

# DeskTop Set™

Professional Organizer for Windows

## **User Guide**



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# 1

# Introduction

## How Desktop Set Works For You

DeskTop Set has been developed with a single goal in mind: to allow you to become more organized and productive. Its modular building blocks are integrated, and each of them works well on its own. If you already use a scheduling program, you may consider integrating just Address Book and Dialer into your system. If you use a database to store names, addresses, and telephone numbers, you might add just the Dialer and Calendar. If you are attached to one of the other organizational methods shown below, DeskTop Set will work with that, too.

DeskTop Set is a professional tool— simple and elegant on the one hand, comprehensive on the other. As a professional tool, it gives you more with increased usage and expertise. Here is why it is ready-to-use out of the box, yet sophisticated enough to grow with you:

- ◆ DeskTop Set installs easily and is immediately useful. You do not need extra training or professionals to set up forms, establish links to data, make connections, or define field names before you are productive.
- ◆ Everything you need to export, import, backup, or print professional-quality calendars, notes, letters, envelopes, etc. is included. DeskTop Set is also willing to work with your existing programs.

- ◆ File tabs let you switch between personal and business files, as well as local and network, with one click.
- ◆ DeskTop Set looks and works like the paper address books, calendars, and memo pads you have been using for years. Anyone in your organization or family can figure it out in minutes.
- ◆ It is visually appealing but not distracting. It knows you have enough excitement in your day so it doesn't dazzle you with busy colors and complexity.
- ◆ You can turn window components on or off to fit any screen size. Display everything on your 17" desktop monitor, but hide everything that isn't necessary on your small laptop.
- ◆ DeskTop Set doesn't require specialized computer knowledge, so there aren't any computer concepts or lingo to learn. It works like you do; it knows where you left off and where to return when you power up, exactly like your desk.
- ◆ Consistent user interface throughout all programs accelerates the learning process. It is inspired by Windows 95, so once you learn Windows you can use DeskTop Set.
- ◆ Perform most tasks using drag-and-drop: assign Address Book entries to topics, groups, and categories; schedule an appointment; create a speed-dial button, and more.
- ◆ Menus are streamlined, allowing you to use the identical command to do the same task in all applications.
- ◆ DeskTop Set will run in Windows 3.1x, so you can still use it on your laptop and older PC.
- ◆ It finds names instantly as you type them. It dials with just a click and sets appointments with just a few more clicks. You will never have to wait for the Windows "hourglass" wait symbol, even if you don't have a new Pentium. This is great when hands are busy and time is short.
- ◆ Information related to each person or company is stored in one comprehensive Folder. Phone histories, pictures, directions, letters, and project files are all available in one place.
- ◆ It is easily customizable so you will be able to use it the way you want, not the way we think you should.
- ◆ It produces presentation-quality printouts and works with programs that transfer information to hand-held organizers. This lets you take the information with you when you are away from your computer.
- ◆ DeskTop Set accomplishes a lot with minimal effort. You carry out most tasks with just a few clicks. You rarely need to use a keyboard, because it schedules meetings with the click of a mouse by using pre-configured templates. These templates automatically insert appropriate information into selected descriptions.

- ◆ You can password protect files and hide your sensitive information from prying eyes.
- ◆ DeskTop Set compresses and backs up all your information to a floppy in just one click.
- ◆ Like a good assistant, it helps you to stay in control and reach your goals. By giving you the information you need when you need it, DeskTop Set will free you up to work on more important tasks. For example, instead of worrying what you need to bring to a meeting and when to arrive, you can concentrate on preparing your presentation.

## **Desktop Set Helps You Work With Others**

The term Personal Information Manager is a misnomer. Today, few people work alone:

- ◆ Families need to know when to pick up their children or where to send holiday cards.
- ◆ Business executives must communicate with each other and their assistants to make sure they are all working toward one common goal.
- ◆ Attorneys need to cooperate with their partners to develop a strong, secure firm that will excel in representing their clients.
- ◆ Doctors work with their partners, nurses, and clerical staff to make sure their patients get the best possible care.
- ◆ Teachers coordinate their specialty subject with the rest of the school so students receive a solid, well-rounded education.

No matter what your job is, you need to know what your colleagues are doing. As you can see, DeskTop Set can become an asset to your personal and professional life.

