



UNIPLEX

Business Software

Advanced Office System

USER GUIDE

Vol 4

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About this Guide**◆ About this Guide**

The five volume Uniplex V9 user guide set supersedes the V8.00 user guides plus the **V8.10 User Guide Supplement**. Additional supplementary and technical documentation is provided on-line with the software. The printed manuals include:

Guide Name	Contents
UBS Installation Guide & Supplemental Release Notes	Installation/upgrade directions plus platform-specific release notes.
Uniplex II Plus User Guide Volume 1	Introduction, filing, Word Processor, and Sketch Pad.
Uniplex II Plus User Guide Volume 2	File Manager, printing, and Spreadsheet.
Uniplex II Plus User Guide Volume 3	Database Forms, Database Query, Key Recorder, integration, menu maps, desk maps, ring menus, glossary, and topic index.
Advanced Office System User Guide (Volume 4)	Electronic Mail, Time Manager, Card Index, Personal Organizer, Report Writer, Formfill, printing, integration, menu maps, desk maps, glossary, and topic index.
Advanced Graphics System User Guide (Volume 5)	Presentation Graphics, Presentation Editor, printing, integration, menu maps, desk maps, clip art, glossary, and topic index.



About this Guide

◇ Version Information

Some of the material in these guides will not apply to users of Uniplex releases prior to V9.00. Please contact your Uniplex supplier or Uniplex directly for information about upgrading to the current release. Users upgrading from V8.00 or earlier should consult the **File Manager** chapter for information about a new method for carrying out all folder and file-related operations.

◇ Useful Shortcut Keys

These shortcut keystrokes can be used throughout Uniplex:

Cut and Paste		Insert	
mark top left	Esc (line/row	Ctrl o
mark lower right	Esc)	character	Ctrl e
paste insert	Esc *i	switch insert/overtyp	Esc i
paste overlay	Esc *o		
Delete		Quick Movements	
line/row	Ctrl x	top of screen/list	Esc Ctrl t
work/cell	Ctrl w	next screen/page	Ctrl d
character	Ctrl c	previous screen/page	Ctrl u
		start of line	Esc <-
		end of line	Esc ->
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access Utility popup	F12 or Esc xu		
switch processes	Esc xs	Save Work	
list processes	Esc xp	save and continue	Esc w
		save and exit	Esc e
		save to new file	Esc sx
Format Paragraph	Ctrl fp		
		Undo Last Command	
Hard Return	Esc Return		Esc u
		Enter £ Sign	
Help	Esc h		Esc % #
		F10	
F1...F9	Esc 1...9	F10	Esc 0
F11...F19	Esc Esc 1...9	F20 (X/Open prefix)	Esc Esc 0



◇ **The Uniplex User Guide Set**

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Chapter 2: Filing Your Work

Chapter 3: Word Processor

Chapter 4: Sketch Pad

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Appendix C: Word Processor Ring Menus

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Introduction



◆ Introduction

Welcome to Uniplex Advanced Office System!

Uniplex Advanced Office System expands the power of Uniplex II Plus. The system provides a wide range of office automation features which you can use together with the Word Processor, Spreadsheet and Database to make your everyday work pleasanter, quicker and much more efficient.

Uniplex Advanced Office System provides you with a fully functional Electronic Mail system, a sophisticated Time Manager, a Report Writer, in addition to a wide range of office tools. These include an automated Card Index, which lets you store names, addresses, telephone numbers, and other vital information, both for your own and for business use. Uniplex Advanced Office System used in conjunction with Uniplex II Plus provides you with one of the most productive and useful business tools available.

Integration is one of most important features of Uniplex, and extends to its full power with the Advanced Office System. Each application provides features and capabilities equal to any stand-alone product, and there is total integration between all applications, together with complete consistency of commands and operations.

You can quickly and simply switch between tasks while using Uniplex. For example, you can refer to your Time Manager while you are creating a Uniplex document, or you can have your Card Index at hand while you send a series of memos using Electronic Mail.

Uniplex can perform all the usual office chores like filing, sending memos, typing, scheduling meetings, searching for information and producing financial forecasts.



Introduction

With Uniplex Advanced Office System, all this can be achieved with maximum efficiency and the minimum of duplicated work.

Uniplex has been designed so it is easy to learn and easy to use. The same commands are used consistently throughout the product, regardless of which element you are using. The extensive and consistent use of *softkeys* means complex operations can be carried out with one keystroke by following the on-screen menus.

You can display relevant help at any point while using Uniplex.

Uniplex is a business tool that has been designed for real business use. Although it can be used by one person very efficiently, its real benefits can be seen when used by whole departments or complete organizations. Uniplex links people to information and improves corporate communications at all levels. It is a true multi-user design, the more people there are using it, the more efficiently the system operates.

Uniplex Advanced Office System has the following set of applications:

- o **Electronic Mail.** You can send messages to other Uniplex or Unix users. If your system is connected to the Internet you can send messages to other Internet users. Messages can have attached documents or files. Mail is organized using mailboxes.
- o **Time Manager.** Using Time Manager you can organize your appointments and calendar on a day-to-day basis, and for several months in advance. You can schedule meetings with other calendar users and set alarms to warn you in advance of important events.
- o **Card Index.** You can set up card indexes for any list of information you use regularly. For example, an address list of contacts. You can quickly access and update this information.



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- o **Personal Organizer.** You can use Personal Organizer to manage all your personal and business information. In addition to storing information in a systematic format, which you can readily retrieve at any time, you can produce a printed copy of any Personal Organizer information to place in your personal file.
- o **Report Writer.** You can use Report Writer to automatically produce reports using data from the Database, Word Processor, or any other Uniplex application.
- o **Formfill.** Formfill lets you complete the forms that are regularly used in your office.
- o **Printing.** You can print the documents and files you create with Uniplex on any type of printer. If required, you can print a document proportionally spaced on a laser printer to produce professional results.

In addition to this wide range of applications, Uniplex has a number of facilities that provide total integration between the applications:

- o **External Windows.** External Windows lets you use more than one Uniplex application at the same time. You can switch between applications simply and quickly. You can be working at one task, and switch to a different task by pressing a couple of keys.

It is just as easy to switch back to the original task. This is particularly useful if you want to perform several different Uniplex tasks in succession. In this way, you can save valuable time. In addition, you can keep the context in which you are working. For example, you can have your personal calendar constantly at hand while you work in the Word Processor or Spreadsheet.

- o **Key Recorder.** Key Recorder lets you record sequences of keystrokes you make and subsequently reuse them. This means you can repetitively perform long or complicated sequences of keystrokes by pressing only a couple of keys. In



Introduction

addition, you can store sequences of commands which perform a common task in a standardized way.

Together with the External Windows and Key Recorder, Uniplex provides a totally integrated and consistent approach in the following ways:

- o You can use the same editing commands throughout all the forms-based applications. For example, you use the same commands when using Database Forms and Time Manager.
- o When searching for information, whether in the database, the card index, your mailboxes, or any other of the data storage facilities, the commands you use to search are the same.
- o You can use the cut and paste facility in the same way throughout the product to simply and easily transfer information between applications. For example, you can transfer information from your personal calendar into a word processing document, then mail it using Electronic Mail.



◆ Using this Guide

◇ Purpose of this Guide

The Uniplex Advanced Office System User Guide (Volume 4) is intended for anyone who wants to use the Uniplex Advanced Office System. It contains instructions for those people new to Uniplex and the more experienced Uniplex user.

◇ Organization of each Chapter

Each chapter in this guide is organized as follows:

Table of Contents	The beginning of each chapter contains a detailed table of contents.
Overview	The overview provides an introduction to the purpose and major features of the application.
How to Access the Application	This section provides the instructions to access the application.
Worked Example	The worked example section leads you through a typical session of using the application. It provides detailed instructions for each stage of the session.
Reference	The remainder of each chapter describes the full functionality of the application. The sections are organized into logical task units.
Index	A comprehensive index is included at the end of each chapter.



Using this Guide

◇ Organization of the Chapters

The Uniplex Advanced Office System User Guide (Volume 4) is organized into the following chapters:


- | | |
|-----------------------------|--|
| 1 Electronic Mail | Send messages to other people on your system, other connected systems, or the Internet. |
| 2 Time Manager | Organize your time using the calendar and scheduling facilities. |
| 3 Card Index | Set up and use a card index for lists of information. |
| 4 Personal Organizer | Store, retrieve, and print a variety of personal and business information. Use a wide range of office tools, such as calculators and clocks. |
| 5 Report Writer | Produce professional reports using data from the database or any other data source. |
| 6 Formfill | Complete the forms that are often used in your office. |
| 7 Printing | Print your work in a variety of ways. |
| 8 Integration | Use the consistent command structure and integration facilities of Uniplex. |
| Appendices | Maps of the Uniplex menus and Desk/Utility popups. |

For details on Uniplex II Plus applications, refer to the **Uniplex II Plus User Guide**.



◇ Conventions Used in this Guide

The following conventions are used in this guide:

Convention	Meaning
Uniplex	Used throughout this guide as an abbreviation of Uniplex Advanced Office System.
<i>Text Like This</i>	Output from Uniplex as seen on a terminal.
Text Like This	Enter this text exactly as shown.
<i>Text Like This</i>	Enter the appropriate parameter in this position in the command line (also shows notes and new terms).
	A short note or additional information.
Press a Key	Press and release the appropriate key.
Pick and Point	Move between items with the arrow keys until the required option is highlighted, then press RETURN .
Press ESC key	Press the ESC key and then press <i>key</i> (i.e., ESC e). Do not press RETURN .
Press CTRL key	Hold down the CTRL key and press <i>key</i> (i.e., CTRL x). Do not press RETURN .
Press Fx	Press the appropriate function key.



Using this Guide

Convention

Meaning

[parameter]

An optional expression in a command line or sequence, for example:

create database [with log in "filename"]

The clause within the square brackets is optional, but requires a valid file name between the quotation marks; you can enter:

```
create database
```

or

```
create database with log in "db.log"
```

. . .

Additional parameters or values can be entered, for example:

create table *tablename* (*column_name*,...)

You can enter more than one column name, separated by commas, for example:

```
create table table1 (col1,col2,col3)
```

{param!param}

Shows the list of available options (parameters) in a command, for example:

grant privilege to {public!user_list}

You can enter:

```
grant connect to public
```

or

```
grant connect to john,karen
```

Chapter 1

Electronic Mail

Electronic Mail

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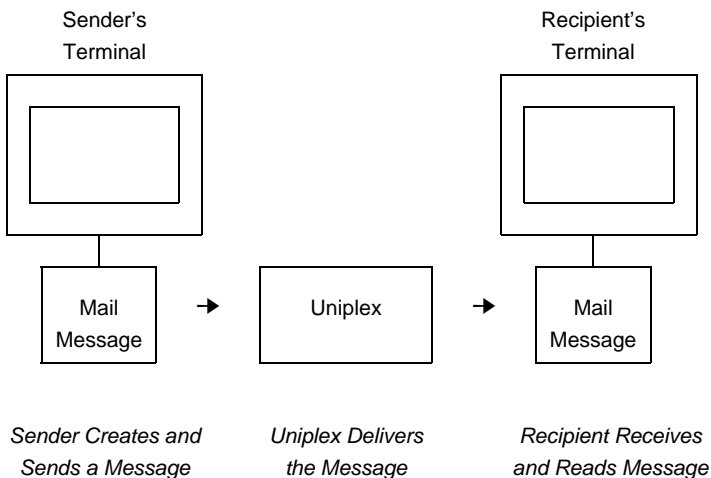
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◆ Overview

Uniplex Electronic Mail lets you send and receive mail. It has the following advantages over traditional mail systems:

- o Uniplex sends the mail instantly which means that information is not subject to potentially expensive time delays.
- o The person you want to contact does not have to be at his or her terminal to receive your mail.
- o You can send word processing documents using Electronic Mail This makes it simple to revise and return documents.
- o You can efficiently manage your incoming and outgoing mail.

The words and concepts used by Electronic Mail are very similar to those for a manual mail system. For example, if you require a weekly report from several other departments, you can *send a memo* requesting this report. The departments can *reply* with their reports. You can *attach* their *letters* to your report and *forward* it to the relevant people. This diagram illustrates Uniplex Electronic Mail:





Overview

You can protect the contents of a mail message, either in transit or when it arrives. The security features are easy to use, but are difficult to intercept and decrypt. Actions you can perform on all mail messages you send or receive include:

- o Print messages and attachments, converting if required from another file format.
- o Delete messages to the trashcan for later recovery if required.
- o Save messages into a specific mailbox or to a file.

When Uniplex mail is sent to another Uniplex mail user the following extra features are also available:

- o Confirmation when mail has been delivered.
- o Confirmation when mail has been opened by the recipient.
- o Request that the recipient send further confirmation that he has actually read the mail.
- o Notification if the mail has not been read after a specified number of days.
- o Delete (retrieve) a previously sent mail message.

◇ Different Types of Mail

Mail is stored in three areas:

- o **Incoming Mail.** Mail that has been sent to you.
- o **Outgoing Mail.** Mail that you have sent or have marked to be sent in the future and have optionally saved a copy of.
- o **Saved Mail.** Mail that you have received and archived.

◇ Access Electronic Mail

To access Uniplex Electronic Mail from the Main Menu:

- o Pick and point the **Mail** option.

Uniplex displays the Mail menu.

To access Electronic Mail from other Uniplex applications:

- 1 Press **ESC xd** or **F9**.

Uniplex displays the Desk options Popup Menu.

- 2 Pick and point the **Mail** option.

Uniplex displays the Mail menu:

E L E C T R O N I C M A I L 08/10/99 16:50

INCOMING MAIL	SAVED MAIL
1 - Read Incoming Mail	6 - Read Archived Mail
OUTGOING MAIL	GENERAL
2 - Easi Send	A - Administration
3 - Send Letter	W - Who is Logged On
4 - Send a file	H - Help
5 - Check Mail Sent	Q - Quit

F1=Enter F2=Redraw F4=Quit

F8>More



Worked Example

◆ Worked Example

This section provides a worked example, the purpose of which is to help you learn the basic Electronic Mail tasks.

In this worked example, you are instructed to send, reply to and forward messages to yourself. If a colleague is learning how to use Electronic Mail at the same time as you, substitute your username with theirs. Fictitious names are used throughout this worked example. These names are displayed in the message headers. When you work through the example, Uniplex shows either your name (or the name of the colleague you are working through the example with) in the message headers.

1 Create a Mailbox

You can organize your mail into mailboxes. They are a useful way of storing mail, since they help you to find and use your mail messages quickly and efficiently.

Create a new mailbox as follows:

- a) Pick and point the Mail option.
- b) Pick and point the Administration option.
- c) Pick and point the Create Mailbox option.
- d) Enter **practice** in the Create Mailbox form and press **RETURN**.

✎ *You can delete this mailbox after this exercise.*

Uniplex creates the mailbox.

- e) Press F4 or **ESC q** to leave the Create Mailbox form.
- f) Pick and point Quit to leave the Administration menu.



Worked Example

Enter name of new mailbox, F6 to list approved mailboxes

C R E A T E M A I L B O X

Enter name of new mailbox
[practice_____]

F1=Send F2=Redraw

F4=Quit

F6=List Mboxs

2 Create a Mail Message

When you send a message to someone using Electronic Mail, you type it in at your terminal and Uniplex sends it to the other person. You do not need to produce anything on paper. Uniplex sends the message immediately, so there is no delay between sending the mail and the recipient receiving it.

The procedure below describes how to send a standard mail message, using the Send Letter option. There is also a quick way to send mail, using the Easi Send option. This uses a set of predefined defaults to send mail, and is described in *Reference*.

Create a mail message as follows:

- a) Pick and point the Send Letter option.

Uniplex displays the Memo Pad.

- b) Enter the following:

Hello Frank:

**There is a marketing conference in New York in June.
I'd like you and Gary to attend.**

Worked Example

Please contact Lee to set it up. Let me know if you have any problems.

Regards,

George

- c) Press F1 or **ESC e** when you have finished the message.

Type your memo then press F1. Press F3 for full word processor.

M E M O P A D

Hello Frank:

There is a marketing conference in New York in June.
I'd like you and Gary to attend.

Please contact Lee to set it up. Let me know if you
have any problems.

Regards,

George

F1=Save&Exit F2>File F3=Editor F4=Quit >Effect F8>More

3 Send a Mail Message

Uniplex displays the Send Form. This form provides the letter head for the message and lets you specify how the message is sent. Complete the Send Form as follows:

- Enter your own username in the To field and press TAB.
- Enter **practice** in the Mailbox field and press TAB.
- Enter **Conference** in the Subject field and press TAB.



Worked Example

Enter brief description of the contents of the letter.

S E N D F O R M

To	[<username>_____]				
Mailbox	[practice_____]				
Subject	[Conference_____]				
CC	[_____]				
Blind CC	[_____]				
Attach	[_____]				
Save	[no__]	Certify	[yes_]	Priority	[2]
Notify	[4_]	Registered	[yes_]	Encode	[no__]
Send date	[19/08/99]	Confirm	[no__]	Password	[no__]

F1=Send F2=Redraw F3=ReEdit F4=Quit F5=List Users F6=List Mboxes

4 Associate a Password with a Mail Message

You can provide a password in the Send Form. The recipient must know this password before being able to read the message. It is up to you and the recipient to agree on and communicate the password. Enter a password as follows:

- a) Use the down arrow key and the TAB key to move the cursor to the Password field (this field is positioned at the bottom right of the screen).
- b) Press the SPACEBAR to scroll the entry to **yes**.
- c) Leave all the other fields blank or with their default entries. Press F1 or **ESC e** to leave the form.

Uniplex displays the password form.

Worked Example

Enter password for the letter

S E N D F O R M

The password for your letter must be entered twice
The password will not be displayed on your screen

[_____]

F1=Enter F2=Redraw

F4=Quit

- d) Enter **secret** and press RETURN.

Uniplex does not display **secret** on the screen as you enter it. This is to provide additional security. You must enter the password again to make sure you entered it correctly.

Uniplex sends the message. Since you have sent it to yourself, Uniplex delivers the message to you.

5 Receive and Read a Mail Message

A notice is displayed in a popup box when a new message arrives. You can read the new mail at once or press RETURN to remove the notice. The incoming mail notice displays at the cursor position if you are not using Uniplex when a mail message arrives and displays when you next log in if a message arrived while you were not on the system. Read the practice letter:

- a) Pick and point the Read Incoming Mail option.

Uniplex displays the Read Incoming Mail form.

**Worked Example**

Choose a mailbox using pick & point

R E A D I N C O M I N G M A I L				
Mailbox	Entries	Urgent	Unread	Date received
1 general	3	0	0	08/24/99 09:22
2 practice	1	0	0	08/24/99 13:54
3 trashcan	8	0	1	08/24/99 12:22

F1=Enter F2=Update F3=Go Top F4=Quit F5=Expand

- b) Pick and point the **practice** mailbox.

Uniplex displays the Choose Letter form which lists the incoming mail under three main headings:

URGENT UNREAD READ

As you have only sent one message, and you did not specify urgent, the Choose Letter form looks like the one below:

Choose a letter using pick & point

R E A D I N C O M I N G M A I L		
From	Subject	Date
UNREAD MAIL		
1 George	Conference	08/24/99 13:54

F1=Enter F2=Update F3=Delete F4=Quit F5=Expand F6=Srcch F7=Batch

Worked Example

- c) Pick and point the message.

Uniplex displays the Password Verification form:

Enter password to look at letter

P A S S W O R D V E R I F I C A T I O N

This letter has been sent to you with a password security stamp
Enter the password in order to read the letter

[_____]

F1=Send F2=Redraw F4=Quit

- d) Enter **secret** and press RETURN.

Uniplex displays the message and a ring menu along the top of your screen, for example:

Select: reply copy print delete forward confirm archive
move

george Conference 08/24 13:54

Hello Frank,

There is a marketing conference in New York in June.
I'd like you and Gary to attend.

Please contact Lee to set it up. Let me know if you
have any problems.

Regards,

George

F1=Enter F2=Redraw F3=Delete F4=Quit F5=Expan



Worked Example

The status line at the top of the message display shows the sender's name, the message subject, plus the date and time the message was received.

6 Print a Mail Message

Sometimes you want to print a mail message. For example, if the message contains an agenda and you want to take a printed copy of the agenda to the meeting. Print your practice letter:

- a) Pick and point the Print option. (Use the arrow keys or TAB to move the highlighting to Print and press RETURN.)

You can now choose how to print your message.

- b) To use the pre-set default values, toggle the Easi Print option with the SPACEBAR.

To print using your own printing requirements, toggle the Print Using Form option with the SPACEBAR.

In the first case, the message is printed immediately. In the second case, Uniplex displays the Printing Selection form.

7 Forward a Mail Message

You may want to forward a message you receive to someone else. For example, if the message contains information a colleague needs to know. Uniplex lets you forward a copy of the message while retaining the original. To forward a message:

- a) Pick and point the Forward option.

You can now add your own comments to the start of the message if you choose.

Worked Example

Press SPACEBAR to select option (yes/no)

F O R W A R D M A I L

Do you wish to add any comment(s) at top of letter ?

[yes_____]

F1=Send F2=Redraw F4=Quit

- b) If you want to add comments, press the SPACEBAR to select the **yes** option and press RETURN.
- c) Type your comments on the memo screen, for example :

Gary,

Please read the letter below. Looks like you will be in New York in June! I'm afraid I can't make it - I am planning a long vacation for then.

Let me know if you have any other commitments yourself.

Frank

- d) Press F1 or **ESC e** when you have finished typing your comments.

Uniplex displays the Send Form.



Worked Example

8 Complete the Send Form to Forward a Message

Whether or not you entered your own comments at the start of the message to be forwarded, when you press F1, Uniplex displays the Send Form. Complete the Send Form as follows:

- a) Enter your own name in the To field.
- b) Do not change the entry in the mailbox field.
- c) Enter **practice forward** in the Subject field.
- d) Press F1 or **ESC e**.

Uniplex forwards the message and redisplayes the original.

9 Reply to a Mail Message

Often you want to reply to messages. For example, if the sender has asked a question or requires a response from you. Reply to your practice letter as follows:

- a) Press RETURN with the Reply option highlighted.

Uniplex displays the Memo Pad.

- b) Enter the following:

Hello George,

Thanks for your message. I am checking with Gary to see if he can make the sales conference in June. Unfortunately I am touring Australia for the best part of that month, so will be unable to attend.

Let me know if you want anyone to go in my place.

Frank

- c) Press F1 or **ESC e** when you have finished the reply.

Worked Example

Uniplex displays the Send Form and completes the To field with the sender's name (your name in this case), the Subject field with the original subject prefixed with Re:, and the Mailbox field with the original mailbox **practice**.

Leave all other fields blank or with their default settings, and press **ESC e**. Uniplex sends the message and returns you to the original message.

- d) Press F4 or **ESC q** to leave the message, and repeat the operation to leave the Read Incoming mail form.

10 Delete a Mail Message

When you no longer need a mail message, and often this is immediately after reading it, you can delete it. By deleting old or redundant messages, you help to keep your mail areas uncluttered and save disk space.

If you have a *trashcan* mailbox, any messages you delete will be moved there. If you do not have a *trashcan* mailbox and you require this facility you can simply create it. See *Create a Mailbox*.

This means that if you delete a message accidentally you can always retrieve it, using the move command, assuming it is still in the trashcan (the number of days a message is kept there can be configured by your System Administrator).

By now, Uniplex should have delivered the reply and forwarded messages you sent. Read and delete them as follows:

- a) Pick and point the Read Incoming Mail option.

Uniplex displays the Select Mailbox form.

- b) Pick and point the **practice** mailbox.

Uniplex displays the Read Incoming Mail form.



Worked Example

- c) Pick and point the reply you sent. Its header contains the subject Re:Conference, for example:

R E A D I N C O M I N G M A I L		
From	Subject	Date
UNREAD MAIL		
Frank	Re:Conference	08/24/99 14:30

Uniplex displays the message.

- d) Pick and point the Delete option from the ring menu at the top of the screen.

Press * to confirm deletion.

Uniplex deletes the message and returns you to the Read Incoming Mail form.

- e) Pick and point the message you forwarded. Its header contains the subject you included, for example:

R E A D I N C O M I N G M A I L		
From	Subject	Date
READ MAIL		
Frank	Practice Forward	08/24/99 14:35

Uniplex displays the message, with a forward log at the beginning of it, and a ring menu along the top of the screen.

Worked Example

- f) Pick and point the Delete option.

Press * to confirm deletion.

Uniplex deletes the message and returns to the Read Incoming Mail form.

- g) Press **ESC q** or F4 to return to the Mail menu.

✎ *You can also delete a message directly from the Incoming Mail list for a given mailbox by moving the cursor onto it and pressing F3. The message is then transferred to the trash-can mailbox, if it exists, as described above.*

11 Set Auto-Reply

You can set auto-reply to inform people who send you mail that you are out of the office or to provide similar general information. Uniplex automatically sends a message that you have written to all people who send you mail. You can unset auto-reply at any time. You can set auto-reply on selected mailboxes or all of your mailboxes. To set auto-reply on your practice mailbox:

- a) Pick and point the Administration option.

Uniplex displays the Administration menu.

- b) Pick and point the Set Auto-reply option.

Uniplex displays the Memo Pad.

- c) Enter the following:

Thank you for your message. Unfortunately, I am on vacation at the moment. I will be back in the office on the 23rd. If your message is important, please contact Mary.

- d) Press **ESC e** when you have finished.



Worked Example

Uniplex displays the Select Mailbox form.

- e) Pick and point the **practice** mailbox.
- f) Uniplex will now send your response to anyone sending messages to the practice mailbox. Press **ESC q** to return to the Administration menu.
- g) Pick and point Quit to leave the Administration menu.

12 Send a Letter

The Memo Pad lets you send short messages quickly, and without any special editing. If you want to send a longer message and want to create this message using full word processing facilities, you can invoke the Word Processor while writing a message. Send a practice letter as follows:

- a) Pick and point the Send Letter option.

Uniplex displays the Memo Pad.

- b) Press F3 to invoke the Word Processor.

Uniplex invokes the Word Processor, and replaces the Memo Pad with the word processing screen. The full word processing facilities are available to you.

- c) Enter the following:

Our position in the local softball league is as follows:

	P	W	L	D
Bogey Bears	6	5	1	0
Pink Panthers	6	4	2	0
Terrible Tigers	5	3	1	1
Lone Rangers	5	2	2	1
Artful Dodgers	6	0	5	1

Worked Example

In an attempt to improve our record I think we should have a practice session this Thursday at 8.

- d) Press **ESC e**.

Uniplex displays the Send Form.

- e) Enter your own name in the To field and press TAB.
- f) Enter **practice** in the Mailbox field and press TAB.
- g) Enter **Softball** in the Subject field.
- h) Press **ESC e** to leave the Send Form.

Uniplex sends the message, but since auto-reply is set on your practice mailbox it sends the automatic reply to you.

13 Read an Automatic Reply

When you send mail to someone who has auto-reply set, Uniplex sends their reply to you. The message subject indicates it is an automatic reply. Read the automatic reply as follows:

- a) Pick and point the Read incoming mail option.

Uniplex displays the Select Mailbox form.

- b) Pick and point the **practice** mailbox.

Uniplex displays the Choose Letter form.

- c) Pick and point the message with the subject:

An Automatic Reply

Uniplex displays the message and a ring menu along the top of your screen.



Worked Example

- d) Pick and point the Delete option to delete this message.

Press * to confirm deletion.

- e) Press **ESC q** to return to the Mail menu.

14 Unset Auto-Reply

If you have auto-reply set, you should unset it when you return to the office. Unset auto-reply on your practice mailbox:

- a) Pick and point the Administration option.
- b) Pick and point the Unset Auto-reply option.
- c) Pick and point the **practice** mailbox.

Uniplex unsets auto-reply and returns you to the Administration menu.

- d) Pick and point the Quit option to return to the Mail menu.

15 Delete your Practice Mailbox

You have now completed the worked example. It is recommended that you delete the practice messages and mailbox you created as follows:

- a) Delete the remaining messages for both the incoming and sent messages in the practice mailbox.
- b) Delete the practice mailbox using the Delete Mailbox option on the Administration menu.



Reference

◆ Mailboxes

You can organize your mail by using mailboxes. It is recommended that you use at least the following three mailboxes:

- o **Business.** This is intended for mail you send and receive that does not fit any particular category. For example, a message announcing that an employee has been promoted.
- o **Personal.** This is intended for mail you send and receive that is not strictly business mail. For example, you can keep mail concerning company social events in this mailbox.
- o **Calendar.** Uniplex places any Time Manager bookings made by mail in the calendar mailbox.

Uniplex automatically creates the *general* mailbox. This is known as the *default mailbox*. If other mail users send you mail without specifying a mailbox, Uniplex places the mail in your general mailbox.

Until you create any mailboxes, Uniplex uses your general mailbox for all your mail. Since it is the only mailbox available, you do not need to select or name the general mailbox when carrying out mail tasks. When you create additional mailboxes, you must then select and name the general mailbox when you want to use it. You can create additional mailboxes, for example *plans*. Uniplex divides each of the mail areas into these mailboxes. For example, see the next page.

**Mailboxes**

Before you create any mailboxes:

Incoming Mail

general

Saved Mail

general

Outgoing Mail

general

After you create the calendar, personal, and business mailboxes:

Incoming Mail

general	calendar	personal	business
---------	----------	----------	----------

Saved Mail

general	calendar	personal	business
---------	----------	----------	----------

Outgoing Mail

general	calendar	personal	business
---------	----------	----------	----------

All incoming mail that does not have a mailbox specified is placed in the general mailbox.

After you create any additional mailboxes, for example, plans:

Incoming Mail

general	calendar	personal	business	plans
---------	----------	----------	----------	-------

Saved Mail

general	calendar	personal	business	plans
---------	----------	----------	----------	-------

Outgoing Mail

general	calendar	personal	business	plans
---------	----------	----------	----------	-------

You can specify the receiving mailbox if you know another user's mailbox name. This helps the recipient to identify the mail's subject.

◇ Name Mailboxes

It is recommended that everyone use the same mailbox names. Your System Administrator can make this easier for you by including approved mailbox names in the approved mailbox name list. When you create a mailbox you can display this list and create a mailbox using one of the displayed names.

For example, you work in an administration department and receive mail on the following topics:

finance salaries

The System Administrator includes these names in the approved mailbox name list. Each user creates mailboxes with these names and also creates the personal, calendar, and business mailboxes.



Mailboxes

Therefore, each user has the following mailboxes:

general	personal	calendar	business	finance	salaries
---------	----------	----------	----------	---------	----------

Each user knows these mailbox names and chooses one for each message. For example, if the mail is about salaries, you address it to the person's *salaries* mailbox. If it is personal mail, you send it to the *personal* mailbox. If it is none of the above, send it to the *general* mailbox.

- ✎ *If you do not specify a mailbox when sending mail, Uniplex automatically places the mail in the recipient's general mailbox.*

Decide with the System Administrator and other users on your system how you want to name mailboxes.

- ✎ *Your System Administrator can change the name of the default mailbox to something other than general.*

◇ **Trashcan Mailbox**

You may also have a **trashcan mailbox**. Check with your System Administrator as the mailbox may be known under a different name on your system. This mailbox stores messages you have deleted for a given length of time defined by your System Administrator. See *Delete a Message* for details on using the trashcan mailbox.

◇ **Use Mail without Mailboxes**

Mail is divided between *Incoming*, *Outgoing*, and *Saved* categories, all stored in the *general* mailbox by default unless you have created other mailboxes. The mailbox specified by the sender is ignored unless it matches an existing mailbox you have created. Copies of mail you send are also stored in the general mailbox unless you have specified a different mailbox for the recipient which is the same as one of your own mailboxes.

◇ Create a Mailbox

You can create separate mailboxes to organize your mail efficiently. Your system may have a list of *approved mailbox names* to ensure consistency. Check with your System Administrator and see *Name Mailboxes* for details. To create a mailbox:

- 1 Pick and point the Administration option.
- 2 Pick and point the Create Mailbox option.

Uniplex displays the Create Mailbox form.

Enter name of new mailbox, F6 to list approved mailboxes

C R E A T E M A I L B O X

Enter name of new mailbox
[_____]

F1=Send F2=Redraw

F4=Quit

F6=List Mboxes

- 3 Enter the name you want to give the mailbox and press **ESC e** or, if you want to use an approved mailbox name:

- a) Press F6 for a list of approved mailboxes.

Uniplex displays them in a popup menu.

- b) Pick and point the name of the mailbox you want to create.

Uniplex places the name in the Mailbox field.



Mailboxes

- c) Press **ESC e**.

Uniplex creates the mailbox. If other users send mail to a mailbox before you create it, Uniplex stores it in the general mailbox. You need to transfer it to the new mailbox.

- 4 Press **ESC q** to leave the Create Mailbox form, if you do not want to create additional mailboxes.

◇ Delete a Mailbox

When you no longer need a mailbox, you can delete it. When you delete a mailbox, Uniplex transfers mail sent to the deleted mailbox to the general mailbox instead. To delete a mailbox:

- 1 Pick and point the Administration option.
- 2 Pick and point the Delete Mailbox option.

Uniplex displays the Select Mailbox form.

- 3 Pick and point the mailbox you want to delete.

Uniplex displays a prompt asking you to confirm that you want to delete this mailbox.

- 4 Enter *. Uniplex deletes the mailbox. If there is mail in the mailbox, Uniplex transfers it to the general mailbox.
- 5 Press **ESC q** to leave the Delete Mailbox form.

or

Delete additional mailboxes.

◆ Send Mail

◇ Ways to Send Mail

You can send mail to users on your computer system or to users on other computer systems. You can send short or long messages, or documents. In addition, you can attach any type of document to a message, for example a graphics file or a compiled program. You can use full word processing capabilities when creating a letter.

