

CLARIS™

FOR MACINTOSH



Claris Organizer™

USER'S GUIDE

FOR MACINTOSH



Claris Organizer

USER'S GUIDE

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Claris Corporation

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Santa Clara, California 95052

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About Claris Organizer

Claris Organizer is a personal organization tool that integrates tasks, contacts, and notes in one compact application.



The agenda module schedules your appointments, events, special dates, and to-do items.



The tasks module keeps track of your to-do items.



The contact module manages information about your business associates, friends, and contacts.



The notes module organizes your notes, memos, and ideas.

Chapter 1

Getting started with Claris Organizer

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- Claris® Registration Card
- Claris Support Portfolio Service Directory

Chapter 1

Getting started with Claris Organizer

This chapter covers the following:

- brief overview of the Claris Organizer™ application
- information on using this guide
- installing Claris Organizer
- starting Claris Organizer

About Claris Organizer

Claris Organizer is a personal organization tool that integrates your calendar, tasks, contacts, and notes in one compact application.



The agenda module schedules your appointments, events, special dates, and to-do items



The tasks module keeps track of your to-do items



The contact module manages information about your business associates, friends, and relatives



The notes module organizes your notes, memos, and ideas

What's in this package

Here is what you'll find in the Claris Organizer package:

- one disk (*Disk I*), which includes the Installer application, the compressed Claris Organizer application, the compressed version of the Claris Help System, the compressed Claris Organizer Help, Claris Organizer Alarm Extension, a sample file, and a Read Me file
- *Claris Organizer User's Guide*, which gives you installation instructions, a step-by-step tutorial on using Claris Organizer, and a description on using Help
- Claris™ Registration Card
- *Claris Support Portfolio Service Directory*

What you need

To use Claris Organizer, your system must meet the following minimum requirements:

- at least a Macintosh Plus with a hard disk
- System 7.0 or later
- at least 1.2 MB of *available* memory (RAM) to run Claris Organizer (4 MB *total* memory is recommended)
- 2 MB of disk space to install all Claris Organizer files

Using this user's guide

To learn about Claris Organizer in the fastest and easiest way, follow the step-by-step instructions in chapters 2, 3, 4, 5, and 6 using the Sample Organizer file provided. The remaining chapters provide additional information to introduce you to Claris Organizer:

Chapter	What it covers
1: Getting started with Claris Organizer	Overview of Claris Organizer Installing and starting Claris Organizer
2: Working with agendas	Step-by-step tutorial for using the agenda module
3: Working with contacts	Step-by-step tutorial for using the contact module
4: Working with tasks and notes	Step-by-step tutorial for using the task and note modules
5: Working with attachments	Step-by-step tutorial for creating links between items
6: Finding and displaying information	Step-by-step tutorial for finding specific information
7: Printing	Basics of printing your calendar and an address book
A: Setting preferences	How to customize the modules
B: Importing data from other PIM products	How to use data you've already set up in other PIM products

Chapter

What it covers

C: Using Claris Organizer Help

How to find information you need in the Help system

D: Printing double-sided pages

How to print double-sided pages on various printers

Customer support and registration

Please take the time to complete and mail the postage-paid product registration card for your new software. For information about customer support, refer to the *Claris Support Portfolio Service Directory* included in the product package.

Making a backup copy

To protect your software, Claris recommends that you make a backup copy of your Claris Organizer disk before you start the installation procedure. When you name the backup disk, give the blank disk the same name as the disk you're copying (for example, *Disk 1*). Claris Organizer Installer won't recognize a disk if its name is different from the original.

Store the original disk in a safe place and use the copy for installation. For more information on backing up disks, see your *Macintosh Reference* manual.

- ◆ **Reminder** Lock your original Claris Organizer disk (slide the locking tab so that the hole in the disk is open) and keep it in a safe place.

Installing Claris Organizer

You must use the Installer program to install the Claris Organizer application—you can't copy the files to your hard disk by dragging the files to your desktop. The files are compressed and the Installer decompresses the files.

To install Claris Organizer:

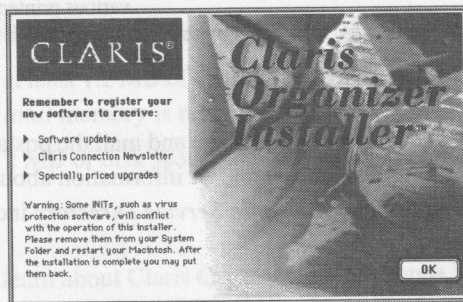
1. Turn on or restart your Macintosh and hold down the Shift key to turn extensions off.

Wait until you see the message "Welcome to Macintosh, Extensions Off" before releasing the Shift key. Some system extensions and control panels (like virus protection utilities) can interfere with the operation of the Claris Organizer Installer.



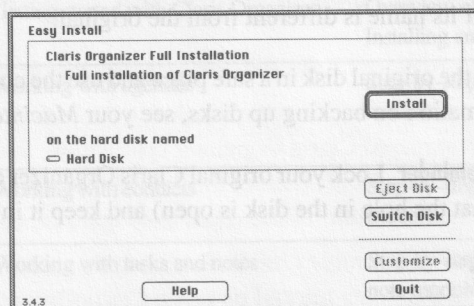
2. Insert *Disk 1* and double-click the disk icon to display the contents.
3. Double-click the Installer icon to start the Claris Organizer installer.

You see the Installer startup screen.



4. Click **OK**.

You see the Easy Install dialog box.



5. If you don't see the name of the hard disk where you want to install Claris Organizer, click **Switch Disk**.

If you switch to a disk that isn't a hard disk or doesn't have enough space available, the Install button is dimmed and the dialog box tells you why you can't install onto that disk.

6. **Click Install.**

The Installer begins copying files. A dialog box stays on the screen, telling you what the Installer is doing.

After all the files are installed, a final dialog box tells you the installation on your hard disk was successful.

7. **Restart your Macintosh after installation to turn the extensions back on, including the Claris Organizer Alarms extension.**

Starting Claris Organizer

To start Claris Organizer:

1. **Open the Claris Organizer folder, and double-click the application icon.**

You see the Personalize dialog box, where you supply your name, company name (if applicable), and software registration number.

2. **In the Personalize dialog box, type your name and press Tab.**



Claris Organizer
Application icon



3. **Type your company name, if applicable, and press Tab.**

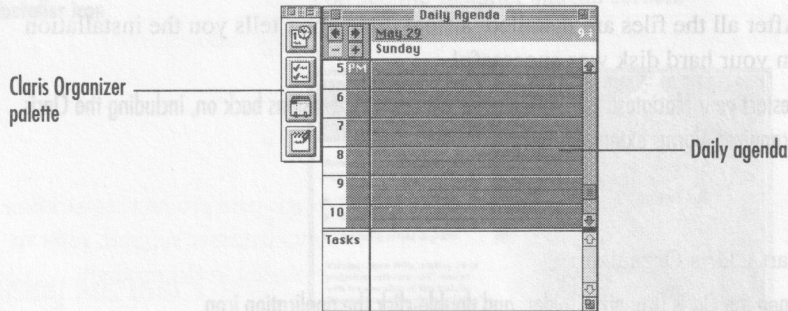
If you don't have a company name, you can put other information (like your address) in the box or leave it blank.

4. **Type the serial number from your Claris Organizer registration card.**

The serial number is optional, but Claris recommends typing it here in case you lose your registration card.

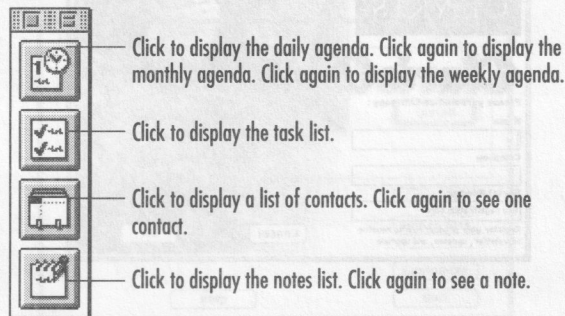
5. **Click OK.**

The first time you open Claris Organizer, you see a palette and a blank daily agenda. This is the start of a new file.



About the palette

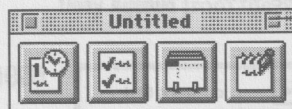
You'll notice that next to the daily agenda is the Claris Organizer palette. You use the palette to display the four, integrated modules.



- Explore the different modules by clicking the buttons on the palette.

When you click a button on the palette, you see the window for that module. You can move and resize the windows to fit on your screen. You can also drag the palette by the top to move it and you can display the palette horizontally.

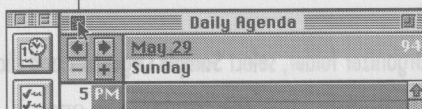
- To display the palette horizontally, choose **Wide Palette** from the Window menu.



Click to display the palette title bar only. Click again to see the entire palette.

To close a window, click the close box or choose **Close Window** from the File menu.

Close box



Closing a file

With Claris Organizer, you can have only one file open at a time. For now, close this new file and open the sample file to follow the tutorial.

To close the file:

1. Choose **Close File** from the File menu.
2. In the dialog box that appears asking if you want to save the file, click **Don't Save**.

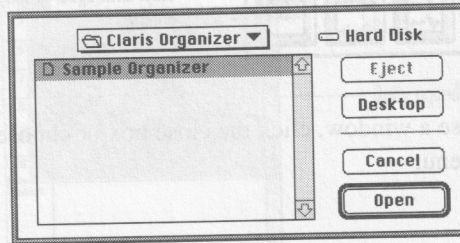
Opening the sample file

The sample file contains data you'll use for the next five chapters. Use the sample file to learn the basics of Claris Organizer before starting with your own data. If you plan to import existing data from another PIM product, see appendix B, "Importing data from other PIM products" when you're ready to work on your own.

To open the sample file:

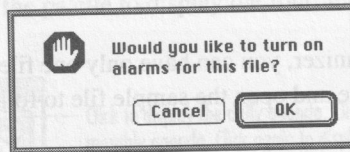
1. Choose **Open** from the File menu.

You see the Open dialog box.



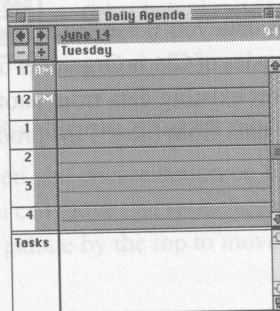
2. In the Claris Organizer folder, select **Sample Organizer** and click **Open**.

You can also double-click the filename to open it.



3. In the dialog box that appears, click **OK** to turn on alarms for this file.

You see the daily agenda showing today's date.



- ◆ **Don't see the daily agenda?** When you open an existing file, Claris Organizer opens the file in the same state as when you quit the application in the previous session. If someone has used this sample file before you, choose **Daily Agenda** from the Window menu.

Where to go from here

The next chapter takes you through the agenda, where you'll learn how to create appointments.

Working with agendas

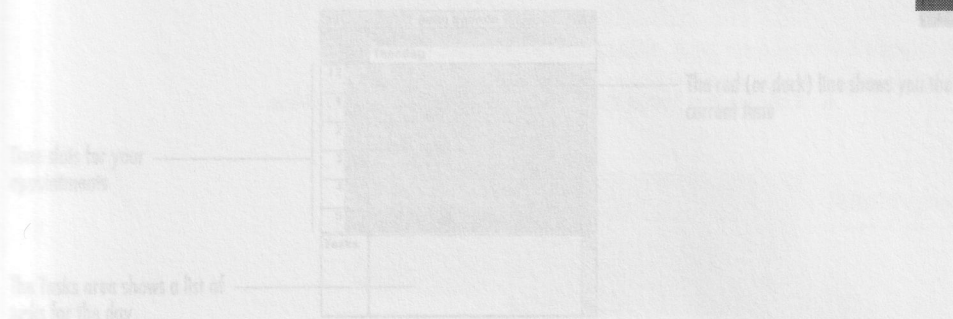
Displaying the daily view	2-2	Monthly agenda	2-16
Adding an appointment	2-5	Weekly agenda	2-17
Adding an event	2-12	Using the agenda	2-19
Adding a special date	2-14	Where to go from here	2-19

Chapter 2

To display the daily view:

1. If you don't see the daily agenda, click the Agenda button until you see the daily agenda, or choose Daily Agenda from the Window menu.

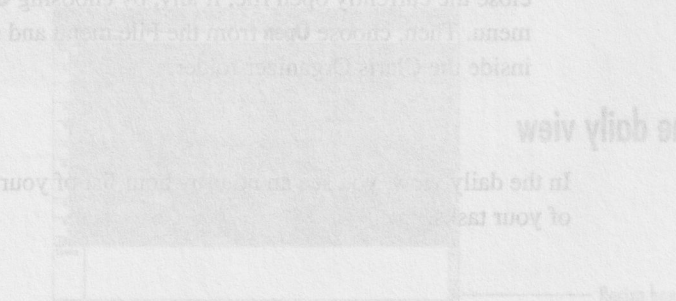
Your screen should look like this.



2. Click the zoom box to make the daily agenda fill the screen.

Working with agendas

Displaying the daily view	2-2	Monthly agenda	2-16
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Chapter 2

Working with agendas

With Claris Organizer, you can work with your agenda in daily, weekly, and monthly views.

In this session of the tutorial, you'll display the daily view and then create an appointment.

- If you have taken a break since the last chapter, open the file **Sample Organizer**: close the currently open file, if any, by choosing **Close File** from the File menu. Then, choose **Open** from the File menu and select **Sample Organizer** inside the Claris Organizer folder.

Displaying the daily view

In the daily view, you see an hour by hour list of your appointments and a list of your tasks.



Agenda button

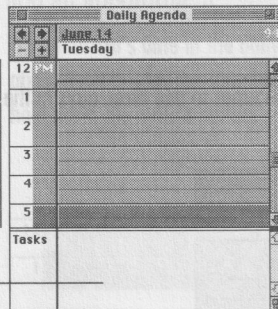
To display the daily view:

1. If you don't see the daily agenda, click the Agenda button until you see the daily agenda, or choose Daily Agenda from the Window menu.

Your screen should look like this.

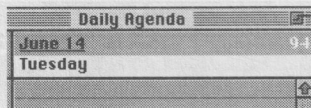
Time slots for your appointments

The Tasks area shows a list of tasks for the day



The red (or dark) line shows you the current time

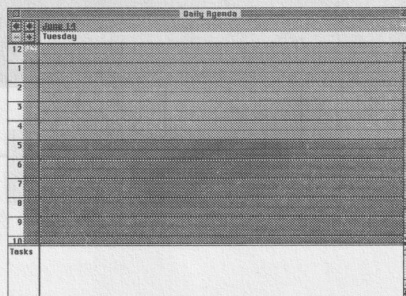
2. Click the zoom box to make the daily agenda fill the screen.



Zoom box

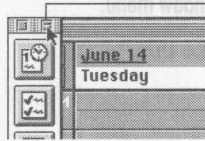
You can also make the window larger by dragging the resize box until the agenda is the size you want.

The agenda expands to fill the screen



Resize box

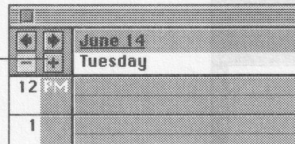
- Click the palette zoom box to move it out of the way.



Click here to display just the palette title bar

- Click the Plus button three times to add three days to the view.

Plus button



Your screen should look like this.

The agenda now displays four days

Daily Agenda				
	June 14 Tuesday	June 15 Wednesday	June 16 Thursday	June 17 Friday
12 PM				
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				
Tasks				

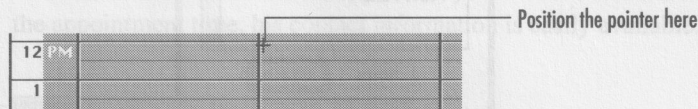
Scroll bar

Adding an appointment

Suppose you get a phone call from your co-worker Matt. He wants to set a date for lunch for tomorrow. While you're on the phone, you can easily add the appointment to the agenda.

To add an appointment:

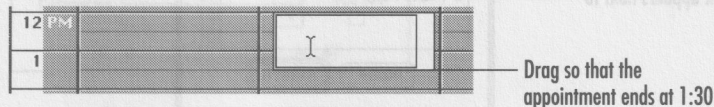
1. On tomorrow's date in the daily agenda, move the pointer to the beginning time of the appointment—for this example, position the pointer near the top of the 12 PM time slot and hold down the mouse button.



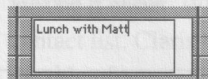
If you don't see the 12 PM time slot, click the scroll bar arrows on the right side of the window until it appears.

