E	copying with File Manager
App E	renaming with File Manager
App E	stored by File Manager
App D, App E,	File Funct'ns
App F	
16-6, App D, App E,	File Manager
App F	
	File Manager
App D, App E	entering from P.A.M.
App D, App E	entering from PCF
App E	explained
App E	how it stores files
App E	how to use
App D	using to estimate cardfile size
App D	using with transfer functions to combine cardfiles
	Filename
14-2	defined
14-2	extensions
10-10	for print to file
13-5, 13-6	for transferring out
App E	how File Manager stores files
14-3	list of
14-4, 14-7/14-8	looking for more
14-4, 14-7/14-8	looking in different subdirectory
14-2	of cardfile
14-2	.PDT
14-2	.PFM
14-2	.PIX
9-3, 16-6, map	Find & View
9-1, 9-10, 16-6, map	Find Cards
9-1/9-11	Finding cards
9-5	by alphabetical terms

- 9-8/9-9** by dates
- 9-6/9-7** by numerical terms
- 9-9/9-10** by telephone number
- 9-7/9-8** by time
- 9-1/9-11** Finding part of cardfile
- 9-1** getting ready
- 9-2/9-4** steps for finding
- Fixed disc
 - 1-1/1-2** starting PCF from
 - App A** working with
 - 5-7** Full cardfile, adding cards to
 - 5-7** Full disc, adding cards to
 - 6-6, 16-6, map** FullName & Count
 - 1-5** Function key boxes, defined
 - 1-9/1-10** Function keys (f1-f8)
 - 1-9/1-10, 16-1/16-9** Function labels, each one defined

G

- 9-7** Greater than (>) as search term

H

- 8-1, App B** Hayes or Hayes-compatible modem for autodialing
- Holding file
 - 13-1** explained
 - 13-4/13-5** moving all card form information into
 - 13-12/13-13** moving information from into modified form
 - 13-5/13-6** moving some card form information into
 - 13-3/13-6** putting information into to modify card form
 - 1-9** Home key

I

- 18-2** Imports Cardfile, card form
- 6-9** Index tab label, touching to select card

App F INT:
7-3, App F Integral thermal printer
18-4 Inventory, card form

K

1-9/1-10 Keyboard, how to use
Key field
7-3 changing information in
4-6 changing to adapt card form
13-2, 13-9 changing to re-sort cards
3-6 default
1-5, 3-6 defined
5-3 filling in alphabetic information
2-5/2-6, 3-7 setting up for sorting

L

3-3/3-5 Labeling fields
13-2 Labels, changing and moving in card form
1-10/1-11 Leaving PCF
Lengthening
13-10 card
4-7/4-8 card to adapt card form
13-8/13-9 fields in card form
4-5/4-6 fields to adapt card form
9-7 Less than (<) as search term
Lines
7-4 figuring how many for printing cards
10-6/10-7 figuring how many for printing labels
7-4 telling PCF the number for printing cards
10-6/10-9 telling PCF the number for printing labels
7-4, 16-6, map Lines Per Card
7-4 Lines per card, defined
10-6 Lines per label, defined
10-7, 16-6, map Lines Per Lbl

- 10-9/10-11 Lists
 - creating
 - 10-1/10-11 printing
 - Looking
 - 6-1/6-10 at cards
 - App E at list of files in another drive and directory
 - 6-6/6-7 through cardfile
 - App F LST:
-

M

- Mailing list and labels
 - 2-4/2-5 planning cardfile for
 - 10-1/10-11 printing
 - App C MailMerge and PCF
 - 18-5 Membership Record, card form
 - App G Messages, causes and responses for error
 - Modifying card form
 - 13-11 finishing and saving new form
 - 13-1/13-13 of cardfile with cards
 - Moving
 - 12-1/12-6 cardfiles to new discs
 - 5-2 cursor between fields
 - 13-12/13-13 information from holding file into modified form
 - 13-3/13-6 information into holding file, when changing card form
 - 18-5 Music Catalog, card form
-

N

- Naming
 - 4-9 adapted card form
 - 3-9/3-10 card form/cardfile
 - 13-11 modified card form
- Narrowing search
 - 9-10/9-11
 - 7-2, 7-4/7-5, 16-7, map Next Card
- 6-6 Number of cards in cardfile

Numbers

- 9-2** as search terms
- 8-1** for autodialing
- 9-6/9-7** searching by, if you are unsure of other symbols
- 9-6** searching by, when you know all symbols and numbers (regular number searches)
- 5-3** setting up for sorting or searching
- 9-7/9-8** typed as time

O

- 6-1** Open card, defined
- Other programs
 - 2-6/2-7, App C** planning to use PCF with
 - App C** using PCF with