## **About This Manual**

This book is both a tutorial and a reference. It describes how DeskTop Set can help organize your information, and also describes the options for each DeskTop Set module in depth.

Read on to start on your path of increased productivity. You will soon see why Okna has gathered a loyal following of users over its history. Thank you for choosing DeskTop Set.





# 2

# Installing and Importing

## Installing DeskTop Set

This chapter shows you how to install or update DeskTop Set. We expect that you already have Windows installed on your computer and are familiar with its basic features. If you are updating from an earlier version of DeskTop Set, please make a backup of your data before running the install program.

### Installing DeskTop Set

**To start the install program:**

- ◆ Place the DeskTop Set disk in your CD-ROM drive. If it does not auto-run, the following steps are also necessary:
- ◆ Click the **Start** button and select **Run**.
- ◆ Type `x:\setup.exe` in the *Run* dialog box, where *x* is the name of your CD-ROM drive.
- ◆ Click the **OK** button.

## Installing DeskTop Set in Windows 3.1x

To start the install program:

- ◆ Place the DeskTop Set disk in your CD-ROM drive.
- ◆ Select the **File/Run...** command.
- ◆ Type `x:\setup.exe` in the *Run* dialog box, where *x* is the name of your CD-ROM drive.

## Installation Options

As the installation dialog box opens, the program suggests where to put the files. For most users, the default values are acceptable and there is no need to make any changes.

Type your name and company here.

DeskTop Set uses two different directories on your hard drive. This is where the program files are stored.

This field shows the drive your install CD is in. It is for information only and cannot be changed.

This is where all your information (such as names, addresses, and appointments) are stored on your hard drive.

When the installation program begins, this is the first window you see. If you use DeskTop Set on a network, the name, company, and serial number information are used to identify your files and maintain security.

## User Information

Option	Description
User Name and Organization	Fill in the registered owner's name (required) and Company name (optional). This identifies your data on a network.
Serial Number	Enter your serial number exactly as it appears. Be sure to use capital letters and hyphens as shown. This is a unique serial number. It must be entered correctly to run the program, and also prevents other users from accessing your data without permission.
Product Key	This is used for product validation, ensuring your program is properly registered and that you are eligible for customer support. Be sure to type it exactly as it appears.

## Directories and Options

Option	Description
Source	The CD-ROM drive containing your installation disk.
Windows	The name of the subdirectory that contains Windows. It is determined for you; there is no need to change this.
Programs	This field contains a suggested name for your program directory. The installation program automatically creates this new subdirectory.
Data	This field contains a suggested name for your data directory. The installation program automatically creates this new subdirectory.

- ◆ Verify and complete the above information, then click on the **Install** button (or the **Update** button if you are reinstalling).
- ◆ As the install program works, the status bar indicates progress. Click on **Cancel** if you need to terminate the installation.

## Windows 95 Setup Options

If you use Windows 95 you are given additional setup options. This program is also available as a separate utility that allows you to enable the following options at a later date.

Windows 95 lets you put icons on the desktop so you can start a program without opening any menus or folders.

Mark this box to install DeskTop Set mail and fax merge template in Word 7.

Click here if you want to create a link between DeskTop Set and Exchange.

Windows 95 allows DeskTop Set to arrange its icons according to your preferences. Whether you prefer starting programs with the *Start* menu, or with icons on the desktop, these settings let you put them anywhere you want.

◆ Mark the options that you want installed and click on the **OK** button.

The following options are available for Windows users:

Option	Description
Create Windows desktop shortcuts...	Adds shortcuts to your Windows desktop for Address Book, Calendar, and Dialer. You can quickly access DeskTop Set directly from Windows desktop.
Create a Windows desktop folder...	Creates a folder on your Windows Desktop containing shortcuts to all DeskTop Set applications. Use this to have all DeskTop Set applications easily accessible without cluttering your desktop.
Create a Start Menu group...	Creates a DeskTop Set sub-menu on the <b>Start/Programs</b> menu. Start DeskTop Set as you would other applications.