2. While holding down the mouse button, drag the pointer to the ending time of the appointment—for this example, drag to 1:30. Then, release the mouse button.

This draws an appointment box. The blinking insertion point appears and you can type a description for the appointment.



3. Type Lunch with Matt.



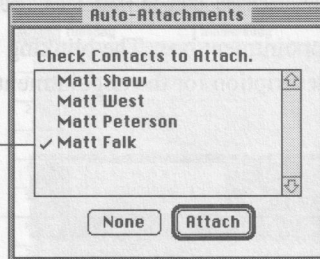
4. Press Tab or Enter (not Return).

Anytime you create an appointment, Claris Organizer figures out who in your contact list might be attending. For this example, Claris Organizer lists all the contacts named Matt—you can easily link a contact with the appointment.



5. In the Auto-Attachments dialog box, click to the left of the matching contact name—Matt Falk.

A checkmark appears next to the name



6. Click **Attach**.

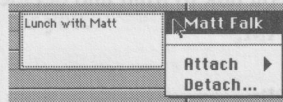
The paper clip shows that the appointment has an attachment.

This appointment has an attachment



When an item has an attachment, you can view the attachment by clicking the paper clip.

7. Position the pointer over the paper clip for the appointment you just created, hold down the mouse button, and choose Matt Falk. Then, release the mouse button.



The lunch appointment is attached to Matt Falk's contact card

The contact card for Matt Falk appears. If you need to call Matt and change the appointment time, his contact information is easily available.

Close box

The information you need to call Matt is right there

8. Click the close box to close the contact card.

You'll learn more about contacts in the next chapter.

- ◆ **Making it easier** When you make an appointment with someone in your contact list, Claris Organizer figures out the possible contacts by comparing the title of your appointment with information in the contact card. For example, when you typed "Lunch with Matt," Claris Organizer displayed all the contacts named Matt. If you had typed "Lunch with Matt at ACME," Claris Organizer would have displayed only the contacts named Matt who work at ACME. If you had typed "Matt W.," Claris Organizer would have displayed Matt West.

Moving an appointment to another day

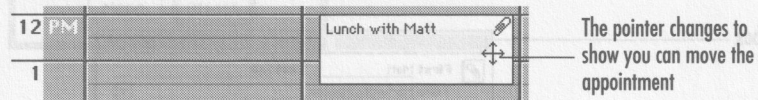
With Claris Organizer, changing an appointment is as easy as dragging it to another day.

Suppose an important company meeting is scheduled for 1:00 on the day of your lunch with Matt. You talk to Matt and decide to move the lunch to the following day at 11:30 AM.

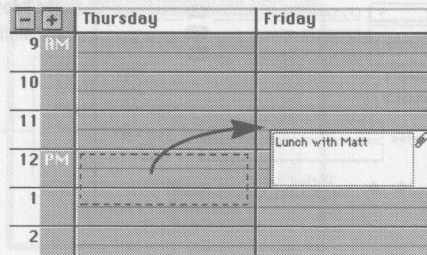
To move an appointment:

1. Move the pointer to the right side of the Lunch with Matt appointment box.

You should see the pointer change.



2. Drag the appointment box to the following day, starting at 11:30.



Adding a recurring appointment

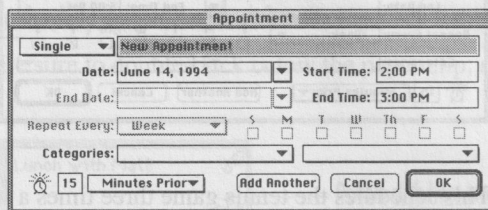
Suppose you want to make good on your New Year's resolution and schedule time for regular exercise. You decide to commit to playing tennis three times a week. You can have Claris Organizer automatically schedule your tennis appointments every week. In Claris Organizer, this is called a *recurring appointment*.

To add a recurring appointment:

1. Choose **Appointment** from the Create menu.

The Appointment dialog box appears.

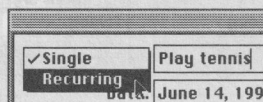
In the Appointment dialog box, you can fill in details about the appointment, such as date and time. Claris Organizer fills in today's date for you.

The Appointment dialog box is shown. It has a title bar 'Appointment'. Below it is a 'Single' dropdown menu and a 'New Appointment' button. The 'Date' field is set to 'June 14, 1994'. The 'Start Time' field is '2:00 PM' and the 'End Time' field is '3:00 PM'. The 'Repeat Every' dropdown is set to 'Week'. Below that are checkboxes for days of the week: S, M, T, W, Th, F, S. The 'Categories' field is empty. At the bottom, there is a bell icon, '15 Minutes Prior', 'Add Another', 'Cancel', and 'OK' buttons.

2. Type **Play tennis**.

This replaces the words “New Appointment” with “Play tennis.”

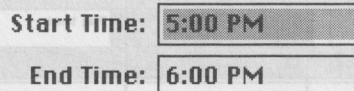
3. From the Single pop-up menu, choose **Recurring**.

A close-up of the 'Single' dropdown menu. It shows two options: 'Single' with a checkmark and 'Recurring'. The text 'Play tennis' is visible in the background, and 'June 14, 199' is partially visible below.

The Appointment dialog box now shows more options.

4. Click in the Start Time box and then press the Plus (+) key until the time shows 5:00 PM.

Press the Plus key without the Shift key. Using Shift-Plus changes the minutes, not the hours. You can also type 5:00 PM in the Start Time box.

A close-up of the 'Start Time' and 'End Time' fields. The 'Start Time' field is set to '5:00 PM' and the 'End Time' field is set to '6:00 PM'.

Claris Organizer automatically assumes the appointment will last an hour—the time in the End Time box changes automatically. If you typed the Start Time, press Tab or click in the End Time box.

5. Click the **M**, **W**, and **F** checkboxes.

Appointment


Recurring ▾ Play tennis

Start Date: June 14, 1994 ▾ Start Time: 5:00 PM

End Date: ▾ End Time: 6:00 PM

Repeat Every: Week ▾ S ☐ M ☒ T ☐ W ☒ Th ☐ F ☒ S ☐

Categories: ▾ ▾

 15 Minutes Prior ▾ Add Another Cancel OK

- Select the days of the week

This schedules the tennis game three times a week.

For now, ignore the two category pop-ups. These allow you to categorize your Claris Organizer items so you can later create customized views by categories.

6. Click **OK**.

June 15 Wednesday	June 16 Thursday	Sample Organizer Friday
	Lunch with Matt	
Play tennis		Play tennis

Play tennis appears as a — recurring appointment in the agenda window

Setting alarms

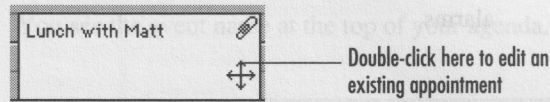
With Claris Organizer, you can set an alarm to remind you of an upcoming appointment.

Suppose you want to set an alarm for the lunch appointment with Matt you created earlier. You set alarms in the Appointment dialog box.

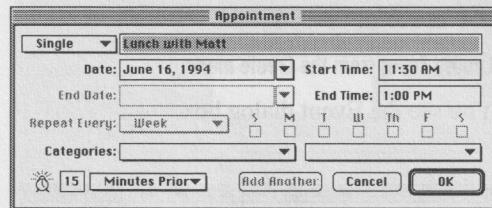
To set an alarm:

1. In the daily agenda, double-click in the Lunch with Matt appointment box.

Be sure to double-click below the paper clip, or the text entry box appears.



You see the Appointment dialog box for the lunch with Matt.



2. In the Appointment dialog box, click in the alarm box, select 15, and then type 10.

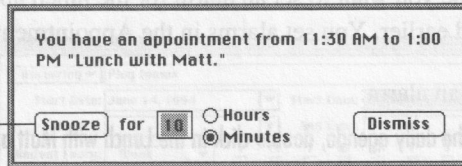


Type 10 in the alarm box

3. Click **OK**.

Ten minutes before your lunch appointment with Matt, you'll see this message on the screen, even if Claris Organizer isn't running.

Click Snooze to have the reminder reappear



See "Setting alarm preferences" on page A-6 for more information on alarms.

Adding an event

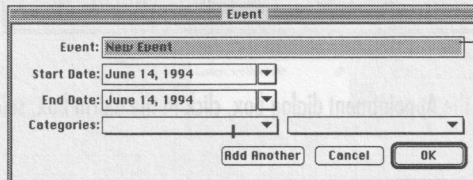
Events can span one day, such as a seminar, or several days, such as a vacation.

For the tutorial, you'll add your upcoming two-day vacation.

To add an event:

1. Choose **Event** from the Create menu.

You see the Event dialog box.



Enter the name you want to appear for the event on your agenda

2. In the Event box, type **Vacation**.

Start Date:
 End Date:
 Categories:

☐ Tuesday (Today)
 ☒ Wednesday (Tomorrow)
 ☐ Thursday
 ☐ Friday
 ☐ Saturday
 ☐ Sunday
 ☐ Monday

- Select the day after tomorrow

Your two-day vacation starts the day after your lunch with Matt.

- From the End Date pop-up menu, choose the following work day.
- Click **OK**.

You see the event name at the top of your agenda.

[illegible]

The event appears on your daily agenda, as well as your monthly and weekly agendas

Adding a special date

A special date is an annual event that happens on the same day every year, such as a birthday or anniversary.

To add a special date:

1. Choose **Special Date** from the Create menu.

Special Date

Title: Enter a name for the special date

Date:

Categories:

☒ Show Task List, Days Before

2. In the Title box, type Nancy's birthday.
3. From the Date pop-up menu, choose **Tomorrow**.

Special Date

Title:

Date:

Categories:

☒ Show Task List, Days Before

Enter the name you want to appear for the event on your agenda

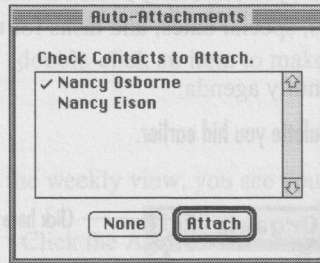
- ✓ Tuesday (Today)
- Wednesday (Tomorrow)
- Thursday
- Friday
- Saturday
- Sunday
- Monday

4. Leave the **Show Task List** checkbox checked.

When the **Show Task List** checkbox is selected, a reminder about the special date appears in the Tasks area of your daily agenda. This reminds you to buy a present or mail a card.

5. Click **OK**.

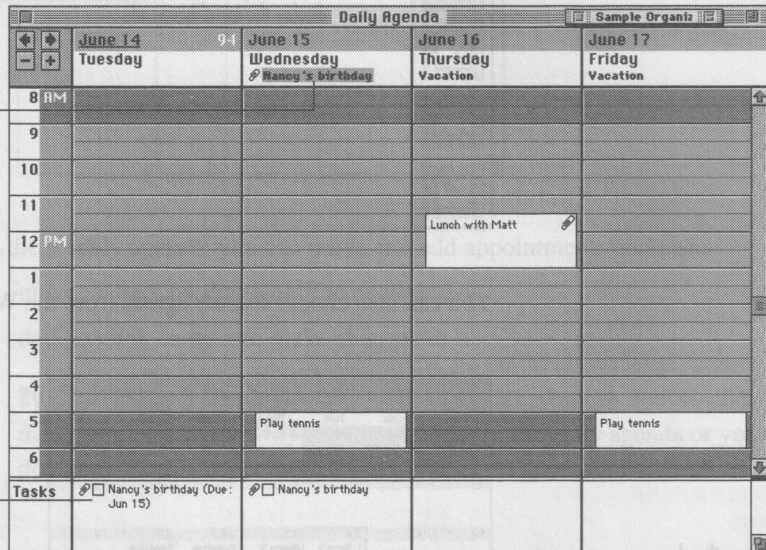
You see the Auto-Attachments dialog box.



- Click to the left of Nancy Osborne, and then click **Attach**.

The special date appears in the daily, weekly, and monthly agendas. It also appears on the same date for the following years.

The special date appears on the day in your daily agenda, as well as the weekly and monthly views



The task in the Tasks area reminds you the special date is coming up, so for example, you'll remember to buy a card

Monthly agenda

With Claris Organizer, you can easily switch to the monthly agenda to see your appointments, events, special dates, and tasks for the month.

To switch to the monthly agenda:

1. First, redisplay the palette you hid earlier.



Click here to redisplay the palette

2. Click the Agenda button until you see the monthly agenda.



Click the Agenda button to display the monthly agenda

You can also choose **Monthly Agenda** from the Window menu.

Today is outlined

Monthly Agenda						
June 1994						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
			1	2	3	4
5	6	7	8	9	10	11
12	13	14 1. Nancy's birthday (D...	15 Nancy's birthday 5-6 PM Play	16 Vacation 11:30-1 PM Lunch with ...	17 Vacation 5-6 PM Play tennis	18
19	20 5-6 PM Play tennis	21	22 5-6 PM Play tennis	23	24 5-6 PM Play tennis	25
26	27 5-6 PM Play tennis	28	29 5-6 PM Play tennis	30		

In the monthly agenda, you can move and add appointments, events, special dates, and tasks:

- move an item by dragging it to another day.
- double-click an item to make changes to it.

Weekly agenda

In the weekly view, you see your appointments for each day of the week.

- Click the Agenda button again to see the weekly agenda.

Click the arrows if you don't see the current week

Sun	Mon	Tue	Wed	Thu	Fri	Sat
Jun 12	Jun 13	Jun 14	Jun 15	Jun 16	Jun 17	Jun 18
		1: Nancy's birthday (Du...	Nancy's birthday 5-6 PM Play tennis 1: Nancy's birthday	Vacation 11:30-1 PM Lunch with M...	Vacation 5-6 PM Play tennis	

Click the Plus button to show more weeks





Today is outlined

In the weekly agenda, you can move and add appointments and tasks:

- move an item by dragging it to another day.
- double-click an item to make changes to it.
- ◆ **By the way** In the weekly and monthly agendas, you can double-click a date (for example, Jun 15) to go to that date in the daily agenda or you can double-click in a blank area on a day to add an appointment.

Customizing agenda windows

In all three agenda windows, use the following buttons to customize the view.

Click this button	To
	Display the previous day, week, or month
	Display the next day, week, or month
	Add another day to the daily agenda (up to seven days), another week to the weekly agenda (up to six weeks). If the plus sign is dimmed, you can't add any more.
	Display one fewer day or week in the agenda. If the minus sign is dimmed, you can't remove any more.

Moving around with the Navigator

You can move quickly to a particular day by using the Navigator.

1. Choose **Navigator** from the Window menu.

Click to close the Navigator

Today is outlined

Click a month to display that month

Navigator

June 1994

Sun	Mon	Tue	Wed	Thu	Fri	Sat
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

Jan	Feb	Mar	Apr	May	Jun	93
Jul	Aug	Sep	Oct	Nov	Dec	95

Click to display just the Navigator title bar; click again to redisplay the Navigator

Click a day to go to that date

Click a year to display that year in the Navigator

You can also double-click the date in the daily agenda, the month in the monthly agenda, or the year in the weekly agenda to display the Navigator.

2. To close the Navigator, click the close box.

- ◆ **By the way** Choosing **Go To Date** from the Locate menu lets you type a specific date to go to.

Closing the agenda

To end this tutorial session, you'll close the agenda.

- ▶ To close the agenda, choose **Close Window** from the File menu, or click the close box.

If you choose **Close File** by mistake, you may see a message asking if you want to save the file. Click **Cancel** and choose **Close Window**.

Where to go from here

Go to the next chapter if you're ready to learn about the contacts module.

If you want to quit and return to the tutorial later, save the changes you've made.

- ▶ To save the changes, choose **Save** from the File menu.

Help topics

For more information on the agendas, see the following Help topics:

- Changing agenda views
- Viewing the daily agenda
- Viewing the weekly agenda
- Viewing the monthly agenda
- Navigating agendas
- Adding a single appointment
- Adding recurring appointments
- Adding events and special dates
- Editing appointments
- Moving appointments
- Setting agenda preferences

See appendix C, "Using Claris Organizer Help" for how to use the onscreen Help.

Chapter 3

Working with the contact list

The contact module displays contacts in a list view or a card view. In this chapter, you learn how to work with the contact list.

- If you have taken a break since the last chapter, start by opening the Sample Organizer file. Close the currently open file, choosing **Close File** from the **File** menu. Then, choose **Open** from the **File** menu and select **Sample Organizer** in the **Chris Organizer** folder, and click **Open**.