There are three ways to send mail :

- o **Easi Send.** Send a message quickly using a set of pre-defined default values to meet your individual requirements.
- o **Send Letter.** Send a message without using a set of predefined default values. Enter your own values on the Send form.
- o **Send a File.** Send a single file, such as a Word Processor document that you prepared earlier, to another user.

◇ Easi Send and Send a Letter

For both of these options, you create the mail message in the same way. When you actually send the message though, you will see the complete Send Form displayed for the Send Letter option but not for Easi Send. To send mail:

- 1 Pick and point the Easi Send or Send Letter option.

Uniplex displays the Memo Pad.

- 2 Enter the text of the message.

When typing your message, text automatically wraps onto the next line. You can move around the Memo Pad using the cursor keys. You can also use the standard Uniplex commands to insert and delete characters and lines, effect text, cut and paste text, merge in documents, and save your message. See the **Word Processor** chapter in the **Uniplex II Plus User Guide**.



Send Mail

You can use the Word Processor to create or edit the message by pressing **F3**. Uniplex invokes the Word Processor and you can use its full capabilities to write the text of your message.

- 3 When you have finished the message, press **F1** or **ESC e**.

If you selected Easi Send, the Send Form consists of only three fields: *To*, *Mailbox* and *Subject*. If you selected the Send Letter option, Uniplex displays the Send Form, which you should complete as described after the next section.

◇ Send a File

This option lets you send a file of any type to another user:

- 1 Pick and point the Send a File option from the Mail main menu.

Uniplex displays a message prompting you for the name of the file you want to send. By default, your current folder is the one that you were in when you invoked Mail.

- 2 To specify a file from this folder, simply type the filename and press **F1** or **ESC e**. Or, you can press **F3** to open File Manager in Select File(s) Mode and select the file(s) to send. If you want to send a file from somewhere other than your current folder and you do not wish to use File Manager, you need to type in the full pathname of the file and then press **F1** or **ESC e**.

✎ *If you select more files than can fit into the attach field, a warning is given and the remaining filenames are not included.*

- 3 Uniplex displays the Send Form, which you should complete as described below, giving details of who you want to send the file to, and specifying any special requirements.

◇ Complete the Send Form

The only fields you must fill in are the *To* and *Subject* fields, the others are optional. If you are using the Easi Send command the Send Form only has one other field, *Mailbox*. If you leave this blank the message is sent to the recipient's general mailbox by default.

- ✎ *If you want to see and/or change any of the other values on the full Send Form while using Easi Send, press softkey F7. You can then alter any of the default values as you would for the Send Letter or Send a File options.*

When using the full Send Form, you may change any of the default values and fill in any of the blank fields. Change or make your own entries in fields where you want Uniplex to send your mail differently to the default way. Press TAB or RETURN after making an entry in a field. Use the arrow keys to move around the Send Form. Press any key to scroll the entries in scrollable fields.

Enter addresses, separate with commas. Press F5 for list

S E N D F O R M

To	[_____]		
Mailbox	[_____]		
Subject	[_____]		
CC	[_____]		
Blind CC	[_____]		
Attach	[_____]		
Save	[no__]	Certify	[yes_] Priority [2]
Notify	[4_]	Registered	[yes_] Encode [no__]
Send date	[19/08/99]	Confirm	[no_] Password [no__]

F1=Send F2=Redraw F3=ReEdit F4=Quit F5=List Users F6=List Mboxes



Send Mail

To

List the intended recipient(s) of the mail. Press **F5** to display a pop-up directory of user names and pick and point required names from those listed or enter the names directly using one of the methods listed below. Once you have finished using the pick and point list, press **ESC q** to return to the Send form.

- ✎ *Comments associated with names (enclosed with asterisks) have no effect on the address, they are for information only.*

Mail can be sent using any mixture of these address formats:

- **Full Name.** Enter the name of the recipient in the form usually used in your organization. See *Mailing Lists*.
 - ✎ *The System Administrator must define a list of such alias names which are used to represent the underlying computer address with an actual name or designation.*
- **System User Name.** Any person who has an account on the same system as you can be addressed by the name with which they *log in* to the system (*i.e., mxw, johnh, peterb, etc.*).
- **Internet E-mail Address.** You can enter the address of someone on another system or someone who is connected to the Internet in the standard format for Internet addressing (*i.e., rmfox@compuserve.com or mxwmail@hotmail.com*).

You may be asked to use another format for your internal systems. This will commonly be in the format *Systemname > Username*, for example *fax>Head_Office* or *INET>jonh@amy.co.il*.

- **Circulation List.** When you send mail to a circulation list, Uni-plex only delivers it to the first person in the list. That person then forwards the message to the next person on the list, and so on. See *Circulation Lists*.

Send Mail

- o **Mailing List.** You can send mail to groups of people using mailing lists. See *Mailing Lists*
- ✎ *To send mail to more than one person separate each address with a comma. Uniplex does this for you if you select names from the pick and point list.*

Mailbox

The mailbox for which the mail is intended. Enter the name of a mailbox into which you want the mail to be delivered. Press **F6** to display a list of approved mailbox names. Pick and point the mailbox you want to use. If you save a copy of this message it will be placed in a mailbox with the same name.

You can also specify a mailbox name directly and even specify different mailboxes for different recipients by using the format *User-name < Mailboxname* on the **To**, **CC**, and **BCC** lines. For example *mail>Johnb<Accounts* or *mxw@uniplex.com<Enquiries*.

- ✎ *The mail will be delivered to the general mailbox if you enter an incorrect name or the name of a mailbox which the recipient does not have.*

Subject

The subject of the mail. This will appear on notifications and as the header of the mail message in the mail store. A subject should make it easy to find the message at a later date.

CC

Additional (*Carbon Copy*) recipients of this mail. Enter the addresses in the same way as for the **To** field.

- ✎ *Use F5 to list addresses and F6 to list mailbox names.*



Send Mail

Blind CC

Undisclosed (Blind Carbon Copy) recipients of this mail. Enter the addresses of recipients you do not want to be known to the other addressees. Complete this field the same way as the **To** field.

✎ *Use F5 to list addresses and F6 to list mailbox names.*

Attach

Attach file(s) to mail. Enter the names of one or more files to be sent with the message. Separate the names with spaces. To use the File Manager to select files to attach:

- a) Press **F12 (Esc xu)** for the Utility Menu.
- b) Choose **List Files** to open File Manager in Select File Mode.
- c) Select file to attach and press **F1 (Esc e)**.

✎ *To attach additional files, separate the file names with commas.*

✎ *You can send any type of file as an attachment, even those that Uniplex cannot read or display, for example, Microsoft Word documents, sound files, or graphics files.*

Binary (8-bit) files (*i.e.*, word processing documents) are transmitted using the Internet MIME (Multipurpose Internet Message Extensions: RFC 1521) standard for binary encoding and can be sent both to another Uniplex Mail user or to the user of any Internet-compliant mail system.

A Uniplex Mail user must have the Uniplex Document Access module in order to read non-Uniplex documents. A non-Uniplex user must have the original application (*i.e.*, Microsoft Word, *etc.*) or a third-party document viewer in order to read a specific document format other than a text file.

Save

Save a copy of the message. To keep a copy of the message in Sent Mail, scroll the entry to **Yes**. The message will be filed in the same mailbox as you specified in the Mailbox field if that mailbox exists. If no mailbox was specified or if the specified mailbox does not exist, it will be filed in your general mailbox. Saved mail can be printed, saved as a new document, deleted, and re-mailed at a later date. Set the field to **No** to discard the message.

Notify

Number of days for unread mail notification. Enter the number of days after which you want Uniplex to send you a message informing you that the recipient has not read your mail. The default value is four days. Increase or decrease this value as necessary or enter a space to make the field blank to cancel unread mail notifications.

✎ *If you have a mailbox called Notifications, Uniplex places any notification messages in it.*

Send Date

Date on which to deliver mail. Enter a date for when you want the mail delivered. The default value is today's date and mail will be sent immediately if you do not change this field. Use the same format as displayed to enter the date. You can schedule mail to be sent at any future time if you do not want it sent immediately.

Certify

Read mail status update. Scroll this field to **Yes** if you want to be able to check that mail sent to recipients on remote systems has been *read* with the Check Mail Sent option. Local mail is always certified. See *Check the Status of Mail*. If you scroll this field to **No** you will not be able to check the read status of the message and you will not receive an unread mail notification if the message goes unread.



Send Mail

Registered

Received mail status update. Scroll this field to **Yes** if you want to be able to check that mail has been *received* (not necessarily *read*) by recipients on remote systems. Local mail is always registered. You can check the received status using the Check Mail Sent option. See *Check the Status of Mail*.

Confirm

Request recipient sends confirmation of reading mail. Scroll the entry to **Yes** if you want the recipient to confirm he has read your mail. You can request confirmation in addition to setting Certified and Registered on your message. You might want to do this if it is very important that the recipient reads and acknowledges he has seen the message. You can check for confirmation using the Check mail option. See *Check the Status of Mail*.

Priority

Specify priority. Set this to **1** if the message is urgent. The message displays a * next to it in the recipients mailbox when it is received. Leave the value set to 2 to indicate that the message has normal priority. Additional priority levels can be defined by the System Administrator.

Encode

Encode mail in transit. Scroll this entry to **Yes** if you want mail to remote systems to be encrypted so that it cannot be intercepted and read while in transit.

✎ *Only mail sent to other computers will be encoded.*

Password

Specify a password. Scroll the entry to **Yes** if you want to place a password on the mail message. After you complete the Send Mail form, you will be prompted for the password with which to protect

the message. Unless the recipient knows this password, they will not be able to read the message. You should arrange with the recipient a secure way of agreeing on and communicating the password.

Press **ESC e** when you have completed the Send Form.

If you requested to include a password with the message, Uniplex displays the password form. Enter the password. Uniplex asks you to re-enter the password to make sure you entered it correctly. Uniplex does not display the password. Uniplex sends the letter.

◇ **Check the Status of Mail Sent**

You can use this command to check the status of a message you have sent and also to remail the message to the same or different recipients. The status can be one or more of the following:

Confirmed	Recipient has received, read and confirmed receipt of the message.
Read	Recipient has received and read the mail.
Received	Recipient has received the mail but not yet read it.
Retrieved	You have retrieved the message before the recipient read it. See <i>Retrieve a Message</i> .
Bad Users	Uniplex was unable to send this message to a remote user since this user name is not known to that system.
Unknown	Uniplex does not know if the recipient has received the message.

✍ *If one or more of the recipients has not read the message, Uniplex displays an asterisk (*) in the letter header.*



Send Mail

To check the status of a message:

- 1 Pick and point the Check Mail Sent option from the Electronic Mail menu.

If you use mailboxes, Uniplex displays the Select Mailbox form (see Step 2), otherwise, go to Step 3.

- 2 Pick and point the mailbox which contains the message.

Uniplex displays a list of all the messages sent to the mailbox you specified, divided into those for which copies were saved and ones that did not have copies saved.

✎ *If the letter is to be sent in the future, Uniplex displays **F** in the letter header.*

- 3 Pick and point the message you want to check.

The message's header, its status and a ring menu are displayed (if you did not save a copy of the message, only the *retrieve* and *delete* options are available):

retrieve Call back the selected message as long as the recipient has not already read it.

remail Remail the message to the same recipient if a copy was saved. See *Remail a Message*.

delete Remove the message. See *Delete a Message*.

✎ *You can also delete messages using F3.*

send Send the message to one or more users if a copy was saved. See *Forward a Message*.

read Display the message if a copy was saved.

-
- 4 Pick and point one of the options from the ring menu or press **ESC q** to leave the Check Status form.
- ✎ *Message status is kept for a period of time specified by the System Administrator. The status of a saved message is not removed until you delete the message.*
- 5 If you choose the read option (assuming you saved a copy), Uniplex displays the text of the message you sent and a ring menu with the following options:
- down** Display the next page of the message.
- up** Display the previous page of the message.
- ✎ *Uniplex only displays the down and up options if the message is more than one page long.*
- remail** Remail the message. See *Remail a Message*.
- copy** Copy the message to a document. See *Copy a Message to a Document*.
- print** Print a copy of the message. See *Print a Message*.
- delete** Delete the message. See *Delete a Message*.
- ✎ *You can also delete messages using F3.*
- send** Send the message to one or more other users. See *Forward a Message*.
- attach** Display the attachment if one is present. Display a list of the attachments if there is more than one. See *Read Attachments to a Message*.



Send Mail

◇ Remail a Message

You can remail a failed message (a fault with a remote connection) if you have saved it. See *Send Mail*. To remail a message:

- 1 Check the status of the message as described in *Check the Status of a Message*.

Uniplex displays a ring menu along the top of the screen.

- 2 Pick and point the Remail option.

Uniplex re-mails the message to the original addressees.

◇ Retrieve a Message

You can retrieve a message sent to another Uniplex user (sent the message to the wrong person or sent the wrong message), but only if the recipient has not yet read it. To retrieve a message:

- 1 Check the status. See *Check the Status of a Message*.
- 2 Select the Retrieve option if the message is not read.

Uniplex displays the following prompt:

```
Enter * to retrieve or QUIT to leave [ ]
```

- 3 Press * to perform the retrieve, or F4 to cancel the request.

If you select * Uniplex displays:

```
A retrieve has been attempted
```

You can check whether the retrieve has been successful using the Check Mail Sent option again.



◆ Read Mail

◇ Read a Message

If you are using another Uniplex application when someone sends you mail, a message box pops up on your screen telling you that you have new mail. You can either press RETURN to acknowledge the message and continue with your work or enter * to go directly to Electronic Mail and read it.

If you are not using Uniplex, a one-line notification message is displayed on your screen. If you are logged out, Uniplex displays the message the next time you log in. If you have been away from your terminal, you can check whether you have received any mail while you were away by using the Read Incoming Mail option.

To read mail:

- 1 Pick and point the Read Incoming Mail option.

If you use mailboxes, Uniplex displays the Select Mailbox form as follows:

Mailbox	Entries	Urgent	Unread	Date	Received
---------	---------	--------	--------	------	----------

- 2 If the Select Mailbox form is displayed, pick and point the mailbox you want to check. You can see which mailboxes contain unread mail by the entry in the Unread field of the Choose Mailbox form.

Uniplex displays the Read Incoming Mail form for the selected mailbox under the following headings :

From	Subject	Date
------	---------	------

The *From* field contains the name of the sender.

The *Subject* field contains a brief description of the contents of the mail, if the sender included one.

**Read Mail**

R Indicates an auto reply has been received.

F Indicates an auto forward has been received.

The *Date* field contains the date and time the message arrived on your system.

3 Pick and point the message you want to read. The messages are displayed in the order they were received, with the oldest message at the top and the most recent at the bottom of the list.

4 If the sender included a password with the message, Uniplex displays the Password Verification form. Enter the password.

✍ *It is up to you and the sender to arrange a secure way of agreeing on and communicating the password.*

Uniplex displays the first page of the message, and a ring menu along the top of the screen.

5 Pick and point from the options displayed in the ring menu:

down Display the next page of the message.

up Display the previous page of the message.

✍ *Uniplex only displays the down and up options if the message is more than one page long.*

reply Send a reply to the message and automatically address it to the person who sent you the mail. See *Reply to a Message*.

copy Create a document containing the mail message used like any other Uniplex document. See *Copy a Message to a Document*.

print Print a copy of the mail. See *Print a Message*.

- delete** Delete the message. See *Delete a Message*.
- ✍ *You can also delete messages using F3.*
- forward** Forward the message to one or more other users. See *Forward a Message*.
- confirm** Send a message to the sender confirming you have read the message. See *Confirm Receipt of a Message*.
- attach** Display the list of attachments to the message. See *Read Attachments to a Message*.
- ✍ *Uniplex only displays this option if the message has attachments.*
- archive** File the message in Archived Mail. See *Archive a Message*.
- move** Move the message to a different mailbox. See *Move a Message*.
- ✍ *Uniplex only displays this option if you have more than one mailbox set up.*
- browse** If the message that you have been sent is not a text or Uniplex document format you will be given an extra option to *browse* the message. Uniplex will attempt to determine the file type and either display it as-is or to convert it to a Uniplex-readable format.
- ✍ *Uniplex tries to produce a readable document, but cannot browse some formats such as graphics files.*

See the relevant sections elsewhere in this manual for details on using these options.



Read Mail

◇ Reply to a Message

Many messages you receive require a response. Uniplex makes replying to a message simple. Rather than addressing the message yourself, Uniplex addresses the message for you.

To reply to a message:

- 1 Pick and point the Reply option from the ring menu at the top of the screen displaying the message.

Uniplex displays the Memo Pad.

- 2 Enter the text of your message (for full word processing capabilities, press F3).
- 3 When you have completed the message, press **ESC e**.

Uniplex displays the Send Form. It completes the following fields:

To Uniplex enters the address of the person who sent you the mail.

Mailbox Uniplex enters the mailbox of the original letter.

Subject Uniplex enters the subject of the mail you received, prefixing it with Re:

- 4 Complete the remaining fields, as described in *Send a Letter*.
- 5 Press **ESC e** when you have completed the form.

Uniplex sends your reply.

◇ Confirm Receipt of a Message

When you receive a message, the sender can request notification that the mail was delivered successfully and that you have read it. You can further confirm receipt of the mail yourself. You may want to do this if you receive an important message where the sender is concerned that you have read and taken note of the message.

To confirm receipt of a mail message:

- 1 Read the message, as described in *Read a Message*.

Uniplex displays a ring menu along the top of the screen.

If there is a **C** in the Status field of the header for the message, the sender has requested confirmation, for example:

From	Subject		Latest Date
Colin	Future Strategy	UC	09/23/99 08:17

- 2 Pick and point the Confirm option.

Uniplex sends confirmation to the sender. The sender can check for this confirmation by checking the status of the message. See *Check Status of a Message*.

◇ Read Attachments to a Message

You can attach files to messages (see *Send a Letter*). These attachments can be any type of file, including a word processing document, a graphics file or a compiled program.

To read an attachment to a message:

- 1 Read the message, as described in *Read a Message*.

Uniplex displays a ring menu along the top of the screen and a message indicating the message has attachments.



Read Mail

- 2 Pick and point the Attach option.

If there is more than one attachment, Uniplex displays a list of the attached files.

- 3 Pick and point the attachment you want to read.

Uniplex displays the attachment, if it is a text file, and displays a ring menu along the top of the screen.

The ring menu contains the following options:

down Display the next page of the attachment.

up Display the previous page of the attachment.

✎ *Uniplex only displays the down and up options if the attachment is more than one page long.*

copy Copy the attachment to a standard Uniplex document. See *Copy a Message to a Document*.

print Print a copy of the attachment. See *Print a Message*.

delete Delete the attachment. See *Delete a Message*.

browse If the file is a non-Uniplex document the browse option is given. Uniplex will attempt to make the file readable by use of the Document Access file converters.

For other file types, such as graphics files, it is best to save the attachments to a file and move them to another system that understands the file format

- 4 Pick and point the option you want to use or press **ESC q** to leave the attachment.

◇ Move a Message

If you have more than one mailbox set up, apart from your general default one (see *Mailboxes*) you can use this option to move a message from the mailbox it is currently in to a different one. This is very useful in letting you transfer messages you receive to *action* or *pending* mailboxes you have created, helping to organize your work more efficiently.

✎ *This option is only displayed if you have more than one mailbox set up on your system.*

To move a message:

- 1 Read the message as described in *Read a Message*.

Uniplex displays a ring menu at the top of the screen.

- 2 Pick and point the Move option.

Uniplex displays a pop-up list of your other mailboxes.

- 3 Pick and point the mailbox to move the message to.

A prompt asks you to confirm the move.

- 4 Press * to move the message or **F4** to cancel the option.

If you press *, Uniplex moves the message to the selected mailbox, and then displays the Read Incoming Mail screen again.

If you cancelled the command, the ring menu is redisplayed at the top of the screen.



Batch Commands

◆ Batch Commands

You can issue some commands on a batch, or group, of mail messages. Access the batch commands when your mail lists are displayed:

- 1 Press **F7**.

This ring menu displays with the Incoming Mail list:

`review` `delete` `print` `forward` `move` `archive`

This ring menu displays with the Sent Mail list:

`delete` `print` `forward` `move`

- ✎ *Unless you saved a copy of a message, print and forward refer to the message details and not the message text. The move option is only displayed if you have more than one mailbox defined.*

- 2 Pick and point the option you want from the ring menu.

- ✎ *If you select the review option from the Incoming Mail list, Uniplex displays your unread mail, in the order you received it. After you have read a message, select next on the ring menu to go to the next unread message.*

Uniplex prompts you to select the messages to act on.

- 3 Move the cursor onto a message and press **SPACEBAR** to select it. Each selected message is highlighted and the cursor moves down to the next message on the list.

Press **SPACEBAR** again to deselect a message.

- 4 When you have selected all the messages you want, press **F1** or **ESC e** to carry out the option. The option selected then works in the same way as for individual messages.

◆ Archive Mail

◇ Archive a Message

You can archive incoming messages into your archived mail area by removing them from Incoming mail and placing them in Archived mail. This additional method of organizing mail keeps the majority of mail in Incoming as *current* mail. It is recommended that you periodically remove mail from Archived mail. To archive a message:

- 1 Read the message, as described in *Read a Message*.
- 2 Pick and point the Archive option.

Uniplex removes the message from Incoming mail and places it in Archived mail.

◇ Read an Archived Message

To read an archived message:

- 1 Pick and point the Read Archived Mail option.

Uniplex displays the Select Mailbox form if you use mailboxes.

- 2 If the Select Mailbox form is displayed, pick and point the mailbox which contains the message. Uniplex displays the Choose Letter form.
- 3 Pick and point the message you want to read.

Uniplex displays the message and a ring menu along the top the screen. This menu can include the following options:

down Display the next page of the message.

up Display the previous page of the message.



Archive Mail

↖ *Uniplex only displays the down and up options if the message is more than one page long.*

reply Send a reply to the message and automatically address it to the person who sent you the mail. See *Reply to a Message*.

copy Copy the message to a document. See *Copy a Message to a Document*.

print Print a copy of the message. See *Print a Message*.

delete Delete the message. See *Delete a Message*.

↖ *You can also delete messages using F3.*

forward Forward the message to one or more other users. See *Forward a Message*.

confirm Send a message to the sender confirming you have read the message. See *Confirm Receipt of a Message*.

attach Display the attachment if there is one. See *Read Attachments to a Message*.

↖ *Uniplex only displays this option if the message has one or more attachments.*

move Move a message to a different mailbox. See *Move a Message*.

↖ *Uniplex only displays this option if you have more than one mailbox.*

4 Pick and point the option you want to use or press **ESC q** to leave the message.

◆ General

The following sections describe these tasks:

- o Copy a Message to a Document
- o Print a Message
- o Delete a Message
- o Forward a Message
- o Find a Message
- o Display More Details About a Message

You can carry out these tasks on any type of message. That is, a message sent to you, a message you have sent and have saved a copy of, or a message you have archived.

To carry out each of these tasks, you must first read the message (unless you use the Batch Command equivalents described above). For details of how to read each type of message, see the appropriate section of this chapter as follows:

Type of Message	Section
A message you have sent.	Read Sent Mail
A message you have received.	Read a Message
A message you have archived.	Read an Archived Message



General

◇ Copy a Message to a Document

You can copy a message to a document. You can use the document containing the message with other Uniplex facilities. For example, if someone sends you a records file, you could use it with the Database and Report Writer or if you are sent a word processing document you can edit it using the Word Processor.

To copy a message to a document:

- 1 Read the message, as described in the appropriate section for the type of message you want to copy. Uniplex displays a ring menu at the top of the screen.

- 2 Pick and point the Copy option.

Uniplex displays the Copy Letter to Document form.

- 3 Enter the name of the document and press **ESC e**. If you want to use File Manager complete either of the following steps.

- Save the message to a new file by pressing **F5** to open File Manager in Create File Mode.
- Save the message to an existing file by pressing **F6** to open File manager in Select File Mode.

✍ *If the document already exists, Uniplex asks for confirmation that you want to overwrite it.*

◇ **Print a Message**

You can print messages. This is useful if you want a paper-copy of a message, for example if a message contains the agenda for a meeting.

To print a message:

- 1 Read the message, as described in the relevant section for the type of message you want to print.

Uniplex displays a ring menu at the top of the screen.

- 2 Pick and point the Print option.

You can now choose whether to print the message using the preset default values by toggling the Easi Print option, or to enter your own printing requirements by toggling the Print Using Form option, using the SPACEBAR.

In the first case, the message is printed immediately. On the other hand, if you choose to print using different values, Uniplex first displays the Printing Selection form.

- 3 If you chose the Print Using Form option, press **ESC e** to leave the Printing Selection form with its current settings, unless you want to change them.

Uniplex prints the message with a header comprising the sender's name, the date delivered and the subject.



General



Delete a Message

You can delete messages that you have received or sent. It is a good idea to delete redundant messages so that you use your mail application efficiently and free up disk space.

There may be a mailbox set up on your system called **trashcan**. This stores any messages you delete and keeps them for a given length of time before removing them altogether.

Ask your System Administrator for details about the trashcan mailbox, including the name it has been given and the period of time messages are kept, both of which are configurable by the System Administrator.

To delete a message:

- 1 Read the message, as described in the relevant section for the type of message you want to delete.

Uniplex displays a ring menu at the top of the screen.

- 2 Pick and point the Delete option.
- 3 Press * to delete the message. Press F4 or **ESC e** to cancel the command and keep the message.

✍ You can also delete messages directly from the Incoming Mail and Check Mail Sent lists, by pressing softkey F3.

◇ Forward a Message

You can forward mail to other users. It is useful to forward mail when you receive mail that may be of interest to other users.

To forward a message:

- 1 Read the message, as described in the relevant section for the type of message you want to forward.

Uniplex displays a ring menu at the top of the screen.

- 2 Pick and point the Forward option.

You now have the option of adding your own comments to the beginning of the message you want to forward.

- 3 Press the SPACEBAR to select the **yes** option if you want to add comments, then press RETURN.

- 4 Enter your comments on the memo screen and press **F1** or **ESC e**.

Uniplex displays the Send Form.

- 5 Complete this form as described in *Send Mail*.

✎ *If the message you are forwarding has attachments, Uniplex forwards them too. Although you cannot add any further attachments, you can merge in additional documents with the text of the message.*

Uniplex forwards the message and includes a forward log at the top of the message when it delivers it.



General

◇ Find a Letter

Whenever you are using the Choose Letter form to select any type of letter (Incoming, Outgoing, Saved), Uniplex provides a facility to help you find the right letter.

To find a letter:

- 1 Display the appropriate Choose Letter form for the type of message you are searching for (see the relevant section).
- 2 Press **F6**.

Uniplex displays the Search for a Letter form. You can make the following entries in this form:

System The name of the computer system from where the message was sent.

From The name of the person who sent the mail.

Mailbox The name of the mailbox the message was placed in.

Subject The subject of the message.

Date The date of the message.

Priority The priority of the message.

Free text The words or phrases used in the message.

Time The approximate time the message was sent.

✎ *Depending on how your system has been configured, Uniplex finds the messages that were sent within a time range (i.e., five minutes on either side of the time you specify). For more details see your System Administrator.*

- 3 Complete whichever fields you know for this letter. For example, if you know the name of the person who sent you the letter, complete the From field.

You can use symbols for searching and wildcards in this form. See *Symbols for Searching*.

- 4 Press **ESC e** when you have completed as many of the fields as you can.

Uniplex displays a list of letters with the attributes you specified.

- 5 You can press **F6** again to further refine the search.

◇ **Symbols for Searching**

Electronic Mail uses *pattern matching* symbols and *wildcards* to let you specify a group of messages you want to find. Pattern matching symbols are mathematical operators which let you find all messages that are equal, not equal, greater than, or less than a specified parameter such as all messages which were sent to you on a particular day.

You use wildcards to match one or more characteristics in a string of text. For example, you can find entries that begin with a particular letter or end with a certain extension. Wildcards are useful if you do not know the full text of the entry for which you are searching.

You can also use pattern matching symbols or wildcards to find messages with a defined set of characteristics. For example, you can find all the messages which were sent by a particular person, on a specified day, with a particular subject. This table shows the pattern matching symbols and wildcards that are available.



General

Operator Function

= **Equal To.** Use this operator to find a message matching your entry in this field. For example, to find all messages sent by fred, enter the following in the Sender field:

`=fred`

If you make an entry in a field without including a symbol, Uniplex assumes you want to find all messages that are equal to your entry.

! **Not Equal To.** Use this operator to find a message not containing your entry in this field. For example, to find all messages not placed in the general mailbox, enter the following in the Mailbox field:

`!general`

> **Greater Than or Equal To.** Use this operator to find messages with an entry in this field that is greater than or equal to your entry. You can use this symbol to find messages sent on or after a date. For example, to find a message sent on or after the 15th March, enter the following in the Date field:

`>03/15/98`

< **Less Than or Equal To.** Use this operator to find messages with an entry in this field that is less than or equal to your entry in this field. You can use this symbol to find messages sent on or before a specified date. For example, to find a message sent on or before the 15th March, enter the following in the Date field:

`<03/15/98`

Operator	Function
*	<p>Match any Characters. Matches any number of characters; either a single character, a series of characters, or no characters. For example, if you know that the first five letters of the sender's system name are <i>spurs</i>, but you do not know the remainder of the name, enter the following the System field:</p> <p><code>=spurs*</code></p>
?	<p>Match a Character. Matches any single character anywhere in a pattern. For example, if you know the first five letters of the sender's system name are <i>spurs</i>, but you do not know the sixth, enter the following in the System field:</p> <p><code>=spurs?</code></p>

You can use pattern matching symbols and wildcards in combinations to make your search as specific as you need. For example, `???[h-m]*` matches all records where the fourth character of the specified field is in the range *h* to *m*.

◇ Display More Information on a Message

Whenever you have selected a message, (when the header is highlighted on the Choose Letter form), you can display more information about the message.

To display more information about a message:

- o Press F5 (Expand)

Uniplex displays the details of the message as entered into the Send Form by the sender of the message.



Auto-Reply

◆ Auto-Reply

◇ Set Auto-Reply

If you are going to be out of the office for a while, or unable to read your mail for some other reason, you can set auto-reply. Once set, if any new mail is sent to you, Uniplex automatically sends the reply you have created.

For example, if you are going on vacation you can create a message saying that you are away, who to contact instead of you, and when you will be back. The mail remains in your account for you to read when you return.

To set auto-reply:

- 1 Pick and point the Administration option.

Uniplex displays the Administration menu.

- 2 Pick and point the Set auto-reply option.

Uniplex displays the Memo Pad.

- 3 Enter the message. Press **ESC e** when you have finished.

If you use mailboxes, Uniplex displays the Select Mailbox form.

- 4 If the Select Mailbox form is displayed, pick and point each mailbox for which you want auto-reply set.

- 5 When you have selected all the mailboxes for which you want to set auto-reply, press **ESC q** to leave this form.

Uniplex sets auto-reply on the mailboxes you select. Your reply is sent to any new mail received in this mailbox after you have set auto-reply.



◇ Unset Auto-Reply

- 1 Pick and point the Administration option.

Uniplex displays the Administration menu.

- 2 Pick and point the Unset Auto-reply option.

If you use mailboxes, Uniplex displays the Select Mailbox form.

- 3 If the Select Mailbox form is displayed, pick and point each mailbox for which you want to unset auto-reply.

- 4 Press **ESC q** when you have selected all the mailboxes for which you want to unset auto-reply.



Auto-Forward

◆ Auto-Forward

◇ Set Auto-Forward

If you are going to be out of the office for a while and you want mail you receive during that time to be forwarded to another user, you can use auto-forward.

To set auto-forward:

- 1 Pick and point the Administration option.

Uniplex displays the Administration menu.

- 2 Pick and point the Set auto-forward option.

Uniplex displays the Address List form.

- 3 Enter the address(es) you want your messages forwarded to and press **ESC e** or press F1. (Specify this list in the same way you address a mail message.)

If you use mailboxes, Uniplex displays the Select Mailbox form.

- 4 If the Select Mailbox form is displayed, pick and point each mailbox for which you want auto-forward set and press RETURN. Press **ESC q** or F4.

Uniplex sets auto-forward on the mailboxes you select. Any mail sent to these mailboxes now is forwarded to the person you specified, with a forward log at the beginning of the message.

Uniplex leaves a copy of the forwarded mail message in the mailbox of the original recipient.



◇ Unset Auto-Forward

To unset auto-forward:

- 1 Pick and point the Administration option.

Uniplex displays the Administration menu.

- 2 Pick and point the Unset auto-forward option.

If you use mailboxes, Uniplex displays the Select Mailbox form.

- 3 If the Select Mailbox form is displayed, pick and point each mailbox for which you want to unset auto-forward and press RETURN. Press **ESC q** or F4 to return to the Administration menu.



Mailing Lists

◆ Mailing Lists

A Uniplex Mail Alias allows a system administrator to create a list of users who work as a functional group and assign them an inclusive title. This means that mail can be sent to an entire group of recipients without having to enter each name individually. For example, a Mailing List could be created called *Sales Department* which contains the following members:

mxw@uniplex.com	bxo
plb	jjh
bigblue>ced	rlgibno@it.atlic.net
UK Sales	Roger Paterson *Contractor*

Aliases are also used to substitute real user names for complex email addresses. For example, *Mark Dobson* could be used for the address *drabble9@rogno.erewhon.wa*. When sending mail using the pick and point list to select addresses, all previously defined mailing lists and individual names are displayed.

To see either the contents of a mailing list or the underlying email address of an individual listed in the pick and point list, position the cursor on an alias name and press **F5**. For example, if the alias name is *Marketing Department*, pressing **F5** lists all the names in that alias. If the alias name is *Mark Johnson*, pressing **F5** shows the full email address of the user.