P

- P.A.M. (Personal Applications Manager)
 - App D, App E** entering File Manager from
 - 1-2/1-5** Main menu, starting PCF from
 - 10-8/10-9** Paper, printing on
 - App E** Pathname, defined
 - 1-2/1-4, App D, App E** PCF Application Work Disc
 - App D** warnings about removing
 - App D** what to do when space is tight
 - App E** PCF Dir
 - 1-6/1-8** PCF screen, parts of
 - 14-2** .PDT
 - 1-2/1-5** Personal Applications Manager (P.A.M.) Main menu, starting PCF
 - 1-2/1-4, App D** Personal Work Disc
 - 14-3** .PFM
 - Phone
 - 8-2/8-3** how to use automatic dialing
 - 3-6/3-7** setting up field for automatic dialing
 - 18-9** Phone Message, card form
 - 6-7/6-8** Pinpointing card or part of cardfile

14-2
2-1/2-7
7-2, 7-4, 16-7, map
App F
10-8, 10-11, 13-6, 16-7,
map
7-4/7-5, 16-7, map
10-4, 13-5, 16-7

10-8
App F
10-9, 10-10/10-11
App F
App F
App F
10-6, 16-7
App F
7-3/7-5, 10-1/10-11,
App E
7-3/7-4
7-4
10-2/10-4
10-1/10-11
10-1/10-11
10-1/10-11
10-6/10-7
7-3/7-4
10-8
10-5/10-6
2-4
7-5
10-5/10-6
10-5, 10-7, 13-5,
16-8, map
10-10, 16-8, map

10-9
10-10, App D
16-8, map
App F

.PIX
Planning card form
Previous Card
Primary printer
Print & Exit
Print Card
Print Cardfile
Printer
checking before printing
setting for PCF
stopping
telling PCF which to use
three choices described
Print Field
Print File/Dir
Printing with PCF
cards one at a time
changing card size for
how fields will be printed
information from cards
lists
mailing labels
number of lines per card
one complete card at a time
paper for
parts of card
planning for printing
several cards in order
telling PCF which fields to print
Print Options
Print To File
Print to file
defined
filename for
Print to Printer
PRN:

R

- 6-8/6-10** Reading individual cards
- 4-6** Rearranging (sorting) cardfile
- 12-5/12-6** Recopying cardfiles, to copy to another disc
 - Redraw Border
- 3-8, 4-5, 4-7, 4-8, 13-10, 16-8, map** Removing discs from disc drive, warnings about
 - Rename File
- 14-4, map** Renaming file
 - Replace File
- App E** Replacing cardfiles
- 11-8, 16-8, map** Resetting autodial when adapting card form
- 11-1, 11-7/11-8** Responding to error messages
- 4-6** Restaurants, card form
- App G** Restore Original
- 18-11** Return Dir
- 7-1, 7-2, 16-9, map** Return File
- App E** Returning cardfile to PCF from File Manager
- 14-9, map** Return key, defined
- 14-6, 14-8** Reversing changes on card
- 1-9** Rotating cardfile, planning for
- 7-2, 7-4** Running, card form
- 2-3**
- 18-11**

S

- 4-9/4-11** Saving
 - adapted card form
- 5-5/5-6** card
- 3-11/3-12** card form
- 13-11** modified card form
- 1-6/1-8** Screen, parts of
- 6-6/6-7** Scrolling through cardfile
- Searching
 - 9-2, 9-5** for alphabetical terms
 - 9-2, 9-6/9-7** for greater than or less than specific number
 - 9-2, 9-6/9-7** for numbers

9-1/9-11 for part of cardfile
9-1 getting ready for
9-10/9-11 narrowing scope of
2-6, 5-3/5-4 planning for by date or time
2-5, 5-3 planning for by name
9-2/9-4 steps for
9-2 wildcard (for part of term)
9-2, 9-5 Search terms
9-2 alphabetical
9-2, 9-6/9-7 for finding cards
App F numerical
6-8 Secondary printer
1-10 Selecting card, defined
14-6, 14-8 Select key, defined
3-7, 4-6, 13-9, 16-9, Sending cardfile to PCF from File Manager
map Set Autodial
3-6, 13-9, 16-9, map Set Key Field
App F Set Printer
18-4 Shipping Invoice, card form
Shortening
13-9/13-10 card to change card form
4-7 existing card size when adapting card form
4-5 existing field when adapting card form
3-5 existing field when designing card form
13-8 field lengths in changing card form
4-2, 13-7, 16-9, map Show Old Form
1-3/1-5 Single-sided discs, starting PCF from
Sorting
3-6 cards in cardfile
13-2, 13-9 changing how cards are sorted (key field)
2-6, 5-3/5-4 planning for by date and time
2-5, 5-3 planning for by name
3-6 telling PCF how by setting key field
11-1, 11-2/11-4 Splitting cardfile
1-2, map Start Applic
App D Start Copying
1-1/1-5 Starting PCF
1-2/1-3 with double-sided discs
1-2/1-5 with dual flexible disc drive
1-1/1-2 with fixed disc