Displaying the contact list

To display the contact list:

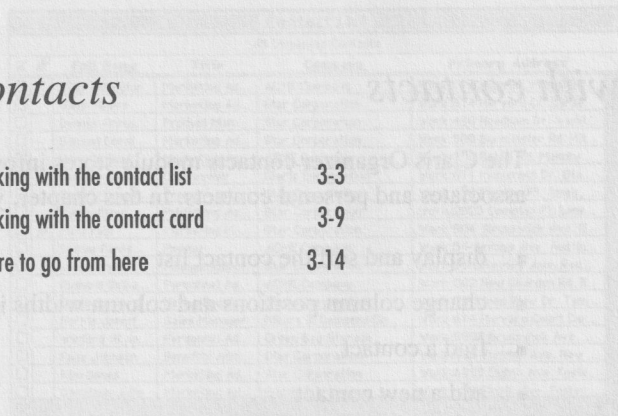
1. Click the **Contacts** button until you see the contact list.
- You see the contact list for the Sample Organizer file.



Contacts button

Working with contacts

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Chapter 3

Working with contacts

The Claris Organizer contacts module stores information about your business associates and personal contacts. In this chapter, you'll learn how to:

- display and sort the contact list
- change column positions and column widths in the contact list
- find a contact
- add a new contact
- customize the contact card

Working with the contact list

The contact module displays contacts in a list view or a card view. First, you'll learn how to work with the contact list.

- ▶ If you have taken a break since the last chapter, start Claris Organizer and open the Sample Organizer file. Close the currently open file, if any, by choosing **Close File** from the File menu. Then, choose **Open** from the File menu and select **Sample Organizer** in the Claris Organizer folder, and click **Open**.

Displaying the contact list

To display the contact list:

1. Click the **Contacts** button until you see the contact list.

You see the contact list for the Sample Organizer file.



Contacts button

Contact List				
45 Displayed Contacts				
X	Full Name	Title	Company	Primary Address
<input type="checkbox"/>	Billy Adlington	Marketing As...	ACME Company	Work :613 Main St. Memphis, ...
<input type="checkbox"/>	Glenn Akers	Marketing Ad...	Star Corporation	Work :614 Harvard Ct. Carso...
<input type="checkbox"/>	Dennis Ammo...	Product Man...	Star Corporation	Work :438 Needham Dr. Vichi...
<input type="checkbox"/>	Samuel Corni...	Marketing Ad...	Star Corporation	Work :500 Burmeister Rd. Hil...
<input type="checkbox"/>	Vern Critzer	Marketing As...	ACME Company	Work :700 Battle Rd. Manche...
<input type="checkbox"/>	Danielle Down...	Copywriter	Claris Corporation	Work :611 Monument Dr. Sta...
<input type="checkbox"/>	Pamela Dreyf...	Promotions ...	Star Corporation	Work :690 Fielding Pl. Ames, ...
<input type="checkbox"/>	Nancy Eison	Publishing As...	Star Corporation	Work :2820 Compton Pl. Lans...
<input type="checkbox"/>	Matt Falk	Marketing M...	Star Corporation	Work :904 Brunswick Ave. G...
<input type="checkbox"/>	Denise Farns...	Printer	ACME Company	Work :54 Arroyo Ave. Austin...
<input type="checkbox"/>	Luke Forrest	Finance Admin.	Star Corporation	Work :99 Lakeview Ave. Red...
<input type="checkbox"/>	Riohard Gelha...	Personnel As...	ACME Company	Work :562 New Chardon Rd. B...
<input type="checkbox"/>	Doris Gerhard	Hiring Specta...	Claris Corporation	Work :79 Island View Dr. Tam...
<input type="checkbox"/>	Norris Jennif...	Sales Manager	Hikers & Campers Co...	Work :614 Harvard Court Car...
<input type="checkbox"/>	Winford III Jo...	Personnel Ad...	Green Bay Storage	Work :5905 Brunswick Ave. ...
<input type="checkbox"/>	Faye Johnson	Benefits Adm...	Star Corporation	Work :560 Yorkton Ave. New ...
<input type="checkbox"/>	Kim Jones	Marketing Ad...	Star Corporation	Work :6839 Eighth Ave. Foste...
<input type="checkbox"/>	Davidson Julie	Marketing Ad...	Smith & Weyerman As...	Work :839 Eighth Ave. Foste...

Sorting the contact list

The contact list consists of rows and columns. Each row represents a contact record and each column represents a field used on the contact card for entering and storing information about the contact.

Sorting the contact list is as easy as clicking the mouse button. The underlined field title indicates the field by which the contact list is sorted; the dotted underlined field title indicates the field sorted second.

Primary sort field Full Name Company Secondary sort field

The contact list in the sample file is currently sorted by full name (full name sorts by last name). If two contacts have the same last name, then they are sorted by Company.

Full Name is underlined

Contact List				
45 Displayed Contacts				
<input type="checkbox"/>	<u>Full Name</u>	Title	<u>Company</u>	Primary Address
<input type="checkbox"/>	Bitly Adlington	Marketing As...	ACME Company	Work :613 Main St. Memphis, ...
<input type="checkbox"/>	Glenn Akers	Marketing Ad...	Star Corporation	Work :614 Harvard Ct. Carso...
<input type="checkbox"/>	Dennis Ammo...	Product Man...	Star Corporation	Work :438 Needham Dr. W'ioht...
<input type="checkbox"/>	Samuel Corni...	Marketing Ad...	Star Corporation	Work :500 Burmeister Rd. Hil...
<input type="checkbox"/>	Vern Critzer	Marketing As...	ACME Company	Work :700 Battle Rd. Manche...
<input type="checkbox"/>	Danielle Down...	Copywriter	Claris Corporation	Work :611 Monument Dr. Sta...
<input type="checkbox"/>	Pamela Dreyf...	Promotions ...	Star Corporation	Work :690 Fielding Pl. Ames, ...
<input type="checkbox"/>	Nancy Eison	Publishing As...	Star Corporation	Work :2520 Compton Pl. Lans...
<input type="checkbox"/>	Matt Falk	Marketing M...	Star Corporation	Work :904 Brunswick Ave. G...
<input type="checkbox"/>	Denise Farns...	Printer	ACME Company	Work :54 Arroyo Ave. Austin...
<input type="checkbox"/>	Luke Forrest	Finance Admin.	Star Corporation	Work :99 Lakeview Ave. Red...
<input type="checkbox"/>	Richard Gelha...	Personnel As...	ACME Company	Work :562 New Chardon Rd. B...
<input type="checkbox"/>	Doris Gerhard	Hiring Specia...	Claris Corporation	Work :79 Island View Dr. Tam...
<input type="checkbox"/>	Norris Jennif...	Sales Manager	Hikers & Campers Co...	Work :614 Harvard Court Car...
<input type="checkbox"/>	Winford Ill Jo...	Personnel Ad...	Green Bay Storage	Work :5905 Brunswick Ave. ...
<input type="checkbox"/>	Faye Johnson	Benefits Adm...	Star Corporation	Work :560 Yorkton Ave. New ...
<input type="checkbox"/>	Kim Jones	Marketing Ad...	Star Corporation	Work :6839 Eighth Ave. Foste...
<input type="checkbox"/>	Davidson Julie	Marketing Ad...	Smith & Waterman As...	Work :839 Eighth Ave. Foster...

To change the sort order of the contact list:

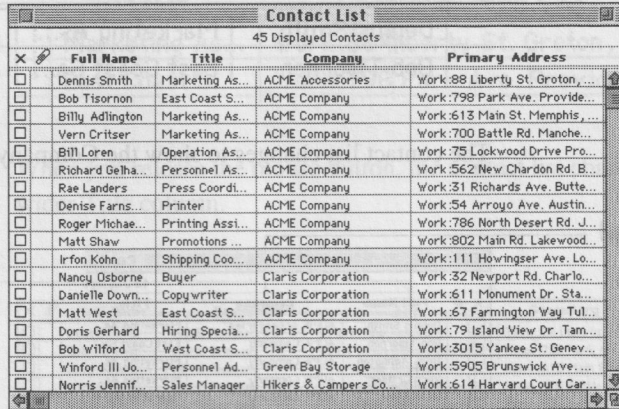
1. Click the Company field title.

Company The underline becomes solid

The contact list changes—the list is now sorted first by Company.

2. Hold down the Shift key and click **Title** to select the Title field as the second column to be sorted.

The contact list changes again—sorted first by Company, and then by Title.



	Full Name	Title	Company	Primary Address
<input type="checkbox"/>	Dennis Smith	Marketing As...	ACME Accessories	Work:88 Liberty St. Groton...
<input type="checkbox"/>	Bob Tisonron	East Coast S...	ACME Company	Work:798 Park Ave. Provide...
<input type="checkbox"/>	Billy Adlington	Marketing As...	ACME Company	Work:613 Main St. Memphis...
<input type="checkbox"/>	Vern Critser	Marketing As...	ACME Company	Work:700 Battle Rd. Manche...
<input type="checkbox"/>	Bill Loren	Operation As...	ACME Company	Work:75 Lockwood Drive Pro...
<input type="checkbox"/>	Richard Gelha...	Personnel As...	ACME Company	Work:562 New Chardon Rd. B...
<input type="checkbox"/>	Rae Landers	Press Coordi...	ACME Company	Work:31 Richards Ave. Butte...
<input type="checkbox"/>	Denise Farns...	Printer	ACME Company	Work:54 Arroyo Ave. Austin...
<input type="checkbox"/>	Roger Michae...	Printing Asst...	ACME Company	Work:786 North Desert Rd. J...
<input type="checkbox"/>	Matt Shaw	Promotions ...	ACME Company	Work:802 Main Rd. Lakewood...
<input type="checkbox"/>	Irfon Kohn	Shipping Coo...	ACME Company	Work:111 Howrings Ave. Lo...
<input type="checkbox"/>	Nancy Osborne	Buyer	Claris Corporation	Work:32 Newport Rd. Charlo...
<input type="checkbox"/>	Danielle Down...	Copywriter	Claris Corporation	Work:611 Monument Dr. Sta...
<input type="checkbox"/>	Matt West	East Coast S...	Claris Corporation	Work:67 Farmington Way Tul...
<input type="checkbox"/>	Doris Gerhard	Hiring Specia...	Claris Corporation	Work:79 Island View Dr. Tam...
<input type="checkbox"/>	Bob Wilford	West Coast S...	Claris Corporation	Work:3015 Yankee St. Genev...
<input type="checkbox"/>	Vinford III Jo...	Personnel Ad...	Green Bay Storage	Work:5905 Brunswick Ave. ...
<input type="checkbox"/>	Norris Jennif...	Sales Manager	Hikers & Campers Co...	Work:614 Harvard Court Car...

- ◆ **Another way to sort** You can also sort any field in the contact list by using **Sort** from the View menu.

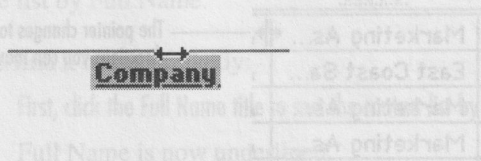
Changing column position

Changing the position of a column is as simple as dragging the field title. For this example, you'll move the Company field so that it is next to the Full Name field.

To change the column position:

1. Press and hold down the mouse button on the Company field title.

When you start to drag, the pointer should change to look like this:



2. Drag the pointer so that it's between the Full Name and Title fields and release the mouse button.

	Full Name	Title	
	Dennis Smith	Marketing As...	ACM
	Bob Tisornon	East Coast Sa...	ACM

The contact list changes to show the Company column in its new position.

Company is now the second column

	Full Name	Company	Title
<input type="checkbox"/>	Dennis Smith	ACME Accessories	Marketing As...
<input type="checkbox"/>	Bob Tisornon	ACME Company	East Coast Sa...
<input type="checkbox"/>	Billy Adlington	ACME Company	Marketing As...
<input type="checkbox"/>	Vern Critser	ACME Company	Marketing As...
<input type="checkbox"/>	Bill Loren	ACME Company	Operation Asst.
<input type="checkbox"/>	Richard Gelha...	ACME Company	Personnel As...
<input type="checkbox"/>	Rae Landers	ACME Company	Press Coordi...

Changing the column width

Sometimes the information in a column of the contact list is too long to fit in the current column display. Claris Organizer makes changing the column width easy. For this example, you'll widen the Title column so that you can see the full titles of all the contacts.

To change the column width:

1. Move the pointer over the column line to the right of the Title column.

Title
Marketing As...
East Coast Sa...
Marketing As...
Marketing As...

The pointer changes to show the directions you can move

2. Press the mouse button and drag the pointer to the right until it is below the M in Primary and release the mouse button.

Move the cursor below the M

	Title	Primary Address
	Marketing As...	Work:884 Liberty St. Groton, ...
	East Coast S...	Work:798 Park Ave. Provide...

When you release the mouse button, the contact list changes to show the wider Title column.

The Title column is wider

X	Full Name	Company	Title	Secondary
<input type="checkbox"/>	Dennis Smith	ACME Accessories	Marketing Associate	Home:88 Liberty
<input type="checkbox"/>	Bob Tisornon	ACME Company	East Coast Sales Assistant	Home:798 Park A
<input type="checkbox"/>	Billy Adlington	ACME Company	Marketing Assistant	Home:613 Main S
<input type="checkbox"/>	Vern Critser	ACME Company	Marketing Assistant	Home:700 Battle
<input type="checkbox"/>	Bill Loren	ACME Company	Operation Asst.	Home:75 Lookwoc
<input type="checkbox"/>	Richard Gelha...	ACME Company	Personnel Asst.	Home:562 New Cl
<input type="checkbox"/>	Rae Landers	ACME Company	Press Coordinator	Home:31 Richard
<input type="checkbox"/>	Denise Farns...	ACME Company	Printer	Home:54 Arroyo
<input type="checkbox"/>	Roger Michaels	ACME Company	Printing Assistant	Home:786 North I
<input type="checkbox"/>	Matt Shaw	ACME Company	Promotions Assistant	Home:802 Main R
<input type="checkbox"/>	Irfon Kohn	ACME Company	Shipping Coordinator	Home:111 Howing

- ♦ **Choosing which columns to display** Claris Organizer displays certain columns as a default. You can change the default by choosing which columns you want to display in the contact list. See "Setting contact preferences" on page A-4.

Finding a contact quickly

Claris Organizer can take you directly to a name in your contact list. It matches the letters you type to the items in the primary sorted field, so first you'll re-sort the list by Full Name.

To find a contact quickly:

1. First, click the Full Name title to sort the contact list by the last name.

Full Name is now underlined.

2. Type **f**.

Claris Organizer goes directly to the first contact whose last name starts with F.

Matt Falk is selected

Danielle Down...	Claris Corporation
Pamela Dreyf...	Star Corporation
Nancy Eison	Star Corporation
Matt Falk	Star Corporation
Denise Farns...	ACME Company

3. Double-click Matt Falk's record in the contact list (or simply press Enter).

You see Matt's contact card. The next section shows you how to work with the contact card.

The screenshot shows a 'Contact' window with the following fields and values:

- First Name:** Matt
- Last Name:** Falk
- Title:** Marketing Manager
- Company:** Star Corporation
- Work Address:** Street 904 Brunswick Ave.
- City:** Green Bay
- State:** WI
- Zip:** 54321
- Country:** (blank)
- Work Phone:** (715) 555-6325
- Home Phone:** (509) 555-8541
- Fax Phone:** (509) 555-8562
- Custom 1:** (blank)
- Custom 2:** (blank)
- Categories:** (blank)
- Marked:** ☐
- Status:** Contact 9 of 45, 45 Total Contacts

- ◆ **By the way** Claris Organizer provides other ways to find items. See Chapter 6, "Finding and displaying information."

Working with the contact card

The contact card shows detailed information about your contacts, such as the name, address, and telephone information. The contact card has custom fields to store information such as e-mail addresses or spouse names.

Adding a contact

You add contact information into a contact card. The built-in intelligence in Claris Organizer makes entering information quick and easy. These built-in features include:

- capitalizing words automatically
- storing a list of common entries
- completing words as you enter them by matching entries in the list
- formatting telephone numbers

You can turn off some of these features in preferences. See "Setting contact preferences" on page A-4.

To add a new contact:

1. Choose **Contact** from the Create menu.

You see a blank contact card.

You enter contact
information into fields

First Last
Title
Company
Street
City State
Zip Country
Telephone
Telephone
Telephone
Custom 1
Custom 2
Categories
Marked
Contact 46 of 46
46 Total Contacts

2. Type **Tina** in the **First** field and press **Tab**.
3. Type **Johnson** in the **Last** field and press **Tab**.

Notice that several fields have pop-up menus next to them, for example, the **Title** field.