Mailing lists can themselves contain previously defined mailing lists. In this way an entire company can be referred to with just one address, made up from other mailing lists. For example, the mailing list *Entire Company* could contain the following addresses and mailing lists:

Sales Department	Jon Barrymore *MD*
Administration/HR	Engineering Department
Finance Director	Head Office

◆ Circulation Lists

You can send mail to a circulation list. When you send mail to a circulation list, Uniplex does not send the mail to each person in the list, each recipient must forward the message to the next person in the list. You specify the list and Uniplex automatically addresses the forwarded mail. Circulation lists are useful for messages where you require responses (*i.e.*, signatures or comments); for example, you could send the following message to Julie, Peter, and Simon:

Following the graduate recruitment day last week, I need your opinions on who we are to ask to second interview. We will be recalling 2 out of the 4. Please add your votes (yes or no) to the following list and forward to the next person on the circulation list (I have included my vote in the last column):

	Julie	Peter	Simon	Wesley
Turner (Mech. Eng.)				yes
Dick Williams (English Lit.)				no
Laura Montgomery (Social Studies)				yes
Elizabeth Smith (History)				no

To send mail to a circulation list:

- 1 Create the letter or memo in the normal way.
- 2 In the To field of the Send Form, specify the circulation list as follows:

name, (name, name, ... name)



Circulation Lists

where *name* is the name of each person in the circulation list, for example:

```
fred, (john, jane, freda)
```

Uniplex sends the message to the first person in the circulation list and includes a forward log at the top of the message.

To read a message sent to a circulation list:

- o Read the message in the normal way.

Your name appears without parentheses when Uniplex displays the message header in the Select Letter form. Other recipients' names will also be listed, in the order of circulation, but will be shown in parentheses. In addition Uniplex displays a message indicating that the message must be forwarded. When you have forwarded the message, Uniplex no longer displays the prompt when you read the message. For example, if you are the first person in the circulation list, the circulation list can appear as:

```
mary, (jill, louise, fred)
```

or if you are the second:

```
(mary), jill, (louise, fred)
```

or if you are the last:

```
(mary, jill, louise), fred
```

The parentheses around addresses before your name in the list indicate the recipients who have read and forwarded the mail.

The parentheses around addresses after your address in this list indicate the recipients who have not received the message, the first of these being the person you must forward the mail to.

To forward a message sent to a circulation list:

- 1 Read the message in the normal way.
- 2 Pick and point the Forward option.

Uniplex displays the Send Form.

- 3 If you want to edit the message, press **F3**. Uniplex displays the message in the Document Editing form. Edit the message as required. Press **ESC e** to return to the Send Form.
- 4 If required, change any of the entries in the Send Form.
- 5 Press **ESC e** to send the message to the next person in the list. Uniplex sends the message, including a Forward Log at the top of the message.



Dates and Times in Mail Messages

◆ Dates and Times in Mail Messages

Uniplex includes the date and time in the header of all messages. The format of the date and time may vary from system to system, for example:

MM/DD/YY HH:MM

where:

MM	Month
DD	Day
YY	Year
HH	Hour (24 hour clock format)
MM	Minute

The date and time is defined as follows:

- **Incoming Mail.** The date and time you received the message.
- **Outgoing Mail.** The date and time you sent the message.
- **Forwarded Messages.** The date and time the message was forwarded.
- **Replies.** The date and time you replied to the message.
- **Mailboxes.** The date and time of latest letter received, sent, or archived.

You can use dates and times as criteria when searching for a message. Refer to *Find a Letter* for more details.

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Chapter 2

Time Manager

Time Manager

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◆ Overview

Uniplex Time Manager is an automated calendar. You can use it like an ordinary desk calendar to organize your appointments and schedule on a day-to-day basis and for several months in advance.

You can use Time Manager to:

- o Store all your appointments, bookings, and reminders.
- o Set alarms to notify you of important meetings or events.
- o Schedule meetings with other calendar users.
- o Book regular events automatically.
- o Produce printed daily, weekly, and monthly schedules.
- o Create group calendars or calendars to schedule the use of shared facilities, such as a meeting room.

The advantages of Time Manager are:

- o Use Time Manager interactively while engaged in other Uniplex tasks.
- o Save time by copying identical entries and booking regular events automatically.
- o Track everyone's personal working time to simplify scheduling meetings with other calendar users.



Overview

◇ Time Manager Terminology

Term	Explanation
Personal Calendar	Uniplex automatically creates a calendar for your personal use when you start to use Time Manager. You can also create other calendars, for example, for your group or to schedule the use of a shared facility.
Event	Any entry in a calendar. An event can be, for example, an appointment, a meeting or a private memo.
Conference	An entry placed in multiple calendars.

◇ Access Time Manager

You can access Time Manager from the Main menu or from any application using the Desk menu.

To access Time Manager from the Main Menu:

- o Pick and point the Time Manager option.

To access Time Manager from any application:

- o Press **ESC xd** or **F9** and then:

Add an Event. Pick and point the Add Calendar Event option.

Access Time Scheduling. Pick and point the Time Scheduling option.

Display At-a-Glance Calendar. Pick and point the At-a-Glance option.

Access the Time Manager menu. Pick and point the Next Page option, then pick and point the Full Time Manager option.

Uniplex displays the Time Manager menu, as follows:

Calendar: mark T I M E M A N A G E R 08/25/99 11:21

VIEW CALENDAR	CONFERENCE	PRINTING
1 - At-a-Glance	8 - Schedule	P - Print Calendar
2 - 2-Weekly View	9 - Cancel/Reschedule	N - Print Alarms
3 - Monthly View		L - Print/View Plan
EVENT	BLOCK BOOKING	UTILITIES
4 - Add Event	D - Add (day/week)	S - Select Calendar
5 - Inquire/Amend	M - Add (month)	C - Calendar
	E - Edit/Cancel	A - Administration
ALARMS		H - Help
6 - Create Alarm		Q - Quit
7 - Remove Alarm		

F1=Enter F2=Redraw F4=Quit F8>More F9=Desk



Access Help

You can access on-line help at any time while you are using the Time Manager. You can request help about the tasks you can perform from the menu you are in or you can request more detailed help from within the application itself.

To access help about a menu:

- o Pick and point the Help option from the Uniplex menu.

Uniplex displays a help screen detailing the options available from the current menu.



Overview

To access specific help about Time Manager:

- 1 Press **ESC h** at any time while you are using Time Manager.

Uniplex displays a popup menu showing the list of help topics available.

- 2 Pick and point the help topic you require. In some cases, Uniplex displays a further popup menu from which you can pick and point a help topic.

Uniplex displays one or several screens of help about the topic you specified.

To return to your task:

- o Press **ESC q**



Worked Example

◆ Worked Example

This section introduces you to the main facilities of the Time Manager. When you have worked through the example you can start to use the system to organize your own appointments, conferences, and calendar. Uniplex automatically creates a calendar for your own personal use when you first use Time Manager. This example assumes you are working in your own calendar from the main menu.

1 Add a New Event

You can add new events to any part of your calendar on today's date or several months in advance. You can enter any kind of information, for example, appointments, group meetings, or private memos. The calendar works like an ordinary desk calendar. You select a date and a time, then you make an entry which is automatically stored. Once it is there you can refer to it easily; you can also edit, copy, or delete it.

To add a new event to your calendar:

- a) Pick and point the Add Event option.

Uniplex displays the Detail Calendar Entry Form.

Press any character key to display a pick and point list of the available options in each scrollable list.

Complete the form:

- a) Make sure today's date is in the Event Date field. Uniplex has entered it by default. Press TAB to move to the Start Time field.
- b) In the Start Time field, enter **10:00**. Press TAB twice.
- c) In the End Time field, enter **11:30**. Press TAB twice.
- d) In the Summary field, enter **Progress Meeting**.



Worked Example

You can leave all the other fields blank or with their default entries.

Enter date in DD/MM/YY format

ADD EVENT		D E T A I L		C A L E N D A R		E N T R Y	
Event date	: [08/25/99]	Created on	: 08/25/99				
Start time	: [10:00__]	Alarm at	: [_____]				
End time	: [11:30__]						
Event Class	: [Confirmed]						
Summary	: [Progress Meeting_____]						
Public text	: [_____]						
	[_____]						
	[_____]						
	[_____]						
Private text	: [_____]						
	[_____]						
	[_____]						
	[_____]						

F1=Enter F2=Redraw F4=Quit F8>More F9=Desk

- e) Press **ESC e** to save the event.

Uniplex makes the entry in your calendar, then displays the Add Entry form to enable you to make another entry.

- f) Press **ESC q** to quit from the form.

Uniplex returns you to the main menu.

Worked Example

2 Change an Event

You can change any part of an entry once it has been made. To change the entry you have just made:

- a) Pick and point the Inquire/Amend option from the menu.
Uniplex displays:

```
Select: view date add copy edit remove
```

```
Calendar: Mark A M E N D / I N Q U I R E
```

```
Calendar date : 08/25/99
```

```
START      END          CLASS      SUMMARY
```

```
10:00am-11:30am  Conf      Progress Meeting
```

Uniplex displays a list of events for today's date (only one item if this is your first use of Time Manager).

- b) Pick and point the Edit option from the ring menu.
c) Pick and point **Progress Meeting** from the list.

Uniplex displays the Detail Calendar Entry screen.

- d) Leave the Event Date field as it is. Press TAB.
e) Change the start time from **10:00** to **11:00**. Press TAB twice.
f) Change the end time from **11:30** to **12:30**.
g) Press **ESC e** to save our changes and leave the form.

Uniplex changes the start and finish time of the entry and returns you to the Calendar Amend/Inquire screen.



Worked Example

3 Copy an Event

You can copy any event to another place in the calendar such as for a series of meetings at regular intervals or if you need a reminder to perform a regular task. To copy an event:

- a) Pick and point the Copy option from the ring menu.
- b) Pick and point Progress Meeting from the list (there is only one item in the list if this is your first use of Time Manager).

The Detail Calendar Entry screen displays.

- c) Change the Event Date from today to tomorrow.
- d) Press **ESC e** to leave the form.

If event date is a holiday or a weekend or clashes with another event, you must press * to make the booking.

Uniplex copies your entry to the same time tomorrow. Your original entry is still in place.

4 Add Public and Private Text

You can add up to four lines of public and four lines of private text to your calendar. Normally, anyone who has access to your calendar can read the public text; only you can read the private text. To add public and private text:

- a) Pick and point the Edit option from the ring menu.
- b) Pick and point **Progress Meeting** from the list (only one item if this is your first use of Time Manager).

Uniplex displays the Detail Calendar Entry screen.

- c) Use TAB to move to the Public Text field.

Worked Example

- d) Enter the following, pressing RETURN after each line:

**Departmental Progress Meeting. All
managers will be present. Take along
one page weekly summaries from all
members of department.**

Use TAB to move to the Private Text field.

- e) In the Private Text field, enter the following:

**Last meeting before vacation begins!
Warn Sue of problems.**

- f) Press **ESC e** to leave the form.

Uniplex enters the text in your calendar and returns you to the Calendar Amend/Inquire screen.

5 View the Calendar

You can look at the calendar at any time to remind yourself of forthcoming events. To look at the entries you have just made:

- a) Pick and point the Date option from the ring menu:

Uniplex displays the current date.

- b) Change to tomorrow's date and press RETURN.

The summary list of entries for tomorrow is displayed.

- c) Pick and point the View option from the ring menu.

**Worked Example**

- d) Pick and point Progress Meeting from the list.

The Detail Calendar screen shows tomorrow's entry. You cannot make any changes to this screen. View other entries for the same day by using the *Next* and *Previous* options.

- e) Press **ESC q** to leave the form.

Uniplex returns to the Inquire/Amend screen.

- f) Press **ESC q** again to return to the Time Manager menu.

6 Glance at Your Calendar

Look at entries for other dates by using the *At-a-Glance* displays to get a rapid overview of your calendar for the current month and several months following. To view the current month:

- a) Pick and point the At-a-Glance option.

A display for this month is shown, for example:

* - Indicates a 'weekend'

Calendar: Mark VIEW CALENDAR

August 1999

SUN	MON	TUE	WED	THU	FRI	SAT
*1	2	3	4 (1)	5 (1)	6	*7
*8	9	10	11	12	13	*14
*15	16	17	18	19	20	*21
*22	23	24	25 (3)	26 (1)	27	*28
*29	30	31				
SUN	MON	TUE	WED	THU	FRI	SAT

Worked Example

Tomorrow's date is highlighted on the screen. Tomorrow's date is the *current* date because it was the last date you were working with. Next to the date is a '1' in parentheses. This indicates the number of events booked for that day.

- o Weekends are Indicated with an Asterisk (*)
- o National Holidays are Marked **Nat Hol**
- o Special Holidays are Marked **Sp Hol**

There are three different types of display available and each is designed to suit the needs of different users.

- b) Press SPACEBAR to move between the different displays until you return to the display shown above.
- c) Use the arrow keys to move the highlight over today's date.
- d) Press **ESC e**.

Uniplex displays the summary list of today's events.

- e) Press **ESC q** to return to the display. Press **ESC q** again to return to the Time Manager Menu.

7 Create a Calendar

As well as having a calendar for your own personal use you can create additional calendars, for example:

- o **Create a Group Calendar.** Coordinate a department or a group working on a project.
- o **Create a Shared Resource Calendar.** Track use of a shared resource (for example, a room or a piece of equipment).



Worked Example

To create a calendar:

- a) Pick and point the Administration option.

Uniplex displays the Calendar Administration menu.

- b) Pick and point the Create a Calendar option.

- c) Where Uniplex asks you to enter the name of a Calendar, enter **practice**. Press RETURN.

Uniplex returns you to the menu.

All the work you do from now on is in the Practice Calendar.

- d) Pick and point Quit to return to the Time Manager menu.

8 Use another Calendar

You can create and use other calendars just like your personal calendar. To enter an event in the *practice* calendar:

- a) Pick and point the Add Event option.

Uniplex displays the Detail Calendar Entry form. Complete the form as follows:

- b) In the Event Date field enter tomorrow's date. Use TAB to move to the Start Time field.
- c) In the Start Time field, enter **15:00**. Press TAB twice.
- d) In the End Time field, enter **16:00**. Press TAB twice.
- e) In the Summary field, enter **Sales Conference**.

You can leave all other fields blank or with the defaults.

- f) Press **ESC e** to make the entry.

Worked Example

The *practice* calendar entry is made and you return to the Detail Calendar Entry form. Press **ESC q** to leave this form.

9 Schedule a Conference

In addition to working with individual calendars, you can arrange conferences with several other calendar users. You specify the names of all the calendars you want searched, and Uniplex finds all the common available time slots. If there is a suitable common time for the conference, you can enter the event in all the calendars you specified. Events entered into several calendars are referred to as *conferences*.

To schedule a conference:

- o Pick and point the Schedule option.

Uniplex displays the Scheduling Form.

Complete the form as follows:

- a) In the Calendars to search field, enter:

yourname,practice

Separate the names of the two calendars with a comma.
Press TAB.

- b) Leave today's date in the Search Start Date field. Press TAB.
- c) Enter tomorrow's date in the Search End Date field. Press TAB.
- d) Enter **09:00** in the Search Start Time field. Press TAB.
- e) Enter **17:00** in the Search End Time field. Press TAB.



Worked Example

- f) Enter **1:00** in the Free Time Required field.

You have asked for an available one-hour period over the next two days in normal working hours.

- g) Set the Search Outside Normal Working Time field to Y.
h) Press **ESC e** to leave the form.

Uniplex searches your own calendar and the practice calendar for a common available time.

10 Find a Time for a Meeting

When the search is complete, Uniplex displays a grid showing the amount of free (F) and busy (B) time in the two calendars that you have asked to be searched. The time is marked in three hourly segments on the top line of the grid. Only today's schedule is displayed. To display tomorrow's schedule:

- o Pick and point the Next option from the ring menu.

Uniplex displays the grid showing tomorrow's schedule.

To add the appointment to both of the calendars:

- a) Pick and point the Add option from the ring menu.

Uniplex prompts for a start time showing the first available time as a default.

- b) Enter **9:00**. Press RETURN.

Uniplex displays the Detail Calendar Entry screen. The date, start, and end time are already entered.

- c) Use the TAB key to move to the Summary field. Enter:

Strategy Meeting

Worked Example

The Private Text field is not displayed. You cannot enter private text in conference events.

- d) Press **ESC e** to leave the form.

Uniplex enters the event in your own calendar and in the practice calendar.

- e) Press **ESC q** to return to the Time Manager menu.

11 View other Calendars

You have been working in the practice calendar. To return to your own calendar:

- a) Pick and point the Select Calendar option.

Uniplex displays a pick and point list showing the different calendars to which you have access. Your own calendar is highlighted.

- b) Pick and point your own calendar.

Uniplex returns you to the Time Manager menu.

You work in your own calendar until you use this option again to access another calendar.

12 Remove an Event

You can remove events you no longer want:

- a) Pick and point the Inquire/Amend option.
b) Pick and point the Date option.
c) Enter today's date and press RETURN.



Worked Example

Uniplex displays a summary list of events for today.

- d) Pick and point the Remove option from the ring menu.
- e) Pick and point **Progress Meeting**.

The Detail Calendar Entry screen for that event displays.

- f) Press * to confirm that you want to delete the item.

✎ *You cannot delete Conference events you originated with the Remove option. See Schedule a Conference.*

- g) Press **ESC q** to return to the Time Manager menu.

13 Complete the Worked Example

You have finished the worked example. There are features to which you have not yet been introduced. These include using alarms, entering alias names, controlling access to your calendar, booking blocks of time, and producing printed copies of selected parts of the calendar. Details on all of these and the features you have already learned about are contained in the reference sections that follow.

Before you begin to use the Calendar to organize your appointments and conferences:

- a) Return to the Practice Calendar using the Select Calendar option.
- b) Remove all the remaining entries for today's and tomorrow's dates using the Delete Calendar option from the Administration menu. See *Delete a Calendar*.



Reference

◆ Add Events

You can add new events to any part of your calendar. You can add them to today's date or enter them several months in advance. You can enter any kind of information in your calendar, for example, appointments, group meetings or private memos.

When you add a new event, you need to enter the date of the entry. You can also add a start and end time of the event, and a brief text summary to describe the event.

You can enter events with no start and end time to serve as general reminders for that day.

You can also enter up to four lines of public text and four lines of private text. You can control the amount of access that other people have to these different areas of your calendar. See *Controlling Access to Calendars*.

To make an entry:

- 1 Pick and point the Add Event option.

Uniplex displays the Detail Calendar Entry form.

- 2 Complete the Detail Calendar Entry form as follows:

Press the TAB or RETURN key after making an entry in a field. Use the arrow keys to move around the form.

Press any character to display a pick and point list of the available options in each scrollable field.

You must complete the Event Date field and the Summary field. You do not need to complete any of the other fields.



Add Events

Enter date in DD/MM/YY format

ADD EVENT D E T A I L C A L E N D A R E N T R Y

Event date	: [08/25/99]	Created on	:08/25/99
Start time	: [_____]	Alarm at	: [_____]
End time	: [_____]		
Event Class	: [Confirmed]		
Summary	: [_____]		
Public text	: [_____]		
	[_____]		
	[_____]		
	[_____]		
Private text	: [_____]		
	[_____]		
	[_____]		
	[_____]		

F1=Enter F2=Redraw F4=Quit

F8>More F9=Desk

Field	Explanation
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Event Date	Enter the date for the entry. Today's date is entered by default, but you can enter any date. Use the format of your system (usually mm/dd/yy or mmddyy). For example, March 9 can be entered as 03/09/99 or 030999.
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Start Time	Enter the starting time of the appointment. You can use a variety of formats. For example, you can enter 3:00 in the afternoon in these ways:
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Format	Example
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hhmm	1500
h:mmpm	3:00pm
hh:mm	15:00

Field	Explanation
	<p>Leave this field blank to enter a general note for the day. For example, you can enter a note reminding you that your assistant is on vacation. Uniplex does not warn you if you enter an event that clashes with an untimed event. The only exception to this is if the event is a <i>Vacation</i>. See the <i>Event Class</i> field.</p>
End Time	<p>Enter the time the appointment will finish. Use any of the Start Time formats. You cannot enter an end time if you did not enter a start time.</p>
Event Class	<p>Define a class for each event:</p> <p>Confirmed. Makes a confirmed entry and warns you of clashes with other events.</p> <p>Provisional. Makes a provisional entry and warns you of clashes with other events.</p> <p>Invitation. An open event; several invitations can be for the same time. There is no warning if this clashes with existing or future events.</p> <p>Vacation. Enter vacations as timed or untimed events. An untimed vacation will still generate warnings if existing or future events clash with it.</p> <p><i>Confirmed</i> is the default. Press SPACEBAR to scroll through the other options.</p>
Created On	<p>Uniplex automatically enters the date that the entry was created. You cannot change this entry.</p>
Alarm At	<p>You can set an alarm to alert you of the event if you are the owner of the calendar. Enter the time for the alarm to sound using the format hh:mm.</p>



Add Events

Field	Explanation
Alarm At (continued)	The computer will beep and display the summary text on your screen at the set time.
	✎ <i>You can also add alarms using the Create Alarm option. See Create an Alarm.</i>
Mail Notification (Y/N)	This field is only displayed if you are not the owner of the calendar. Leave the default at Y if you want to send the owner a mail message informing him or her of the entry, otherwise enter N .
Summary	Enter a brief description of the appointment. This description is shown whenever a summary list is displayed and for the alarm message. You must make an entry in this field.
Public Text	Enter up to four lines of text. Anyone who has access to your calendar can read this text by default. You can change the access rights. See <i>Control Access to Calendars</i> .
Private Text	Enter up to four lines of text. You are the only one who can read this entry by default. You can change the access rights. See <i>Control Access to Calendars</i> .

✎ *You can also add new entries using the Inquire/Amend option described in the next section.*

3 Press **ESC e** when the form is complete.

Uniplex displays an Add form to allow you to make further entries to your calendar.

4 Make further entries to your calendar as described above, or press **ESC q** to quit.

◆ Use the Calendar

You can use the Inquire/Amend option to look at existing entries. They may have been made by you, or other people. You can also use this option to add an entry, make changes to the entry, copy the entry to another place in the calendar, or remove the entry.

◇ View an Entry

To see the entries for the current day:

- 1 Pick and point the Inquire/Amend option.

Uniplex displays a summary list of all the entries for the current date. The current date is the last date you were working on. If you have just started to use the calendar, the current date is today's date. An asterisk (*) next to an entry indicates a conflict in times.

```
Select: view date add copy edit remove
Calendar: Mark          A M E N D / I N Q U I R E
```

Calendar date : 04/03/99			
START	END	CLASS	SUMMARY
09:00am-12:30pm	*	Conf	Sales Meeting
11:00am-12:30pm	*	Conf	Progress Meeting
01:30pm-01:45pm		Inv	Employee Review
04:00pm-05:30pm		Prov	Meet Suppliers

- 2 Pick and point the View option.



Use the Calendar

- 3 Pick and point the event you want to view.

Uniplex displays the details of the event you selected.

- o Pick and point the Next option from the ring menu to see the next event for the same day.
- o Pick and point the Previous option to scroll backwards to the previous event for the same day.

- 4 Press **ESC q** to leave the option.

To display the entries for another day:

- 1 Pick and point the Date option from the ring menu.
- 2 Enter the date you want to look at. Press RETURN.

Uniplex displays the summary list for that day.

- 3 Pick and point the View option to see that day's detail entries.
- 4 Pick and point the entry you want to view.
- 5 Press **ESC q** to leave the option.

For more information on how to move to different days of the calendar, see *At-a-Glance Displays*.

◇ Add an Entry

You can add an entry to any calendar for which you have the correct access permission. Talk to your System Administrator if you have any difficulty adding entries to your own calendar.

You can use the Inquire/Amend option to add an entry, as well as the Add Event option from the Time Manager menu.

To add an entry using the Inquire/Amend option:

- 1 Pick and point the Inquire/Amend option.

Uniplex displays a list of entries for the current date with their summary descriptions. In addition, Uniplex displays a ring menu at the top of the screen.

- 2 Pick and point the Add option from the ring menu.

✎ *The add option is not displayed if you do not have write permission for the calendar. See Control Access to Calendars.*

Uniplex displays the Detail Calendar screen.

- 3 Complete the Detail Calendar form as described in *Add Events to the Calendar*.
- 4 Press **ESC e** when the screen is complete.

Uniplex enters the event in your calendar and returns you to the Inquire/Amend screen.



Use the Calendar



Edit an Entry

Use the Edit option to make changes to an existing entry. In addition, you can use this option to move an entry from one place in the calendar to another.

✎ *The Edit option is not displayed if you do not have editing permission for the calendar. See Control Access to Calendars.*

To edit an entry:

- 1 Pick and point the Inquire/Amend option.
- 2 Pick and point the Edit option from the ring menu.
- 3 Pick and point the entry you want to edit.

Uniplex displays the Detail Calendar form for that entry.

- 4 Make any changes to the form that are required. Uniplex moves the entry to the new place in the calendar if you change the date or the time.

If the entry is a *Conference* booking you cannot edit the time or the date with this option unless you are the originator of the conference. Use the Conference option from the Time Scheduling menu. See *Schedule a Conference*.

- 5 Press **ESC e** when the form is complete.

Uniplex places the edited entry in the calendar.

◇ Copy an Entry

You can use the Copy option to make duplicate entries. This is particularly useful if you want to arrange a series of meetings at regular intervals or if you need a repeated reminder to perform an important task.

You need to have write access to a calendar to copy an event. Uniplex copies a conference as a normal event and not as a conference.

To copy an entry:

- 1 Pick and point the Inquire/Amend option.

Uniplex displays a list of summary entries for the current date.

- 2 Pick and point the Copy option from the ring menu.
- 3 Pick and point the event you want to copy.

Uniplex displays the Detail Calendar screen.

- 4 Change the date and/or the time for the copied entry.
- 5 Press **ESC e**.

Uniplex copies the event. The original entry is left unchanged.

- 6 Repeat the procedure if you want the event to be copied to anywhere else in the calendar.

✎ *Use the Edit option described in the previous section if you want to move an entry rather than copy it.*

Use the Calendar

◇ Remove an Entry

You can easily remove events that have been made in error or are no longer applicable. You can remove conference entries that have been made for you by someone else.

✎ *You are not allowed to remove a conference entry with this option if you originated it. See Schedule a Conference.*

To remove an entry made in error or that is no longer applicable:

- 1 Pick and point the Inquire/Amend option.
- 2 Pick and point the Remove option from the ring menu.

Uniplex displays a summary list of events.

- 3 Pick and point the item to remove.

Uniplex displays the detailed text of the entry to remove.

- 4 Press * to confirm that you want to remove the item. Press **ESC q** to quit if you have selected the wrong item.

✎ *Use the Delete Calendar option if you want to delete all entries prior to a particular date.*

◇ Delete a Calendar

Use the Delete Calendar option to clear out events that you no longer need. This is useful as it frees up valuable disk space. You can only use this option if you are the owner of the calendar. Uniplex asks you to enter a date; all entries prior to the date are deleted.

To delete a calendar:

- 1 Pick and point the Administration option.

Uniplex displays the Time Manager Admin menu.

- 2 Pick and point the Delete a Calendar option.

Uniplex displays the Delete Past Entries Screen.

- 3 Enter the date of the last entry that you want to keep. Use the date format used by your system. Press RETURN.

Uniplex deletes all entries up to the date you specified, then displays the number of events remaining in the calendar.

- 4 Press RETURN.

Uniplex takes you to the Time Manager Admin menu.

Search Facilities

◆ Search Facilities

Calendar search helps you to find a specific event or a range of events that have been entered in a calendar. For example, if you know that you have a sales meeting booked in July, but don't know the exact time or date you can tell Uniplex to search your calendar for July to find all confirmed sales meetings. You can specify these search parameters:

- o From Date
- o To Date
- o From Time
- o To Time
- o Class
- o Free Text

◇ Search for Events

Calendar: Mark C A L E N D A R S E A R C H

You may search for events throughout the current calendar. Enter criteria that will identify the events to be selected. Free text allows you to search for any phrase in the calendar.

Search start date : [_____]

end date : [_____]

Search start time : [_____]

end time : [_____]

Event class : [_____]

Free text : [_____]

To search a calendar:

- 1 Pick and point Find Events from the Time Manager menu.

Uniplex displays the Calendar Search form.

Press any character to display a pick and point list of the available options in each scrollable field.

- 2 Complete the Calendar Search form as follows:

Field	Explanation
Search Start Date	Enter the date from which to start searching. Use the date format for your system.
End Date	Enter the date at which to stop searching. Use the date format for your system.
Search Start Time	Enter the event start time to search for. Use the time format for your system.
End Time	Enter the event end time to search for. Use the time format for your system.
Event Class	Use SPACEBAR to scroll to the event class you want to search for.
Free Text	Enter any text you want to search for. Uniplex finds any text you enter which has been entered in summary, public, or (if you have access) private text of the event.

See *Search Options* for details of the entries you can make in this form and how they affect the search.

- 3 When the form is as you require it, press **ESC e** or F1.



Search Facilities

Uniplex searches through your calendar and displays a summary of any events that meet the criteria you have specified.

For example:

Select : `view` `select` `find`

Calendar: Keith C A L E N D A R S E A R C H

DATE	START	END	CLASS	SUMMARY
07/23/99	09:00	- 12:30	Conf	Sales Meeting
07/28/99	11:00	- 01:00	Prov	Interview

See *Use Selected Events* for details of how to use the events you have selected.

◇ Search Options

You can enter different values in each of the fields in the Calendar Search form to search for events in different ways.

Start and End Dates

In these fields you enter the dates between which you want Uniplex to search for events. For example, if you enter a start date of 07/01/99 and an end date of 07/31/99, Uniplex will search the calendar for July 1999 to find the events you require.

Leave both fields blank if you want Uniplex to search the whole of the calendar for events. Leave the start date blank if you want Uniplex to start searching for events from the first entry in the calendar. Leave the end date blank if you want Uniplex to stop searching for events at the last entry in the calendar.

Start and End Times

Enter the event times between which you want Uniplex to search for events. The start time finds any events that start on or after the time you specify. The end time finds any events that end at or before the time you specify. If you enter a start time of 10:00am and an end time of 2:00pm, Uniplex finds an event that starts at 9:00 a.m. and ends at 1:30 p.m., as well as an event that starts at 11:00 a.m. and ends at 3:00 p.m.

Leave both fields blank to search for *any* events in the dates you specify *whatever* time they occur. Leave the start time blank if you want Uniplex to search for events beginning before the end time. Leave the end time blank if you want Uniplex to search for events ending after the start time.

Event Class

Use SPACEBAR to scroll to the class of event to search for: *Confirmed*, *Provisional*, *Invitation*, or *Vacation*. Leave the event class blank to search for events regardless of their class.

Free Text

Enter any text that appears in the event for which you are searching. This can be text that appears in the summary, the public text, or (if you have access) the private text of the event. If you do not know the exact text you are searching for you can use *wildcards*.

Use wildcards to replace unknown text. There are two wildcards you can use, asterisk (*) and question mark (?). You use a question mark anywhere in the text to match a single character. For example, A? matches AA, AB, AC and so on, but not A. You use an asterisk to match any number of characters, a series of characters, or no characters. For example, ic* matches ice, iced, and ice-cream.



Search Facilities

◇ Use Selected Events

There are three ways you can use the information after finding an event or range of events. You can view full details of an individual event (view), select an individual event to Amend/Inquire (select), or repeat the search you have made using different values (find).

✎ *Only the find option is available if Uniplex cannot find an event that fits the options you specify. Use the find option to search for another event or to re-specify your search.*

View an Event

To view an event:

- 1 Pick and point the View option from the ring menu.
- 2 Pick and point the event you want.

Uniplex displays the full details of the event you select when you select the View option from the ring menu .

Press **ESC q** to return to the list of selected events.

Select an Event

To select an event:

- 1 Pick and point the Select option from the ring menu.
- 2 Pick and point the event you want.

Uniplex places you in the Time Manager Amend/Inquire mode when you choose the Select option from the ring menu.

Uniplex also displays a summary of any other events with the same date as the event you select.

See *Use the Calendar* for details of the Amend/Inquire option.



Find an Event

To find an event:

- 1 Pick and point the Find option from the ring menu.
- 2 Pick and point the event you want.

Uniplex returns you to the Calendar Search form showing the last field values you entered when you select the Find option from the ring menu. You can change any of the field values and search your calendar again.

Schedule a Conference

◆ Schedule a Conference

You can use the Schedule option to book conferences with other calendar users. Uniplex searches through all the calendars you specify and finds all common, available time slots. Complete the following steps to schedule a conference:

- 1 Search for all common, available time slots for everyone involved in the conference. See *Search for Available Time*.
- 2 Decide on a suitable time for the conference based on this information. See *View the Scheduling Timetable*.
- 3 Add the conference entry to all the calendars searched if you find a suitable time slot. See *Add the Conference Entry*.
- 4 You can repeat the process, specifying different dates or a smaller amount of free time, if there is no suitable time slot. Alternatively, you can send invitations to everyone whether or not they have free time available. See *Make Invitations*.

◇ Search for Available Time

You can ask Uniplex to search through as many calendars as you want and find all the common available time slots. To do this:

- 1 Pick and point the Schedule option.

Uniplex displays the Scheduling Form.

- 2 Complete the form as follows:

Press TAB or RETURN when you have made an entry and want to move to the next field. Enter the names of all calendars to search, the start and end date, the start and end time, and the amount of free time required.

Press any character to display a pick and point list of the available options in each scrollable field.