1-3/1-5 with single-sided discs
App D Start Over
14-5, map Start Rename
18-4 Stock Inventory, card form
3-10 Storing cardfile
3-9 Stray marks, cleaning off after correcting card form
App E Subdirectories, setting up
Subset (see Workset)
18-7 Suppliers and Their Products, card form
1-2/1-4 System Work Disc

T

1-10 Tab key, defined
18-10 Tax Deduction, card form
9-9/9-10 Telephone number, searching by
12-4 Temporary cardfile location, while copying to another disc
Terms
9-2 for finding cards
1-5/1-6 used in PCF defined
14-2 Three filenames in cardfile name
Time
9-8 finding part of
9-7/9-8 how to type numbers
9-7/9-8 searching by
9-8 searching for cards earlier than/later than
2-6, 5-4 setting up to sort or search by
2-6, 5-4 Time field, designing
Titles
13-2 changing in card form
3-3 putting into card form
1-8 Touch screen, explained
13-2, 16-9, App D, map Transfer In
13-4, 13-6, 16-9, App D, map Transfer Out
App D Transferring cardfiles when disc space is tight
Transferring in
13-12 defined
App D running out of room while

App D using to combine cardfiles
App D using with File Manager
App D using with worksets to combine cardfiles
 Transferring information
App C from BASIC
App C from CONDOR
App C from dBASEII
App C to BASIC
App C to CONDOR
App C to dBASEII
App C to MailMerge
2-6/2-7 Transferring information to or from other programs, planning for
 Transferring out
13-3 defined
App D running out of room while
App D using to combine cardfiles
App D using with File Manager
App D using with worksets to combine cardfiles

U

1-9 Up arrow key, defined
14-2/14-6 Using File Manager to rename cardfile
2-6/2-7, App C Using PCF with other programs

W

Wildcard
9-2 defined
9-2, 9-5/9-9 how to use
18-9 Wine Cellar, card form
10-10 Word processing programs, using PCF with
9-2 Words, as search terms
 Workset
9-5 changing the cards in
11-6/11-7 combining into one cardfile

11-2/11-4	copying as permanent cardfile
9-5	copying as separate cardfile
9-1, 9-11	defined
9-11	effects of changing cards in
9-4, 9-10	finding cards in
9-2/9-4	making
9-4	searching for cards in
9-10/9-11	searching for part of
App D	using with transfer functions to combine cardfiles
9-11	ways you can use

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Personal Card File (45422A)

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Month Day Year

Name: _____
First Initial Last

Street: _____

City _____

State: _____ Zip _____ Phone (_____) _____

1. In what industry do you work?

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| 302 <input type="checkbox"/> Manufacturing | 308 <input type="checkbox"/> Insurance |
| 303 <input type="checkbox"/> Distribution, Wholesale, Retail Trade | 309 <input type="checkbox"/> Health and Medical Services |
| 304 <input type="checkbox"/> Real Estate | 310 <input type="checkbox"/> Education |
| 305 <input type="checkbox"/> Agriculture, Forestry, Livestock | 311 <input type="checkbox"/> Business and Consulting Services |
| 306 <input type="checkbox"/> Construction | 312 <input type="checkbox"/> Public Administration/Government |

2. Please check the box which best describes your occupational category.

- | | |
|---|--|
| 101 <input type="checkbox"/> Professional Staff | 105 <input type="checkbox"/> Educator |
| 102 <input type="checkbox"/> Middle Manager | 106 <input type="checkbox"/> Student |
| 103 <input type="checkbox"/> Top Manager | 107 <input type="checkbox"/> Retired |
| 104 <input type="checkbox"/> Owner or Principal | 108 <input type="checkbox"/> Other _____ |

3. Please check the box which best describes the principal function you perform.

- | | |
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| 202 <input type="checkbox"/> Marketing | 207 <input type="checkbox"/> Sales |
| 203 <input type="checkbox"/> Finance or Accounting | 208 <input type="checkbox"/> Personnel |
| 204 <input type="checkbox"/> Mgmt./Administration | 209 <input type="checkbox"/> Data Processing |
| 205 <input type="checkbox"/> Customer Service | 210 <input type="checkbox"/> Other _____ |

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Using Personal Card File (45422-90105)

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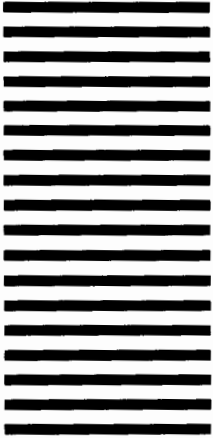
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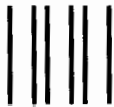
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