Click here to display the pop-up menu

4. From the **Title** pop-up menu, choose **Manager**.

The pop-up menu displays commonly used entries

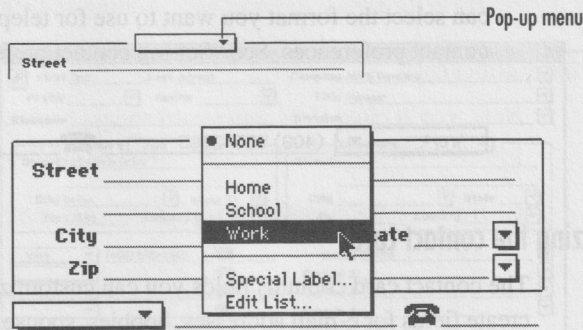
- ◆ **By the way** You can add your own entries to a field's pop-up menu. Just type the entry and choose **Add to List** from the pop-up menu.

5. In the **Company** field, type **A**.

Notice that Claris Organizer helps you complete your entry. Using the items in the pop-up menu, it matches what you type as you type it and fills in the field for you. This is called auto-completion.

6. Type **C**.
7. Press **Tab** when the field shows **ACME Company**.

8. From the pop-up menu above the address, choose **Work**.



9. In the Street field, type 123 circle drive and press Tab.

Notice that Claris Organizer enters "123 Circle Drive" in the field, capitalizing the first letter of each word. This is called auto-capitalization.

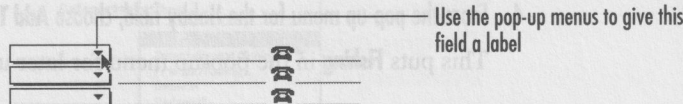
10. Fill in the rest of the address so that it looks like this:

Click in a field or press Tab to move from field to field

Diagram illustrating the contact card with the address field filled in. The address is 123 Circle Drive. The City is Dallas, State is TX, Zip is 12345, and Country is USA. The pop-up menu is still open and shows "Work" selected.


Use the pop-up menus to make entering information easier

11. From the pop-up menu in the first telephone field, choose **Work**.



12. In the first telephone field, type 4085552365 and press Tab.

Claris Organizer automatically formats the telephone number for you. You can select the format you want to use for telephone numbers by setting contact preferences. See “Setting contact preferences” on page A-4.



Work (408) 555-2365 ☎ — Type extensions here

Customizing the contact card

The contact card contains fields you can customize. For example, you can create fields for e-mail addresses, hobbies, spouse names—anything you want.

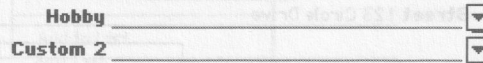
To create a custom field:

1. Click the field title Custom 1.

The field title is selected and you can type a new one.

2. Type Hobby.

Your screen should look like this:



Hobby Custom 2

The Custom 1 field is now changed to Hobby on all the contact cards in the sample file, including existing ones. Suppose that several of your contacts enjoy fishing. You can add fishing to your list of hobbies.

3. Click in the Hobby field and type Fishing.
4. From the pop-up menu for the Hobby field, choose **Add To List**.

This puts **Fishing** in the pop-up menu for later use.

Expanding the contact card

The contact card can actually have up to four custom fields. In the normal layout of the card, you see two custom fields. In the expanded contact card, you see four custom fields. The expanded card also lets you enter a second address and another phone number.

The expanded card has room for two addresses and additional fields

► To expand the contact card, click the zoom box in the upper-right corner of the card.

Contact

First Tina Last Johnson Company ACME Company

Prefix Suffix Title Manager

Nickname Division

Primary Work Secondary

Street 123 Circle Drive Street

City Dallas State TX City State

Zip 12345 Country USA Zip Country

Work (408) 555-2365 Hobby Fishing

Custom 2 Custom 3 Custom 4

Categories

Modified: Jun 26, 1994 Contact 46 of 46 46 Total Contacts

Marked

Assigning categories

By categorizing your contacts, you can create special lists or views of your contacts. For example, you can divide your contacts into two groups: business and personal. Later, you can print separate address books: one for business contacts and another for personal contacts.

To assign a category:

1. Find the Categories field near the bottom of the contact card.
2. From the Categories pop-up menu, choose **Business**.

Categories

- None
- Business
- Entertainment/Dining
- Friends/Family
- General
- Personal
- Phone Call
- Project 1
- Trade
- Travel
- Work

You can select one or two categories for each contact. Claris Organizer has several sample categories, and you can also add your own and color-code them for easy reference. See "Adding and editing categories" on page 6-5.

Closing the contact card

Next, you'll close the contact card and go back to the contact list. The contact you just entered appears at the bottom of the list.

- To close the contact card, click the close box or choose **Close Window** from the File menu.

If you choose **Close File** by mistake, you may see a message asking if you want to save the file. Click **Cancel** and choose **Close Window**.

Where to go from here

In the following chapter, you'll learn how easy it is to create a task.

If you want to quit and return to the tutorial later, save the changes you've made.

- To save the changes, choose **Save** from the File menu.

Help topics

For more information on the contact manager, see the following help topics:

- Viewing contacts
- Adding contacts
- Changing contact list views
- Deleting contacts
- Customizing contact fields
- Marking contacts
- Changing field labels
- Duplicating contact information
- Setting contacts preferences
- Editing contact information

See "Using Claris Organizer Help" on page C-1" for how to use the onscreen help.

Working with tasks

Claris Organizer keeps track of your to-do items (called *tasks*). To create a task, you can:

- set the task up as a one-time, recurring, or undated task
- give the task a due date
- set a reminder that the task is due (and the number of days prior to the due date you want to be reminded)
- set a priority for the task
- categorize a task into one or more groups

In the last chapter, you entered a new contact. In this chapter, you'll learn how to schedule a to-do item to call the new contact.

- If you have taken a break since the last chapter, start Claris Organizer and open the Sample Organizer file. Close the currently open file, if any, by choosing **Close File** from the **File** menu. Then, choose **Open** from the **File** menu, and open the Sample Organizer file from the Claris Organizer folder.

Working with tasks and notes

Working with tasks

4-3

Where to go from here

4-9

Suppose you want to call Tina Johnson, the contact you added in the previous chapter. You can schedule a to-do item by attaching a task to the contact.

To attach a task to a contact:

1. If the palette is hidden, choose **Show Palette** from the **Window** menu.
2. If you don't see the contact list, click the **Contact** button to display it.
3. First, click **Full Name** to re-sort the contact list.

Tina Johnson's name (which was at the bottom of the list) is now in alphabetical order.

4. With the contact list window active, type **J** to go to the last names starting with J.

g the contact card

You can select one or two categories for each contact. Claris Organizer has several sample categories, and you can also add your own and color-code them for easy reference. See "Adding and editing categories" on page 6-3.

Next, you'll close the contact card and go back to the contact list. The contact you just entered appears at the bottom of the list.

- ▶ To close the contact card, click the close box or choose **Close Window** from the File menu.

If you choose **Close File** by mistake, you may see a message asking if you want to save the file. Click **Cancel** and choose **Close Window**.

Where to go from here

In the following chapter, you'll learn how easy it is to create a task.

If you want to quit and return to the tutorial later, save the changes you've made.

Working with tasks and notes

- ▶ To save the changes, choose **Save** from the File menu.

The Claris Organizer task module stores information about your to-do items. In this chapter, you'll learn how to:

- create a task quickly by dragging
- make a call
- take notes on a call

Deleting contacts

Customizing contact fields

Marking contacts

Changing field labels

Duplicating contact information

Setting contacts preferences

Editing contact information

See "Using Claris Organizer Help" on page C-1" for how to use the onscreen help.

Working with tasks

Claris Organizer keeps track of your to-do items (called *tasks*). When you create a task, you can:

- set the task up as a one-time, recurring, or undated task
- give the task a due date
- set a reminder that the task is due (and the number of days prior to the due date you want to be reminded)
- set a priority for the task
- categorize a task into one or two groups

In the last chapter, you entered a new contact. In this chapter, you'll learn how to schedule a to-do item to call the new contact.

- If you have taken a break since the last chapter, start Claris Organizer and open the Sample Organizer file. Close the currently open file, if any, by choosing **Close File** from the File menu. Then, choose **Open** from the File menu and select **Sample Organizer** in the Claris Organizer folder.

Creating a task

Claris Organizer provides several ways to create a task. The fastest and easiest way is to link an item, such as a contact, to a task. In Claris Organizer, this is known as creating an attachment.

Suppose you want to call Tina Johnson, the contact you added in the previous chapter. You can schedule a to-do item by attaching a task to the contact.

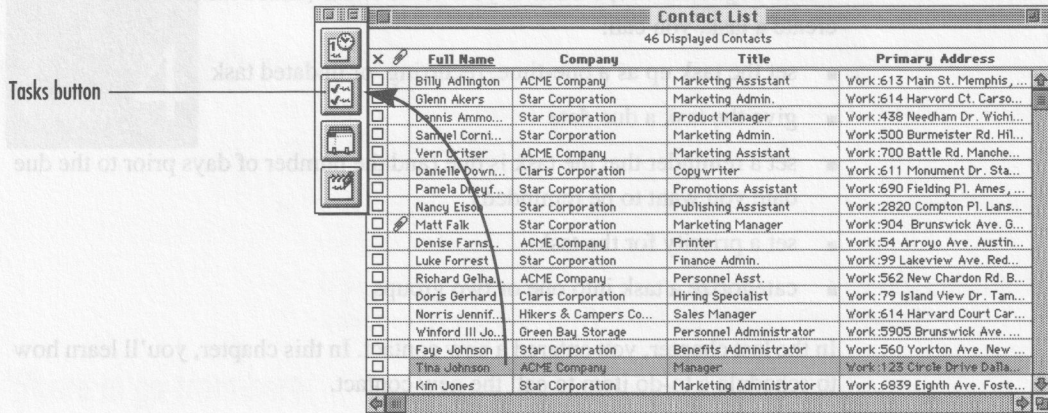
To attach a task to a contact:

1. If the palette is hidden, choose **Show Palette** from the Window menu.
2. If you don't see the contact list, click the Contact button to display it.
3. First, click Full Name to re-sort the contact list.

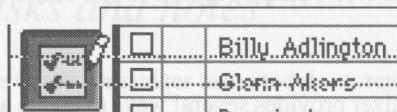
Tina Johnson's name (which was at the bottom of the list) is now in alphabetical order.

4. With the contact list window active, type **j** to go to the last names starting with J.

5. Select Tina Johnson's record and drag it to the Tasks button in the palette.



6. When the pencil appears, release the mouse button.



The pencil indicates you're creating a new item—in this case, a task

You see the Task dialog box.

Task

Single **Call Tina Johnson**

Due Date: June 16, 1994 Remind: 0 Days Before

End Date: Carry Over After Due ☒

Priority: Medium

Repeat Every: Week S M T W Th F S

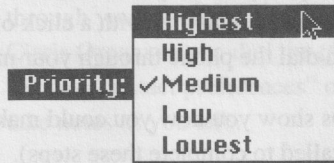
Categories: Business

Add Another Cancel OK

Claris Organizer enters the task name for you

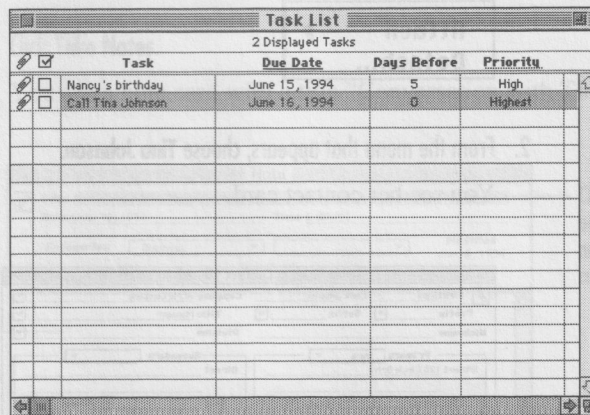
Notice that Claris Organizer figures that you probably want to call Tina Johnson because you dragged her name from the contact list to the Tasks button. You can change the text if you want.

7. From the Priority pop-up menu, choose **Highest**.



8. Click **OK**.

The task list appears. If you don't see the task list, choose Task List from the Window menu.



9. Click the Priority field title in the task list.

Claris Organizer sorts the task list by priority. Notice that Priority is underlined.

The paper clip next to the task shows that it has an attachment—in this case, to Tina Johnson’s contact card.

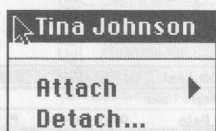
Making a call

Now you have an easy way to call your contacts—by using the paper clip, you can locate Tina's telephone number with a click of the mouse button. Claris Organizer can even dial the phone through your modem.

The following steps show you how you could make a call (you don't need to have a modem installed to complete these steps).

To make a call:

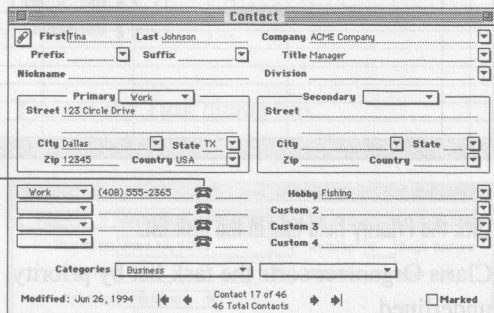
1. In the task list, select the paper clip next to the task, Call Tina Johnson.



2. From the menu that appears, choose **Tina Johnson**.

You see her contact card.

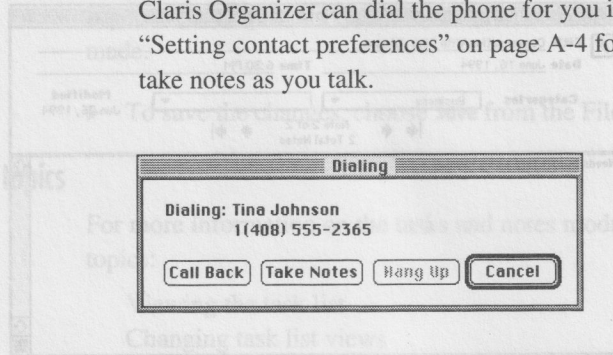
Telephone icon



First Tina		Last Johnson		Company ACME Company	
Prefix		Suffix		Title Manager	
Nickname		Division			
Primary Work		Secondary			
Street 123 Circle Drive					
City Dallas		State TX	City		
Zip 12345		Country USA	City		
Work (408) 555-2345		Hobby Fishing			
		Custom 2			
		Custom 3			
		Custom 4			
Categories Business					
Modified: Jun 26, 1994 Contact 17 of 46 46 Total Contacts					

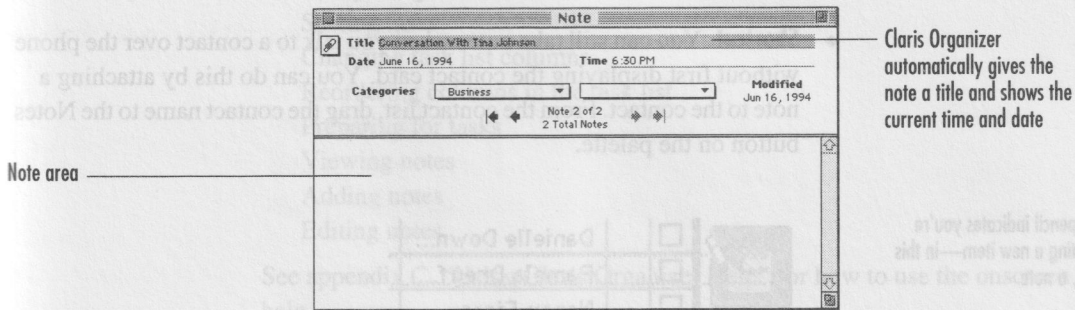
3. In the contact card, click the telephone icon that's next to the number you entered.

Claris Organizer begins dialing the telephone. (You'll hear the dialing through your speakers, but Claris Organizer is not actually placing a call. Claris Organizer can dial the phone for you if you have a modem. See "Setting contact preferences" on page A-4 for modem settings.) You can take notes as you talk.