Schedule a Conference

Field	Explanation								
Calendars to Search	<p>Enter the names of all the calendars that you want included in the search. Press ESC !, or the List Users softkey, to display a pick and point list of available calendars. You can pick and point more than one name from the list. Press ESC q to leave the list. You can enter <i>alias names</i>. See <i>Use the Alias Facility</i>.</p> <p>You must have access to all the calendars you enter. Remember to include your own calendar if you want the entry booked there. Separate each name with a comma, for example:</p> <pre>fred,mary,salesgroup</pre> <p>There is no limit to the number of calendars to search. Enter just your own name if you want to find the first available time slot for yourself.</p>								
Start and End Search Dates	<p>Enter the first and last possible dates for the search. The current date is entered here by default, but you can change this. Use the format for your system (often mm/dd/yy or mmdyy). For example, you can enter March 9 either as 03/09/99 or 030999.</p>								
Start and End Search Times	<p>Enter the first and last possible times for the search. You can enter the time in a variety of formats. For example, 3:00 in the afternoon can be entered in any of these ways:</p> <table border="1"> <thead> <tr> <th>Format</th> <th>Example</th> </tr> </thead> <tbody> <tr> <td>hhmm</td> <td>1500</td> </tr> <tr> <td>h:mmpm</td> <td>3:00pm</td> </tr> <tr> <td>hh:mm</td> <td>15:00</td> </tr> </tbody> </table>	Format	Example	hhmm	1500	h:mmpm	3:00pm	hh:mm	15:00
Format	Example								
hhmm	1500								
h:mmpm	3:00pm								
hh:mm	15:00								



Schedule a Conference

Field	Explanation
Free Time Required	Enter the amount of time you need for the conference in the format hh:mm.
Search Outside Normal Work Time Y/N	Enter Y if you want the search to include times outside the normal work hours of the people involved in the search. This will also add weekends and holidays. Leave the default as N if you want the search limited to normal work hours. <i>Time Manager stores information on the normal work hours of all users. This information also tracks annual holidays. See Personal Working Time.</i>

3 When the form is complete, press **ESC e**.

◇ View the Scheduling Timetable

Uniplex searches through the calendars you have specified and displays a timetable showing the combined schedules when you have completed the form as described in *Search for Available Time*. The top line of the grid shows the time in three-hourly segments. The following symbols are used:

- o **F** Free Time
- o **B** Busy Time

The timetable for the first available date is displayed first if there is more than one date with available time. You can scroll through the other days and see all the available times if you have specified a search over more than a single day.

- o Pick and point the Next option from the ring menu.

Only days with some available time are displayed.

Schedule a Conference

◇ Add the Conference Entry

You can view the Scheduling Timetable and choose the most suitable time for the conference. You can enter the conference in all the calendars you included in your search. To do this:

- 1 Pick and point the Add option from the ring menu.
- 2 Enter the start time of the event. Uniplex displays the time of the first free slot as a default. You must enter the event in an available free time slot. If you cannot do this, use the Invite option instead. See *Make Invitations*.

Uniplex displays the Detail Calendar Entry screen.

- 3 Complete the form as described in *Add Events*. Uniplex enters the event date and times which cannot be changed.
- 4 Press **ESC e** to leave the form.

Uniplex adds the event to all the calendars in the search.

- ✎ *Uniplex does not normally display the private text field when you are adding entries to others' calendars.*

◇ Make Invitations

You can invite other calendar users to events. Invitations do not need a free time slot and Uniplex does not warn you if an invitation clashes with another event.

Schedule a conference in the same way as described in *Search for Available Time* and *View the Scheduling Timetable*. The Scheduling Timetable is displayed:

- 1 Pick and point the Invite option from the ring menu.
- 2 Enter a start time for the event.



Schedule a Conference

Uniplex displays the Detail Calendar Entry Screen. Complete the form as described in *Add the Conference Entry*.

There does not have to be time available for invitation events to be entered. Any calendar user can hold several invitation events for the same time. Uniplex does not give warnings if an invitation clashes with an existing confirmed or provisional event.

◇ Use the Alias Facility

The Alias facility is a useful shortcut if you use the Schedule option to regularly organize meetings for the same group of people. Rather than entering the names of all the calendars you want to search, you can group them under a single name. You enter the alias name when you want to schedule a conference for that group. Uniplex searches the calendars of all the members of the group and finds any available free time.

Your System Administrator may have already set up alias names for use on your system. You can also use names that have been grouped for mailing lists in Electronic Mail as long as the alias you use contains user names recognized by your system.

✍ *You cannot specify user names on a remote system unlike the mailing lists used with Electronic Mail.*

Press **ESC !** or the List Users softkey when Uniplex prompts for a user name to see the alias names you can use. Talk to your System Administrator if you are not sure which names to use. You can create your own alias list if the ones on your system do not meet your requirements.

To create an alias list:

- 1 Pick and point Administration from the Time Manager menu.
- 2 Pick and point Create Alias.

Schedule a Conference

Uniplex displays the Create List form.

- 3 Complete this form as follows:

Field	Explanation
List Name	<p>Enter the name you want to call the list. For example:</p> <pre>directors</pre> <p>Add a comment enclosed in asterisks (*) to the name if you wish:</p> <pre>directors*doc division*</pre>
Availability	Leave the entry set to <code>personal</code> .
Address(es)	<p>Enter the address of each person you want included in the list. Separate each name with a comma. The address is the user name of the person. For example, a user with the user name <i>smithf</i>:</p> <pre>smithf</pre>

- 4 Press **ESC e** when you have completed the form. Uniplex creates the alias list.

You must exit from Uniplex and re-enter for the alias list to become effective.

You can edit alias lists. They are stored in the file `uniplex.alias`. See the next section for details.



Schedule a Conference

◇ Edit an Alias List

You can edit aliases you have created as follows:

- 1 Pick and point Administration from the Time Manager menu.
- 2 Pick and point Edit Alias.

Uniplex displays the Edit List File form.

- 3 Leave the entry set to `personal`. Press **ESC e**.

Uniplex displays the file containing your alias list entries. They are in the format:

listname = address,address...address

where *listname* is the name you gave the alias list and *address* is the address of each person in the list.

- 4 Edit the list as required.
- 5 Press **ESC e** when you have made your changes.

Uniplex makes your changes to the alias lists.

◇ Cancel and Alter Events

You can cancel or make changes to events you have booked with the Schedule option. Uniplex automatically makes the changes in all the calendars involved in the conference if you cancel or change a Conference event. To cancel or reschedule a conference event:

- 1 Pick and point Cancel/Reschedule.

Uniplex displays a pick and point list of all the conferences that you booked for the current day.

- 2 Pick and point Date from the ring menu.

Schedule a Conference

- 3 Enter the date of the conference you have booked.

Uniplex displays a pick and point list of all the conferences that you booked for the date you entered.

To cancel the event:

- a) Pick and point Cancel from the ring menu.
- b) Pick and point the event you want to cancel.
- c) Press * to confirm that you want to cancel the event, or press **ESC q** to abandon the command.

Uniplex cancels the conference in all the calendars in which the event was booked. In addition Uniplex enters a message informing the user of the cancellation. The message is placed in the summary field of the original entry.

The entry remains in the calendar, but its event class is changed to Notification. Notification class events cannot clash with any other event, so new events can be entered for the same time slot as the canceled event. In addition, you cannot edit or copy this type of entry.

To change the event:

- a) Pick and point Alter from the ring menu.
- b) Pick and point the conference you want to reschedule.
- c) Change any of the details of the event as necessary.

Uniplex alters the event in all the calendars in which the event was booked. If the event has been rescheduled, the date and time of the new entry are entered in the private text field of the original entry. In addition, Uniplex enters a message informing the user of the change. The message is placed in the summary text field of the original entry.



Schedule a Conference

If an event is rescheduled, the original entry remains in place, but its event class becomes Notification. A Notification event cannot clash with any other event, so new events can be entered in the original time slot. In addition, you cannot edit or copy this type of event.

If a rescheduled event clashes with existing events or falls on a holiday or outside normal working hours, Uniplex warns you of this and does not make the booking.

◆ Block Booking

Uniplex can automatically make block bookings. This is useful if you want to enter a series of regular meetings in your own or another calendar. For example, you can automatically block book weekly meetings or a meeting on the last Thursday of every other month.

◇ Daily or Weekly

You can make block bookings for regular daily or weekly events:

- 1 Pick and point the Add (day/week) option.

Uniplex displays the Block Booking form.

- 2 Complete the form as follows:

Press any character to display a pick and point list of the available options in each scrollable field.

Field	Explanation
Starting On	Enter the first date that you want the entry made. Use the date format for your system. For example, if the format is mm/dd/yy or mmddyy you can enter March 6 as 03/06/99 or 030699.
Ending On or Before	Enter the last date that you want the block booking made.
Start Time	Enter the start time of the event. Use any of the usual time formats.
End Time	Enter the end time of the event.
Event Class	Enter the event class by pressing SPACEBAR to scroll through <i>Confirmed</i> , <i>Provisional</i> , <i>Invitation</i> , or <i>Vacation</i> .

**Block Booking**

Field	Explanation
Always Make Booking (Y/N)	Leave the default setting of N if you want the entry only to be made if it is within normal working hours. Change the entry to Y if you want the entry made even if it falls outside normal working hours, including holidays and weekends.
Repeat Every	Enter the repeat interval for the event. For example, enter 1 if the event is daily, 7 if the event is weekly.
Summary	Enter one line of summary text which describes the event.
Public Text	Enter up to four lines of text for anyone who has access to your calendar to read. See <i>Controlling Access to Calendars</i> .
Private Text	Enter up to four lines of text that only you can read. See <i>Controlling Access to Calendars</i> .
Alarm At	This field is only displayed if you are the owner of the calendar. You can set an alarm to alert you to the event. Enter the time you want the alarm to sound using the format hh:mm. The alarm will sound at that time on the day of the event.
Mail Notification (Y/N)	This field is only displayed if you are not the owner of the calendar. You can ask Uniplex to automatically send the owner a mail message informing him or her of the entries you have made.

3 Press **ESC e** to leave the form.

Block Booking

The entries are made in your calendar unless a confirmed or provisional event clashes with previous events in which case a warning message is displayed.

◇ **Monthly**

You can schedule block bookings on a monthly basis. You can book a regular event every month or, for example, you can book an event for the first Thursday on every second month. To do this:

- 1 Pick and point the Add (month) option.

Uniplex displays the Block Booking form.

- 2 Complete the form as follows:

Field	Explanation
Starting On	Enter the first date that you want the entry made. Use the date format for your system. For example if the format is mm/dd/yy or mmddyy you can enter March 6 as 03/06/99 or 030699.
Ending On or Before	Enter the last date that you want the block booking made.
Start Time	Enter the start time of the event. Use any of the usual time formats.
End Time	Enter the end time of the event.
Always Make Booking (Y/N)	Leave the default setting of N if you want the entry only to be made if it is within normal working hours. Change the entry to Y if you want the entry made even if it falls outside normal working hours, including holidays and weekends.



Block Booking

Field	Explanation
Event Class	Enter the class of the event. By default Uniplex enters <i>Confirmed</i> . Press SPACEBAR to scroll through the choices. You can make a <i>Confirmed</i> , <i>Provisional</i> , <i>Invitation</i> , or <i>Vacation</i> entry.
Repeat Every	Enter the repeat interval for the event. For example, you can ask for the entry to be made on the first Monday of every month, the last day of the month, the third working day of every fourth month, etc. See <i>Defining the Frequency</i> .
Summary	Enter one line of summary text which describes the event.
Public Text	Enter up to four lines of text for anyone who has access to your calendar to read. See <i>Controlling Access to Calendars</i> .
Private Text	Enter up to four lines of text that only you can read. See <i>Controlling Access to Calendars</i> .
Alarm At	This field is only displayed if you are the owner of the calendar. You can set an alarm to alert you to the event. Enter the time you want the alarm to sound using the format hh:mm. The alarm will sound at that time on the day of the event.
Mail Notification (Y/N)	This field is only displayed if you are not the owner of the calendar. You can ask Uniplex to automatically send the owner a mail message informing him or her of the entry you have made.

Define the Frequency

You can define the frequency of the event when you make a monthly block booking. The booking does not have to be made every month; it can be made, for example, every third month, or even twice a year. You define the entry in three fields on the Monthly Block Booking form. See *Monthly Block Bookings*. On the screen the fields look like this:

Repeat Every: [] [] in every [] month

In the first two fields you define the day of the month when the event is held. In the last field, you define the frequency of the event. Scroll through the choices for each field entry with SPACEBAR. Define the frequency as follows:

- 1 In the first field, you can make any of the following entries:

first	fourth
second	last
third	

For example, if the event is held on the first Monday of every month, you scroll the entry to *first*.

- 2 In the second field you can make any of the following entries:

Monday	Thursday	Sunday
Tuesday	Friday	day
Wednesday	Saturday	working day

For example, if the event takes place on the first day of the month, scroll the entry to *day*. If the event takes place on the last working day of the month, scroll the entry to *working day*. If the event takes place on the third Thursday of the month, scroll the entry to *Thursday*.



Block Booking

- 3 In the last field, enter the frequency for the event defined in terms of the monthly interval between events. Leave the field blank if the event takes place every month. Otherwise, scroll the entry to any of the following:

<i>second</i>	<i>fifth</i>
<i>third</i>	<i>sixth</i>
<i>fourth</i>	

For example, if the event takes place every other month, scroll the entry to *second*. If the event takes place twice a year, scroll the entry to *sixth*.

◇ Edit or Cancel an Event

If you change or cancel a block booked event, Uniplex automatically changes or cancels all the remaining events in the block.

To cancel or change a block booked event:

- 1 Pick and point the Edit/Cancel option.

Uniplex displays a pick and point list with all the events booked through block booking for the current day.

- 2 Pick and point the Date option from the ring menu.
- 3 Enter the date from which you want the changes or cancellation to take effect.

Uniplex displays a pick and point list with all the events booked through block booking for that date.

To cancel an event:

- a) Pick and point the Cancel option from the ring menu.
- b) Pick and point the event you want to cancel from the list.

Uniplex displays the Detail Calendar entry screen.

- c) Press * to confirm you want to cancel the event, or press **ESC q** to quit.

Uniplex deletes any remaining events booked in that block from the specified date onwards.

To change an event:

- a) Pick and point the Alter option from the ring menu.
- b) Pick and point the event you want to change from the list.

Uniplex displays the Block Booking form.

- c) You can change any of the details on the form except the date and the frequency.

Uniplex changes all block booked events from the date you specified. Block booked events before the date you specify are left unchanged.

- d) Press **ESC e** to save the form.



Personal Working Time

◆ Personal Working Time

Time Manager stores information on the working hours of individual users and calendars. This is particularly useful if there is a wide variation between different working patterns, with, for example, some users working part-time and others working on shifts. You can change the work time in each individual calendar. Uniplex lets you enter a work pattern consisting of up to 30 days. To change your own work time:

- 1 Pick and point the Administration option.

Uniplex displays the Time Manager Admin menu.

- 2 Pick and point the Specify Working Hours option.

Uniplex displays the Amend Worktime screen. This lists the day number down the left side of the screen, followed by two columns listing the start and end time for each day.

- 3 By default, the Date field contains your current work time starting date (set by your System Administrator). If you do not want the work pattern to begin on this date, enter the date that you want the work pattern to begin. Press TAB.

Day one of the work pattern matches the date in the date field.

- 4 Enter the start time and end time of day one. Press TAB to move to the next line.
- 5 Enter the start and end times of any other days. If you do not work a particular day, enter WE (for Weekend).

For example, you work from 9 to 5 five days a week from Monday to Friday, with Saturdays and Sundays off, and the Start Date you specify for the pattern is a Monday.

Personal Working Time

Fill in the form like this:

Start Date: [08/06/99]

Day	Start Time	End Time
1.	09:00	17:00
2.	09:00	17:00
3.	09:00	17:00
4.	09:00	17:00
5.	09:00	17:00
6.	WE	WE
7.	WE	WE

You do not need to make entries in the rest of the fields if the working pattern continues repeating itself in a seven day cycle, Day 1 of the cycle is always the same day of the week as that of the start date. In this example, the Start Date is a Monday, therefore Day 1 of the cycle is always a Monday. If however, you work for one week from 9-5 and the second week you work from 2-10, you would need to make entries for a 14 day cycle. For example:

Start Date: [08/06/99]

Day	Start Time	End Time
1.	09:00	17:00
2.	09:00	17:00
3.	09:00	17:00
4.	09:00	17:00
5.	09:00	17:00
6.	WE	WE
7.	WE	WE
8.	14:00	22:00
9.	14:00	22:00
10.	14:00	22:00
11.	14:00	22:00
12.	14:00	22:00
13.	WE	WE
14.	WE	WE



Use Alarms

◆ Use Alarms

You can set alarms for any time to warn you of forthcoming events. The alarm can be sounded at regular intervals if required. The computer will 'beep' at the specified time and, optionally, a message of your choice can be displayed on the screen.

◇ Create an Alarm

- 1 Pick and point Create Alarm from the Time Manager menu.

Uniplex displays the Enter Alarm form.

- 2 Complete the form as follows:

Press the TAB or the RETURN key when you have completed a field and you want to move to the next field. You must complete the first alarm date and the first alarm time. You can leave the default entries in the other fields.

Field	Explanation
Alarm Message	Enter a text message to appear with the alarm. You can suppress the message. See below for details.
First Alarm Date	Enter a date for the alarm. Uniplex displays today's date by default, but you can change it to any other date. Use the format mm/dd/yy or mmddyy. For example, if you want to enter March 9, you enter it as 03/09/99 or 030999.
First Alarm Time	Enter the time for the first alarm. Uniplex displays the current time by default, but you can change it to any other time. Time can be entered in a variety of formats. For example, you can enter 3:00 in the afternoon in any of these ways:

Field	Explanation	
First Alarm Time (continued)	Format	Example
	hhmm	1500
	h:mm:pm	3:00pm
	hh:mm	15:00
Repeat Interval	Enter the frequency for the repeat interval using the format hh:mm. For example, if you enter a repeat interval of 00:10, the alarm will sound every ten minutes. Uniplex enters 00:00 in this field by default which turns repeats off.	
Sound Bell Only (Y/N)	Uniplex can display a message on the screen when the alarm sounds. Enter Y here if you want the terminal bell to sound with no message. Uniplex enters N by default.	
Remember for Login (Y/N)	Alarms can be stored so that if they go off while you are logged out, the alarm will be sounded when you next log in. Store the alarm by entering Y here. Uniplex enters N by default.	

- 3 **Press ESC e** to set the alarm.
- 4 Enter further alarms or press **ESC q** to return to the menu.

You can enter an alarm directly from the Detail Calendar form if you are in your own calendar. See *Add Events*.

- ✎ *If the alarm fails to sound, check with your System Administrator that the alarm facility is correctly installed.*

Use Alarms

◇ Remove an Alarm

You can remove alarms that you have set in error or that are no longer appropriate as follows:

- 1 Pick and point the Remove Alarm option.

Uniplex displays a list of your current alarms.

- 2 Pick and point the alarm you want to delete.

- 3 Press * to confirm that this is the alarm you want to delete.

Uniplex deletes the alarm.

◇ Print an Alarm

You can print a list of all the outstanding alarms that have been set for your system. To do this:

- 1 Pick and point the Print Alarms option.

Uniplex displays the Print Alarms form.

- 2 Leave the entry set to `PRINTER` and press **ESC e** if you want your outstanding alarms printed directly to the default printer.

or

Enter the filename and press **ESC e** if you want the outstanding alarms placed in a file.

For example, enter:

`calendar`

Use Alarms

When printing to a file, in addition to typing the name of a file, you can choose a file to overwrite from File Manager by using the popup UTIL menu:

- 1 Press **F12 (Esc xu)**.
- 2 Choose **List Files** to open File Manager in Select File Mode.
- 3 Select the file to overwrite and press **F1 (Esc e)**.

Alternatively, you can press the down arrow key in the associated **filename** field to open File Manager in Create File Mode. You can create a new file from here in which to print the output.

Calendar Plan

◆ Calendar Plan

Calendar Plan produces a printed copy of your schedule to fit inside a wallet or a planner. The System Administrator can customize the size and format of the plan. Space is provided for manual entries which you can transfer to your calendar when you return to your desk. There are four different printed schedules.

- o Daily Summary
- o Weekly Summary
- o Daily Detail
- o Monthly Summary

◇ Print a Calendar Plan

- 1 Pick and point the Print/View Plan option.

Uniplex displays the Planning Views form.

- 2 Complete the form as follows:

Field	Explanation
Plan Type	Press SPACEBAR to scroll the entry to a plan type: <i>Daily Summary</i> , <i>Daily in Detail</i> , <i>Weekly</i> , and <i>Monthly</i> . See <i>Plan Types</i> .
Starting Date	Enter the date. A daily plan is printed for that day. A weekly or monthly plan starts on the Monday preceding this date
Print File	Leave blank to display to screen or enter an output file (use File Manager from the popup UTIL menu to select a file to overwrite or enter # to open File Manager in Create File Mode), for example, enter:

`plan`

or enter **PRINTER** to print the plan.

◇ Plan Types

There are four types of plan.

o **Daily Summary**

Your personal working hours are split into half-hour segments to produce a Daily Summary Plan. Two additional half-hour segments are added, one at the beginning of the day and one at the end. The summary text for all booked events is shown in the starting time slot and any subsequent time slots. A blank space for you to write in new events manually is left for any time slots where there are no booked entries. A space is reserved for notes at the end of the summary and shows any untimed events plus any events booked outside working hours.

o **Detailed Daily Plan**

Your personal working hours are divided into half-hour segments to produce the Detailed Daily Plan. Two extra half-hour segments are added, one at the beginning of the day and one at the end. Both the summary and the public text of all booked events are shown in the starting time slot and repeated in any subsequent time slots. A blank space for you to write in new events manually is left for any time slots where there are no booked events. A space is reserved for notes at the end of the plan and shows any untimed events plus any events booked outside working hours.

o **Weekly Plan**

The Weekly Plan is a summary of all the events booked for a seven day period. The plan is split into seven daily segments, starting with the Monday preceding the date you specified. Each daily segment contains the time and summary text of all events booked for that day with information on the month, date, and day plus any holidays and weekends. A Weekly Plan will fit on one page if your week consists of an average of six events for each day, otherwise the plan will be printed on two or more



Calendar Plan

pages. Talk to your System Administrator if you want to change the design of your plans.

o **Monthly Plan**

The Monthly Plan is a summary of all events booked for a calendar month, starting with the Monday preceding the date you specified. The plan includes a daily segment for every day of the month. Each daily segment contains the time and summary text of all events booked for that day with information on the month, date, and day plus any holidays and weekends. A Monthly Plan will fit on one page if your week consists of an average of six events for each day, otherwise the plan will be printed on two or more pages. Talk to your System Administrator if you want to change the design of your plans.

◇ **View Plans on the Screen**

You can view your daily, weekly, or monthly plans on the screen or you can print them out. See *Print a Calendar Plan*. Use the following commands when viewing the plans on the screen:

Command	Task
RETURN	View Next Page
CTRL u	View Previous Page
ESC q	Quit

◆ At-a-Glance Displays

You can overview the status of your calendar for days, weeks, and months ahead using the At-a-Glance displays. There are three different screen displays; *monthly*, *2-weekly*, and *month-at-a-glance*. . You can use the display that suits you best.

○ At-a-Glance

This display shows the current month. Today's date is highlighted. A number in parentheses next to each date shows the number of events that have been booked for the particular day. Weekends, National, and Special Holidays are indicated.

○ Monthly Display

A whole month is displayed, showing the dates along the top of the screen and the times in 2-hour slots down the left side of the screen. Weekends, National and Special Holidays are indicated. The current day is highlighted. Booked time is shown as an inverse block.

○ 2-Weekly Display

A grid showing the nearest two whole weeks to the current day is displayed. Weekends, National, and Special Holidays are indicated. The current day is highlighted. Booked time is shown as an inverse block.

Each of the displays work in the same way:

- Press **CTRL d** to view the next month (or the next two weeks if you are using the 2-Weekly option).
- Press **CTRL u** to view the previous month.

Alternatively, you can use the softkeys to perform these functions. Press SPACEBAR to move between the three different displays.



At-a-Glance Displays

To look at the events of a day in detail:

- 1 Use the arrow keys to move the cursor to a day.
- 2 Press **ESC e**.

Uniplex displays a summary list of all the events for that day.

To look at the events in detail:

- a) Pick and point the View option from the ring menu.
- b) Pick and point the item you want to view.

◆ **Work with Other Calendars**

◇ **Create a Calendar**

Uniplex automatically creates a personal calendar for your use. It is possible to create additional new calendars either for your own personal use, for group use, or for scheduling the use of a common shared facility or room. To create a calendar:

- 1 Pick and point the Administration option.

Uniplex displays the Time Manager Admin menu.

- 2 Pick and point the Create a Calendar option.

Uniplex displays the Create Calendar form.

- 3 Enter a name for the new calendar and press RETURN.

Uniplex selects that calendar and you can use it.

◇ **Select a Calendar**

You always start in your personal calendar. You must have permission to read the Public Text of any calendar you want to select. To work in another calendar:

- 1 Pick and point the Select Calendar option.

Uniplex displays a pick and point list of all calendars.

- 2 Pick and point the calendar you want to work in.

✎ *If you do not have access to the calendar you have selected, Uniplex displays a message indicating this.*

Uniplex displays the Time Manager menu. All the work you do from now until you select another calendar will be in the calendar you have just chosen.



Control Access to Calendars

◆ Control Access to Calendars

You can control the access that others have to calendars that you have created. The range of access you allow can vary from denying any access at all to allowing others to read and create entries.

◇ Amend Calendar Permissions

Your System Administrator has set up the access permissions that others have to your calendar by default. Talk to him or her about the type of access that has been set up. Follow these steps to amend the access rights:

- 1 Pick and point the Administration option.
- 2 Pick and point the Amend Calendar Permissions option.

Uniplex displays the Amend Access Rights form.

- 3 Complete the form as follows:

Field	Explanation
-------	-------------

Name(s)	Enter the user name of the person whose access rights to the current calendar you are changing. You can enter as many names or aliases as you want; separate each one with a comma. Press ESC ! or the List Users softkey to see a pick and point list of all users and aliases.
----------------	---

You can pick and point more than one name from the list. Press **ESC q** to leave the list. Enter **ALL** to change the access for everyone. You can set general access rights by entering **ALL** and still allow special access to some individuals. Individual access rights have precedence over general rights.

Control Access to Calendars

Field	Explanation
Read Access	Define how much of your calendar you want others to read. Press SPACEBAR to scroll through the choices:
	None No access to your calendar.
	Search Only The user can search your calendar for available time slots to schedule a meeting, but cannot read or create any entries. They may be able to book conference events, depending on the write access you have given them.
	Public The user can read all entries, excluding private text.
	Public & Private The user can read the whole entry, including private text.
Write Access	Define the areas to which you will let others add entries. Press SPACEBAR to scroll through:
	None No entries can be made.
	Public Entries can be made except to the private text area.
	Public & Private Entries can be made to any area.



Control Access to Calendars

Field	Explanation
Modify Access	Define whether or not other users can make changes to and delete entries from your calendar. Press SPACEBAR to scroll through the choices:
None	No changes can be made by others. Entries cannot be deleted.
Edit/Delete	Changes can be made. Entries can be deleted.

- 4 Press **ESC e** to save the entries you have made.

◇ List Calendar Permissions

You can list the rights that others have to calendars that you own. If you are working in a calendar that is not your own, you can list the access that you have to that calendar.

To list the access rights that others have to your calendar.

- 1 Make sure that you are in your own calendar.
- 2 Pick and point the Administration option.

Uniplex displays the Time Manager Admin menu.

- 3 Pick and point the List Calendar Permissions option.

Uniplex displays a table showing the read, write, and modify access rights that others have to your calendar.

Control Access to Calendars

For example:

```
Calendar: mike      -- DISPLAY ACCESS RIGHTS --
```

Access rights for calendar mike			
NAME	READ	WRITE	MODIFY
susan	None	None	None
richard	Public	None	None
anita	Public/Private	Public	Edit/Delete

- 4 Press **ESC q** to quit the screen.

To list the permissions that you have to someone else's calendar:

- 1 Pick and point the Administration option.

Uniplex displays the Time Manager Admin menu.

- 2 Pick and point the Select Calendar option.

- 3 Pick and point the name of the calendar for which you want to display the access rights. You must have read access to the calendar you select. Press RETURN.

- 4 Pick and point the List Calendar Permissions option.

Uniplex displays your permissions rights for that calendar.

- 5 Press **ESC q** to quit the screen.

✎ *Remember you remain in the calendar you selected until you select a different calendar.*

General Information

◆ General Information

◇ Display Calendar

The Calendar option available in Time Manager Utilities lets you view a three month display of dates. To display the calendar:

- 1 Pick and point Calendar from the Time Manager menu.

A three month calendar displays starting with the current month.

- 2 Scroll the month and years using the arrow keys:

← Back One Month

→ Forward One Month

↑ Back One Year

↓ Forward One Year

- 3 Press **ESC q** to return to the Menu.

◇ Print a Schedule

Uniplex can print out portions of your schedule. This is particularly useful if you want to produce a list of forthcoming events as it prints in a larger format than the Calendar Plan. To do this:

- 1 Pick and point Print Calendar from the Time Manager menu.

Uniplex displays the Print Calendar form.

General Information

- 2 Complete the form as follows:

Field	Explanation
Start Date	Enter the start date of the schedule range to be printed.
End Date	Enter the end date of the schedule range to be printed.
Output File	Uniplex enters PRINTER by default. This indicates that the output should be sent directly to the printer. You can change this to a file name by entering the name, using File Manager from the popup UTIL menu to select an existing file to overwrite, or enter # to open File Manager in Create File Mode.
List in Detail (Y/N)	Enter Y if you want the printed copy to include the detailed text of each event. Leave the default at N if you want a summary description.
Merge Format (Y/N)	Enter Y if you want the event details listed down the page. Leave the default at N if you want the event details listed across the page.

- 3 Press ESC e to leave the form.

Uniplex prints out the portion of the schedule you specified.

◇ **Quit the Calendar**

To leave the calendar:

- 1 Complete any tasks and return to the Time Manager menu.
- 2 Pick and point the Quit option.

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Chapter 3

Card Index

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◆ Overview

The Card Index lets you store information, such as names and addresses. A card index system is useful because:

- o You can store many different kinds of information in one place using a consistent interface.
- o You can easily search through cards. For example, ask Uniplex to find all references to a particular company in your index.
- o You can make any field on a card a key field to enable a rapid search through that index.
- o You can automatically dial a telephone number you have selected from the index (using external autodialing equipment).
- o You can store company-wide information in a public card index available to other computer users; you can store personal information in a private card index.

Overview

Uniplex provides the Card Index functionality both as a standalone application for developing your own databases and as several completed database applications:

Application	Available	Description
Card Index	Main Menu	The complete, uncustomized Card Index application. Use this to design, setup, and use card indexes for your own personal requirements.
To-do List	Personal Organizer	A Uniplex-designed card index for maintaining a to-do list.
Projects	Personal Organizer	A Uniplex-designed card index for maintaining details about projects.
Note Pad	Personal Organizer	A Uniplex-designed card index for keeping quick notes.
Personal Phone and Address List	Personal Organizer	A Uniplex-designed card index for maintaining a personal list of phone numbers and addresses.
Public Phone and Address List	Desk Menu	A Uniplex-designed card index for maintaining a public list of phone numbers and addresses.

The **Personal Organizer** chapter describes how to use the Uniplex-designed card indexes. This chapter describes how to use the Card Index application. Use this chapter as a reference for the complete functionality of the Card Index application.

Read the **Personal Organizer** chapter for details of using the Uniplex-designed card indexes.

◇ Access the Card Index

You access the different card indexes as follows:

To access the Card Index application:

- o To access the Card Index from the Main menu:
 - Pick and Point the Card Index option.
- o To access the Card Index from any application:
 - a) Press F12 or **ESC xu**.
 - b) Pick and point the Card Index option.

To access the public Phone and Address List:

- 1 Press F12 or **ESC xu**.
- 2 Pick and point the Phone & Addresses option.

To access your Personal Phone and Address List:

- 1 Pick and point the Personal Organizer option.
- 2 Pick and point the Personal Phone Address List option.

To access the additional card indexes:

- o Pick and point the Personal Organizer option from the Main menu.

See the **Personal Organizer** chapter for details of these Card Index applications.



Add a Card

◆ Add a Card

A card is a blank form on which you enter information. The form resembles the paper cards you find in various office card files.

To add a card to your index:

- 1 Select the Card Index you require. See *Access the Card Index*.

Uniplex displays the ring menu at the top of your screen.

- 2 Pick and point the Add option.

Enter the record on your card. A record is any completed card, for example:

```
[Verzog Albert _ _ _ _ _]
[(214) 254-8121_ _ _ _ _]
[Laser Lighting, Inc._ _ _ _ _]
[VP of Sales _ _ _ _ _]
[Direct Line: (214) 225-4994 _ _ _ _ _]
[_ _ _ _ _]
[_ _ _ _ _]
[_ _ _ _ _]
[_ _ _ _ _]
[_ _ _ _ _]
```

- 3 Press **ESC e** to complete the record.

You can add more cards or press **ESC q** to quit.

Label the Fields on a Card

◆ Label the Fields on a Card

You can tailor cards to suit your requirements. A default Card Index does not contain labels. You can enter information into the index without setting any labels, but setting them makes it easier to search for particular card(s). This section describes how to set labels. Each line on the card is called a field. If a card contains the following record:

```
[Verzog Albert _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ ]
[(214) 254-8121_ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ ]
[Laser Lighting, Inc._ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ ]
[VP of Sales _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ ]
[Direct Line: (214) 225-4994 _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ ]
[_ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ ]
[_ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ ]
[_ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ ]
[_ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ ]
[_ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ ]
```

then

```
[Verzog Albert_ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ ]
```

and

```
[(214) 225-4993 _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ ]
```

are both fields.