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Start Alarm Monitor...	Adds the DeskTop Set Alarm Monitor to the Windows Startup Group. This monitors Calendar, Phone Log, and Reminder alarms.
Install DeskTop Set specific templates...	Adds Microsoft Office templates. They let you use DeskTop Set data in Microsoft Office documents, and automatically attach Office files to DeskTop Set entries.
Install DeskTop Set services...	Lets you access DeskTop Set's Address Book from Microsoft Exchange. Send e-mail without storing addresses in two different locations.

## Installing an Update

If you have used DeskTop Set before, then you should follow these instructions to update your program.

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**Note:** You are not able to change the location of program or data files when installing an update. If this is necessary, uninstall DeskTop Set and then run the original installation program. Do not forget to back up your data first.

---

Please back up your data before installing an update.

### To update DeskTop Set:

- ◆ Close all DeskTop Set applications that may be running.
- ◆ Insert the DeskTop Set disk in your CD-ROM drive.
- ◆ In Windows 95, select the **Start/Run** command.
- ◆ In Windows 3.1x, select the **File/Run** command from Program Manager.
- ◆ Type `x:\setup.exe` in the *Run* dialog box, where *x* is the name of your CD-ROM drive.
- ◆ Verify that all of the information in the *DeskTop Set Setup Options* window is correct.
- ◆ Click the **Update** button.

## Reinstalling DeskTop Set

These steps are used when you need to reinstall your program files and retain DeskTop Set information (data files) on your system. Even though data files are not affected, please make a backup before continuing.

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Note: You are not able to change the location of program or data files when reinstalling DeskTop Set. If this is necessary, uninstall DeskTop Set and then run the original installation program. Do not forget to back up your data first.

---

### **To reinstall DeskTop Set:**

- ◆ Close all DeskTop Set applications that may be running.
- ◆ Insert the DeskTop Set disk in your CD-ROM drive.
- ◆ In Windows 95, select the **Start/Run** command.
- ◆ In Windows 3.1x, select the **File/Run** command from Program Manager.
- ◆ Type `x:\setup.exe` in the *Run* dialog box, where *x* is the name of your CD-ROM drive.
- ◆ Verify that all of the information in the *DeskTop Set Setup Options* window is correct.
- ◆ Click the **Update** button.

### **Uninstalling DeskTop Set**

#### **To remove DeskTop Set from your computer:**

- ◆ Close all DeskTop Set programs that are running.
- ◆ Insert the DeskTop Set disk in your CD-ROM drive.
- ◆ In Windows 95, select the **Start/Run** command.
- ◆ In Windows 3.1x, select the **File/Run** command from Program Manager.
- ◆ Type `x:\setup.exe` in the *Run* dialog box, where *x* is the name of your CD-ROM drive.
- ◆ Click the **Remove** button.
- ◆ The program gives you the option to leave your data files. If you have not copied all your important information to another location, leave your data on your computer. If you are confident that you have a backup of your data files, go ahead and delete them.

## Importing Existing Data

DeskTop Set's Import Wizard will lead you through the process of converting files into DeskTop Set format.

This utility is documented and demonstrated in various ways:

- ◆ The DeskTop Set Presentation, which appears in the installation CD-ROM, contains a demonstration on how to import a text file. This includes Steps One through Eight.
- ◆ The Import Wizard itself contains a **Video** button. If you click this button, a short movie will play, demonstrating how the Import Wizard works.
- ◆ The Import Wizard's **Help** button will display on-screen help detailing how the Import can be performed.

In addition, this document details how to map your fields (see Step 8).

### A word on importing files

Wizard automatically imports data from a variety of formats: ASCII (text) files, as well as files from ACT!, Lotus Organizer, SideKick, and, in the future, others. It is important to note that these import filters are developed without the assistance of their respective publishers.

Because of this, you will find that basic information, such as names, addresses, calendar events, notes, and reminders will transfer properly into DeskTop Set. You may find, however, that certain proprietary information may *not* transfer - examples include attachments, special links between contacts and their events, and custom printing templates. Information such as this is stored in a program-specific format, rather than standard formats, and it is often not possible to include this information in the transfer.

Please be aware that it may be necessary to re-create this proprietary information in DeskTop Set once your information has been imported.