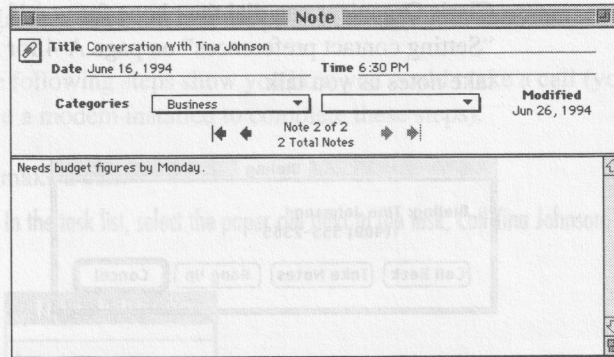
4. Click **Take Notes**.

You see a note card with a title "Conversation with Tina Johnson."



5. Click in the note area and type Needs budget figures by Monday.

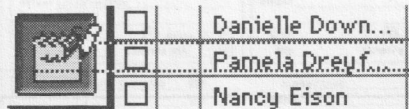
Move the palette if you can't see the cursor—the palette may be covering part of the note area.



Notes are useful for storing conversations, meeting agendas, directions to various locations, and general ideas.

- ◆ **Shortcut** You can still take notes when you talk to a contact over the phone without first displaying the contact card. You can do this by attaching a note to the contact. From the contact list, drag the contact name to the Notes button on the palette.

The pencil indicates you're creating a new item—in this case, a note



Closing the windows

Next, you'll close the note card, task list, and contact list. In the next chapter, you'll learn how easy it is to create additional attachments.

- To close the windows, click the close box or choose **Close Window** from the File menu for each window. Leave the palette open.

Where to go from here

Go to the next chapter if you're ready to learn more about creating attachments.

If you want to quit and return to the tutorial later, save the changes you've made.

- To save the changes, choose **Save** from the File menu.

Help topics

For more information on the tasks and notes modules, see the following Help topics:

- Viewing the task list
- Changing task list views
- Adding a single task
- Adding recurring tasks
- Adding an undated task
- Completing a task
- Sorting tasks
- Changing task list columns
- Reordering columns in the task list
- Preparing for tasks
- Viewing notes
- Adding notes
- Editing notes

See appendix C, "Using Claris Organizer Help" for how to use the onscreen help.

Chapter 5

You can create new attachments by dragging an item from one area to another. For example, the following are some attachments you might create:

- create a task to call a contact by dragging a contact name from the contacts list to the daily agenda
- take notes on a meeting by dragging an appointment to the palette
- prepare for a meeting by dragging an appointment to the task area of the daily agenda
- schedule time for a task by dragging a task from the task list or task area to the daily agenda

Creating new attachments

The following sections show you some of the attachments you can make.

- If you have taken a break since the last chapter, start Claris Organizer and open the Sample Organizer file. Close the currently open file, if any, by

Working with attachments

Creating new attachments	5-3
Displaying attached items	5-9
Where to go from here	5-12

Chapter 5

Working with attachments

In the last chapter, you created links (called *attachments*). You attached a task to a contact and a note to a contact. In this chapter, you'll learn more about attachments.

Attachments give you quick and easy access to the information you need where and when you need it. Some attachments are automatic—Claris Organizer can automatically link a contact to an appointment, for example. You can also create attachments on your own.

You can create new attachments by dragging an item from one place to another. For example, the following are some attachments you might make:

- create a task to call a contact by dragging a contact name to the task area of the daily agenda
- take notes on a meeting by dragging an appointment to the Notes button on the palette
- prepare for a meeting by dragging an appointment to the task area of the daily agenda
- schedule time for a task by dragging a task from the task list or tasks area of the daily agenda to a time slot in the daily agenda

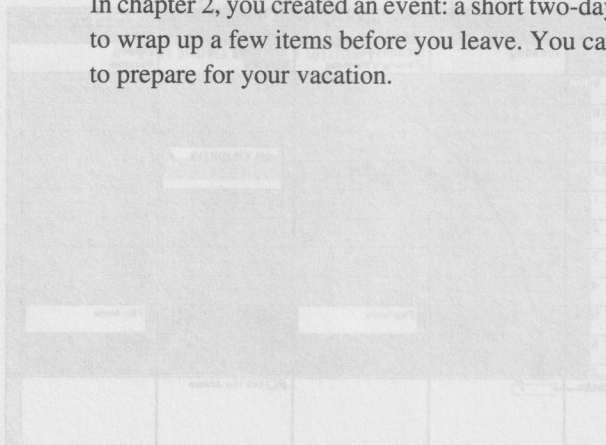
Creating new attachments

The following sections show you some of the attachments you can make.

- ▶ If you have taken a break since the last chapter, start Claris Organizer and open the Sample Organizer file. Close the currently open file, if any, by choosing **Close File** from the File menu. Then, choose **Open** from the File menu and select **Sample Organizer** in the Claris Organizer folder.

Attaching a new task to an event

In chapter 2, you created an event: a short two-day vacation. Suppose you need to wrap up a few items before you leave. You can create a task to remind you to prepare for your vacation.



To attach a new task to an event:

1. Click the Agenda button to display the daily agenda and display the date (or dates) on which you scheduled your vacation.

Use these arrows to find the dates

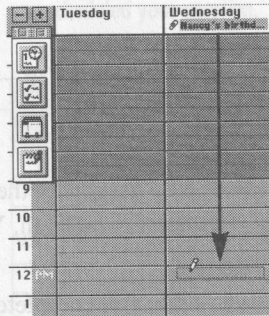
Daily Agenda		Sample Organizer	
June 14 Tuesday	June 15 Wednesday Nancy's Birthday	June 16 Thursday Vacation	June 17 Friday Vacation
9 AM			
10			
11			
12 PM		Lunch With Matt Falk	
1			
2			
3			
4			
5	Play tennis		Play tennis
6			
7			
Tasks		<input type="checkbox"/> Call Tina Johnson	

2. In the daily agenda, drag the Vacation item from the first day of your vacation to the Tasks area two days prior to the start of your vacation.

Drag an event to the task area

Daily Agenda		Sample Organizer	
June 14 Tuesday	June 15 Wednesday Nancy's Birthday	June 16 Thursday Vacation	June 17 Friday Vacation
9 AM			
10			
11			
12 PM		Lunch With Matt Falk	
1			
2			
3			
4			
5	Play tennis		Play tennis
6			
7			
Tasks		<input type="checkbox"/> Call Tina Johnson	

2. In the daily agenda, drag the special date, Nancy's birthday, to the 12 PM time slot.



The pointer becomes a pencil.

3. When the pencil is over the 12 PM slot, release the mouse button.



This automatically creates an appointment, with the words "Celebrate..." in front of the special date title—Celebrate Nancy's birthday.

You can change the text if you want, for example, "Buy gift for Nancy."

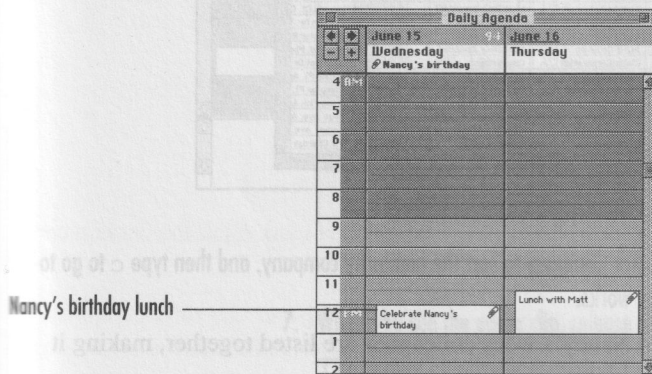
Attaching any two items

You can attach any two items by dragging one on top of the other.

Suppose you want to invite a few colleagues to Nancy's birthday lunch. You can drag their names to the lunch date.

To attach several contacts to an appointment:

1. Make sure you see the appointment for Nancy's birthday lunch in the daily agenda.



You could also display the weekly or monthly agenda, as long as you can see Nancy's lunch appointment on the screen.

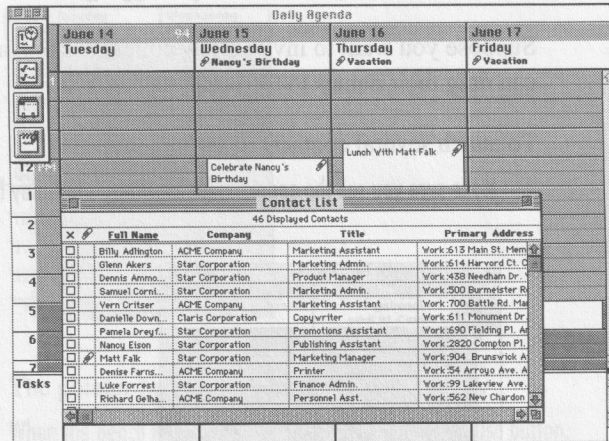
2. If you don't see the palette, choose **Show Palette** from the Window menu.

If you see the palette title bar only, choose **Tall Palette** or **Wide Palette** from the Window menu.

3. Click the **Contacts** button to display the contact list.
4. Drag the contact list by its title bar and move it below or next to the agenda.

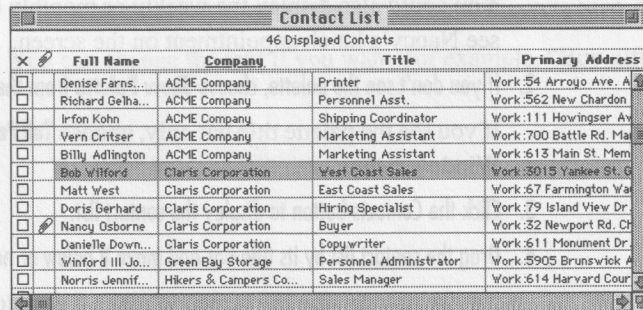
You're rearranging the screen to make it easy to drag contact names to the appointment. You need to see the contact list as well as "Celebrate Nancy's birthday."

Your screen might look something like this:

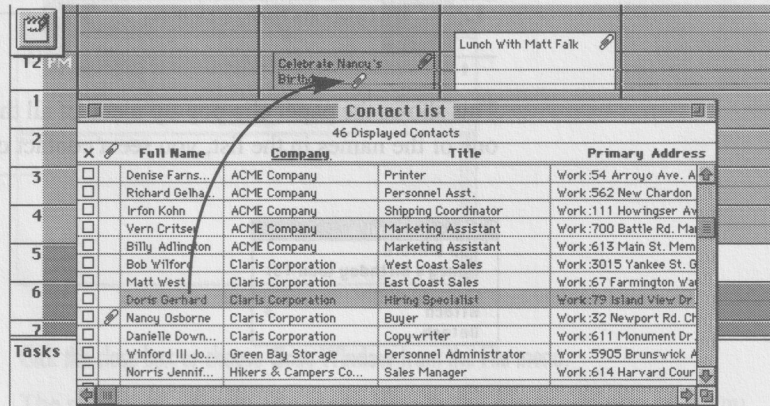


- In the contact list, click **Company** to sort the names by company, and then type **C** to go to Claris, where Nancy works.

This way, all of Nancy's work colleagues are listed together, making it easier to find them.



- Find Doris Gerhard, click in the Full Name field, and drag the name from the contact list to the agenda until the pointer is on top of Celebrate Nancy's birthday (the pointer becomes a paper clip).



- When you see the paper clip, release the mouse button.

The paper clip indicates that Doris Gerhard is attached to the appointment, Nancy's lunch.

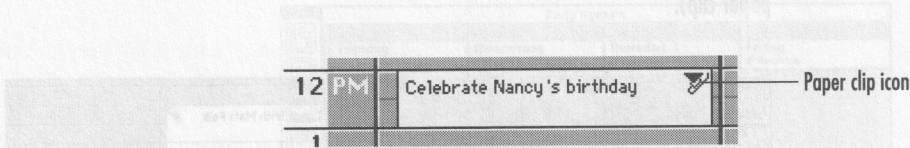
- Repeat for **Bob Wilford**.
- Click the close box in the contact list window to close the contact list.

Displaying attached items

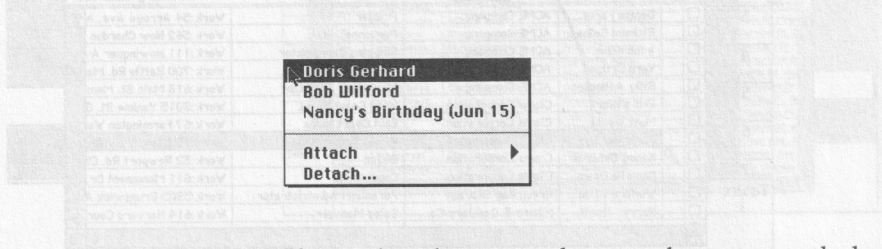
Throughout Claris Organizer, all items that have an attachment show a paper clip next to them. To display an attachment, you select it from the paper clip pop-up menu.

To display an attachment:

1. In the agenda window showing the birthday lunch, select the paper clip icon.



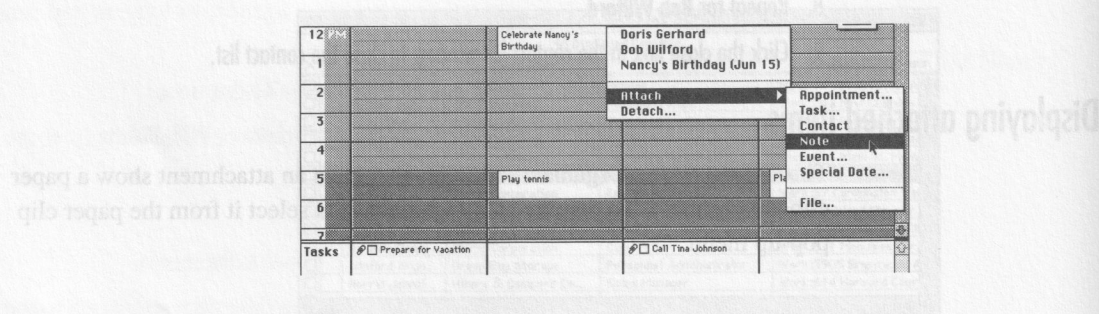
This shows the paper clip pop-up menu of all the attachments. If you select one of the names in the list, you see a contact card.



If you selected a name and you see the contact card, close the contact card and click the paper clip again.

Another way to attach something is to use the paper clip menu. Suppose you wanted to add a note—Doris agrees to arrange for the waiters to sing.

2. From the paper clip pop-up menu, choose **Attach** and then choose **Note** from the submenu.

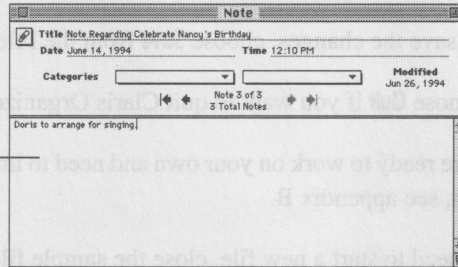


You see a note card.

3. Click in the note area and type Doris to arrange for singing.

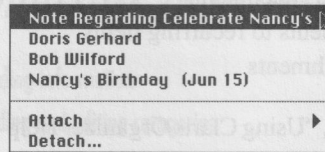
You may need to move the palette to see the text insertion point if the palette is on top of the note area.

Note area



4. Click the close box or choose **Close Window** from the File menu.

The note now appears as a menu item in the paper clip pop-up menu attached to Nancy's birthday lunch.



Closing the windows

- To close the windows, click the close box or choose **Close Window** from the File menu for each window. Leave the palette open.

Where to go from here

In these chapters you've learned most of what you need to know to get started on your own. The following chapters cover finding information and printing, however, you can read through them later.

- To save the changes, choose **Save** from the File menu.

Choose **Quit** if you want to quit Claris Organizer for the moment.

If you're ready to work on your own and need to import data from another PIM product, see appendix B.

If you need to start a new file, close the sample file and choose **New** from the File menu.

Help topics

For more information on attachments, see the following help topics:

Attaching items

Adding multiple attachments

Adding attachments to recurring items

Removing attachments

See appendix C, "Using Claris Organizer Help" for how to use the onscreen help.

Chapter 6

Finding and displaying information

Finding information	6-2
Adding and editing categories	6-5
Changing the view of your information	6-8
Where to go from here	6-11

Chapter 6

om here

In these chapters you've learned most of what you need to know to get started on your own. The following chapters cover finding information and printing; however, you can read through them later.

► To save the changes, choose **Save** from the File menu.

Choose **Quit** if you want to quit Claris Organizer for the moment.

If you're ready to work on your own and need to import data from another PIM product, see appendix B.

If you need to start a new file, close the sample file and choose **New** from the File menu.