Label the Fields on a Card

To label the cards:

- 1 Pick and point the Set Labels option.

Uniplex displays a card template:

```
[_ _ _ _ _]
[_ _ _ _ _]
[_ _ _ _ _]
[_ _ _ _ _]
[_ _ _ _ _]
[_ _ _ _ _]
[_ _ _ _ _]
[_ _ _ _ _]
[_ _ _ _ _]
[_ _ _ _ _]
```

- 2 Enter the labels you want displayed on the cards. For example, you could complete the form as follows:

```
[Name_ _ _ _ _]
[Telephone _ _ _ _ _]
[Company_ _ _ _ _]
[Comments_ _ _ _ _]
[_ _ _ _ _]
[_ _ _ _ _]
[_ _ _ _ _]
[_ _ _ _ _]
[_ _ _ _ _]
[_ _ _ _ _]
```

Press RETURN after completing each field in the form.

⚡ *Labels must not be more than 10 characters in length.*

- 3 To complete the form, press **ESC e**

Label the Fields on a Card
◇ **Key Fields**

You may find that you often search the Card Index using the same field. For example, you often know the name on a card and use that information to find the telephone number. You can create a key of important labels on a card. Uniplex uses this key to find cards more quickly. To do this:

- 1 Pick and point the Set Label option.
- 2 Add the word **key** to the label you most frequently search on:

```
[Name key_ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _]
```

This would speed up any search in which you know the name.

- 3 Press **ESC e**

◇ **Group Labels**

You can use the Set Labels option to group fields together when searching cards. For example, suppose you have entered the words *VP of Sales* in the comments section of the card:

```
Comments      [VP of Sales _ _ _ _ _ _ _ _ _ _ _ _]
               [_ _ _ _ _ _ _ _ _ _ _ _]
               [_ _ _ _ _ _ _ _ _ _ _ _]
               [_ _ _ _ _ _ _ _ _ _ _ _]
               [_ _ _ _ _ _ _ _ _ _ _ _]
               [_ _ _ _ _ _ _ _ _ _ _ _]
               [_ _ _ _ _ _ _ _ _ _ _ _]
```

Normally Uniplex will only find the card if you enter your search condition on the same line. However, if you grouped the seven comment lines together, Uniplex would search all of them for *VP of Sales* and display all cards that match that phrase.



Find a Card

◆ Find a Card

You can use the Find option to find cards that meet a search condition. For example, you can find all the cards relating to *Laser Lighting, Inc.* Use the Examine option to display the card you require. When you use the Find option Uniplex displays a list of all the cards that match your search condition and indicates the number of cards found. This list is called the current *selection set*. All other options, such as Examine, Print, and Cut, act on the selection set until you enter a different set of search conditions. To find a card:

- 1 Pick and Point the Find option.

To search for an exact match you enter:

value

where *value* is the exact value you want to find.

For example:

```
Name [Verzog Albert _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _]
```

- 2 Press **ESC e**

Uniplex finds all the cards containing *Verzog* in the name field. Then you use the Examine option to display the required card. See *Examine a Card* for more information on how to do this.

◇ Search with Two or More Conditions

You can search for cards using two or more search conditions:

- 1 Pick and point the Find option.

Enter the conditions you want to use during the search of the Card Index, for example:

```
Name      [Verzog Albert _ _ _ _ _ _ _ _ _ _ ]
Telephone [_ _ _ _ _ _ _ _ _ _ _ _ _ _ _ ]
Company   [Laser Lighting, Inc._ _ _ _ _ _ _ _ _ ]
```

- 2 Press **ESC e**

This will find any cards in the index which match these two search conditions.

◇ Find Cards that Match a Pattern

Often you will find that you only know part of the entry in a particular field. You can use the Uniplex pattern match facility to find cards that meet a wide range of conditions.

Symbols for Searching

Card Index uses *search modifiers* and *pattern matching symbols* to define groups of records. Search modifiers search for a range of records relative to a value. Pattern matching symbols match features of a text string such as entries that begin with a particular letter or end with a certain extension. This is useful if you do not know the full name or exact spelling of an entry.

You can search for records which have one particular characteristic like all the records relating to a particular company. You can also find records with a defined set of characteristics such as all the records relating to addresses which include a particular town and have names beginning with a particular letter.



Find a Card

This table lists the search modifiers:

Modifier	Function
=	Equal To. Find a record matching this field value. An entry without a modifier will find all records equal to that field value.
!	Not Equal To. Find a record not containing this field value.
>	Greater Than or Equal To. Find a record greater than or equal to this field value.
<	Less Than or Equal To. Find a record less than or equal to this field value.
\text	<p>Case-insensitive, Context-insensitive. Find an entry that contains <i>text</i>, for example, if you enter:</p> <p><code>\the</code></p> <p>Uniplex finds entries containing:</p> <p><i>THE the These their Other</i></p>
@text	<p>Sounds-alike. Find an entry that sounds like <i>text</i>, for example, if you enter:</p> <p><code>@steve</code></p> <p>Uniplex finds entries containing:</p> <p><i>steve and stephen.</i></p>

This table lists the pattern matching symbols:

Symbol	Function
*	Match any number of characters, either a single character, a series of characters, or no characters.
[n-m]	Match a character in the range from <i>n</i> to <i>m</i> .
?	Match a single character.

You can use pattern matching symbols in combinations to make your search as specific as you need. For example, `???[h-m]*` matches all records where the fourth character of the specified field is in the range h to m.

For example:

```
Name           [ _ _ _ _ _ _ _ _ _ _ _ _ ]
Telephone Number [ _ _ _ _ _ _ _ _ _ _ _ _ ]
Company        [ Las*_ _ _ _ _ _ _ _ _ _ _ ]
```

will find every card with *Las* in the first part of the Company field.

For example:

```
Name           [ _ _ _ _ _ _ _ _ _ _ _ _ ]
Telephone Number [ _ _ _ _ _ _ _ _ _ _ _ _ ]
Company        [ [A-C]*_ _ _ _ _ _ _ _ _ _ ]
```

will find every card where the company name begins with either A, B, or C.

◆ Examine a Card

You use the Examine option to look at the cards listed as a result of using Find. To do this:

- 1 Use Find to display a selection set of cards.
- 2 Pick and point the Examine option.
- 3 Pick and point the card you require.

or

Press **ESC e**

This displays the first card in the selection set.

- 4 Pick and point the Next option to display the next card in the selection set.

or

Pick and point the Previous option to display the previous card in the selection set.

or

Pick and point the Cut option to cut the card in address format (for pasting into a word processing document, for example). See *Cut and Past Cards*.

or

Pick and point the Autodial option to automatically dial number on the cards. See the next section for details.

- 5 Press **ESC q** to leave the Examine option.



Dial from a Card

◆ Dial from a Card

You can use Uniplex to dial telephone numbers stored in the Card Index if your computer system is equipped with an autodial facility. Ask your System Administrator whether your system is so equipped and whether the autodialer has been configured.

To use the autodial facility:

- 1 Use Find to display a selection set of cards.
- 2 Pick and point the Examine option.
- 3 Pick and point the card you require.
- 4 Pick and point Autodial.

Uniplex checks the cards for those fields defined as *tel* type fields. Uniplex automatically dials the number in that field if there is only one *tel* type field. Uniplex displays the fields if the card contains more than one *tel* type field. Pick and point the required number. Uniplex does not display the autodial option if there are no *tel* type fields on the card.

◆ Edit a Card

You can edit a card as follows:

- 1 Use Find to display the required card.
- 2 Pick and point the Edit option.
- 3 Pick and point the required card.

You use the arrow keys to move the cursor onto any line on the card and overwrite information. The following editing commands are available:

Command	Softkey	Function
CTRL e	F3 F1	Insert a space.
CTRL c	F3 F3	Delete a character.
ESC dr	F3 F8 F3	Clear from the current cursor position to the end of the line.
CTRL x	F3 F4	Clear a field.
ESC ds	F3 F8 F4	Clear all the fields in the card.

To complete the revised card press **ESC e**.



Copy a Card

◆ Copy a Card

You can copy a card as follows:

- 1 Use the Find option to display the required card.
- 2 Pick and point the Copy option.
- 3 Pick and point the required card.

You use the arrow keys to move the cursor onto any line on the card and overtype information. You can use editing commands described in *Edit a Card*.

To make the copy, press **ESC e**.

◆ Remove a Card

Occasionally, you may need to remove those cards you no longer need. This is a good idea as it saves you searching through cards you no longer require and it frees up disk space on your computer. To use this option:

- 1 Use the Find option to display a selection set of cards.
- 2 Pick and point the Remove option.
- 3 Pick and point the required card.

Uniplex displays the card you selected.

- 4 Press * to delete the card.

or

Press RETURN to keep the card.

◆ Cut and Paste Cards

You can output the information in the Card Index to files or clipboards. You can then incorporate the records into word processing documents, reports, a mail merge, the spreadsheet, or the database. Uniplex can output cards in two ways: *address format* and *tabular format*. The *address format* is useful for incorporating cards in word processing documents, reports, or a mail merge. A card output in this way will appear as follows:

```
Verzog Albert
214 225 4993
Laser Lighting, Inc.
Direct Line: (214) 225-4994
```

The *tabular format* is useful for incorporating cards in a spreadsheet or database table. A card output in this way will appear as follows:

```
Verzog Albert (214) 225-4993 Laser Lighting, Inc. VP of Sales
```

◇ Output Cards in Address Format

You can write out a card(s) to a file using the Print option from the ring menu. This option writes out the card in address format, one field under another, one card per page. To do this:

- 1 Use the Find option to display a selection set of cards.
- 2 Pick and point the Print option.

Uniplex displays a form to complete.

- 3 Leave the entry set to **PRINTER** to send the output directly to the default printer. Press **ESC e**.

or

Enter a name for your print file and press RETURN.



Cut and Paste Cards

Copies of the selected cards are put in the specified file.

You can also output a single card in address format by examining the card and selecting the cut option from the ring menu. Uniplex places the output in the current clipboard.

◇ **Output Cards in Tabular Format**

Occasionally, you may want to output cards in a tabular format, for example, for use with the spreadsheet or database. You use the Cut option to accomplish this. To use this option:

- 1 Use the Find option to display a selection set of cards.
- 2 Pick and point the Cut option.

Uniplex places copies of the selected cards in the clipboard.

Set the Display Field**◆ Set the Display Field**

You use the Find option to display cards that match a certain search condition. When you do this Uniplex displays the field that you searched in the list. You can change the display by selecting the Set Display option.

To change the display field:

- 1 Pick and point the Set Display option.
- 2 Pick and point the field you want displayed in subsequent lists. Press RETURN.
- 3 If required, pick and point additional fields you want displayed in subsequent lists. Press RETURN after each.
- 4 When you have selected all the fields you require, press **ESC e**. To quit, press **ESC q**.

Uniplex changes the Card Index display.

For example, you ask Uniplex to find the Laser Lighting, Inc. company. The card list will display:

Laser Lighting, Inc.

If you change the display to show both company and telephone number, the card list will show:

Laser Lighting, Inc. (214) 225-4993

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Chapter 4

Personal Organizer

Personal Organizer

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◆ Overview

The Uniplex Personal Organizer gives you easy access to many time-saving features to manage all your personal and business information. You can store information in a systematic format which you can retrieve at any time or can produce in printed form. Using the Personal Organizer, you can:

- o Manage and control your work efficiently.
- o Store and retrieve key project details in a systematic format.
- o Store and retrieve notes, phone numbers, and addresses for your personal or business use.
- o Produce printed copies of all information in a convenient wallet format which you can easily place in a personal organizer.

P E R S O N A L O R G A N I Z E R

08/25/99

1 - To-do List	P - Print in Wallet Format
2 - Personal Phone & Addresses	
3 - Projects	C - Change Folder
4 - Time Manager	F - File Manager
5 - Note Pad	
6 - Calculator	D - Personal Details
7 - Decision Maker	H - Help
8 - Popup Calendar	Q - Quit

F1=Enter F2=Redraw F4=Quit

F8>More



Overview

◇ Access Personal Organizer

- o Pick and point Personal Organizer from the main menu which provides the following facilities:

Facility	Description
To-do List	Organizes the priority of all your outstanding tasks.
Personal Phone and Addresses	Stores phone numbers and addresses for your personal information.
Projects	Stores key details about projects for which you are responsible.
Time Manager	Access the complete Time Manager.
Note Pad	Stores quick notes.
Calculator	Simulation of a calculator.
Decision Maker	Helps you to make decisions.
Popup Calendar	Displays this month's calendar.

These miscellaneous tools are also discussed in this chapter:

- o EasiLetter and EasiMemo

EasiLetter helps you format and write business letters. EasiMemo helps you format and write internal memoranda.

- o While-You-Were-Out

The While-You-Were-Out facility lets you quickly and easily take and distribute messages for colleagues.

Use the Personal Organizer

◆ Use the Personal Organizer

◇ Keep a To-do List

You can use the To-do List to help organize your work. You can organize the priority of your work and refer to the To-do List to remind yourself of all remaining tasks.

Access the To-do List

To access your To-do List:

- o Pick and point the To-do List option from the Personal Organizer menu.

Uniplex displays the To-do List card index. For example:

```
Select:  find   examine add   edit   copy
         remove print   cut   labels set display
         C A R D A M E N D / I N Q U I R E
         3 record(s) selected.
```

June 13	Usherwoods
August 25	Bank Account
September 30	Sale of Shares

```
F1=Enter F2=Redraw F3=Go Top F4=Quit F6>Record
```

Add Items to the To-do List

To add items to the list:

- 1 Pick and point the Add option from the ring menu.

Uniplex displays a blank To-do List card for you to complete.



Use the Personal Organizer

TO DO	DATE	[_____]
1	high	[_____]
2		[_____]
3		[_____]
4		[_____]
5		[_____]
6		[_____]
7		[_____]
8		[_____]
9		[_____]
10		[_____]
11	low	[_____]

- 2 Enter information on the lines provided. You do not need to enter information in all the fields. Use the arrow keys to move around the card.
- 3 Press **ESC e** when you have completed the form.

Uniplex stores the data in the Personal Organizer To-do List.

Find an Item in the To-do List

You can use the Find option to find a particular item or to find an item with a particular set of characteristics.

- 1 Pick and point the Find option from the ring menu.

Uniplex displays a blank form for you to complete.

- 2 Complete the form, entering the item you want to find. You can use pattern matching symbols and wildcards to find cards with a particular set of characteristics. See the **Card Index** chapter for further details.
- 3 Press **ESC e** when the form is complete.

Use the Personal Organizer**Select an Item from the To-do List**

- 1 Pick and point the Examine option from the ring menu.
- 2 Pick and point the item you want to view from the item titles on the screen.

Uniplex displays the full details of the item you selected.

Additional To-do List Options

You can use the ring menu options to edit, copy, delete, print, and cut and paste information in addition to the options outlined in the sections above. Use the options as follows:

Option	Function
Edit	Edit the contents of a To-do List card.
Copy	Copy the contents of a To-do List card.
Remove	Delete the contents of a To-do List card.
Print	Print a To-do List card.
Cut	Transfer a To-do List card to another application (<i>i.e.</i> , a Word Processor document).
Set Display	Define the fields shown on a search.

✎ *Complete details of all these options are contained in the **Card Index** chapter.*

Use the Personal Organizer

◇ Phone and Address List

You can store useful phone numbers and addresses, either for your own personal use or for business use. All the information you store in the Phone and Address List is available only to you. You can produce a printed copy of the list in a convenient wallet format. The full facilities of the Card Index are available. See the **Card Index** chapter for more details. To access the Phone and Address option:

- o Pick and point the Phone and Addresses option from the Personal Organizer menu.

Uniplex displays the Phone and Address card index:

```
Select:  find   examine add   edit   copy
         remove print   cut   labels set display
         C A R D A M E N D / I N Q U I R E
         3 record(s) selected.
```

```
Amy
Norma
Steven
```

```
F1=Enter F2=Redraw F3=Go Top F4=Quit F6>Record
```

Add to the Phone and Address List

To add to the list:

- 1 Pick and point the Add option from the ring menu.

Uniplex displays a blank Phone and Address card.

- 2 Enter information on the lines provided. You do not need to enter information in all the fields. Use the arrow keys to move around the card.

Use the Personal Organizer

Name	[_____]
Full Name	[_____]
Title	[_____]
Co. Name	[_____]
Address	[_____]
	[_____]
	[_____]
	[_____]
	[_____]
Telephone	[_____]
Fax	[_____]
Telex	[_____]

3 Press **ESC e** when you have completed the form.

Uniplex stores the information in the Phone and Address List.

Find a Phone Number or Address

You can use the Find option to find a particular phone number or address or to find a card with a particular set of characteristics.

1 Pick and point the Find option from the ring menu.

Uniplex displays a blank form for you to complete.

2 Complete the form, entering the name, address, or number to find. You can use pattern matching symbols and wildcards to find cards with a particular set of characteristics. See the **Card Index** chapter for further details.

3 Press **ESC e** when the form is complete.

Select a Phone Number or Address

1 Pick and point the Examine option from the ring menu.

2 Pick and point the card you want to view from the titles on the screen.



Use the Personal Organizer

Uniplex displays the full details of the phone and address card you selected.

Additional Phone and Address Options

You can use the ring menu options to edit, copy, delete, print, and cut and paste information in addition to the options outlined in the sections above. Use the options as follows:

Option	Function
Edit	Edit the contents of a Phone and Address card.
Copy	Copy the contents of a Phone and Address card.
Remove	Delete the contents of a Phone and Address card.
Print	Print a Phone and Address card.
Cut	Transfer a Phone and Address card to another application (<i>i.e.</i> , a Word Processor document).
Set Display	Define the fields shown on a search.

✍ *Complete details of all these options are contained in the **Card Index** chapter.*

◇ Time Manager

You can access the complete facilities of Time Manager directly from the Personal Organizer menu.

- o Pick and point the Time Manager option from the Personal Organizer menu.

Uniplex displays the Time Manager menu.

You can use any of the Time Manager facilities. See the **Time Manager** chapter for details.

Use the Personal Organizer

◇ Organize Projects

You can store the key details of each one if you are managing several projects at the same time. You can use the Project cards as a quick reminder of work that remains to be completed. In addition, you can produce a printed copy of the Project cards in a convenient wallet format. To access Project cards:

- o Pick and point the Projects option from the Personal Organizer menu.

Uniplex displays the Projects card index:

```
Select:  find   examine add   edit   copy
         remove print  cut   labels set display
         C A R D A M E N D / I N Q U I R E
         3 record(s) selected.
```

```
Peterson's Account
Triburg (feasibility)
Maynard, Inc. Logo
```

```
F1=Enter F2=Redraw F3=Go Top F4=Quit F6>Record
```

Add a Project Card

You can add a project card to your index:

- 1 Pick and point the Projects option from the Personal Organizer menu.

Uniplex displays the Projects card index.

- 2 Pick and point the Add option from the ring menu.

Uniplex displays a blank card for you to complete.



Use the Personal Organizer

Project	[_____]
Timescale	[_____]
Item 1	[_____]
Item 2	[_____]
Item 3	[_____]
Item 4	[_____]
Item 5	[_____]
Item 6	[_____]
Item 7	[_____]
Item 8	[_____]
Item 9	[_____]
Item 10	[_____]

- 3 Complete the form with the information you require. Use the arrow keys to move around the form.
- 4 Press **ESC e** when the form is complete.

Find a Project Card

You can use the Find option to find information about a particular project or a particular group of projects. For example, you can find all the cards which have information about projects which have to be completed by a particular date.

- 1 Pick and point the Projects option from the Personal Organizer menu.
- 2 Pick and point the Find option from the ring menu.

Uniplex displays a blank form for you to complete.

- 3 Complete the form, entering the name of the project, the time-scale, or other information to find. You can use pattern matching symbols and wildcards to find cards with a particular set of characteristics. See the **Card Index** chapter for further details.
- 4 Press **ESC e** when the form is complete.

Use the Personal Organizer

Select a Project Card

- 1 Pick and point the Project option from the Personal Organizer menu.

Uniplex displays the Project card index.

- 2 Pick and point the Examine option from the ring menu.
- 3 Pick and point the Project information you want to view from the titles on the screen.

Uniplex displays the full details of the Project card you selected.

Additional Project Options

You can use the ring menu options to edit, copy, delete, print, and cut and paste information in addition to the options outlined in the sections above. Use the options as follows:

Option	Function
Edit	Edit the contents of a Project card.
Copy	Copy the contents of a Project card.
Remove	Delete the contents of a Project card.
Print	Print a Project card.
Cut	Transfer a Project card to another application (<i>i.e.</i> , a Word Processor document).
Set Display	Define the fields shown on a search.

✎ *Complete details of all these options are contained in the **Card Index** chapter.*



Use the Personal Organizer

◇ Use the Note Pad

You can use the Personal Organizer Note Pad to store personal notes and reminders. You can enter the note quickly, then find and refer to the note at any time. In addition, you can produce a printed copy of any notes in a convenient wallet format. To access the Note Pad option:

- o Pick and point the Note Pad option from the Personal Organizer menu.

Uniplex displays the Note Pad card index.

```
Select:  find  examine add  edit  copy
         remove print  cut  labels set display
         C A R D  A M E N D / I N Q U I R E
         3 record(s) selected.
```

```
Christmas Conference
Summer Picnic
Thanksgiving Holiday
```

```
F1=Enter F2=Redraw F3=Go Top F4=Quit F6>Record
```

Add Information to the Note Pad

You can easily add information to the Note Pad at any time.

- 1 Pick and point Note Pad from the Personal Organizer menu.

Uniplex displays the Note Pad card index.

- 2 Pick and point the Add option.

Uniplex displays a blank form for you to complete.

Use the Personal Organizer

Subject [_____]
Date [_____]
Notes [_____]
[_____]
[_____]
[_____]
[_____]
[_____]

- 3 Complete the form with the information you need. Use the arrow keys to move around the form.
- 4 Press **ESC e** when the form is complete.

Uniplex stores the information you entered in the Note Pad card index.

Find a Note Pad Card

You can use the Find option to find information about a particular item in your Note Pad. For example, you can find all the items with the same subject matter or all the items written on the same day.

- 1 Pick and point the Note Pad option from the Personal Organizer menu.
- 2 Pick and point the Find option from the ring menu.

Uniplex displays a blank form for you to complete.

- 3 Complete the form, entering the subject, or the date, or other information to find. You can use pattern matching symbols and wildcards to find cards with a particular set of characteristics. See the **Card Index** chapter for further details.
- 4 Press **ESC e** when the form is complete.



Use the Personal Organizer

Select a Note Pad Item

- 1 Pick and point the Note Pad option from the Personal Organizer menu.

Uniplex displays the Note Pad card index.

- 2 Pick and point the Examine option from the ring menu.
- 3 Pick and point the Note Pad information you want to view from the titles on the screen.

Uniplex displays the full details of the Note Pad item you selected.

Additional Note Pad Options

You can use the ring menu options to edit, copy, delete, print, and cut and paste information in addition to the options outlined in the sections above. Use the options as follows:

Option	Function
Edit	Edit the contents of a Note Pad card.
Copy	Copy the contents of a Note Pad card.
Remove	Delete the contents of a Note Pad card.
Print	Print a Note Pad card.
Cut	Transfer a Note Pad card to another application (<i>i.e.</i> , a Word Processor document).
Set Display	Define the fields shown on a search.

✎ *Complete details of all these options are contained in the **Card Index** chapter.*

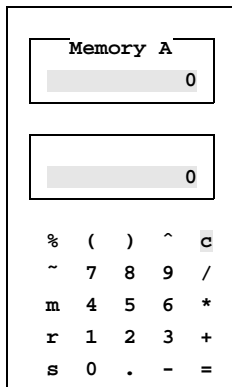
Use the Personal Organizer**◇ Calculator**

The calculator can be used like any pocket calculator to perform simple or complex calculations which may then be transferred directly into a Uniplex task.

Access the Calculator

- o Pick and point the Calculator option from the Personal Organizer menu.

Uniplex displays the calculator:





Use the Personal Organizer

Use the Calculator

The calculator works in a similar way to a pocket calculator.

There are two ways to make a calculation:

- o Move the cursor over the number, letter, or sign of your choice. Press RETURN.
- o Use the calculator display for information only and type in the numbers, letters, and signs directly.

Uniplex displays the number you have entered in the first display row above the calculator keys. The top row is used to display the value in memory.

To clear the calculator display, select **c** from the calculator.

Calculator Operators

The calculator uses the standard operators:

+	add	()	parentheses
-	subtract	^	power
*	multiply	~	negate
/	divide	%	percent

The percent operator works by taking **%** to mean *percentage of first value*. The following examples illustrate this usage:

100-5%	means	<i>100 less 5 percent of 100</i>	=	95
50/25%	means	<i>50 divided by 25 percent of 50</i>	=	4
25/25%	means	<i>25 divided by 25 percent of 25</i>	=	4
50*50%	means	<i>50 times 50 percent of 50</i>	=	1,250

Use the Personal Organizer**Calculator Memories**

The calculator has 26 memories. You can identify a memory with an UPPER CASE character in the range A-Z. When you first start to use the calculator, memory A is in use. To select a memory, press the UPPER CASE letter of your choice. The following memory functions are provided:

Key Function

s	Stores the current value in memory.
m	Adds the current value into the memory.
r	Recalls the contents of the current memory.

Return to a Uniplex Task

Press **ESC e** to transfer the result of the last calculation to the application you are working in.

Press **ESC q** to quit from the calculator without transferring any information.

◇ Popup Calendar

You can refer to the Popup Calendar whenever you want to find out a date, either in the current month or for several years in advance.

Access the Popup Calendar

- o Pick and point the Popup Calendar option from the Personal Organizer menu.



Use the Personal Organizer

Uniplex displays the popup calendar, showing the current month. For example:

July						1999	
SU	MO	TU	WE	TH	FR	SA	
				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	31	

Move Around the Display

The calendar display is for reference only. Use the following keys to move around it.

Key	Function
-----	----------

Right Arrow	Displays the next month.
--------------------	--------------------------

Left Arrow	Displays the previous month.
-------------------	------------------------------

Down Arrow	Displays the current month of the next year.
-------------------	--

Up Arrow	Displays the current month of the previous year.
-----------------	--

Return to a Uniplex Task

Press **ESC q** to return to your Uniplex task.

Use the Personal Organizer◇ **Enter Personal Details**

You can use the Personal Details option to enter all your own details. Uniplex refers to these details when you send EasiLetters or EasiMemos. See *EasiMemo and EasiLetter*.

- 1 Pick and point the Personal Details option.

Uniplex displays the Personal Details form:

Short name: [_____]

Full name: [_____]

Position: [_____]

Department: [_____]

Location: [_____]

Telephone

Extension: x [_____]

- 2 Complete the form with the information you require. Use the arrow keys to move around the form.
- 3 Press **ESC e** when the form is complete.

Uniplex stores your personal details and uses them to complete EasiLetters and EasiMemos.

EasiMemo and EasiLetter◆ **EasiMemo and EasiLetter**

EasiMemo and EasiLetter combine the full power of the Uniplex Word Processor with a selection of easy forms for you to complete. You can use these features to produce standardized business letters and memos quickly and efficiently.

EasiLetter helps you create business letters to be sent either internally or externally. EasiMemo helps you create memoranda for internal use.

With EasiLetter you can:

- o Ensure that business letters are laid out correctly.
- o Ensure you have included all essential information.
- o Use your system address list to automatically enter addresses.

With EasiMemo you can:

- o Ensure memos have a consistent layout.
- o Ensure you have included all required information.

With both EasiLetter and EasiMemo, you can:

- o Mail a completed letter or memo directly via Electronic Mail.
- o Print a letter or memo directly.

For example, you want to enter the following letter:

Sunspex Products
Factor Industrial Estate
Davids Drive
Swanley Sussex

Our Ref: JS/123
Your Ref: AW1234

Thu Aug 17

Mr. Eric Midgley
12 Thornton Close
EDINBURGH
Scotland

Dear Mr. Midgley

Many thanks for your letter of 1st June. It was heartening to know that you had enjoyed using our latest product.

If there is anything we can do to assist you in your further adventures in the Orient, please let us know.

Yours faithfully,

Joe Stevenson
Sales Director

The lines in bold show the entries automatically made.

**EasiMemo and EasiLetter****Produce a Letter**

Before you begin to produce letters with Easiletter, make sure you have completed the Personal Details form. See *Enter Personal Details*. You can produce a business letter of any length using the EasiLetter facility. You fill in a form on the screen, enter the main text of the letter, then instruct Uniplex to either print the letter or mail it using Electronic Mail. To produce an EasiLetter:

- 1 Pick and point the Word Processor option from the main menu.
- 2 Pick and point the EasiLetter option.

Uniplex displays the EasiLetter form:

Input document name.

ENTER DETAILS E A S I - L E T T E R Page 1/2

Document Name: [_____]

Our ref:	[Current document name] [_____]
Your ref:	[_____]
Address:	[Enter name and address manually____]
Date:	Mon Jul 03
Dear	[_____],
Subject:	[_____]
Ending	[Yours faithfully____] [_____]

Scroll down or press <RETURN> for additional options.

F1=Enter F2=Redraw F3>Edit F4=Quit F5=Expand F6>Record

EasiMemo and EasiLetter

Press SPACEBAR in scrollable fields to scroll to the option you require or press any character key to display a pick and point list of the available options. Use the arrow keys to move between the fields. You must complete the *Document Name* and the *Dear* fields. You can make the following entries in the form:

Field	Entry
Document Name	Enter a name for the document here which will be used as the file name.
Our Ref	Will use the document name by default for the <i>Our Ref</i> heading on the letter, otherwise scroll to <i>As defined below</i> to enter your own value or to <i>None</i> to suppress the line.
Your Ref	Enter your addressee's reference here or leave blank to suppress the <i>Your Ref</i> line on the letter.
Address	Select an option to enter an address manually, use the Personal Organizer Address List, or use the public Phone and Address List. See <i>Address a Letter</i> .
Date	Uniplex enters today's date by default. You cannot change this field.
Dear	Enter the name of the addressee.
Subject	Enter the subject of the letter (up to 40 characters).
Ending	Scroll to one of the four preset closings or select <i>As defined below</i> and then enter your own closing on the next line (you may leave it blank to skip the closing).



EasiMemo and EasiLetter

- 3 Complete the form, then press RETURN or Down Arrow to display the next form in which you enter your personal details:

Enter your full name

ENTER DETAILS E A S I - L E T T E R Page 2/2

Your name:	[Robert M. Fox_____]
Your title:	[General Manager_____]
Enclosures:	[0_]
Carbon copies:	[No_]

F1=Enter F2=Redraw F3>Edit F4=Quit F5=Expand F6>Record

- 4 Press **ESC e** when the form is complete.

Uniplex displays the Address form. See *Address a Letter*.

Enter full name of addressee.

ENTER DETAILS E A S I - L E T T E R

Enter name and address of addressee:	
Name	[_____]
Title	[_____]
Address:	[_____]
	[_____]
	[_____]
	[_____]
	[_____]

F1=Enter F2=Redraw F3>Edit F4=Quit F5=Expand F6>Record

◇ Address a Letter

The Address form that Uniplex displays varies according to the option you selected in the Address field of the EasiLetter form.

- o If you selected:

`Enter address manually`

Uniplex displays the EasiLetter Address form.

- 1 Complete the form with the information you require. Use the arrow keys to move around the form.
- 2 Press **ESC e** when the form is complete.

Uniplex displays the Word Processor screen. Enter the main body of the text you wish to send. You can enter any amount of text.

- 3 When the letter is complete, press **ESC e**.

Uniplex displays the Action to Take form. See *Send a Letter* for details.

- o If you selected:

`Use Personal Phones and Addresses`

Uniplex displays the Personal Phones and Addresses card index entry if the name entered on the EasiLetter form matches that held in the Card Index.

If Uniplex cannot match the name entered on the EasiLetter form with a Card Index entry, you use the find option to locate the required entry. In either case, once the record is found:

- 1 Select the Cut option from the command menu and press RETURN.



EasiMemo and EasiLetter

2 Press **F4**.

Uniplex displays the Word Processor screen. Enter the main body of the text you wish to send. You can enter any amount of text.

3 Press **ESC e** when the letter is complete.

Uniplex displays the Action to Take form. See *Send a Letter* for details.

o If you selected:

Use System-Wide Names and Addresses

Uniplex displays the public Names and Addresses card index. See the **Card Index** chapter for details on how to select names and addresses from this.

1 Complete the form with the information you require. Use the arrow keys to move around the form.

2 Press **ESC e** when the form is complete.

Uniplex displays the Word Processor screen. Enter the main body of the text you wish to send. You can enter any amount of text.

3 When the letter is complete, press **ESC e**.

Uniplex displays the Action to Take form. See *Send a Letter* for details.

◇ **Send a Letter**

Now that you have written your letter and provided Uniplex with all its relevant details, you are ready to decide what further action to take. Uniplex displays the Action to Take form when you have selected the address to which to send.

EasiMemo and EasiLetter

Press SPACEBAR to scroll options

ENTER DETAILS A C T I O N T O T A K E

Which of the following options would you like to take?

Edit letter	[Yes_]
Print letter	[Yes_]
Mail letter	[No__]

Would you like to return to this screen afterwards? [No__]

F1=Enter F2=Redraw F3>Edit F4=Quit F5=Expand F6>Record

Press SPACEBAR to scroll the entries to the one of your choice or press any character key to display a pick and point list of the available options. Use the arrow keys to move between the fields. The options perform the following functions:

Option	Function
Edit Letter	Uniplex displays the letter. You can change any part of the letter; either the parts of the letter you entered using the EasiLetter form or the main body of the text.
Print Letter	Uniplex displays the Print Screen form. See the Printing chapter for details on how to complete this form.
Mail Letter	Uniplex displays the Send Mail form. See the Electronic Mail chapter for details on how to complete this form.