Help topics

For more information on attachments, see the following help topics:

Attaching items

Adding or changing a recurring item

Finding and displaying information

Claris Organizer can find and display specific sets of your information. For example, you can find all the contacts who work at ACME or all your tasks due this week. This chapter covers:

- finding information
 - using categories
 - creating views
- If you have taken a break since the last chapter, start Claris Organizer and open the Sample Organizer file. Close the currently open file, if any, by choosing **Close File** from the File menu. Then, choose **Open** from the File menu and select **Sample Organizer** in the Claris Organizer folder.

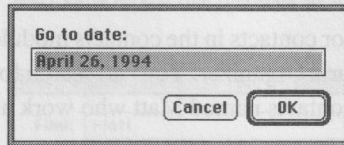
Finding information

Claris Organizer provides several ways to find information.

Finding a specific date

Using commands in the Locate menu, you can go to today's date or to a date you specify.

- ▶ To go to today's date, choose **Today** from the Locate menu.
- ▶ To go to a specific date, choose **Go To Date** from the Locate menu, and then enter the date you want.

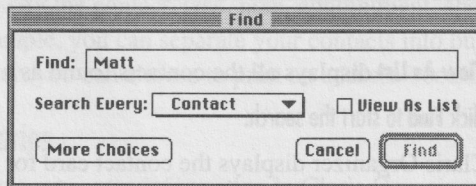


Finding specific contacts

You can use the Find command in any of the Claris Organizer modules. To find information, you provide a description of what you want to find and choose the module (or modules) you want to search. Suppose you want to find a specific contact, Matt Peterson.

To find a contact:

1. Choose **Find** from the Locate menu.
2. In the Find box, type **Matt**.



3. From the Search Every pop-up menu, choose **Contact**.
 4. Make sure **View As List** is not checked for this example.
- View As List** displays all the contacts found as a list.

5. Click **Find** to start the search.

Claris Organizer displays the first item found. Which contact name appears first depends on how the contact list is currently sorted. If it is sorted by last name, Matt Falk's contact card appears first. If it is sorted by company, Matt Shaw's contact card appears first.

6. Choose **Find Again** from the Locate menu until you find Matt Peterson's contact card.

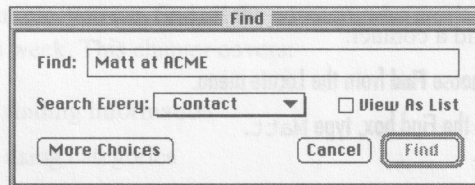
If no more items match your search request, you hear a sound.

Using smart find

When searching for contacts in the contacts module, you can use the intelligent find feature of Claris Organizer. You can search for more specific information, for example, all contacts named Matt who work at ACME.

To find a specific contact:

1. Choose **Find** from the Locate menu.
2. In the Find box, type Matt at ACME.
3. From the Search Every pop-up menu, choose **Contact**.
4. Make sure **View As List** is not checked for this example.



View As List displays all the contacts found as a list.

5. Click **Find** to start the search.

Claris Organizer displays the contact card for the Matt who works at ACME.

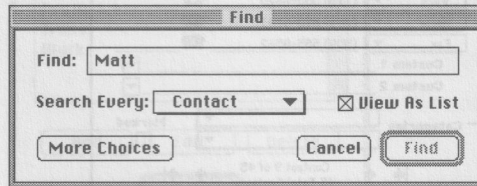
- ◆ **By the way** In the Find dialog box, you can also type Matt Shaw, Matt S, or even M S, and Claris Organizer finds Matt Shaw.

Viewing found contacts as a list

If you're looking for a group of contacts, you can display them as a list, instead of viewing each contact card individually.

To view the contacts as a list:

1. Choose **Find** from the Locate menu.
2. In the Find box, type **Matt**.
3. From the Search Every pop-up menu, choose **Contact**.
4. Select **View As List** (the checkbox should be checked).



View As List displays all the contacts found as a list.

5. Click **Find** to start the search.
Claris Organizer displays all the contacts named Matt.
6. To redisplay all the contacts, choose **All Contacts** from the View menu.

Adding and editing categories

When you enter information in any module, you can select categories to classify the contact, task, note, appointment, special date, or event. For example, you can separate your contacts into business or personal groups. Later, you can choose to print an address book of just your business contacts.

Assigning categories

When you enter information in Claris Organizer, you can assign up to two categories. For this example, you'll assign a category to Matt Falk.

To assign a category:

1. From the list of found contacts from the previous section, double-click Matt Falk to display his contact card.

Click the zoom box if the contact card is expanded

Category pop-up menus

First Name: Matt, Last Name: Falk
 Title: Marketing Manager
 Company: Star Corporation
 Work: [Work]
 Street: 904 Brunswick Ave.
 City: Green Bay, State: WI
 Zip: 54321, Country: [Country]
 Work: (715) 555-6325
 Home: (509) 555-8541
 Fax: (509) 555-8562
 Custom 1: [Custom 1]
 Custom 2: [Custom 2]
 Categories: [Categories] Marked: []
 Contact 9 of 45
 45 Total Contacts

2. From the top category pop-up menu, choose **Friends/Family**.

Categories

- None
- Business
- Entertainment/Dining
- Friends/Family**
- General
- Personal
- Phone Call
- Project 1
- Trade
- Travel
- Work
- Edit Categories...

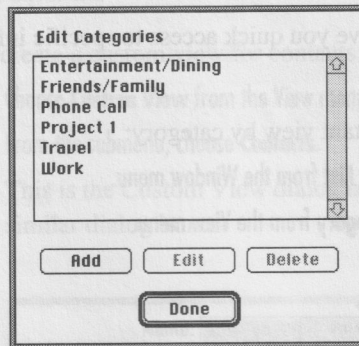
The Category pop-up menus appear in the Appointment, Task, Special Date, and Event dialog boxes, in the contact card, and in the note card.

Editing categories

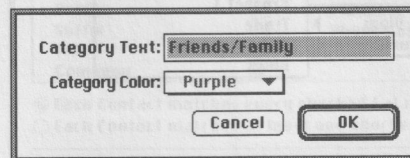
Claris Organizer comes with a set of categories, but you can add your own or edit existing ones.

To edit categories:

1. Choose **Categories** from the Edit menu, and then choose **Edit Categories** from the submenu.



2. Choose **Friends/Family** in the list and then click **Edit**.



3. If you have a color monitor, choose **Purple** as the color for the category.

If you have a color monitor, items you categorize can appear in color in the agendas and lists. You can see at a glance the items belonging to a category.

4. Click **OK** and then click **Done**.
5. Click the **Contact** button to display the contacts list. Notice all the contacts assigned the **Friends/Family** category are now in purple.

Changing the view of your information

By changing the view, you can display subsets of your information. You can create:

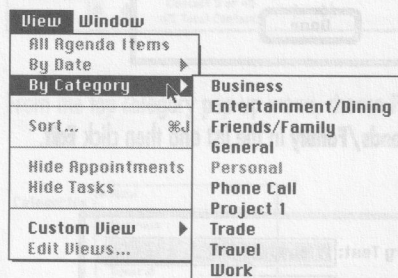
- instant views you can see by selecting a menu item
- custom views you save and use again

Creating instant views

Instant views give you quick access to specific information: by date or by category.

To create an instant view by category:

1. Choose **Contact List** from the Window menu.
2. Choose **By Category** from the View menu.



3. Choose the category **Friends/Family**.

Claris Organizer redisplay the list showing only those contacts whose category is Friends/Family.

4. To show all the contacts in the list again, choose **All Contacts** from the View menu.

The first menu item changes depending on which view you are in.

- ◆ **By the way** You can also create an instant view by date. For example, when the task list is the frontmost window, choosing **Today** from the **By Date** submenu shows only today's tasks.

Creating custom views

You use the Find command for simple, one-time searches. When you search for items using multiple criteria and you perform the search repeatedly, you can create a custom view and save it to reuse later. Custom views appear as menu items in the View menu.

Suppose you want to create a custom view of all the contacts who work at Star in California.

To create a custom view for contacts:

1. Choose **Custom View** from the View menu.
2. From the submenu, choose **Contacts**.

This is the Custom View dialog box for contacts—the other modules have similar dialog boxes.

Name:

Fields:

- Category
- Date Modified
- First Name
- Nickname
- Last Name
- Prefix
- Suffix
- Title
- Company

Category

Any Of

- Business
- Entertainment/Di
- Friends/Family
- Personal
- Phone Call

☒ Each Contact matches every checked (✓) item
☐ Each Contact matches at least one checked (✓) item

☐ Save Current Sort
☐ Save Window Positions

Cancel Save

Give the view a name—it appears on the View menu

3. In the Name box, type Star People in California.

4. In the list of fields on the left, select **Company**.

Select Company

Name: Star People in California

Fields:

- Category
- Date Modified
- First Name
- Nickname
- Last Name
- Prefix
- Suffix
- Title
- ☒ Company

Company

Starts With

Star Corporation

Enter the company name here

☒ Each Contact matches every checked (✓) item
☐ Each Contact matches at least one checked (✓) item

☐ Save Current Sort
☐ Save Window Positions

Cancel Save

5. Click in the text box on the right and type **Star Corporation**.

6. In the list of fields on the left, use the scroll bar arrows to find the **State** field and then select it.

Select State

Name: Star People in California

Fields:

- Suffix
- Title
- ☒ Company
- Division
- Street
- City
- ☒ State
- Code
- Country

State

Starts With

CA

Enter the state here

☒ Each Contact matches every checked (✓) item
☐ Each Contact matches at least one checked (✓) item

☐ Save Current Sort
☐ Save Window Positions

Cancel Save

7. In the text box on the right, type **CA**.

8. Click **Save**.

This custom view now appears as an item in the View menu. Notice the contact list window shows all the Star people in California.

Where to go from here

This ends the tutorial lessons. The following chapter covers printing, which you can read later when you're ready to print.

- ▶ To save the changes, choose **Save** from the File menu.
- ▶ To quit Claris Organizer, choose **Quit** from the File menu.

If you're ready to work on your own and need to import data from another PIM product, see appendix B.

If you need to start a new file, close the sample file and choose **New** from the File menu.

Help topics

For more information on finding and displaying information, see the following help topics:

- Finding information
- Finding text
- Using advanced find options
- Finding recent items
- Adding items to the Locate menu
- Categorizing information
- Assigning categories
- Sorting information
- Customizing views

See appendix C, "Using Claris Organizer Help" for how to use the onscreen help.

Chapter 7

To print your calendar:

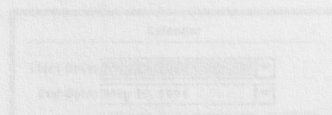
1. Choose Print from the File menu.

You see the Print dialog box.



2. Click the Calendar icon and then click Print (or press Return).

You see the Calendar dialog box.



Printing

Printing your calendar

7-2

Printing your address book

7-6

Printing

3. Select the starting and ending dates and type the dates in the boxes.

4. Select the type of calendar you want to print: Daily, Monthly, or Weekly.

This prints the default daily, weekly, or monthly calendar.

5. Click Print to print the calendar. If you're ready to print the calendar, click Print.

Customizing the calendar layout

When you print your calendar, you can select the starting and ending dates, the type of calendar you want to print (daily, weekly, or monthly), and various other options. You can customize your calendar printout by creating a new layout or by customizing an existing layout. Once you've made a new layout, you can save it to reuse another time.

Printing

Claris Organizer can print all the information in your file in various formats, including calendars, address books, to-do lists, fax cover letters, envelopes, labels, notes, and contact lists.

This chapter covers:

- printing your calendar
- customizing the calendar layout
- address book
- customizing the address book layout

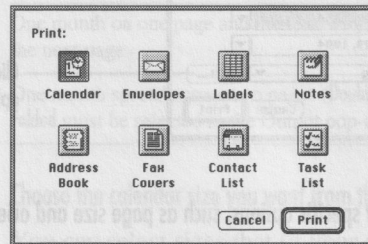
Printing your calendar

When you print your calendar, you can select the starting and ending dates, the time span (daily, weekly, or monthly), and various other options.

To print your calendar:

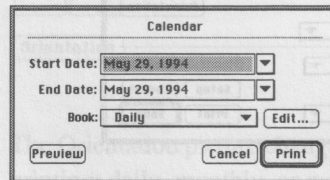
1. Choose **Print** from the File menu.

You see the Print dialog box.



2. Click the **Calendar** icon and then click **Print** (or press **Return**).

You see the Calendar dialog box.



3. Select the starting and ending dates in the pop-up menus, or type the dates in the boxes.
4. Select the type of calendar you want to print in the Book pop-up menu: **Daily**, **Monthly**, or **Weekly**.

This prints the default daily, weekly, or monthly calendars.

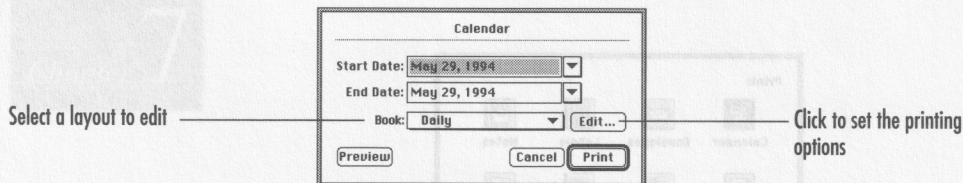
5. Click **Preview** to see what the page will look like, or click **Print** if you're ready to print the calendar.

Customizing the calendar layout

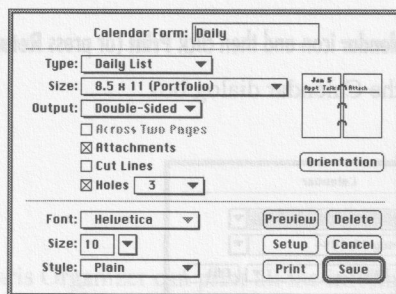
You can customize how your calendar prints by editing an existing layout or by creating a new layout. Once you've made a new layout, you can save it to reuse another time.

To customize a calendar layout:

1. In the Calendar dialog box, choose a layout to edit from the Book pop-up menu.



2. Click **Edit** to set specific options, such as page size and orientation.



3. From the Type pop-up menu, choose the calendar layout you want.

The following table explains the options in the Type pop-up menu.

To print this	Select this option
Each day as a two-page spread: appointments and tasks listed on one page and attachments on the other	Daily List
Each day as a two-page spread: appointments in a temporal format and tasks on one page and attachments on the other	Daily Graphical
Days of the week on one page and attachments on the other page	Weekly

To print this

Select this option

Days of the week across a two-page spread
(**Double-Sided** or **Folded** must be selected in the Output pop-up menu.) Attachments print on subsequent pages.

Weekly, with **Across Two Pages** selected

One month on one page and the following month on the next page

Monthly

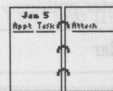
One month spread across two pages (**Double-Sided** or **Folded** must be selected in the Output pop-up menu)

Monthly, with **Across Two Pages** selected

4. Choose the calendar size you want from the Size pop-up menu.

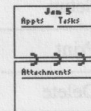
You can select sizes that fit your standard planners.

5. Click **Orientation** to print horizontally or vertically.



Prints horizontally

Orientation



Prints vertically

Orientation

The Orientation picture changes depending on which calendar type you're printing: daily, monthly, or weekly.

6. From the Output pop-up menu, choose **Single-Sided**, **Double-Sided** or **Folded**.

If you select **Double-Sided**, Claris Organizer tells you when to reinsert the pages after the first side has been printed. Depending on your printer, you may need to flip the pages or reverse their order. See appendix D, "Printing double-sided pages."

If you select **Folded**, Claris Organizer prints on single pages, but prints the holes differently so you can simulate double-sided output by folding the pages. **Folded** is available only for certain page sizes.

7. Select the **Across Two Pages** checkbox for the weekly or monthly calendar, if you want the week or month to span two pages.

This option is not available with single-sided output.

8. Select the **Attachments** checkbox to print all items attached to the appointments and tasks being printed.

You can't select **Attachments** for monthly calendars.

9. Select the **Cut Lines** checkbox to have Claris Organizer print dashed lines to guide you in cutting off excess paper to fit your paper-based organizer.
10. Select the **Holes** checkbox and from the pop-up menu, choose the number of holes.
Claris Organizer prints a marker to guide you in punching holes.
11. Choose the font, font size, and font style from the pop-up menus.

After you have made these selections, you're ready to print.

Click this	To
Preview	Get an idea of what the printed calendar will look like
Setup	Change the printer options
Print	Print the calendar
Delete	Delete the settings made to this layout
Cancel	Close the dialog box without saving any of your settings made to this layout
Save	Save the settings you've made for later use

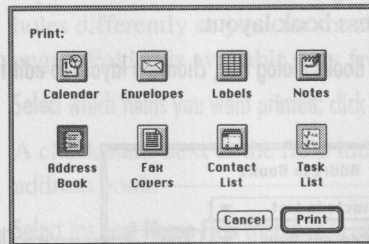
Printing your address book

Printing your address book is easy—many of the options are identical to printing your calendar. You can print an address book with all your contacts, or you can use the Find, View, or Mark features to print a group of contacts.

To print your address book:

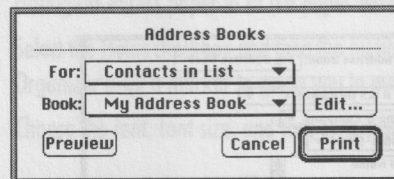
1. Choose **Print** from the File menu.

You see the Print dialog box.



2. Click the **Address Book** icon and then click **Print**.

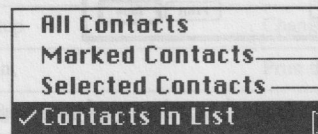
You see the Address Books dialog box.



3. From the For pop-up menu, choose the set of contacts you want to print.

Prints all contacts

Prints only those contacts currently
displayed in the contact list



Prints only those contacts you've
marked in the contact list

Prints only those contacts you've
selected in the contact list

4. From the Book pop-up menu, choose **My Address Book** to print a standard address book format.

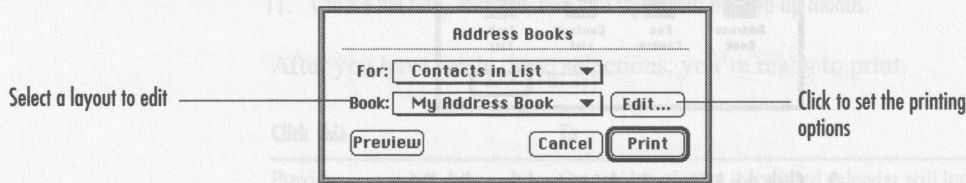
5. Click **Preview** to see what the page will look like, or click **Print** if you're ready to print the address book.

Customizing the address book layout

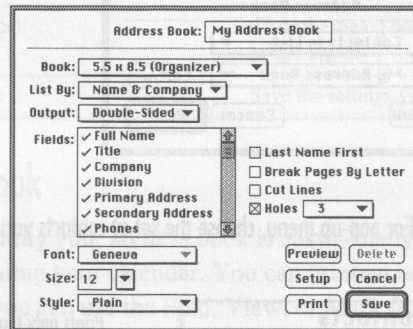
You can change the options for printing your address book by editing an existing layout or by creating a new layout. Once you've made the new settings, you can save the layout to reuse again.

To edit an address book layout:

1. In the Address Books dialog box, choose a layout to edit from the Book pop-up menu.



2. Click **Edit** to set specific options, such as page size.



3. From the Book pop-up menu, choose the page format you need.
4. From the List By pop-up menu, choose how you want the addresses listed by: **Name**, **Company**, or **Both**.
5. From the Output pop-up menu, choose **Single-Sided**, **Double-Sided**, or **Folded**.

If you select Double-Sided, Claris Organizer tells you when to reinsert the pages after the first side has been printed. Depending on your printer, you may need to flip the pages or reverse their order. See appendix D, "Printing double-sided pages."

If you select Folded, Claris Organizer prints on single pages, but prints the holes differently so you can simulate double-sided output by folding the pages. Folded is available only for certain page sizes.

6. Select which fields you want printed: click a field in the list to select or deselect it.

A checkmark next to the field indicates that it will appear in the printed address book.

7. Select the **Last Name First** checkbox to print the contacts listed by last name.

Selecting this option prints "Smith, Bill" instead of "Bill Smith."

8. Select the **Break Pages By Letter** checkbox to start a new page every time the first letter of the last name (or company) changes.

9. Select the **Cut Lines** checkbox to have Claris Organizer print a dashed line to guide you in cutting off excess paper to fit the paper-based organizer you have.

10. Select the **Holes** checkbox and then the number of holes from the pop-up menu to have Claris Organizer print a marker to guide you in punching holes.

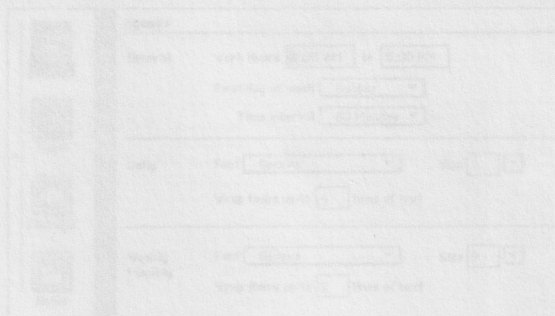
11. Choose the font, font size, and font style from the pop-up menus.

After you have made these selections, you're ready to print.

Click this	To
Preview	Get an idea of what the printed address book will look like
Setup	Change the printer options
Print	Print the address book
Delete	Delete the settings you've made to this layout
Cancel	Close the dialog box without saving any of your settings to this layout
Save	Save the settings you've made for later use

Appendix A

When you choose **Preferences** from the **Edit** menu, you see the Preferences dialog box.



Use the scroll bar to see more options.

Setting agenda preferences

Setting preferences

Setting agenda preferences	A-3	Setting note preferences	A-5
Setting task preferences	A-4	Setting attachment preferences	A-5
Setting contact preferences	A-4	Setting alarm preferences	A-6



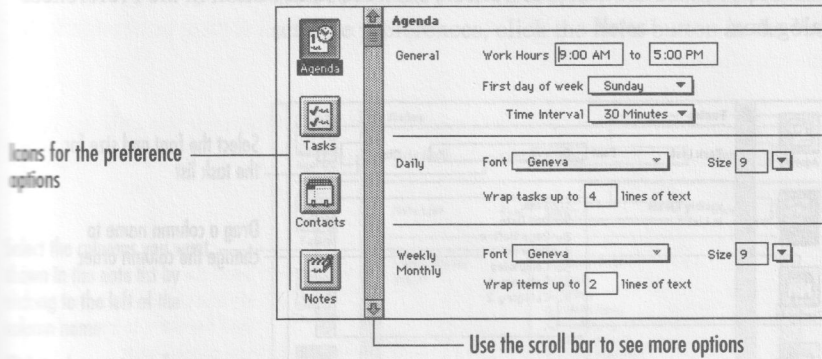
Appendix A

Setting preferences

In Claris Organizer, you can customize certain procedures and options by setting preferences and defaults. Claris Organizer includes:

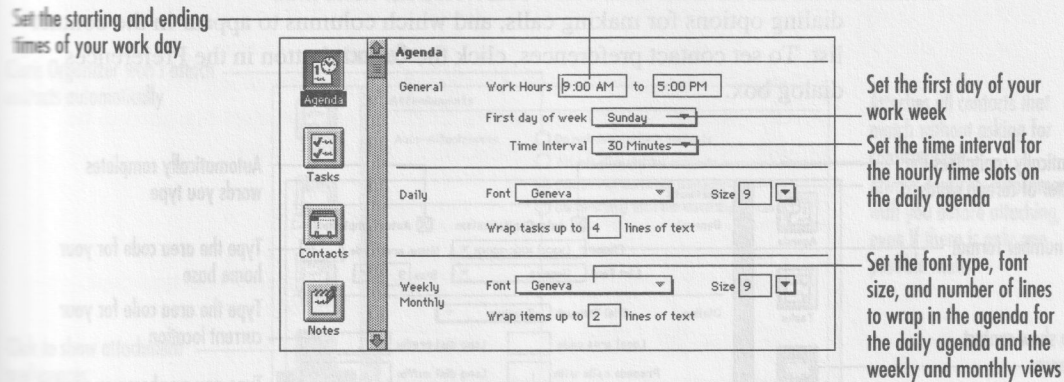
- agenda preferences
- task preferences
- contact preferences
- note preferences
- attachment preferences
- alarm preferences

When you choose **Preferences** from the Edit menu, you see the Preferences dialog box.



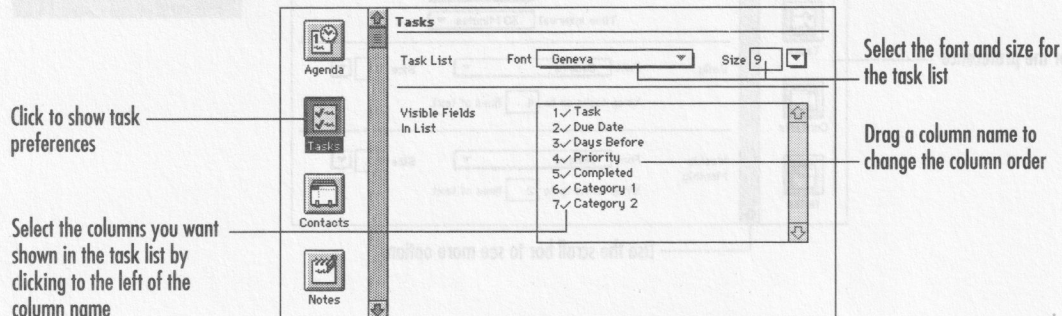
Setting agenda preferences

In the Preferences dialog box, you can customize the way the agenda appears all the time.



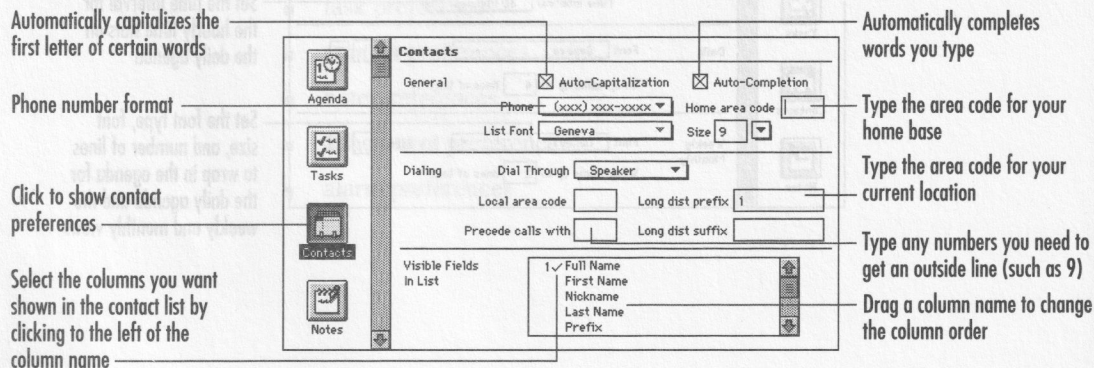
Setting task preferences

You can select the font type and size for the task list, and select which columns should appear. To set task preferences, click the **Tasks** button in the Preferences dialog box.



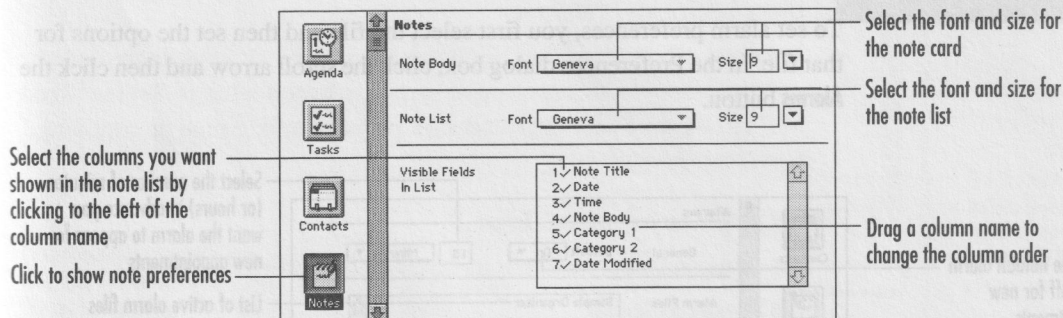
Setting contact preferences

You can select the font type and size for the contact list, the telephone format, auto-capitalization and auto-completion options for the contact card, the dialing options for making calls, and which columns to appear in the contact list. To set contact preferences, click the **Contacts** button in the Preferences dialog box.



Setting note preferences

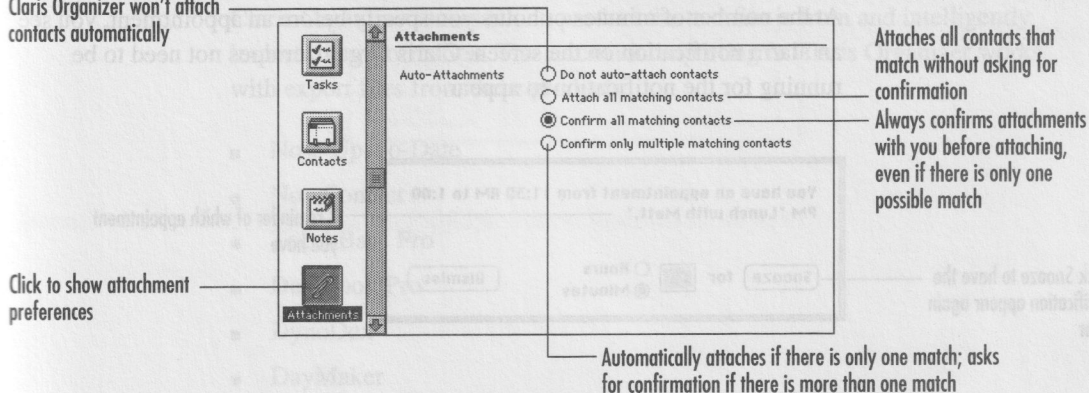
In notes preferences, you can select the font type and size for the note list and the body of the note card, and which columns should appear in the note list. To set note preferences, click the **Notes** button in the Preferences dialog box.



Setting attachment preferences

You can select options for how attachments work. In the Preferences dialog box, click the scroll arrow and then click the **Attachments** button.

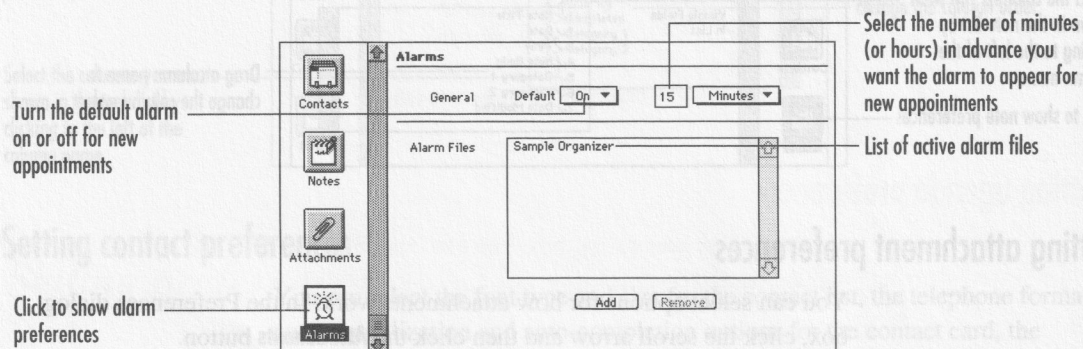
Claris Organizer won't attach contacts automatically



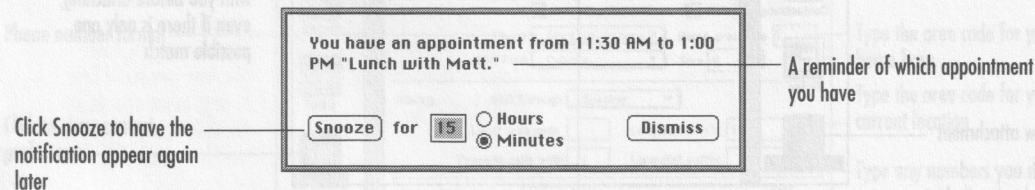
Setting alarm preferences

You can set alarm preferences to turn the alarm on or off and set the default amount of time prior to the appointment you want the alarm to appear. When you create a new appointment, you can use the default setting or change it in the Appointment dialog box.

To set alarm preferences, you first select the file and then set the options for that file. In the Preferences dialog box, click the scroll arrow and then click the **Alarms** button.



At the number of minutes or hours you specify before an appointment, you see an alarm notification on the screen. Claris Organizer does not need to be running for the notification to appear.



Appendix B

Importing data from other PIM products

Importing data from other PIM (Personal Information Managers) products is easy—all you do is export a text file from any of the products listed below. Claris Organizer senses which product the text file is from and intelligently imports the information. The automatic importing in Claris Organizer works with export files from these products:

- Now-Up-To-Date
- NowContact
- TouchBase Pro
- DateBook Pro
- DynoDex
- DayMaker
- Address Book Plus
- Meeting Maker
- QuickDex

To import a file:

1. Double-click your data file to open it in the other PIM application.

Each product has a different Export dialog box, so the steps may vary. Check to see that all of your information is designated for export in the default settings and order.