Press **ESC e** when the form is complete.



EasiMemo and EasiLetter

◇ Produce a Memo

EasiMemo lets you write and address memos quickly and easily.

To produce an EasiMemo, follow these steps:

- 1 Pick and point the Word Processor option from the main menu.

Uniplex displays the Word Processor menu.

- 2 Pick and point the EasiMemo option.

Uniplex displays the EasiMemo form:

Enter name of document for filing.

ENTER DETAILS		E A S I - M E M O	
Document name:	[_____]
From:	[Robert M. Fox	_____
Title:	[General Manager	_____
To:	[_____]
	[_____]
CC:	[_____]
	[_____]
Date:	Sat Aug 28		
Subject:	[_____]

memo....memo....memo....memo....memo....memo....memo....

F1=Enter F2=Redraw F3>Edit F4=Quit F5=Expand F6>Record

Use the arrow keys to move around the form. Press RETURN to complete one field and move to the next.

You can make the following entries in the form:

Option	Function
Document Name	Enter a document name for your file. Uniplex uses the name you enter here as a document name.
From	By default, Uniplex enters your name here. You can enter any other name here.
Title	Uniplex enters your title here. You can change this or delete the title.
To	Enter the name or names of everyone to whom you are addressing the memo. You can enter as many names and addresses as will fit on the two lines of the form.
CC	Enter the names of any people to whom you want your memo carbon-copied to. You can enter as many names and addresses as will fit on the two lines of the form.
Date	Uniplex enters today's date by default.
Subject	Enter the subject of the memo here.

- 3 Press **ESC e** when the form is complete.

Uniplex displays the Word Processor screen.

- 4 Enter the text of the memo.

- 5 Press **ESC e** when the text is complete.

Uniplex displays the Action to Take form.

EasiMemo and EasiLetter

Press SPACEBAR to scroll options

ENTER DETAILS A C T I O N T O T A K E

Which of the following options would you like to take?

Edit memo	[Yes_]
Print memo	[Yes_]
Mail memo	[No__]

Would you like to return to this screen afterwards? [No__]

F1=Enter F2=Redraw F3>Edit F4=Quit F5=Expand F6>Record

Press SPACEBAR to scroll the entries to the one of your choice or press any character key to display a pick and point list of available options. Use the arrow keys to move between the fields. The options perform the following functions:

Option	Function
Edit Memo	Uniplex displays the memo. You can change any part of the letter; either the parts of the letter you entered using the EasiLetter form or the main body of the text.
Print Memo	Uniplex displays the Print screen. See the Printing chapter for details on how to complete the Print form.
Mail Memo	Uniplex displays the Send Form. See the Mail chapter for details on how to complete the Mail form.

Press **ESC e** when the form is complete.

While You Were Out

◆ While You Were Out

Uniplex provides a facility for easily sending a colleague mail about a message you have taken in their absence.

To access the While you were out option:

- 1 Press **F9** or **ESC xd** to display the Desk menu.
- 2 Pick and point the While you were out option.

Uniplex displays the While you were out form as follows:

Type the name of the person who called

ENTER DETAILS W H I L E Y O U W E R E O U T

Name:	[_____]
Company:	[_____]
Phone:	[_____]
Telephoned [] Please call [] Called to see you [] Will call again [] Wants to see you [] Urgent []	

Message:	[_____]
	[_____]
	[_____]
	[_____]
	[_____]

F1=Enter F2=Redraw F3>Edit F4=Quit F5=Expand F6>Record

Complete this form as described below. Press TAB after making an entry in a field. Use the arrow keys to move around the form.

- 1 Enter information about the person who called in the Name, Company and Phone fields.



While You Were Out

- 2 Press the SPACEBAR to toggle * (asterisk) on or off against any of the comment fields.
- 3 Enter a message, if the caller left one, in the Message fields.
- 4 Press **ESC e** when you have made as many entries as you require.

Uniplex displays the Send Form.

- 5 Complete the Send Form with details of the person who was out. See the Electronic Mail chapter for details.
- 6 Press **ESC e** when you have completed the Send Form.

Uniplex sends the message to the person who was out.

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Personal Organizer

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Chapter 5

Report Writer

Report Writer

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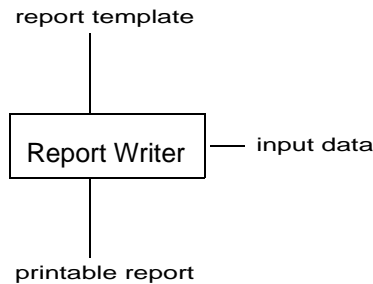
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◆ Overview

The Report Writer is a powerful tool for automatically producing reports. It takes advantage of the data storage and data manipulation facilities of Uniplex. You can use data from the Database, Word Processor documents, or any other system application and then transform it with powerful calculations and extensive formatting into a professional report.

You put a set of instructions into a template to create a report. The Uniplex Report Writer reads the instructions and acts on them when you execute the template. You can use the resulting report like any other Uniplex document, for example, you can print or mail it. You can use a report template with different sets of data. For example, you need a weekly report using data from the database. The data is updated daily; it could be a database used for stock control. You can create a report template for this task and use it every week. The following diagram illustrates the flow of data:



You should understand the following concepts:

Fields and Records

The Report Writer manipulates information which can be stored in the database, in a file, or in the report template itself. The form of the information depends on where it is stored. Uniplex stores information in the database in tables. If you use files you must format the information as *list*. Each piece of information is called a *record*.

Overview

Each part of a record is called a *field*. For example, if the information to be used is a list of products and the number sold, it could be stored in the database as follows:

braces	205	— record
spanners	340	— record
mainstays	567	— record

| field | field

Labels

You must identify the information to the Report Writer by using labels. You label each field of the records of information you want to process. For example, if you are using the information from the previous example, you could have the following labels:

label	label
product	no_sold

braces	205
spanners	340
mainstays	567

Sections and Instruction Sets

The Report Writer is a data processor. It carries out tasks on the data you specify. You create a report by dividing each part of the processing into sections. Each section carries out a different aspect

of creating the report. There are two types of sections: *main sections* and *subsections*. You must have a main section. This controls the flow of process through the report by *calling* subsections. You can have as many subsections as required.

For example, a simple report could have two sections: a main section that creates the title page for the report and calls another section that processes the data for the report. You could have a report template with just one section. You divide each section or subsection into instruction sets. You can have the following instruction sets within a section:

- o **:SPEC** (optional, main section only)

Only used when creating a report using Database Forms. It specifies the source of the input data and where to place the generated report (*i.e.*, there is no input file since the data for the report is in the report template itself).

- o **:DATA** (optional, main section only)

Identifies the data to be used for the report. For example, this could contain a Database Query statement or identify the file containing the data for the report.

- o **:LABEL** (mandatory, main section only)

Matches each field of data to a label which references that data throughout the report template.

- o **:LOCAL** (optional)

Attaches local label names to values that are calculated from other values. In addition, it specifies the functions to carry out on the data and the format for each local label.

- o **:CONTROL** (optional)

Controls how and when a section is manipulated.

Overview

- o **:TEXT** (mandatory)

Contains the text to be included in the report and the layout for the report. You can use the full word processing capabilities, including print time commands and effects.

Syntax

There are certain rules to follow when creating a report, called syntax rules. They are similar to English grammar rules. It is important that you follow these rules, otherwise your report may fail. The following table shows the syntax rules you must follow:

Part of Template	Syntax Rule
Section Names	<p>Section name format must be:</p> <p><code>#SECTION-name</code></p> <p>For example:</p> <p><code>#SECTION-start</code></p>
Instruction Sets	<p>Each instruction set must begin with a colon (:) and be in uppercase:</p> <p><code>:LABEL</code></p>
Lines	<p>Each line in the <code>:LABEL</code>, <code>:LOCAL</code> and <code>:CONTROL</code> instruction sets must end with a semi-colon (;):</p> <p><code>Totbr = sum(salary);</code></p>
Label Definitions	<p>Each formatting option in the labels definition must be separated with a comma followed by a space:</p> <p><code>phone, right, float;</code></p>

◇ Access Report Writer

You can access the Report Writer from the Main menu and from the Database Forms menu.

To access the Report Writer from the Main menu:

- o Pick and point the Report Writer option.

Uniplex displays the Report Writer menu as follows:

```
REPORT WRITER MENU                                08/28/99

REPORT GENERATION                                UTILITIES

1 - Create Report Template                        P - Printing
2 - Edit Report Template                         C - Change Folder
3 - Run Report                                   F - File Manager

                                                H - Help
                                                Q - Quit

F1=Enter F2=Redraw F4=Quit                        F9>Desk
```

To access the Report Writer from the Database Forms menu:

- 1 Pick and point the Database Forms option.
- 2 Select a database using the Select a Database option.
- 3 Pick and point the Report Writer option.



Worked Example

◆ Worked Example

◇ Basic Report

This worked example shows how to create a report template to produce address labels it using input from a file. You can print the resulting output on labels that are formatted on paper measuring 8.5 by 11 (or European A4). This is a particularly useful application of the Report Writer and the template is simple and easy to follow. The complete report template follows:

```
#SECTION-address
:LABEL
firstname, strip, float;
surname, strip, float;
address1, left;
address2, left;
address3, left;
address4, left;
address5, left;
:TEXT
[firstname] [surname]           [firstname] [surname]
[address1_____]             [address1_____]
[address2_____]             [address2_____]
[address3_____]             [address3_____]
[address4_____]             [address4_____]
[address5_____]             [address5_____]
))
```

You can create address labels from any file containing addresses in the following format using this report template:

```
firstname
surname
first line of address
second line of address
third line of address
fourth line of address
fifth line of address
```

Worked Example

For example, a file could contain:

Page Length:6

Jill
Hillington
Norton House
Rowly Drive
Cranleigh
Surrey
.....(data.file #1 PL6)

Fred
Bloggs
109 Melrose Avenue
Willesden
London
.....(data.file #2 PL6)

Jane
Sandridge
81 Brockley Rise
Brockley
London
.....(data.file #3 PL6)

Margret
Morrison
36 Ivor Evans Hall
Camden Road
Camden
London
.....(data.file #4 PL6)

John
Jones
The Chase
Jeffers Ride
Ascot
Berks

Worked Example

Using the report template above and the example file above, the Report Writer creates the following address labels:

Jill Hillington
Norton House
Rowly Drive
Cranleigh
Surrey

Fred Bloggs
109 Melrose Avenue
Willesden
London

Jane Sandridge
81 Brockley Rise
Brockley
London

Margret Morrisson
36 Ivor Evans Hall
Camden Road
Camden
London

John Jones
The Chase
Jeffers Ride
Ascot
Berks

Follow these steps to create the report template shown previously:

1 Create the Report Template

- a) Pick and point the Report Writer option from the Main menu.
- b) Pick and point the Create Report Template option from the Report Writer menu.

2 Enter the Section Name

The report template contains only one section. The first line of the report template must name the section. The name of the section is *address*. But you can call the section any name you want; this name is used internally by the Report Writer.

Worked Example

Uniplex provides softkeys to help you create report templates. You can enter the template yourself, or use the softkeys to enter information for you.

- ✎ *If your machine is set up to enter hard return characters by default at the end of each line, turn this off before you begin to create the report.*

Create the section as follows:

- Press F6 to display the Build Report softkey menu.
- Press F1 to start the section.

Uniplex enters #SECTION- for you and prompts for a section name. Enter the following:

address and press RETURN.

You must follow this syntax whenever you begin a section. That is, you must begin the name with a hash (#), follow it with the word SECTION (in uppercase) and a hyphen, and then the name. If you use the softkeys, Uniplex enters the syntax correctly for you.

3 Enter the :LABEL Instruction Set

Since you will specify the input file when running the Report Writer, you do not need a :SPEC or :DATA instruction set. Therefore, the next section you must include is the :LABEL instruction set which identifies each field of the input data and the format you require for it. First you must indicate the beginning of the :LABEL instruction set:

- Press F5 twice to display the :LABEL softkey menu.
- Press F1. Uniplex enters :LABEL for you.

4 Enter the Labels

You must provide a label for each field of the records in your input file. Each record contains the same fields, so you provide labels for each field once, and these labels refer to the fields in every record. You can use any names for labels, as long as they are not words used by the Report Writer, for example :TEXT. It is helpful to use names that in some way identify the field the label refers to.

Label the firstname field of the record as follows:

- a) Enter the following:

firstname

and press RETURN.

- b) Press F1 to enter the formatting options for text. Uniplex enters them as follows:

```
firstname, strip,float,extend
```

- c) Since you do not require the float or extend options, delete both words, and the comma after the word float.
- d) Press F1 to indicate this is a non-numeric field. Uniplex enters a semi-colon at the end of the label definition and moves the cursor to the next line.

Label the second name of the record in the same way:

- a) Enter the following:

surname

and press RETURN.

Worked Example

- b) Press F1 and delete the words *float* and *extend* as before.
- c) Press F1 again.

Notice that the length of the addresses in the input file vary. To accommodate for every length of address, this report template will allow up to 5 lines of address. If an address is less than 5 lines, the Report Writer leaves the last line blank. Label the lines of the address as follows:

Enter	Press
address1	RETURN F2 F1
address2	RETURN F2 F1
address3	RETURN F2 F1
address4	RETURN F2 F1
address5	RETURN F2 F1

You must include the semi-colon (;) at the end of each label.

Press RETURN then F7 to finish adding labels.

5 Provide the Text Layout

The last task is to provide the actual layout for the labels. You do this within the :TEXT instruction set. Begin the :TEXT instruction set as follows:

- a) Press F5 three times to display the :TEXT softkey menu.
- b) Press F1 to enter the beginning of the :TEXT instruction set.

Uniplex enters the following:

```
:TEXT
```

This report contains no free text, just each address label. Therefore in this section, you must just provide the exact layout you require for the positioning of the labels on the page. You want

Worked Example

the labels in two columns; therefore you provide these two columns in this section.

You enter each label name (that in turn refers to a field in the input file) in the position you require.

When you use a label name in the :TEXT section, it is called a *field definition*, since it refers to a field in the input. To indicate to the Report Writer that you are using a label name, you enclose the label with the delimiters [and].

If the length of the field matches the length of the label, you just enter the label enclosed with the delimiters.

Enter the firstname and surname field definitions as follows:

- a) Press F1. Enter **firstname**. Press RETURN twice. Press the SPACEBAR once.
- b) Press F1. Enter **surname**. Press RETURN twice.
- c) Press the SPACEBAR 10 or so times.
- d) Press F1. Enter **firstname**. Press RETURN twice. Press the SPACEBAR once.
- e) Press F1. Enter **surname**. Press RETURN twice.

The line should now appear as follows:

[firstname] [surname] [firstname] [surname]

✎ *Make sure the space between the columns matches the space between the labels on which you want to print.*

If the field length is longer than the label name, you indicate each extra character of length with the underscore. Each field length must be wide enough to contain the maximum value it will contain.

Worked Example

Since most lines of addresses are longer in length than their labels, enter the field definitions for each line of the address as follows (use the softkeys if required):

[address1 _____]	[address1 _____]
[address2 _____]	[address2 _____]
[address3 _____]	[address3 _____]
[address4 _____]	[address4 _____]
[address5 _____]	[address5 _____]

Include several blank lines after these field definitions. These should match the number of lines between the labels on which you want to print.

Complete the report template by entering the following:

))

6 Save the Report Template

The report template is now complete. Press **ESC e**. When Uniplex prompts for a document name, enter a suitable name for the template, for example *label*.

7 Prepare the Data

Before you can test the template, you must prepare the data for the report as follows:

- a) Pick and point the Word Processor option from the Main menu, then pick and point the Create a Document option.
- b) Enter the data for the report. Use the example data given at the beginning of this section.
- c) When you have finished entering the data, press **ESC e**. When Uniplex prompts for a document name, enter a suitable name for the input file, for example *input*.

8 Run the Report

Run the Report Writer as follows:

- a) Pick and point the Run Report option from the Report Writer menu.
- b) Enter the name of the template.

Uniplex displays the Report Selection form.

- c) Complete the form:

Report Template Filename	Leave this containing the report template name.
Data Filename	Enter the name of the file containing the input data.
Report Output Filename	Enter the name for the output file, if you do not want the default of <i>report.output</i> .

Uniplex creates the report in the file you specify. It formats the data in the way specified in the report template. You can use the file like any other Uniplex document or operating system file. For example, you can print it.

◇ Report Template with Subsections

This section explains how to create a practice report template that contains subsections. This report lists the salaries by branch of all the sales staff in a company.

The complete report template is shown on the following page.

Worked Example

```

#SECTION-salreport
:LABEL
branch;
name;
salary;
:LOCAL
Totco = sum(salary);
:TEXT
:HE1

                        Analysis By Branch

:FO1

                        - # -

This report shows the salaries paid to each branch
in the company for the period 01/01/97 - 01/01/98
#SECTION branch
Total salary paid to all branches [Totco_____]
))
#SECTION-branch
:CONTROL
break branch;
:LOCAL
Totbr = sum(salary);
:TEXT

                        Company Salaries - analysis by branch

                        BRANCH          SALESMEN          SALARY
#SECTION records
Total salary for this branch = [Totbr_____ ]
:PA
))
#SECTION-records
:TEXT

                        [branch_____] [name_____] [salary_____]
))

```

Create this report template as follows:

- 1 Pick and Point the Create a New Document option.
- 2 Enter a title for the main section of the template as follows:

```
#SECTION-salreport
```

- 3 Begin the :LABEL instruction set by entering the following:

```
#SECTION-salreport  
:LABEL
```

- 4 Since there are three fields for each record (branch, name and salary) in the input file, assign them labels, in the order they appear in the file as follows:

```
#SECTION-salreport  
:LABEL  
branch;  
name;  
salary;
```

✎ *You must include a semicolon (;) after each assignment.*

- 5 Since you want to include a total amount of salaries paid to all branches at the end of the report, you must assign a label to this, and carry out the calculation in a :LOCAL section. Begin this section and carry out this function as follows:

```
:LOCAL  
Totco = sum(salary);
```

- 6 Next, you want to start the text layout section of the report, enter the following:

```
:TEXT  
:HE1
```

Analysis By Branch

Worked Example

↘ *The dot command is preceded by a colon instead of a period which is converted to a period when you run the report.*

7 Enter the text for the footer as follows:

```
:FO1  
-#-
```

8 Enter the text for the title page as follows:

```
This report shows the salaries paid to each branch in the  
company for the period 01/01/97 - 01/01/98
```

9 At this point in the report you want to create the report page for each branch. You are going to create another section called **branch** for this. You must call this section at this point. Make a call to this section by entering:

```
#SECTION branch
```

When Uniplex executes this report, at this point it will skip to the section named **branch**. When it has finished processing **branch**, it returns to the line immediately after this.

10 In the next part of the report you want to include the total salaries paid to the branch, as follows:

```
#SECTION branch  
Total salary paid to all branches [Totco_____]
```

You identify the total salaries paid with the label **Totco**. You assigned this label in the **:LOCAL** section previously. You define this as a field using the delimiters **[and]**.

Worked Example

- 11 You are now ready to create the branch section. End the section salreport and start the section branch as follows:

```
#SECTION branch
Total salary paid to all branches [Totco_____]
))
#SECTION-branch
```

- 12 Provide the layout and instructions for the pages of the report that will contain the details of each branch. The text for each branch should appear on a new page and have a subtitle. Every time there is a new branch in the input, re-execute this section. To indicate this, enter:

```
#SECTION-branch
:CONTROL
break branch;
```

The **:CONTROL** label means that when the data from the input file is processed; each time it encounters a new branch number it executes this section again.

- 13 Show the total salaries for each branch at the bottom of each branch page. Since this is a calculation, you perform it using a **:LOCAL** instruction set, enter it as follows:

```
#SECTION-branch
:CONTROL
break branch;
:LOCAL
Totbr = sum(salary);
```

You have assigned a label Totbr to be the sum of salaries to this point.

Worked Example

14 Next, you want to include the text for each branch page:

```
#SECTION-branch
:CONTROL
break branch;
:LOCAL
Totbr = sum(salary);
:TEXT
```

Company Salaries - analysis by branch

BRANCH	SALESMEN	SALARY
--------	----------	--------

15 Process each record in another section called **records**. Call this section from here:

```
#SECTION-branch
:CONTROL
break branch;
:LOCAL
Totbr = sum(salary);
:TEXT
```

Company Salaries - analysis by branch

BRANCH	SALESMEN	SALARY
#SECTION records		

16 After processing the records, you want to include the total of salaries for this branch, enter:

```
#SECTION records
Total salary for this branch = [Totbr_____]
```

17 You want to start a new page after each branch section:

```
#SECTION records
Total salary for this branch = [Totbr_____]
:PA
))
```

Worked Example

18 Next, include the section for processing the records:

```
#SECTION-records
:TEXT
[branch _____] [name _____] [salary _____]
))
```

The report template is now complete.

19 Press **ESC e** to file the report template.

20 Access the Word Processor menu.

21 Create a file called **inputfile**, containing the following data:

London	John	10000
London	Lulu	12000
London	Arnie	25000
Denver	Mick	14000
Denver	Sal	34000
Denver	Chris	19000

22 Run the report as follows:

- a) Pick and point the Report Writer option.
- b) Pick and point the Run Report option.
- c) Enter the name of the report template.

Uniplex displays the Report Writer details form.

- d) Complete this form as follows:

Field	Explanation
Report Template Filename	Enter the name of the template file, if this field does not already contain the correct name.

Worked Example

Field	Explanation
Data Filename	Enter the name of file containing the input data, if you have not specified the data within the template itself.
Report Output Filename	Enter the name you want for the output file, if you do not want the default of <i>report.output</i> .

The resulting report looks like this in the Word Processor:

Page Heading

Analysis by branch

<-End Header->

Page Footer

- # -

This report shows the salaries paid to each branch in the company, for the period 01/01/97 - 01/01/98

<-End Footer->

Company Salaries - analysis by branch

BRANCH	SALESMEN	SALARY
London	John	10000
London	Lulu	12000
London	Arnie	25000

Total Salary for this branch = 47000

Forced Page Break

Company Salaries - analysis by branch

BRANCH	SALESMEN	SALARY
Denver	Mick	14000
Denver	Sal	34000
Denver	Chris	19000

Total Salary for this branch = 67000

Total salary paid to all branches = 114000



Reference

◆ Create a Report

Follow these steps to create a report:

- 1 Plan the report. See *Plan a Report*.
- 2 Prepare the data. See *Prepare the Data*.
- 3 Create the report template. See *Create a Report Template*.
- 4 Run the report. See *Run a Report*.
- 5 Print the report. See *Print a Report*.

◇ Plan a Report

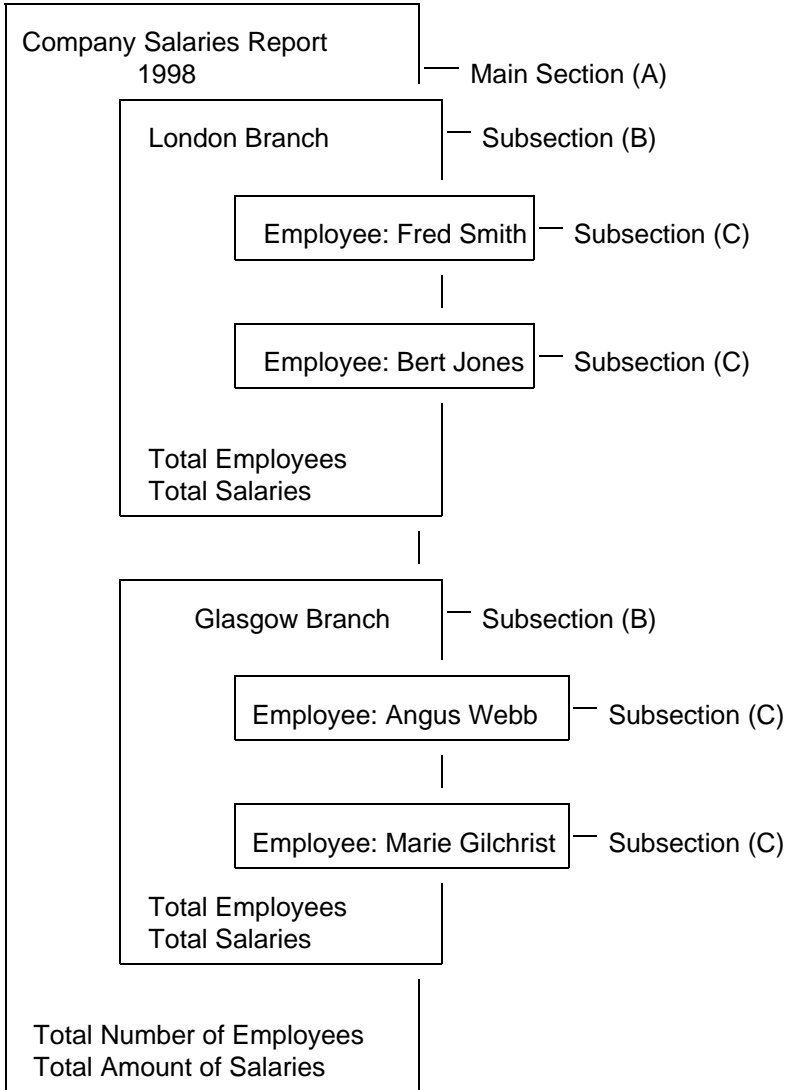
It is important that you plan your report before entering it on the system. Follow these planning stages:

- 1 Design the layout of the report, this includes:
 - o **Title Page.** For example, the report name and distribution.
 - o **Running Headers and Footers.** For example, page numbers.
 - o **Layout of each Section.** For example, the number of columns and the headers for each of these.
- 2 Design the structure of the report.

Decide which parts of the report will occur more than once, such as the information for each employee in a report on employee salaries. Split the processing into sections, each section corresponding to a part of the report to be repeated, such as the information on each employee. The following diagram illustrates this concept. The page following the illustration describes the processing of each section needed to produce this report.

Create a Report

◇ Example Structure of a Report



For the example structure, a report template is required containing the three sections A, B, and C:

A Main Section. It provides the title page, running headers and footers, and the conclusion page. To process each record it calls Subsection B. In addition, it completes the processing by adding the branch total lines.

B Subsection. It carries out the processing you have specified for the beginning of each branch part of your report. In this example, it starts a new page and provides the title of the part.

It then reads in a record from your data. It checks that the branch name is the same as the one for the previous record. If it is, it calls Subsection C.

If the branch name is not the same it completes the processing for this branch (by adding the branch totals lines) and begins a new part (by starting a new page with the title of the part).

C Subsection. It carries out the processing you have specified for each employee record (*i.e.*, calculate the total salary for this employee this year). It then places the record in the report in the format you specified.

See *Worked Example* for a report template that uses a number of subsections.

3 Identify the data you want to use.

You can use data in any one of the following ways:

- o Use Database Query or Database Forms to create a file containing data from the database. You can then either specify this filename within the report template or when running the report.

Create a Report

- o Enter a Database Query statement within the report template to select the data from the database or enter any system command that generates data (*i.e.*, run a third-party application).
- o You can create or use any document or file containing your source data if you are not using data from the database. You can then either specify this document or file name within the report template or when running the report.
- o Include any data in the report template itself.

◇ Prepare the Data

There are several different ways to provide the data and these have different implications for its preparation and how you run the report. Each of the following sections describe the different sources of data and how to prepare it.

Data from the Database

You have two options:

- o Using Database Forms or Database Query, create a file containing the data. See the chapters **Database Forms** and **Database Query** for details.
- o Specify Query statements within the template to select the data.

This is the recommended way to prepare the data if you want to regularly reuse the template, without needing to alter it.

Data from a Uniplex Document or a File

You can use a Uniplex document or any file, for example a file created by another application running on your system, as the input for your report template. Create the file following these rules:

- o At the top of the file, specify the page length as the maximum number of fields per record. For example, if the maximum number of fields per record is 6, enter **.PL6**.
 - o Start each new record on a new page.
 - o Start each field on a new line.
 - o Do not include anything other than the data records in the file.
 - o Do not use print effects in the file.
- ✎ *Uniplex automatically uses the proper format if you create the file with Database Forms, Database Query, or Mail Merge.*

For example:

Page Length: 6

```
Jill
Hillington
Norton House
Rowly Drive
Cranleigh
Surrey
.....(data.file #1 PL6)
Fred
Bloggs
109 Melrose Avenue
Willesden
London
.....(data.file #2 PL6)
```



Create a Report

Jane
Sandridge
81 Brockley Rise
Brockley
London

.....(data.file #3 PL6)

Margret
Morrison
36 Ivor Evans Hall
Camden Road
Camden
London

.....(data.file #4 PL6)

John
Jones
The Chase
Jeffers Ride
Ascot
Berks

◆ Create a Report Template

You create a report template by dividing each part of the processing for the report into sections. Each section carries out a different aspect of creating the report.

For example, a simple report could have two sections: a main section that creates the title page for the report, and calls another section that processes the data for the report. You could have a report template with just one section.

There are two types of sections: Main sections and subsections. You can have only one main section and it must be the first section of the report. You can have as many subsections as you require. The following section shows a standard report template.

◇ Standard Report Template

This section shows how the sections and instruction sets fit together to make a report template. Follow this basic outline when creating a report template. In this template, the first column contains the syntax to use, the second contains explanatory notes and examples.

Syntax	Explanation
:SPEC	Identifies the beginning of the :SPEC instruction set, if you are creating a report from Database Forms. This specifies the format of input and output to and from the report. For example: <pre>:SPEC NO INPUT</pre>
#SECTION-<i>name</i>	Identifies the beginning of the main section of the report. For example: <pre>#SECTION-salaries</pre>

Create a Report Template

Syntax	Explanation
:DATA	<p>Identifies the beginning of the data section. This is an optional section used to access data other than the default way. For example:</p> <pre>DATA input salary.list</pre>
:LABEL	<p>Identifies the beginning of the :LABEL instruction set. In this, you assign labels to the data you are going to use. For example:</p> <pre>LABEL branch; name; salary;</pre>
:LOCAL	<p>Identifies the beginning of the :LOCAL instruction set. In this, you declare the labels whose values you want to calculate using the input data. In addition, you specify the calculation and format of the output. For example:</p> <pre>LOCAL labell = avg(salary);</pre>
:TEXT	<p>Identifies the beginning of the text instruction set. In this, you provide the layout of the report. For example:</p> <pre>:HE2 Salaries Report Company Confidential</pre> <p>This report contains details of the salaries of all sales staff.</p>

Create a Report Template

Syntax	Explanation
#SECTION <i>name</i>	This is a command to go to the subsection of the report labeled <i>name</i> . This means that Uniplex passes control to this section. This is sometimes referred to as a <i>call</i> to a subsection. It returns to this point after completing this section.
#SECTION-<i>name</i>	Identifies the beginning of a subsection. When this subsection is called, Uniplex searches for this <i>name</i> .
))	The end of section marker. You must include an end of section marker at the end of each main and subsection.

Follow these steps to create a report template:

- 1 Create a file for the report. See *Create a File*.
- 2 Create the main section. See *Create a Main Section*.
- 3 If required, create any subsections. See *Create a Subsection*.

◇ **Create a File**

Depending on the source of your input data, create a file for the report as follows:

- o If you are going to use data from the database:

You want the report template to be associated with the database it accesses. Therefore, create the report template from the Report Writer menu as follows:

- 1 Pick and point the Database Forms option.
- 2 Pick and point the Select Database option.



Create a Report Template

- 3 Pick and point the name of the database you want to use.
- 4 Pick and point the Report Writer option.

Uniplex displays the Report Writer menu.

- 5 Pick and point the Create a Report option.

Uniplex displays the word processing form. You are ready to create the report.

- 6 Enter the report, as described below in Create a Main Section and Create a Subsection. Or, create the sections using softkeys, see Create Sections using Softkeys below.

- o If you are not going to use data from the database:

You do not want the report template associated with any particular database. Therefore, create the report template as follows:

- 1 Pick and point the Report Writer option from the Main menu.
- 2 Pick and point the Create Report Template option.
- 3 Enter the report, as described below in Create a Main Section and Create a Subsection. You can use softkeys to help enter a report template. See *Create Sections using Softkeys*.

◇ Create a Main Section

You split the processing for the report into sections. You must have a main section with as many subsections as needed. Each subsection corresponds to a repeated part of the report. The main section calls the subsections at the appropriate points. Subsections can themselves call subsections. You must have the instruction sets :LABEL and :TEXT in the main section. You may have the instruction sets :SPEC, :DATA, and :LOCAL.

Create a Report Template

Follow these steps to create the main section of a report template:

- 1 Begin the section by naming it, follow this syntax:

```
#SECTION-section_name
```

For example: #SECTION-main

- 2 Specify the input data source and where to place the generated report. See *Specify Input and Output*.
- 3 If you are not going to specify an input file when running the report, specify the data for the report. See *Specify the Data*.
- 4 Assign labels to the data. See *Assign Labels*.
- 5 Provide the text layout for the report. See *Provide Text*.
- 6 Make any initial calculations. See *Make Calculations*.
- 7 Call any subsections. See *Call Subsections*.
- 8 End the main section with:

```
))
```

◇ Create a Subsection

You can have as many subsections as needed. Each subsection corresponds to a repeated part of the report. The main section calls the subsections at the appropriate points. Subsections themselves can call subsections. You may have the instruction sets :LABEL, :TEXT, :LOCAL, and :CONTROL in a subsection.

Follow these steps to create a subsection in a report template:

- 1 Begin the subsection by naming it using the syntax:

```
#SECTION-section_name
```

Create a Report Template

For example:

```
#SECTION-sales
```

- 2 Provide any text layout for the subsection. See *Provide Text*.
- 3 Provide any control for the subsection. See *Provide Control*.
- 4 Make any calculations. See *Make Calculations*.
- 5 End the section with:

```
) )
```

◇ Create Sections using Softkeys

Uniplex provides softkeys to help create sections and subsections. They lead you through the different instruction sets required and prompt you to enter information at the appropriate points. They are a useful guide to the syntax.