2. Choose **Export** from the File menu.

- ◆ **Important** Claris Organizer assumes you exported all fields in the default order and that you did not change any special export settings. See the “Read Me” file on the Claris Organizer disk for more information on exporting from your product.

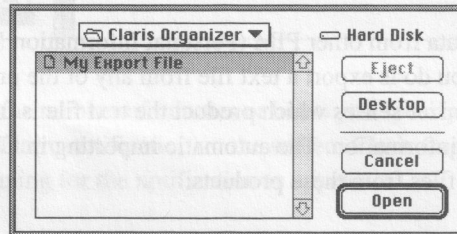
3. Choose **All Fields** and then click **Export**.

4. Give the export file a name, such as **My Export File** and save it.

5. Quit the other application

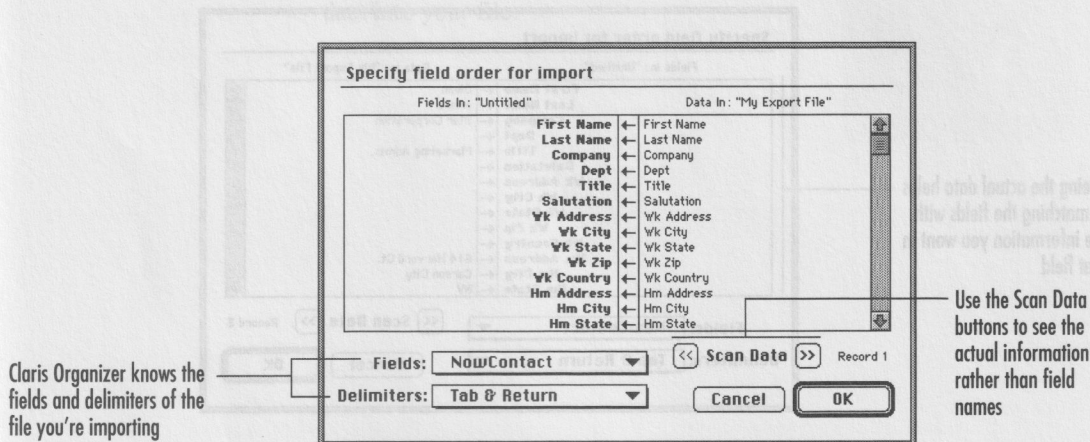
6. Open Claris Organizer.

7. Choose **Import** from the File menu.



8. Locate the file you created in step 4, highlight it, and click **Open** (or double-click the filename).

You see the Import dialog box. Your screen may look different depending on the product you're exporting from.



- ◆ **Note** If the box on the right (**Data In** column) is blank except for the first line, change the current setting in the Delimiters pop-up menu until you see the data correctly.

Each PIM product uses different field names. Claris Organizer automatically chooses the appropriate field names to match the file you're importing. If you want, you can choose a different set of field names using the Fields pop-up menu.

9. Use the Scan Data buttons to cycle through the information in the file to import.

Seeing the actual data helps in matching the fields with the information you want in that field

Specify field order for import

Fields In: "Untitled" Data In: "My Export File"

First Name	←	Glenn
Last Name	←	Akers
Company	←	Star Corporation
Dept	←	
Title	←	Marketing Admin.
Salutation	←	
Wk Address	←	
Wk City	←	
Wk State	←	
Wk Zip	←	
Wk Country	←	
Hm Address	←	614 Harvard Ct.
Hm City	←	Carson City
Hm State	←	NV

Fields: **NowContact** << Scan Data >> Record 3

Delimiters: **Tab & Return** Cancel OK

10. Check the screen: the fields on the left should match the fields on the right. If the fields don't match, drag the fields on the left to match the information on the right.

Drag a field so that the field name matches the correct field information

Fields In: "Untitled" Data In: "My Export File"

Wk State	←	
Wk Zip	←	
Wk Country	←	
Hm Address	←	614 Harvard Ct.
Hm City	←	Carson City
Hm State	←	NV
Hm Zip	←	54321
Hm Country	←	702-555-9875
Work Phone	←	408-555-4655
Home Phone	←	408-555-6241
Fax	←	
Mobile Phone	←	
Custom 1	←	
Custom 2	←	

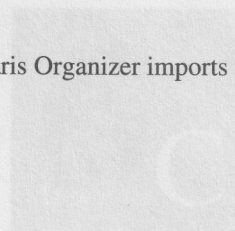
Fields In: "Untitled" Data In: "My Export File"

Wk State	←	
Wk Zip	←	
Wk Country	←	
Hm Address	←	614 Harvard Ct.
Hm City	←	Carson City
Hm State	←	NV
Hm Country	←	54321
Hm Zip	←	702-555-9875
Work Phone	←	408-555-4655
Home Phone	←	408-555-6241
Fax	←	
Mobile Phone	←	
Custom 1	←	
Custom 2	←	

To ignore a field, click the arrow next to it (this deselects the arrow and leaves a dotted line)

-
11. When all the fields match, click **OK**.

A progress report appears on the screen and Claris Organizer imports the data into your file.



Using Claris Organizer Help

As you work with Claris Organizer, you can use Claris Organizer Help to get immediate onscreen help. In Claris Organizer, you get help by choosing from a list of topics.

Once you open Help, you can move between Claris Organizer and Help as needed. You can also print a Help topic.

Appendix C

Using Claris Organizer Help

As you work with Claris Organizer, you can use Claris Organizer Help to get immediate onscreen help. In Claris Organizer, you get help by choosing from a list of topics.

Once you open Help, you can move between Claris Organizer and Help as needed. You can also print a Help topic.



Keyword button

1. In any Claris Organizer window, click the Keyword button.

You see the list of keywords.

2. In the list of keywords, click the word or phrase to see related topics.

The list of topics shows all the topics containing the selected keyword.

3. To go to the topic, double-click it.

To open Claris Organizer Help:

1. Choose **Help** from the Apple menu.

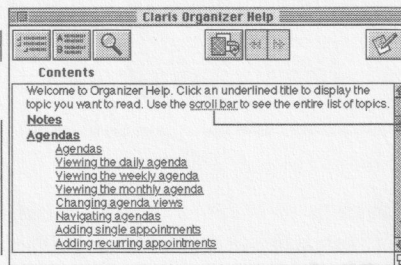
If you have an extended keyboard, you can also press the Help key. You can choose **Help** from the Balloon Help menu—the question mark in the upper-right corner of the screen.

You see the Claris Organizer Help Contents window, with a list of main help topics.

2. Click an underlined title to see a list of related topics.

These buttons navigate through Help

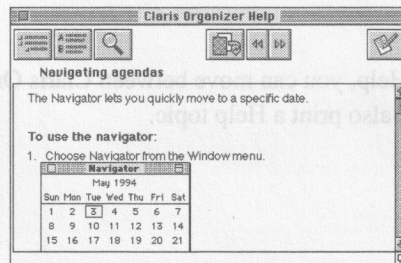
Help topics grouped by










Click a glossary term (words with a dotted underline) to see a definition

Use the scroll bar to view additional topics

3. Click a topic title to go to the information you want.



4. Use any of the Help navigation buttons to move through the Help system.

Click this navigation button	To
	Return to the table of contents from anywhere in the system
	See a list of keywords that relate to a topic or group of topics. When you select a keyword, related topics appear.
	Search through Claris Organizer Help for the text you specify
	Return to the last topic you viewed
	Move backward within a topic category
	Move forward within a topic category
	Add your own comments to a help topic

Searching for a topic

Often, the quickest way to find specific help information is to search for topics related to a descriptive word or phrase (called a *keyword*).

To search for a topic:

1. In any Claris Organizer Help window, click the **Keyword** button.

You see the list of keywords.

2. In the list of keywords, click the word or phrase to see related topics.

The list of topics shows all the topics containing the selected keyword.

3. To go to the topic, double-click it.



Keyword button

Searching for text

You can search Claris Organizer Help for a specific word or phrase.

To search for text:



Search button

1. Click the **Search** button.

You see a Search dialog box.

2. Type the word or phrase you want to search for, then click **Start Search**.

A list of topics containing that word or phrase appears. The number to the left of the titles shows how many times the word or phrase appears in the topic.

3. Double-click a title to go to the topic.

Closing Help

To close the Help window, do one of the following:

- Click the close box in the upper left corner of the Help window.
- Choose **Close Window** from the File menu (or press Command-W).

Appendix D

Printing double-sided pages

Many paper-based organizers show information on both sides of the page. In Claris Organizer, you can print on both sides of a page so that you can use the pages in a paper-based organizer. First you print one side and then Claris Organizer asks you to reinsert the printed pages to print the other side.

- ◆ **Note** Some companies (such as Avery) supply pre-punched and perforated paper for use in 2-page paper-based organizers. Stationary stores sell Avery products. Avery has a toll-free number you can call to find the store nearest you: (800) 252-8379.

This chapter shows you how to print double-sided pages for 2-page organizers. Read the section for your particular printer.

Printing for two-page organizers

Claris Organizer prints your calendar and address book pages to fit several standard two-page organizers:

- 5.5 inch by 8.5 inch (Organizer)
- 4.25 inch by 6.75 inch (Compact)
- 3.75 inch by 6.75 inch (Sr. Pocket)
- 2.75 inch by 5 inch (Jr. Pocket)
- 2.75 inch by 4.25 inch (MiniBook 8)
- 2 inch by 2.25 inch (MiniBook 12)

The Day-Timer Loose-Leaf Jr. Desk (Model L) and the Day Runner Classic are examples of 2-page paper-based organizers.

- ◆ **Note** If you are not using pre-punched and pre-printed forms, such as the Avery forms, you can have Claris Organizer print hollow circles where the holes should be punched and dashed lines where you should cut the paper. These options appear in the dialog box that appears when you're editing a layout. See "Customizing the calendar layout" on page 7-3 or "Customizing the address book layout" on page 7-8.

Select these options to show
you where to punch holes and
cut away excess paper

Calendar Form: **Monthly**

Type: **Monthly**

Size: **5.5 x 8.5 (Organizer)**

Output: **Double-Sided**

☐ Across Two Pages

☐ Attachments

☒ Cut Lines

☒ Holes **6**

Orientation

Font: **Helvetica**

Size: **10**

Style: **Plain**

Preview Delete

Setup Cancel

Print Save

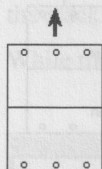
DeskWriter, LaserWriter, and LaserWriter Plus

For the DeskWriter, LaserWriter, and LaserWriter Plus, these are the general steps:

- first print one side of the page
- reverse the order of the pages
- print the other side of the page

Follow the instructions in Chapter 7 for printing. Follow these steps once printing has begun:

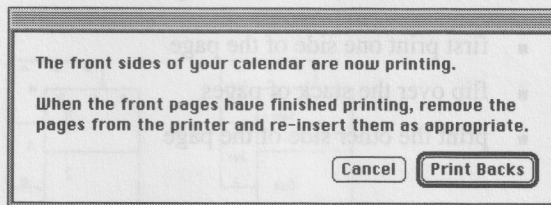
1. If you're using pre-punched paper, feed the paper in the printer so that the holes enter the printer first.



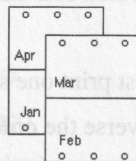
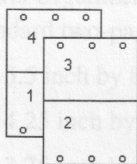
Edge with the holes enters the printer first

The printed pages come out of the printer in reverse order and printed side up. The first page printed (for example, January/April or the A's if you're printing contacts) is at the bottom of the stack.

While the first side is printing, you see a message on the screen.

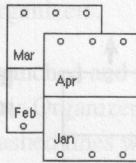
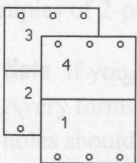


2. Wait until all the pages have printed and then remove the printed pages.



3. Reverse the order of the pages.

The first page that printed should be on top of the stack of pages; the last page should be on the bottom of the stack.



4. Insert the pages back into the paper tray, printed side up.
5. Click **Print Backs**.

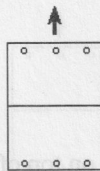
Personal LaserWriter and LaserJet II

For the LaserJet IIP/IIIP and the Personal LaserWriter SC/NT/LS, these are the general steps:

- first print one side of the page
- flip over the stack of pages
- print the other side of the page

Follow these steps for printing:

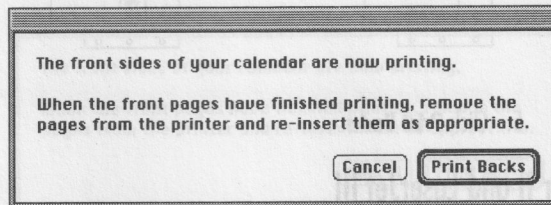
1. If you're using pre-punched paper, feed the paper in the printer so that the holes enter the printer first.



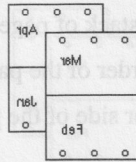
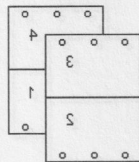
Edge with the holes enters the printer first

The printed pages come out of the printer with the first page at the bottom of the stack and printed side down. The first page printed (for example, January/April or the A's if you're printing contacts) is at the bottom of the stack.

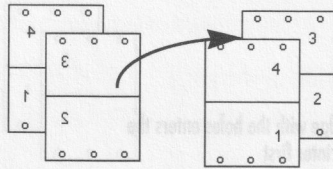
While the first side is printing, you see a message on the screen.



2. Wait until all the pages have printed and then remove the printed pages.

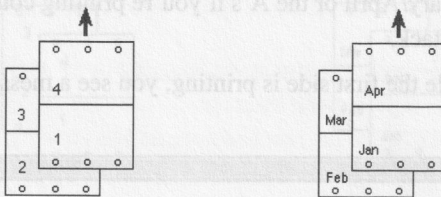


3. Flip over the stack so that the first page that was printed is at the top of the stack.



The first page that printed should be on top of the stack of pages; the last page should be on the bottom of the stack.

4. Insert the pages back into the paper tray, printed side up.



5. Click **Print Backs**.

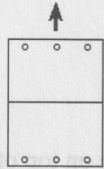
LaserWriter II and LaserJet III

For the LaserJet III/IIID and the LaserWriter II SC/NT/NTX, these are the general steps:

- first print one side of the page
- flip over the stack of pages
- reverse the order of the pages
- print the other side of the page

Follow these steps for printing:

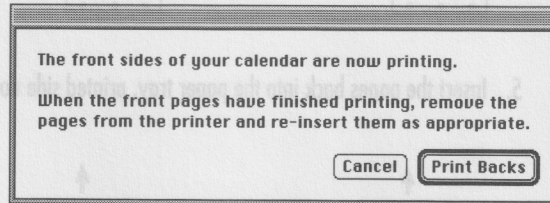
1. If you're using pre-punched paper, feed the paper in the printer so that the holes enter the printer first.



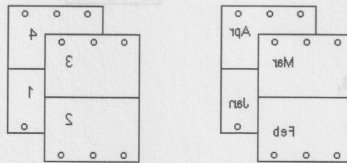
Edge with the holes enters the printer first

The printed pages come out of the printer with the first page at the bottom of the stack and printed side down. The first page printed (for example, January/April or the A's if you're printing contacts) is at the bottom of the stack.

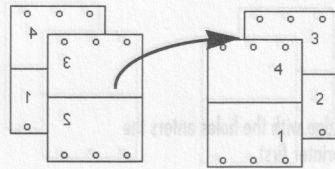
While the first side is printing, you see a message on the screen.



2. Wait until all the pages have printed and then remove the printed pages.

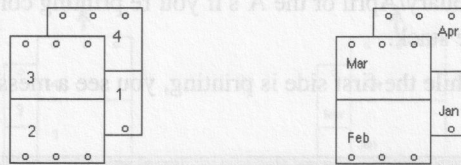


3. Flip over the stack so that the first page that was printed is at the top of the stack.

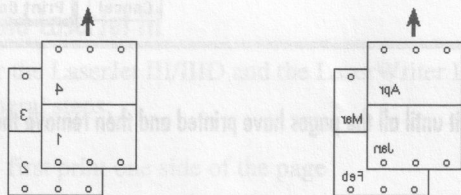


The first page that printed should be on top of the stack of pages; the last page should be on the bottom of the stack.

4. Reverse the order of the pages so that the first page printed is on the bottom.



5. Insert the pages back into the paper tray, printed side down.



6. Click **Print Backs**.