Press **F6** to access the Report Writer softkeys.

The Report Writer softkeys are generally organized as follows:

F1 Start Section	F5 Next Part
------------------	--------------

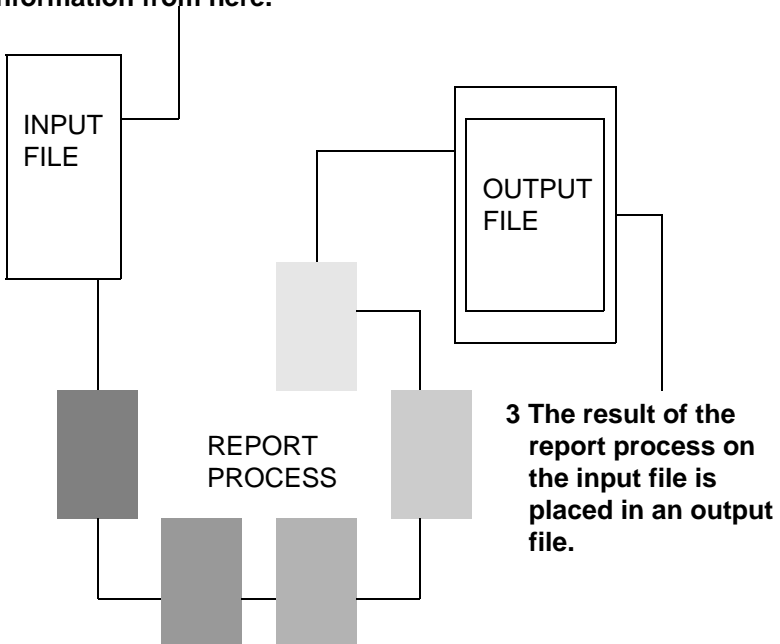
Always use F1 to begin the instruction set. Do not worry if you inadvertently press a softkey that makes an entry you do not require; you can delete entries made by softkeys, just as you can delete any other entries or text in the template.

The softkey line displays prompts and messages to help you enter the correct information. Enter **F7** to return to the main softkey menu. You can work through the softkeys to any point needed.

◇ Specify Input and Output

Report Writer takes input data from a specified file, processes it to match your requirements and outputs it to a specified file.

1 Information from here.



2 Runs through the process outlined in the report.

You can specify the input and output files when you run a report, unless you are using Report Writer from the Database Forms menu.

Use Database Forms

You can specify an input or output file when you create a report using Database Forms in the :SPEC instruction.

Create a Report Template

To specify an output file in Database Forms, enter:

Syntax	Explanation
:SPEC NO INPUT	Enter this if you do not want to specify a file to use when generating the report, but want the report generated according to data definition. When you use NO INPUT you must include the data definition you want to generate the report from, in the :DATA instruction.
:SPEC NO OUTPUT	If you want to output the report to the default clipboard.
:SPEC OUTPUT <i>filename</i>	If you want to output the report to a specified file, where <i>filename</i> is the name of the report.

◇ Specify the Data

If you are not going to specify the input file when running the report, you must include a :DATA instruction set in the main section. If the data is not in the correct order for your report, you can specify the order by clause, see the following section Specify the Order of Data. In addition, you can specify data format flags. See *Data Format Flags*.

Depending on the source of your data, specify the :DATA section as follows:

- o If you want to use a Uniplex document or operating system file and specify it within the report template:

Specify the file name within the :DATA instruction set as follows:

**:DATA
input *filename***

where *filename* is the file containing the data.

Create a Report Template

- o If you want to input the data using Database Query or an operating system command:

Specify the statement or command in a :DATA instruction set:

:DATA

statement

For example, to include a Database Query statement:

```
:DATA
usql
invoke us_salaries
format header end
format separator '\t'
select * from table12
```

- o *If you are using data from the database, use the format separator '\t' command to ensure that the fields of data are separated by tabs.*

- o If you are including the data in the report template itself:

Include the data within a :DATA instruction set as follows:

:DATA

list

data

where *data* is the list of data.

For example:

```
:DATA
list
fred      Denver      Colorado
geoff     Phoenix     Arizona
liz       Fort Worth   Dallas
```

Create a Report Template

✎ If you include a `:DATA` instruction set specifying data from Database Forms, you must include a `:SPEC` instruction set; see the previous section.

◇ Specify Order of Data

If the data is not in the correct order for the report template, include an **order by** statement as follows:

order by *labelname*,...*labelname*

where *labelname* is the name of the label, or labels in the order you want them input into your report. Follow all order by statements with a semi-colon (;).

You can, optionally, specify ascending (ASC) or descending (DESC) order (ASC is the default) as follows:

order by *labelname* **desc**;

You can order by multiple label names. For example:

```
:DATA
order by label1 asc, label2 desc;
list
fred      Denver      Colorado
geoff     Phoenix     Arizona
liz       Fort Worth  Dallas
```

◇ Data Format Flags

Within the `:DATA` instruction set, you can specify flags to act on the report template when you run it. Use the following syntax:

```
:DATA
flags = option;
```

where *option* can be one of the following:

o **start** *n*

Where *n* is the number of the record at which you want the Report Writer to begin processing.

o **end** *n*

Where *n* is the number of the record at which you want the Report Writer to end processing.

o **field** '*x*'

Where *x* is the character, digit, or string used as the field delimiter.

o **record** '*x*'

Where *x* is the character, digit, or string used as the record delimiter.

Follow all flags with a semi-colon (;).

◇ **Assign Labels**

The :LABEL instruction set in the main section identifies the fields used in the :TEXT instruction set in the order in which they will occur, plus any associated formats. You must include the labels in the :LABEL instruction set in the same order as they occur in the input data. You can only include a :LABEL instruction set in the main section of your report template. You must terminate each label definition with a semicolon.

To begin the :LABEL instruction set:

:LABEL

Create a Report Template

To define a label, enter:

labelname, option,...option;

where *labelname* is the name of the label, and can only contain uppercase or lowercase alphabetic characters. The *option* is a formatting option. The options available are in the following table:

Syntax	Explanation
strip	Uniplex strips any trailing spaces following the variable if it is not as long as the maximum field length.
left	Uniplex left justifies the variable within the field if it is shorter than the field length.
right	Uniplex right justifies the variable within the field if it is shorter than the field length.
center	Uniplex centers the variable within the field.
truncate	Uniplex truncates the variable if it is longer than the field length.
extend	Uniplex extends the length of the field if the variable is longer than the declared length.
float	Uniplex allows the position of the field to move if previous formatting on the line has changed a field length.
fixed	Uniplex places the variable in the field exactly as indicated by the template.
delete	Uniplex deletes the line if there is no variable from the input file.

Create a Report Template

You cannot specify the following formatting options: left, right, strip, center.

For example:

```
phone, right, float;
```

The default formatting options are left, extend, and fixed.

Use softkeys to help you enter the formatting options:

- 1 Press **F6** to display the Report Writer softkeys.
- 2 Press **F5** twice to display the :LABEL softkeys.
- 3 Press **F1**.

Uniplex displays:

```
Type label and press RETURN
```

- 4 Enter the name for the label and press RETURN.

Uniplex displays:

```
The label is: F1=Used in Text F2=Left Justified F3=Right  
Justified
```

- 5 Press the softkey for the formatting options you require.

Uniplex displays:

```
The label is: F1=Non-numeric F2= Numeric F3=Money
```

- 6 Press the softkey for the type of label.

Create a Report Template

Uniplex enters the correct formatting options for the type of label you have specified, and prompts you to begin entering the next label. Press **F5** to leave the :LABEL softkeys.

In addition to these formatting options, you can include a *picture* of the format as follows:

format = *pattern*

This should be the last argument on the label line.

Where the *pattern* is made up of any one or a logical combination of the following characters, separators, and symbols:

X Specifies an exact match of the characters.

Format:	Input:	Output:
format = XX/XX/XX	031298	03/12/98

U Changes lower case to upper case.

Format:	Input:	Output:
format = UXXX	fred	Fred

L Changes upper case to lower case.

Format:	Input:	Output:
format = LXXXX	Fred	fred

A Matches alpha characters (a to z and A to Z).

Format:	Input:	Output:
format = AA9	B7	B 7

9 Matches numeric characters.

Format:	Input:	Output:
format = 999.99	23.4	023.40

Create a Report Template

Z Suppresses leading and trailing zeroes.

Format:	Input:	Output:
<code>format = ZZ9.9Z</code>	23.4	23.4

***** Substitutes leading zeroes with asterisks.

Format:	Input:	Output:
<code>format = ****.*</code>	1.1	***1.1

, Separate with a comma.

Format:	Input:	Output:
<code>9,999,999.99</code>	1234669.77	1,234,669.77

/ Separate with a slash.

Format:	Input:	Output:
<code>format = 9/999/999/99</code>	123466977	1/234/669/77

0 Separate with a zero.

Format:	Input:	Output:
<code>99909</code>	1234	12304

B Separate with a blank space.

Format:	Input:	Output:
<code>999B09</code>	1234	123 04

\$ Format with a \$ sign.

Format:	Input:	Output:
<code>\$ZZ,ZZZ,ZZ9.99</code>	1000	\$1,000.00

Create a Report Template

- Display minus sign if variable is a negative number.

Format:	Input:	Output:
<code>format = -ZZ9.9</code>	-10.3	-10.3

- + Display either + or -, depending on the variable.

Format:	Input:	Output:
<code>format = +ZZ9.9</code>	10.3	-10.3
	+10.3	-10.3

- DB** Format for debit, displays DB if variable is negative.

Format:	Input:	Output:
<code>format = ZZZZ9.99DB</code>	-100.3	100.30DB

- CR** Format for credit, displays CR if variable is negative.

Format:	Input:	Output:
<code>format = ZZZZ9.99CR</code>	-100.3	100.30CR

- ()** Displays a negative variable within parentheses.

Format:	Input:	Output:
<code>format = (ZZZ99.9)</code>	-100.3	(100.3)

- %** Displays the percentage sign.

Format:	Input:	Output:
<code>format = Z9%</code>	10	10%

↘ *The variable is truncated if it is larger than the specified format.*

There is no way to distinguish a negative number if you do not use any of the positive or negative formatting options. All negative numbers are shown as positive in this case.

◇ Common Formats

This section provides examples of using the formatting options in some of the most common types of fields:

- o Text within paragraphs, for example, names.

A paragraph of text in normal spacing includes names without trailing spaces. Define the label **name1**:

```
name1, strip, float;
```

- o Numbers within paragraphs, for example, percentages.

A paragraph of text in normal spacing includes percentages without trailing spaces. Define the label **percent**:

```
percent, strip, float;
```

and include the percent sign in the text:

```
[percent]%
```

- o Text within columns, for example, lists of names.

Columns of text are left or right justified at the same point and should not disturb each other's format. Define the label **name2**:

```
name2, left, truncate, fixed;
```

- o Numerics within columns, for example, lists of salaries.

Columns of numbers are left or right justified at the same point and should not disturb each other's format. The decimal point should align. Define the label **number2**:

```
number2, right, fixed, format = ZZ9.9Z;
```

Create a Report Template

- o Money values, for example, dollars and cents.

Money values should display with the right money sign and the correct number of decimal places. Define the label **money**:

```
money, right, fixed, format = $ZZ,ZZ9.99;
```

◇ Provide Text

Provide the report layout, field definitions, and any free format text in the :TEXT instructions set. Use the normal word processing facilities including print time commands and effects. Specify a colon instead of a period before the command when using print time commands to ensure that print commands which affect screen display are not confused while creating the report, for example:

```
:FO
```

Uniplex converts the colon to a period when you run the report.

Provide the following in the :TEXT instruction set:

- o Report Layout
- o Field Definitions
- o Free Text

Each of these is detailed below.

◇ Provide the Report Layout

Include the following text in the :TEXT instruction set:

- o Headers and footers, using the normal word processing print time commands, for example :FO.
- o Title Pages
- o Column Headers

Create a Report Template

For example:

```
:TEXT
```

```
:FO2
```

```
#
```

Annual Report

```

This report contains the
sales figures up to the end
of this fiscal year

```

Month	Product	Sales
-------	---------	-------

◇ Define Fields

To define a field, use the syntax:

```
[labelname_____]
```

Use the delimiter [to start the field definition and] to end the field definition. The *labelname* you use must match a *labelname* defined in the :LABEL instruction set for this section.

For example:

```
:TEXT
```

```
[branch____] [salesmen____] [salary____]
```

You can use print effects to highlight fields. The Report Writer effects the values at runtime according to the print effect.

Create a Report Template

◇ Provide Free Text

Enter text as you would enter text into a normal word processing document, in the position you want it to appear in the report.

◇ Provide Control

You control how and under what conditions you want Uniplex to execute a subsection in the `:CONTROL` instruction set. Uniplex only executes the subsection if the condition is met. You create a subsection for each part of the report you want repeated. As the Report Writer reads in the input data, it checks the condition specified in the `:CONTROL` instruction set. If the condition is met, Uniplex executes the subsection. If not, it does not execute the subsection. In this way, you can control how your report is structured.

Consider the sample report shown in the second half of the *Worked Example* section which is an analysis of employee salaries in the branches of a company. The report prints a new page for each branch, starting with a title and then showing the salary information for each employee in that branch. The `#SECTION-branch` subsection controls this function. It calls the subsection `#SECTION-records` to process each employee record. The instruction `break branch` tells the Report Writer to restart this subsection each time the `branch` field changes and to print a new page with a new title and salary information for the new branch.

✎ *Order the data records by branch or use the Order By command in the `:DATA` instruction set. See *Specify the Data*.*

The `:CONTROL` instruction set provides more complex controls, for example, you do not want to use all the data in the input file, but only selected records (*i.e.*, you want to show only sales figures for those staffers earning more than \$20,000). A special `:CONTROL` instruction set tells the Report Writer to ignore those records where the salary is less than \$20,000. To specify a condition, enter:

`:CONTROL`
operator condition;

where the *operator* can be one of following:

Syntax	Explanation
break <i>name</i> ; (where <i>name</i> is a label name)	Uniplex re-executes this section after the value of the label changes, for example: <code>break salary;</code>
break ;	Uniplex re-executes this section after each data record.
break <i>condition</i> ;	Uniplex re-executes this section if the <i>condition</i> has changed since the last record, for example: <code>break label = branch;</code>
if <i>condition</i> ;	Uniplex only executes this section if the <i>condition</i> is true, for example: <code>if label1 > 3;</code>
while <i>condition</i> ;	Uniplex executes this section while this <i>condition</i> is true, for example: <code>while label6 < 6;</code>

The *condition* can contain any of the operators, functions, and conditional assignments. See *Operators, Functions, and Conditional Assignments*.

◇ Make Calculations

You can make calculations on data accessed in the :LOCAL instruction set by using any combination of label names, functions, operators, and numeric values. You may use formatting options to specify the format of a calculation result. You can use any of the formats listed in *Assign Labels*. Separate each line in the :LOCAL section with a semicolon (;).

Create a Report Template

- Any assignments or calculations you make in the `:LOCAL` instruction set apply to all following subsections, but not to any preceding sections.

To make calculations in the `:LOCAL` instruction set, enter:

`:LOCAL`
expressions;

Separate formatting options with commas. For example, you use the `:LOCAL` section to define the calculation to hold total salaries paid. The following entry would define the label used to identify the field (`Tot_sal`), the calculation, and the formatting for the resulting value:

```
:LOCAL  
Tot_sal = sum(salary), right, fixed, format = $99999.99;
```

The condition can contain any of the operators, functions, and conditional assignments. See *Operators, Functions, and Conditional Assignments*. In addition, you can manipulate strings in the `:LOCAL` instruction set. See *String Manipulation*.

- A calculation cannot specify a figure greater than 15 significant digits.

◇ String Manipulation

You can manipulate strings within the `:LOCAL` instruction set so that you can extract any part of a variable. For example, you may only want to use the 4th and 5th characters of a variable.

To manipulate strings, enter:

```
labelname = labelname[expression]
```

or

```
labelname = [expression, expression]
```

Create a Report Template

Expression can include any combination of values, labelnames, operators, functions, and string manipulators that result in a numeric value where string manipulators are:

Syntax	Explanation
[<i>n</i>]	The <i>n</i> th character of the string, for example: <code>label12 = label11[4]</code>
[<i>n,n</i>]	A range of characters, for example: <code>label13 = label12[1,5]</code> generates the first five characters of the string.
[' <i>x</i> ', ' <i>x</i> ']	A range of characters, giving the start and end characters, enclosed in quotes, for example: <code>label13 = label12['F','d']</code>
[\$- <i>n</i> , \$]	The end of string. \$ is the character number of the last character in the string, for example: <code>partno=serialno[\$-5,\$]</code> generates the last 5 characters of the string.

You can concatenate strings using the syntax:

label = (*label1* & *label2*)

For example:

```
partno3 =(label11 & label12) [9,16]
```

In this example the Report Writer concatenates the two strings and then assigns the 9th to the 16th characters to the label *partno3*.

Create a Report Template

◇ Operators, Functions, and Conditional Assignments

You can use the following operators, functions, rounding functions, and conditional assignments within the :CONTROL and :LOCAL instruction sets:

Operators

Syntax	Explanation
&	String, Concatenate
+	Add, Plus
-	Minus, Subtract
*	Multiply
/	Divide
=	Equal To
!=	Not Equal To
>	Greater Than
>=	Greater Than or Equal To
<	Less Than
<=	Less Than or Equal To
like	Like the Value of the Expression
not like	Not Like the Value of the Expression
%	Divide by 100

Functions

Syntax	Explanation
avg(expression)	Calculate the average of the <i>expression</i> for all records in the section.
sum(expression)	Calculate the sum of the <i>expression</i> for all records in the section.
min(expression)	Calculate the smallest value of the <i>expression</i> for all records in the section.

Create a Report Template

Syntax	Explanation
max (<i>expression</i>)	Calculate the largest value of the <i>expression</i> for all records in the section.
count (<i>expression</i>)	Count the number of records processed in the section.
len (<i>expression</i>)	Length of a string.
abs (<i>expression</i>)	Absolute value.
sign (<i>expression</i>)	Sign of a number; -1 if negative, 1 if positive, 0 if zero.
mod (<i>expr</i> , <i>expr</i>)	Modulus of a division.
round (<i>expr</i> , <i>n</i>)	Round <i>expr</i> to <i>n</i> decimal places.

You can group functions together. For example:

```
round(sum(expr), 3)
```

Conditional Assignments

You can include conditional assignments within a report template in the :LOCAL and :CONTROL instruction sets. Use the following operators and commands to make conditional assignments:

Syntax	Explanation
if then else	The IF, THEN, ELSE command.
=	Equal To
!=	Not Equal To
>	Greater Than

Create a Report Template

Syntax	Explanation
<code>>=</code>	Greater Than or Equal To
<code><</code>	Less Than
<code><=</code>	Less Than or Equal To
like	<i>Like</i> the value or expression (wildcards can be used).
not like	<i>Not like</i> the value or expression (wildcards can be used).

For example, employees are to receive a bonus if they meet a sales target of \$120,000, but not if they fall short of the target figure. You could include the following in the `:LOCAL` section:

```
:LOCAL
Bonus = if MADE > 120000 then MADE * 2% else 0; Total = Normal
+ Bonus
```

You could express this as a boolean function as follows:

```
:LOCAL
Total = Normal + if MADE > 120000 then MADE * 2% else 0;
```

You could enter this as a running total as follows:

```
:LOCAL
Total = sum(Normal + if MADE > 120000 then MADE * 2% else 0);
```

You can use the following wildcards when making conditional assignments:

- ? This matches a single character. For example: A? matches AA, AB, AC, and so on, but not A.
- * This matches any character or series of characters. That is, no characters, one character, or a series of characters.

◇ Call Subsections

You must have a main section as part of the report template. This controls the flow of process of the report, assigns labels, and *calls subsections*. The subsections can themselves call subsections.

As the report template runs, it reads and executes each line sequentially *until it reaches a call to a subsection*. When Uniplex reaches a call to a subsection it notes the position of the call, skips to the subsection, and, depending on the :CONTROL condition, begins executing it. Depending on the :CONTROL condition, it continues executing the subsection for each record.

For example, you want to produce a report that shows the sales performance for the sales staff in all the different branches in your company. You could have three sections as follows:

Main Section

- o Assigns the labels used in the report in :LABEL.
- o Provides the layout for the report and the text for the title and conclusion pages of the report in :TEXT.
- o Calculates the totals for the figures in :LOCAL.
- o Calls the subsection *branches*.

Subsection *Branches*

- o Provides the text and layout for the beginning of each new branch part of the report in :TEXT.
- o Calculates the totals for each branch in :LOCAL.

Create a Report Template

- o Contains a :CONTROL section that controls the processing through the section as follows:

If this is the first record, begin a branch part of the report, then, call the subsection records.

If this is a subsequent record with the same branch, call the subsection records.

If this is a subsequent record with a different branch, begin a branch part of the report. Then, call the subsection records.

Subsection *Records*

- o Formats the record according to :TEXT.
- o Returns to the subsection branches.

To call a subsection, enter:

#SECTION *section_name*

where *section_name* is the name of the section.

- ✎ *When you call a subsection, you do not include the hyphen between SECTION and the section name.*

◆ Run a Report

When you have created the report template, you must execute it. This means you generate the report itself by instructing Uniplex to run the Report Writer on your report template. You can run a report in one of two ways, depending on whether or not it is associated with a database.

◇ Associated with a Database

If you created a report template using the Report Writer menu from the Database Forms menu, then your report template is associated with a particular database (because you must select a database before you can use this menu).

Run a report associated with a database as follows:

- 1 Pick and point the Database Forms option.
- 2 Pick and point the Select Database option.
- 3 Pick and point the database with which your report template is associated.
- 4 Pick and point the Report Writer option.
- 5 Pick and point the Run Report option.

Uniplex displays a list of the report templates available.

- 6 Pick and point the report template you want.

Uniplex prompts for an input filename, unless you have specified NO INPUT in the :SPEC instruction:

Enter input file name:

Run a Report

7 Enter the input filename you require.

- ✎ *If you have specified NO INPUT in :SPEC and there are insufficient instructions or data to run the report you will get an error message.*

8 Uniplex outputs the report according to your specifications. There are three options:

If you have specified NO OUTPUT Uniplex places the finished report in the default clipboard.

If you have specified an OUTPUT file Uniplex places the finished report in the file you specified.

or

Uniplex prompts for an output file name:

`Enter output file name:`

Enter the name of the output file name you require.

- ✎ *If you have not specified input and output file names, Uniplex will display both prompts together.*

9 To look at the report, quit from the the Report Writer menu and then the Database Forms menu. Pick and point the Word Processor option.

If your report is in the default clipboard you can merge it into an existing or new document. See *Cut and Paste* in the **Word Processor** chapter.

If your report is in a specified file you can select the Edit a Document option, then look at that file. See *Edit a Document* in the **Word Processor** chapter.

◇ Not Associated with a Database

Run the report as follows:

- 1 Pick and point the Report Writer option.
- 2 Pick and point the Run Report option.
- 3 Enter the name of the report template.

Uniplex displays the Report Writer details form.

- 4 Complete this form as follows:

Field	Explanation
Report Template Filename	Enter the name of the template file if this field does not already contain the correct name.
Data Filename	Enter the name of file containing the input data if you have not specified the data within the template itself.
Report Output Filename	Enter the name you want for the output file if you do not want the default of <i>report.output</i> .

- 5 Press **ESC e** when the form contains the entries you require.

Uniplex creates the report in the output file you specified. If it encounters any errors in your template, it displays error messages on the screen.



Print a Report

◆ **Print a Report**

You can print a report template as follows:

- o Pick and Point the Printing option.

Print the report in the same way as you print documents. See **Printing**.

- Access Report Writer 5-5
- Add (see Enter)
- Address Label Create 5-9

- Blank Space Separator 5-47
- Break Operator 5-53

- Calculate 5-53
- Call Subsection 5-59
- Center Data 5-44
- Characters Match 5-46
- Comma Separator 5-47
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Chapter 6

FormFill



Formfill

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◆ Overview

Formfill can create forms for any office application such as invoices, purchase orders, expense reports, and paychecks:

- o Print both the form and the data onto a blank piece of paper.
- o Print information on preprinted forms.
- o Print blank forms.

✍ *This chapter explains how to complete and print existing forms. See the on-line **Form Building Tools Guide** for details of using the Create a Formfill options to design and create forms.*

◇ Access Formfill

Access Uniplex Formfill from the Main menu as follows:

- o Pick and point Formfill.

Uniplex displays the Formfill menu:

F O R M F I L L		12/10/99 12:30
USE A FORMFILL 1-Enter Data 2-Print Data and Formfill 3-Print Data only 4-Print Form only	CREATE A FORMFILL 5-Create a Formfill 6-Edit a Formfill 7-Build a Screen and Print Forms 8-View Build Log A-Formfill Alteration and Admin. H-Help Q-Quit	
F1=Enter F2=Redraw F4=Quit		F8>More



Print Data and Form

◆ Print Data and Form

You can use Uniplex Formfill to enter data into a form and print it out. To do this:

- 1 Pick and point the Enter Data option.
- 2 Pick and point the form you require.

Uniplex displays the form on the screen.

- 3 Complete the form. You can use the cursor arrow keys to move the cursor from field to field within the form.
- 4 Press **ESC e**

Uniplex saves the data and displays another blank form.

- 5 When you have finished entering data, press **ESC q**
- 6 Press **ESC q** again to return to the Formfill menu.
- 7 Pick and point the Print Data and Formfill option.

Uniplex displays the Print form. You enter the details for printing into this form. See the **Printing** chapter for information on how to complete the print selection form.

- 8 Press **ESC e**

Uniplex prints the form and the filled-in data onto a blank piece of paper.

Complete a Preprinted Form**◆ Complete a Preprinted Form**

You can use Uniplex Formfill to enter data and print it out on a preprinted form. To do this:

- 1 Pick and point the Enter Data option.

Uniplex displays a list of forms available.

- 2 Pick and point the form you require.

Uniplex displays the form on the screen.

- 3 Complete the form. You can use the cursor arrow keys to move the cursor from field to field within the form.

- 4 Press **ESC e**

Uniplex saves the data and displays another blank form.

- 5 When you have finished entering data, press **ESC q**.

- 6 Press **ESC q** again to return to the Formfill menu.

- 7 Pick and point the Print Data Only option.

Uniplex displays the Print form. You enter the details for printing into this form. See the **Printing** chapter for information on how to complete the print selection form.

✍ *Ensure that you have loaded the required preprinted forms into your printer.*

- 8 Press **ESC e**

Uniplex prints the data onto your preprinted form.

**Print Form Only**◆ **Print Form Only**

You can use Uniplex Formfill to print out copies of a blank form. To do this:

- 1 Pick and point the Print Form Only option.

Uniplex displays the available forms.

- 2 Pick and point the form you require.

Uniplex displays the Print form. You enter the details for printing into this form. See the **Printing** chapter for information on how to complete the print selection form.

- 3 Press **ESC e**

Uniplex prints the form.



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Chapter 7

Printing

Printing

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◆ Overview

You can use Uniplex to print out copies of your documents and files on a wide range of printers, using different fonts, character sets, and typefaces to enhance the appearance of documents. You can:

- o Print a document or file immediately, using Easi-Print.
- o Print using a variety of styles.
- o Print draft and quality versions of documents.
- o Print using different printers attached to the computer system.
- o Print the whole document or a range of pages.
- o Print multiple copies of a document.
- o Print using fixed or proportionally spaced characters.
- o Print text and graphics on the same page.
- o Print on different sizes of paper.
- o Print page-by-page.

Uniplex has a variety of print *styles* which let you produce printed documents to meet your individual requirements. The most commonly used styles are *Fixed-Pitch* and *Quality*.



Overview

Fixed-Pitch printing is intended for documents you want to print quickly and that do not require any special formatting. Quality printing is intended for documents that require special formatting, for example proportional spacing. In addition, you can define your own print styles. See *Print Styles* for an overview of print styles. See the **Uniplex II Plus User Guide** for details of creating print styles.

Uniplex makes it easy for you to produce printed copies of documents or files. You can print using either of two methods:

- o **Use Easi-Print**

Using Easi-Print, you need only specify the document or file name to print. Uniplex prints the document or file on a default printer in a default style.

- o **Complete a Print Form**

You complete a Print form to change the printing defaults. You can also specify the *style* and printer you want to use. See below for more details. In addition, you can specify various aspects of the final printed document format.

- ◇ **Access Printing**

You can access the Uniplex printing facilities in a variety of ways.

To access Printing from the main menu:

- o Pick and point the Printing option from the main menu.

Uniplex displays the Print Menu.

P R I N T M E N U

08/29/99 12:30

PRINT	STYLE
1-Easi-print	5-Create New Print Style
2-Print Using Form	6-Alter Print Style
	7-Copy Print Style
DEFAULTS	8-Delete Print Style
3-Show Print Defaults	
4-Set Print Defaults	
PRINT QUEUES	
	H-Help
S - Show Print Requests	Q-Quit

F1=Enter F2=Redraw F4=Quit

F8>More

To access Printing while working in any Uniplex application:

- 1 Press **ESC xu** or **F12** to access the Utilities Desk.

Uniplex displays the popup Utilities Desk menu.

- 2 Pick and point the Next page option.

Uniplex displays the Print Desk.

- 3 Pick and point the Print option you require.

To access Printing while working with the Word Processor:

- 1 Press **F2** to display the command menu.

- 2 Pick and point the **P**rint option.

Uniplex displays the Print ring menu.

- 3 Pick and point the print option you require.

**Print**◆ **Print**

You can print any document or file you have created, even if you created it outside of Uniplex.

If you want to print out a document or file immediately, using the default style and printer, use Easi-Print. Easi-Print is described in the section that follows.

If you want to print out a document and use a style other than the default style, or make modifications to the style, you complete the Print Form. See *Print Using Print Form*.

◇ **Easi-Print**

To print a document or file immediately using your default printer and style:

- 1 Pick and point the Printing option.

Uniplex displays the Print Menu.

- 2 Pick and point the Easi-Print option.

Uniplex prompts for the document name.

- 3 Enter the document name and press RETURN. Press the down arrow to display a pick and point list of all documents.

Uniplex prints the document using the default printer and style.

See *Print Defaults* for details of how to change these. See *Print Styles* for details of how to define the type of printing you require.



◇ Print Using Print Form

Use the Print form if you want to print a document using a different style or printer than the defaults or if you want to specify additional criteria like number of copies or the range of pages to print:

- 1 Pick and point the Printing option.

Uniplex displays the Print Menu.

- 2 Pick and point the Print Using Form option.

The name of the document you want to print is requested.

- 3 Enter the name of the document you want to print and press RETURN (include the full path if not in the current folder). The Print form displays:

ENTER DETAILS P R I N T S C R E E N Page 1/3

Name of document	[chapter1.1_____]
Printer	[EPSON LASER_____]
Style	[Quality_____]
Print from page number	[1___] to page number [9999] Page numbers: [As printed_]
Number of copies	[1___]
Left hand margin indent	[0___]

(Use DOWNARROW to access advanced printing options)

F1=Enter F2=Redraw F3>Edit F4=Quit F5=Expand F6>Record



Print

- 4 Complete the Print form by using the arrow keys to move between fields and SPACEBAR to select options. Press any character key to display a pick and point list of available options.

Field	Explanation
Name of Document	This field should contain the name of the document you want to print.
Printer	Select a printer name.
Style	Select a Print Style. See <i>Print Styles</i> for details of how to specify these format parameters.
Print from Page Number	Enter the start and end pages to print a page range.
Page Numbers	Define the page range details:
As Printed	Print the numbered pages of the document as determined by change page number (.PN) commands. This is the same as the physical pages if there are no .PN commands.
Physical	Print the physical pages of the document, taking no account of .PN commands. Printing pages 1-3 of a document whose numbering starts at page 20 effectively prints pages 20-22.
WP (approximate)	Print the viewed pages of the document following the page breaks shown when editing on screen.
Number of Copies	The number of copies to print.



Field	Explanation
Left Hand Margin Indent	The number of spaces for the left hand margin indent. The whole page is offset by this number of spaces.

- 5 If you want to specify further characteristics for the print, press the down arrow to display the next part of the form. Otherwise, press **ESC e** to print the document.

ENTER DETAILS P R I N T S C R E E N Page 2/3

Print to screen first	[No__]
Prompt after each page	[No__]
Print alternate pages	[No__]
Print from section	[0__] to section number [9999]
Use printer's copy facility if available	[Yes_]

(Use DOWNARROW to access additional printing options)

F1=Enter F2=Redraw F3>Edit F4=Quit F5=Expand F6>Record

- 6 If you have displayed the next part of the form, complete this form as follows:

Field	Option/Explanation
Print to Screen First	Yes Display print format on screen before printing.
	No Print directly.



Print

Field	Option/Explanation
Prompt after Each Page	Yes Request OK before printing each page (for manual paper feeding).
	No Print continuously.
Print Alternate Pages	Yes Print only alternate pages (manual double-sided printing).
	No Print all pages.
Print from Section Number	Enter the start and end sections to print (the document must contain print time commands for sections).
Use Printer's Copy Facility if Available	Yes Send a single copy of the document to the printer and allow it to handle multiple copy printing.
	No Send print images of each copy.

7 Press **ESC e** to print the document when you have specified all your requirements. Press the down arrow to display the next part of the form to override the paper size and margins defined in the print style.

8 The first field of page three of the Print form displays:

`Use style from Pre-Styled document`

This will use the style settings that are recorded within the document if the document is Pre-Styled. Press SPACEBAR to scroll the entry if you do not wish to use the print style defined in the document format details:

`Use current print style`

The system will use the style from the first page of the form (also used if the document is not Pre-Styled). You can override the paper sizes and margins in this style by scrolling to:

Override the current print style

ENTER DETAILS P R I N T S C R E E N Page 3/3

This screen is used to override the layout specified for the style that you have chosen

[Use style from Pre-Styled document_____]

Paper size	[8x11_____]
Header margin	[0_]
Footer margin	[0_]
Left margin	[0_]
Right margin	[0_]
Gutter margin	[0_]

F1=Enter F2=Redraw F3>Edit F4=Quit F5=Expand F6>Record

9 Now complete the form as follows:

Field	Explanation
Paper Size	Select a paper size.
Header Margin	Number of lines for the header margin.
Footer Margin	Number of lines for the footer margin.
Left Margin	Number of characters for the left margin.



Print

Field	Explanation
Right Margin	Number of characters for the right margin.
Gutter Margin	Number of characters to be added on alternate right and left margins for binding.

✎ *It is only useful to change the page size and margins if you are using a style which allows reformatting (i.e., Quality).*

10 Press **ESC e** to print the document.

◆ Print Styles

Uniplex is delivered with a variety of print styles which have been designed to meet a wide range of needs. In addition, your System Administrator may have set up additional print styles to suit the requirements of your department or organization.

Each print style defines the way that Uniplex prints out your document or file. For example, it specifies the printer you will use, the size of paper, the typeface, and the layout of your document on the page. In addition to these basic requirements, each style also defines the more complex aspects of producing printed documents of a professional quality.

Normally, you only need to know the name of the style that prints out documents to meet your needs. If you have specific requirements that are not met by the styles on your system, you can define your own styles. See the **Printing** chapter in the **Uniplex II Plus User Guide** for details of creating print styles.

Normally, Uniplex provides the following print styles:

Print Style	Explanation
Quality	Prints documents proportionally spaced, or with multiple fonts. Reformats, justifies, and scales the text to fit the page width.
Semi-Quality	Prints documents proportionally spaced or with multiple fonts. Justifies and scales the text to fit the page width, but does not reformat.
No-Reformat	Prints documents proportionally spaced or with multiple fonts. Does not justify, scale the text to fit the page width, or reformat.
Draft	Prints documents fixed pitch, does not reformat or justify the text. Disables printing of high resolution graphics.

**Print Styles**

Print Style	Explanation
Fixed-Pitch	Prints documents fixed pitch, does not reformat, but does justify the text.
Spreadsheet	Prints spreadsheets in landscape mode. Does not reformat or justify.
Non-Uniplex	Prints documents that were not created using Uniplex. Does not reformat or justify the text.
Quality-5x8 or Quality-A5	Same as Quality, but the text is scaled to fit a 5 by 8 or A5 page size (5 by 8 is a standard American page size, A5 is a standard European page size).
Semi-Qual-5x8 or Semi-Qual-A5	Same as Semi-Quality, but the text is scaled to fit a 5 by 8 or A5 page size (5 by 8 is a standard American page size, A5 is a standard European page size).

Each style also defines margins and other controls for the print job. See the **Printing** chapter in the **Uniplex II Plus User Guide** for details of creating print styles.

◆ **Print Defaults**

The System Administrator sets a print default for each user which defines an Easi-Print printer and print style. You can change the print defaults and set a default for each Uniplex application. See the sections below for details of displaying and changing print defaults.

◇ **Show Print Defaults**

You can display your print defaults as follows:

- 1 Pick and point the Printing option.

Uniplex displays the Print Menu.

- 2 Pick and point the Show Print Defaults option.

Uniplex displays your default printer name and style.

◇ **Set Print Defaults**

You can change your print defaults as follows:

- 1 Pick and point the Printing option.

Uniplex displays the Print Menu.

- 2 Pick and point the Set Print Defaults option.

Uniplex displays the Print Defaults form.

- 3 Complete the Print Defaults form by scrolling to select a default printer and style, then select the application to which these defaults will apply.

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Chapter 8

Integration



Integration

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◆ Overview

This chapter describes how to transfer skills and information between Uniplex applications and how to switch between them. There are four key components of Uniplex integration:

- o **Consistent Command Structure.** Uniplex uses the same command set in all its different applications. This means, for example, that you use the same commands to edit a piece of text created with the Word Processor and an area of the Spreadsheet. You use the same commands to find a record stored in the database and find a file in the File Manager.
- o **External Windows.** The External Windows facility lets you switch between two or more Uniplex tasks or applications quickly and efficiently. For example, you can work with the Word Processor or the Spreadsheet and have your calendar always at hand or you can work with two different word processor documents, transferring information between them.
- o **Cut and Paste.** You can cut out a portion of text, data, or graphics from any Uniplex application and transfer it to a different application. For example, you can cut out the result of a database inquiry, perform calculations on it using the Spreadsheet, and incorporate it in a report using the Word Processor.
- o **Desk Options.** You can use the desk options to perform Uniplex tasks directly from another application. For example, you can add an event to your calendar while you are working in the Spreadsheet or you can search through the database while you are preparing a report using the Word Processor.

These components are described in detail in the **Integration** chapter of the **Uniplex II Plus User Guide**.



Overview

Uniplex Advanced Office System provides the following additional facilities to further enhance Uniplex integration:

- o Rapid Menu

See the following section for details.

- o Personal Organizer Menu

The Personal Organizer menu provides options that make use of Uniplex applications in a useful and integrated fashion. See **Personal Organizer** for details.

The following section explains how to use Rapid Menu.

◆ Rapid Menu

The Rapid Menu contains a collection of options from several of the applications that make up Uniplex. This collection is intended to provide your most commonly-used options on one menu.

Therefore, if you use a mixture of applications regularly, you can access them all from the same place rather than having to access the complete menu for each of the applications. Of course, if you want the complete functionality of an application, you access the menu for that particular application.

You can access the Rapid menu from the Main menu as follows:

- o Pick and point the Rapid Menu option.

Uniplex displays the Rapid Menu as follows:

R A P I D M E N U		08/29/99 11:50
COMMON APPLICATIONS		UTILITIES
1 - Create a Document		P - Printing
2 - Edit a Document		C - Change Folder
3 - Create a Spreadsheet		F - File Manager
4 - Edit a Spreadsheet		
5 - Amend/Inquire Database Records		
6 - Amend/Inquire Time Manager		
7 - Send Mail		H - Help
8 - Receive Mail		Q - Quit

F1=Enter F2=Redraw F4=Quit F8>More



Rapid Menu

The options on the Rapid menu provide the following facilities:

Option	Explanation
Create a Document	Invokes the Word Processor and places you in a new document. See Word Processor in the Uniplex II Plus User Guide for details.
Edit a Document	Prompts for the name of a document to edit and invokes the Word Processor, placing you in this document. See Word Processor in the Uniplex II Plus User Guide for details.
Create a Spreadsheet	Invokes the Spreadsheet and places you in a new spreadsheet. See Spreadsheet in the Uniplex II Plus User Guide for details.
Edit a Spreadsheet	Prompts for the name of a spreadsheet to edit and invokes the Spreadsheet, placing you in this spreadsheet. See Spreadsheet in the Uniplex II Plus User Guide for details.
Amend/Inquire Database Records	Displays a pick and point list of available databases. Select a database. A list of tables available with this database is displayed. Select a table; the form for this table is displayed. See Database Forms in the Uniplex II Plus User Guide for details.
Amend/Inquire Time Manager	Displays the Calendar Amend/Inquire form. See Time Manager for details.
Send Mail	Places you in the Memo Pad to write a message. Press ESC e when you have completed the message. Uniplex displays the Send form. Complete the Send form with the addressee and any other details needed. See Electronic Mail for details.

Option	Explanation
Receive Mail	Checks your Incoming Mail for any new mail. The Select Mailbox form (if you use mailboxes) displays if you have new mail. See Electronic Mail for details.
Printing	Displays the Print menu.
Change Folder	Displays the Change Folder dialog.
File Manager	Runs the File Manager.
Help	Runs Rapid menu help.
Quit	Returns to the Main menu.

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Appendix A

Menu Maps



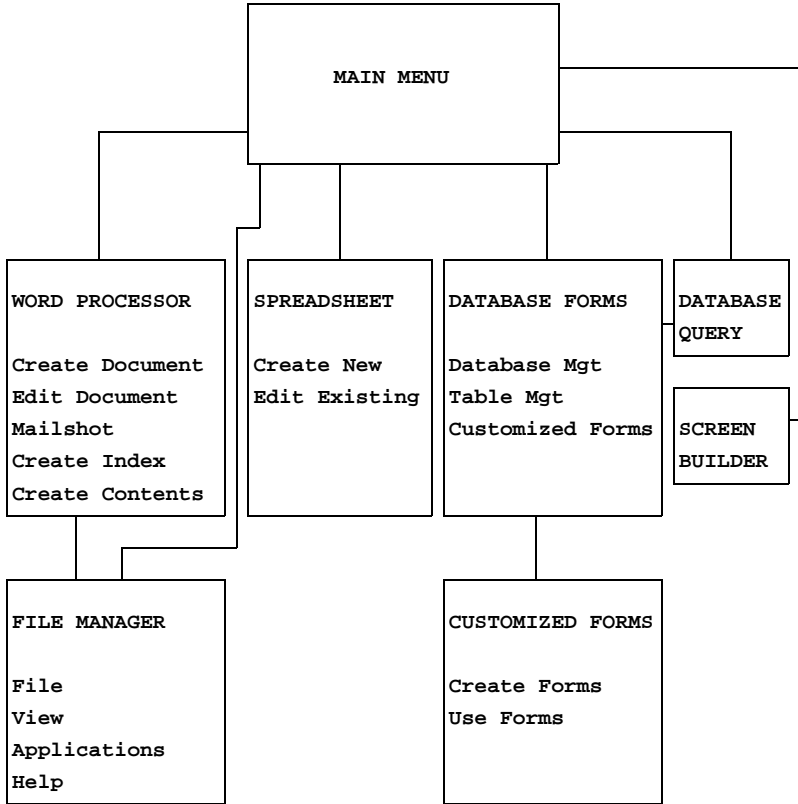
This appendix contains menu maps for all Uniplex combinations. Each map shows how you can access the major applications and utilities. The illustration of each menu shows the major functionality accessible from the menu, but does not list each option available from the menu.

There are menu maps for the following Uniplex combinations:

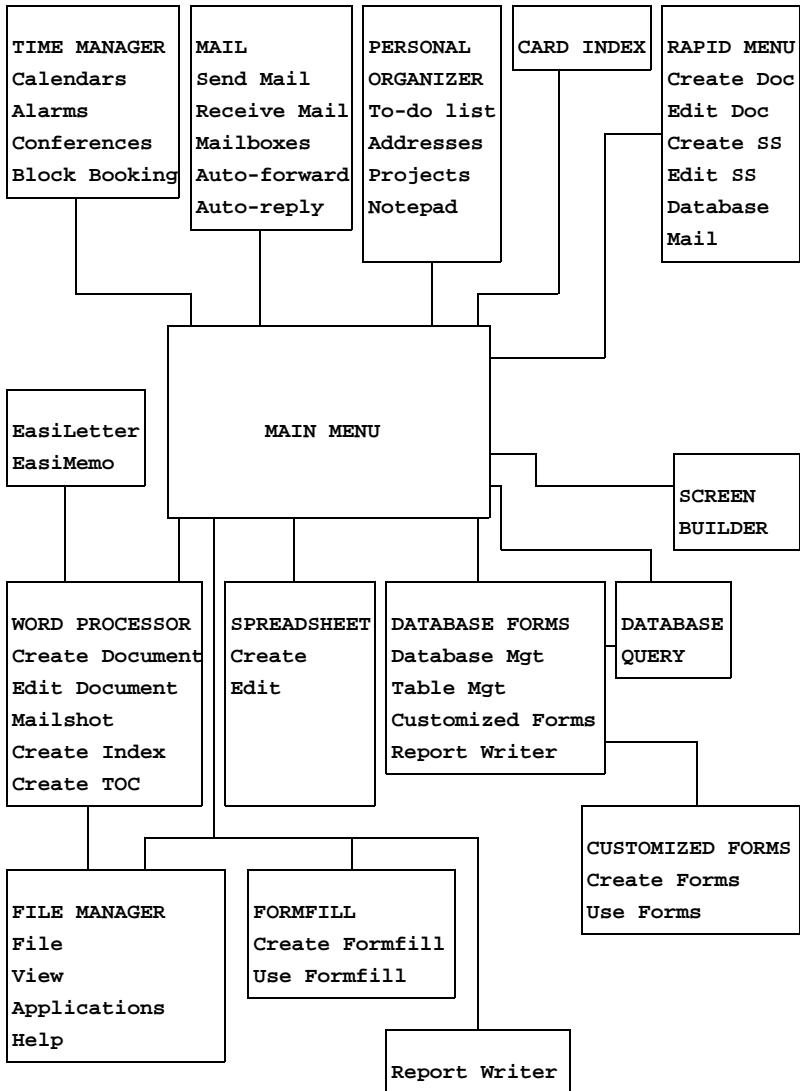
- o Uniplex II Plus
- o Uniplex II Plus with Uniplex Advanced Office System
- o Uniplex II Plus with Uniplex Advanced Office System and Uniplex Advanced Graphics System
- o Uniplex II Plus with Uniplex Advanced Graphics System



Uniplex II Plus Menu Map

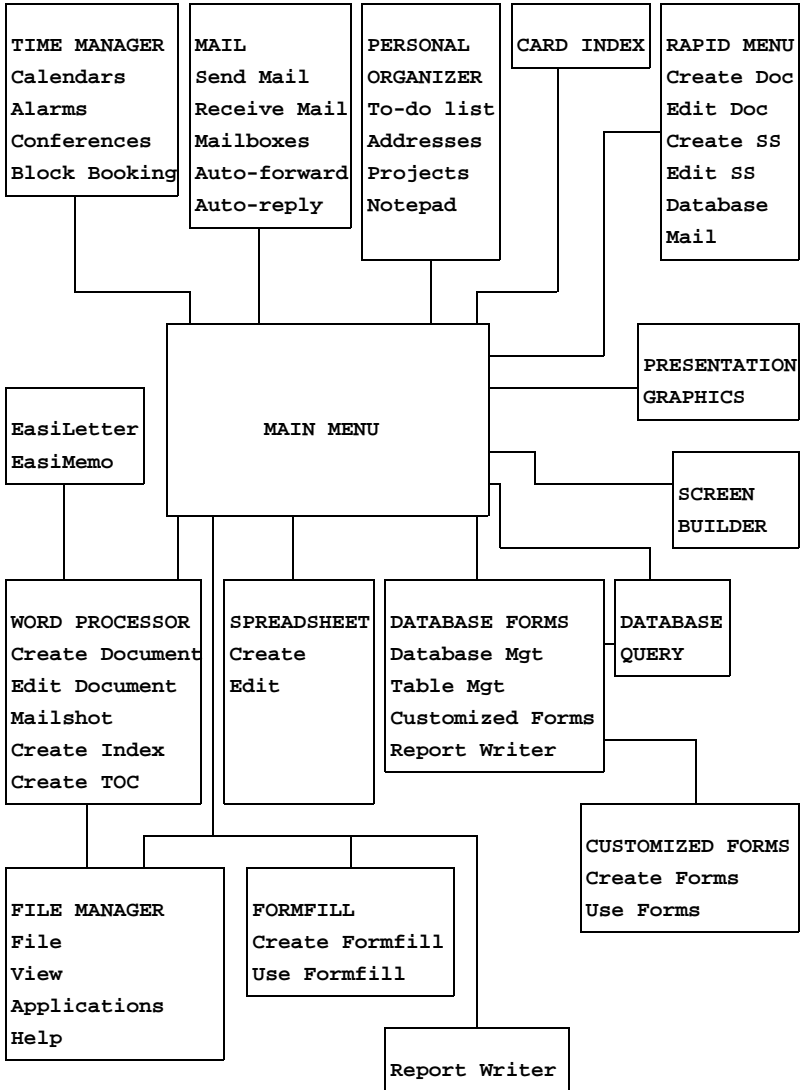


Uniplex II Plus with Advanced Office System Menu Map



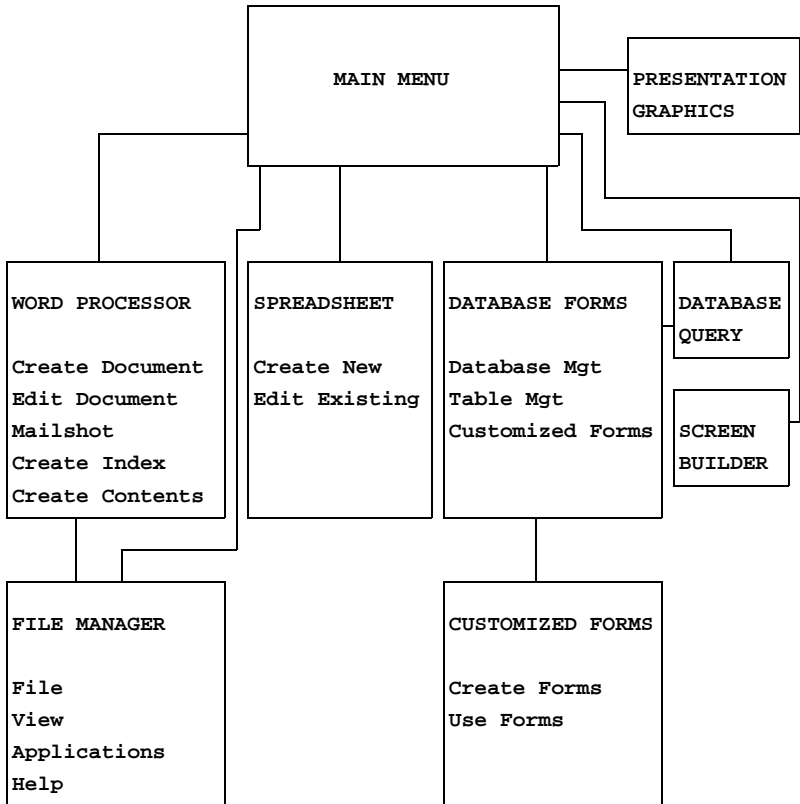


**Uniplex II Plus with Advanced Office System and
Advanced Graphics System Menu Map**





Uniplex II Plus with Advanced Graphics System Menu Map



Appendix B

Desk Maps



This appendix shows the Desk and Utility popup menus available. The options available on these menus depend on which Uniplex products are installed on your system. See your System Administrator for details.

You can access the Desk popup from any Uniplex application as follows:

- o Press **ESC xd** or **F9**

The Desk pops up on your screen. Press **9** to display the next page of the menu. Press **0** to display the previous page of a menu.

You can access the Utility popup from the Desk popup, and you can access them directly from any Uniplex application as follows:

- o Press **ESC xu** or **F12**

Move through the menus to find the option you require. See the maps below to see how the Desk and Utility popups are organized.



Uniplex II Plus Desk Maps

Uniplex DESK: Page 1 of 1

- 1 = Window WP
- 2 = Spreadsheet
- 3 = Database Forms
- 4 = Word Processor
- 5 = Window Spreadsheet
- 6 = Database Query
- 7 = Sketchpad

9 > Next Page
0 > Previous Page

ESC Q to Quit

Uniplex UTIL: Page 1 of 2

- 1 = List Files
- 2 = View Clipboards
- 3 = Clock
- 4 = File Manager
- 5 = Calculator

9 > Next Page
0 > Previous Page

ESC Q to Quit



Uniplex UTIL: Page 2 of 2

- 1 = Print Form
- 2 = Show Print Defaults
- 3 = Set Print Defaults
- 4 = Create New Print Style
- 5 = Edit Print Style
- 6 = Copy Print Style
- 7 = Delete Print Style
- 8 = Show Print Requests

9 > Next Page

0 > Previous Page

ESC Q to Quit



Uniplex II Plus with Advanced Office System Desk Maps

Uniplex DESK: Page 1 of 2

- 1 = Mail
- 2 = Add Calendar Event
- 3 = Phone/Information List
- 4 = Send a Letter
- 5 = While-you-were-out
- 6 = Window WP
- 7 = Spreadsheet
- 8 = Database Forms

9 > Next Page
0 > Previous Page

ESC Q to Quit

Uniplex DESK: Page 2 of 2

- 1 = Word Processor
- 2 = Window Spreadsheet
- 3 = Database Query
- 4 = Sketchpad
- 5 = Formfill
- 6 = Full Time Manager

9 > Next Page
0 > Previous Page

ESC Q to Quit



Uniplex II Plus with Advanced Office System Desk Maps

Uniplex UTIL: Page 1 of 2

- 1 = List Files
- 2 = View Clipboards
- 3 = Clock
- 4 = File Manager
- 5 = Calculator
- 6 = Phone & Address List
- 7 = Card Index
- 8 = Personal Organizer

- 9 > Next Page
- 0 > Previous Page

ESC Q to Quit

Uniplex UTIL: Page 2 of 2

- 1 = Print Form
- 2 = Show Print Defaults
- 3 = Set Print Defaults
- 4 = Create New Print Style
- 5 = Edit Print Style
- 6 = Copy Print Style
- 7 = Delete Print Style
- 8 = Show Print Requests

- 9 > Next Page
- 0 > Previous Page

ESC Q to Quit



Uniplex II Plus with Advanced Graphics System Desk Maps

Uniplex DESK: Page 1 of 1

- 1 = Window WP
- 2 = Spreadsheet
- 3 = Database Forms
- 4 = Word Processor
- 5 = Database Query
- 6 = Sketchpad
- 7 = Presentation Graphics
- 8 = Presentation Editor

- 9 > Next Page
- 0 > Previous Page

ESC Q to Quit

Uniplex UTIL: Page 1 of 2

- 1 = List Files
- 2 = View Clipboards
- 3 = Clock
- 4 = File Manager
- 5 = Calculator

- 9 > Next Page
- 0 > Previous Page

ESC Q to Quit



Uniplex II Plus with Advanced Graphics System Desk Maps

Uniplex UTIL: Page 2 of 2

- 1 = Print Form
- 2 = Show Print Defaults
- 3 = Set Print Defaults
- 4 = Create New Print Style
- 5 = Edit Print Style
- 6 = Copy Print Style
- 7 = Delete Print Style
- 8 = Show Print Requests

9 > Next Page

0 > Previous Page

ESC Q to Quit



Uniplex II Plus with Advanced Office System and Advanced Graphics System Desk Maps

Uniplex DESK: Page 1 of 2

- 1 = Mail
- 2 = Add Calendar Event
- 3 = Phone/Information List
- 4 = Send a Letter
- 5 = While-you-were-out
- 6 = Window WP
- 7 = Spreadsheet
- 8 = Database Forms

- 9 > Next Page
- 0 > Previous Page

ESC Q to Quit

Uniplex DESK: Page 2 of 2

- 1 = Word Processor
- 2 = Window Spreadsheet
- 3 = Database Query
- 4 = Sketchpad
- 5 = Formfill
- 6 = Full Time Manager
- 7 = Presentation Graphics
- 8 = Presentation Editor

- 9 > Next Page
- 0 > Previous Page

ESC Q to Quit

Uniplex II Plus with Advanced Office System and Advanced Graphics System Desk Maps

Uniplex UTIL: Page 1 of 2

1 = List Files
2 = View Clipboards
3 = Clock
4 = File Manager
5 = Calculator
6 = Phone & Address List
7 = Card Index
8 = Personal Organizer

9 > Next Page
0 > Previous Page

ESC Q to Quit

Uniplex UTIL: Page 2 of 2

1 = Print Form
2 = Show Print Defaults
3 = Set Print Defaults
4 = Create New Print Style
5 = Edit Print Style
6 = Copy Print Style
7 = Delete Print Style
8 = Show Print Requests

9 > Next Page
0 > Previous Page

ESC Q to Quit

Glossary



<i>Access</i>	A term used to refer to the type of privilege you have to any kind of information stored on the computer.
<i>Address</i>	In Electronic Mail, the name you use to send messages to other users.
<i>Alarms</i>	A message that Uniplex displays on your screen (and optionally sounds the terminal bell) at a time or interval you specify to remind you of an event or task.
<i>Alias</i>	A named list of other users' names. You specify this name rather than having to specify each user name.
<i>Application</i>	A term used to refer to a component of Uniplex, for example the Spreadsheet.
<i>Append</i>	Adding some information to the end of a file or document.
<i>Archive</i>	Transferring information from the on-line computer memory to a tape or disk which can be stored indefinitely. When used with Electronic Mail, means storing mail for future reference.
<i>Arrow Keys</i>	The four keys on your keyboard, normally labeled with an illustration of an arrow key, each pointing in a different direction. Generally, you use the arrow keys to move the cursor in the required direction.
<i>At-a-Glance Calendar</i>	A display of the month you specify showing the current status of your calendar.



<i>Backup</i>	A copy, normally to tape, of the contents of the disk you use for your work. It is important to make regular backups in case of system failures.
<i>Bold</i>	A method of effecting text, showing it darker than normal text.
<i>CTRL Key</i>	A key on your keyboard that you use in conjunction with other keys to initiate a Uniplex function. It is normally positioned outside the main keyboard.
<i>Calendar</i>	A part of Time Manager that lets you organize your daily, weekly, and monthly schedules.
<i>Card Index</i>	A Uniplex application that lets you store names and addresses in a way that is fast and easy to retrieve.
<i>Center</i>	Positioning text in a central position on the screen or page.
<i>Circulation List</i>	In Electronic Mail, a named list of addressees. Uniplex prompts each recipient of the message to forward the message to the next person in the circulation list.
<i>Clipboard</i>	Used with <i>Cut and Paste</i> . A special area of computer memory where Uniplex stores information you cut. When you paste, Uniplex pastes the contents of the clipboard. There is a default clipboard which Uniplex always uses unless you specify otherwise. In addition, there are nine other clipboards.



<i>Clock</i>	You can display a clock on your terminal screen that shows the current time, based on the time of the computer's own clock.
<i>Command</i>	A sequence of keystrokes or an entry you make that initiates a Uniplex task.
<i>Conferences</i>	An event that you schedule using Time Manager involving more than one calendar.
<i>Cursor</i>	A small marker that always appears on the screen to indicate your current position.
<i>Current</i>	The action or selection that is presently active.
<i>Cut and Paste</i>	The Uniplex facility for moving, rearranging, and reorganizing information. You can use Cut and Paste with most Uniplex applications to transfer information. You <i>cut</i> information to a <i>clipboard</i> and then <i>paste</i> it at the required point.
<i>Default</i>	The action or option used if you do not select otherwise.
<i>Desk Menu</i>	A popup menu that you can display while using most Uniplex applications. From the Desk Menu you can access other applications and Uniplex utilities.
<i>Directory</i>	Your allocation of computer memory for storing your documents and files. This area is divided into a tree structure. Within a directory, there are subdirectories. Subdirectories are sometimes known as <i>folders</i> .



<i>Document</i>	Where you store each piece of work you create using the Word Processor. A document contains text. It can contain a few words or many pages of words.
<i>ENTER Key</i>	A key on your keyboard you can use instead of the <i>RETURN</i> key.
<i>ESC Key</i>	A key on your keyboard you use in conjunction with other keys to initiate Uniplex tasks. It is normally positioned outside the main keyboard.
<i>Edit</i>	The task of changing and updating information using Uniplex facilities. Mainly refers to the task of modifying text using the Word Processor.
<i>Electronic Mail</i>	A Uniplex application for sending and receiving messages to and from other Uniplex or foreign users.
<i>Field</i>	One or more blank spaces on a form that you complete with your requirements.
<i>File</i>	Where you store the work you carry out using Uniplex.
<i>File Manager</i>	A Uniplex application for attaching summary details to a document or file. These details help you find and maintain your documents efficiently.
<i>Fixed Pitch</i>	A method of displaying or printing text where each character takes up the same amount of space.



<i>Folder</i>	A subdivision of the area of computer memory allocated to you and named by you that contains one or more related <i>documents</i> . A folder is sometimes referred to as a <i>subdirectory</i> .
<i>Font</i>	A general name describing the characteristics of printed characters.
<i>Footer</i>	Text that is placed at the bottom of each page of a document. This can be information like the document title and the page number.
<i>Footnote</i>	Text that you want printed outside the main body of text on a page. You can place a footnote at the bottom of a page or at the end of the document.
<i>Format</i>	The general layout of text and data.
<i>Form</i>	A screen display containing <i>fields</i> . You complete the fields with your requirements.
<i>Formfill</i>	A Uniplex application that lets you create forms. These forms can be for completing on the screen, preprinted but uncompleted paper forms, or preprinted and completed paper forms.
<i>Formula</i>	In the Spreadsheet, a command that includes Spreadsheet functions.
<i>Function Keys</i>	The numbered function keys on your keyboard (not the keys for actually entering numbers) that you use to invoke softkeys.
<i>Global Commands</i>	Commands that have an effect throughout the document or file.



<i>Glossaries</i>	An often-used section of text that you create once and then include whenever you need it in other documents.
<i>Hard Return</i>	A line break you do not want reformatted.
<i>Header</i>	A word or line you want repeated at the top of each page of a document. These are only printed when you print the document.
<i>Help</i>	Context-sensitive descriptive text you can display at any point while using Uniplex, to provide guidance on the task you are currently carrying out.
<i>Justification</i>	The process by which extra blank spaces are added between words so that each line is of the same length.
<i>Landscape Printing</i>	A method of printing where the lines are printed across the length of the paper, rather than the width of the paper. This is useful for very wide pieces of text.
<i>Macros</i>	A collection of Uniplex commands and functions that you build into a logical sequence to perform a specific task. You can then execute the macro to carry out the task.
<i>Mail</i>	See <i>Electronic Mail</i> .
<i>Mailboxes</i>	Subdivisions of your mail areas for storing related messages together.
<i>Mail Merge</i>	A Uniplex facility that lets you create a single letter and from this create personalized versions for sending to different people.



<i>Margin</i>	The left and right boundaries of text in a document. The left and right margins are defined by the ruler.
<i>Menu</i>	A list of options shown on the screen. Use pick and point to select an option.
<i>Message</i>	In Electronic Mail, a letter or memo that you send or receive.
<i>Office Automation</i>	Describes the collection of computer software tools that are used within the office.
<i>Operating System</i>	The system that provides the initial level of user interface for using a computer. Uniplex is a layered application that runs on top of the operating system.
<i>Operating Modes</i>	A number of Uniplex applications can run in different modes. For example, the Word Processor can run in <i>insert</i> or <i>overtyp</i> e mode.
<i>Page Break</i>	The point at which you reach the maximum number of lines specified in a document or any point where you want a new page to start in a document.
<i>Pattern Matching</i>	A method of matching characters, words, or phrases to find data. This is used in many Uniplex applications, for example Database Forms.
<i>Pick and Point</i>	The method of selecting options from menu. You move the highlight to the required option and then press RETURN.



<i>Popup Menu</i>	A menu that Uniplex can display while you are using most Uniplex applications. It pops up on the screen, overwriting only a portion of the screen. You can pick and point options from it like any other menu.
<i>Print Time Commands</i>	Commands that you enter into a document or file that cause some action to take place when the document or file is printed.
<i>Proportional Spacing</i>	A method of printing text where each character is printed at a size that is best for it.
<i>Quit</i>	Leaving an application without saving the work you have done while using the application.
<i>RETURN Key</i>	A key on your keyboard (sometimes labeled ENTER). You press the RETURN key to indicate the end of a line of input.
<i>Record</i>	<p>In the Database, a piece of information stored in a database table.</p> <p>In Key Recorder the action of storing a sequence of keystrokes for future use.</p>
<i>Refresh the Screen</i>	Where you request Uniplex to redraw the screen display. This does not affect the data that is currently being displayed.
<i>Report Writer</i>	A Uniplex application that allows you to produce professional and, if required, complex reports using information stored in the database or anywhere else on the system.



<i>Ring Menus</i>	A list of options displayed in a horizontal list along the top of the screen. You can select options from these menus using pick and point. They provide context-sensitive functionality within an application.
<i>Ruler</i>	A line shown at the top of the Word Processing screen. It provides a guide to the format of text. Rulers specify tab, margin, and paragraph indentation. They also indicate whether text is to be justified.
<i>Scroll</i>	Moving the screen display to show other portions of text or data above or below the current display.
<i>Sketch Pad</i>	A Uniplex application for drawing sketches and diagrams using the keyboard and screen.
<i>Softkey</i>	A Uniplex function that you can invoke using the function key of the same number. A softkey menu is displayed on the bottom line of the screen while using most Uniplex applications.
<i>Spell Check</i>	A part of the Word Processing application that checks the spelling of documents, and offers alternatives for misspelt words.
<i>Spreadsheet</i>	A Uniplex application for analyzing data. It is based on the traditional spreadsheet grid, but is much larger and provides a wide range of functions.
<i>Status Line</i>	Most Uniplex applications display a status line at the top of the screen. This provides information on the current status of the application.



<i>String</i>	A series of one or more characters, for example a word or a sentence.
<i>Symbols for Searching</i>	Special characters used to find information in forms-based applications.
<i>Syntax</i>	A number of rules pertaining to the command-based applications. For example, whether to include a space after a comma in a statement.
<i>Tab</i>	A set column width, marked by T on the ruler, that you can move the cursor to using the TAB key.
<i>Table</i>	In the database, a collection of records.
<i>Template</i>	The required layout for input to an application that uses text-based instructions.
<i>Terminal</i>	The keyboard and screen are collectively known as your terminal.
<i>Time Manager</i>	A Uniplex application that helps you to maintain and control your time.
<i>Variable</i>	A part of a command line or statement that varies according to the situation or your requirements.
<i>Window</i>	A portion of the terminal screen. The screen can be divided into up to nine windows, each displaying different information.
<i>Word Processor</i>	A Uniplex application that lets you enter, edit, and effect text.

Topic Index



Additional information can be found in the on-line documentation available under the System Administration menu or through the File Manager's Help pull down menu.

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