## Importing Your Information

### Starting Import Wizard

- ◆ From Address Book, choose **File/Utilities/Import Wizard** from the menu, **or...**
- ◆ From Windows 3.1 Program Manager, double-click the icon labeled *Import Wizard* in the DeskTop Set program group, **or...**
- ◆ From Windows 95, select **Start/Programs/DeskTop Set/Import Wizard...** Click the **Next** button and you will see the following:



*Select the type of file that you will be importing. Converters for popular PIM's are included.*

### Proceeding through the steps

Import Wizard will begin leading you through each of the eight Steps. Many of these steps are self-explanatory. They are described briefly below, and clicking the **Help** button at any time will display detailed information on that particular Step:

Step	Description
Step One	Select a file type. Wizard will need to know what format your data is in now.
Step Two	Choose a file to import. you can browse your hard disk to find the file.



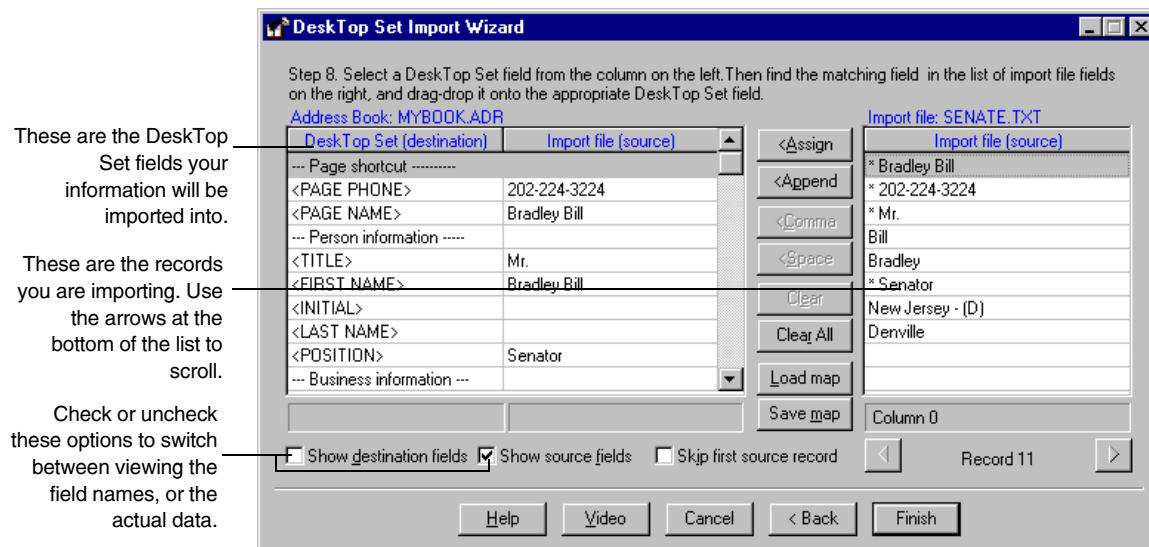
- Step Three      Choose the file's delimiter. This is the character that is used to separate fields. The other application's manual should instruct you as to what delimiter it uses. If you exported this information into a text file, you likely had an opportunity to choose this delimiter when you exported (comma separated is preferred).
- Step Four      Choose what type of information you are importing.
- Step Five      Choose to import into an existing DeskTop Set file, or into a new file. If you are new to importing, we suggest using a new file until you are familiar with this process.
- Step Six        DeskTop Set will display the path and filename of the Desk-Top Set book it will import into. You can change this information now, if you wish, or leave it as it is.
- Step Seven     Format your Page View. (This screen explains how to do this).
- Step Eight     Map your fields. This is the final, and most critical, import step. Detailed instructions appear below.

### **Step Eight: Mapping the fields**

Step Eight is the most critical, since the decisions you make here affect how your information will appear in DeskTop Set. In this step, you will set the field associations, or *map*, between the file you are importing and DeskTop Set.

For example, your old application may refer to each person's cellular phone as the *Cell Phone*. In DeskTop Set, this is referred to as the *Car Phone*. One of the things you will want to do, then, is map the import file's *Cell Phone* to DeskTop Set's *Car Phone*.

In this way, you can be sure that the file will be imported properly, and that your DeskTop Set file will appear exactly as you want it to. You can map the fields as follows.



*Step Eight lets you choose how your information will be stored in DeskTop Set. Click the Video button to watch a short demonstration.*

Option	Description
Assign	Use this button to map the fields. Highlight a line of information from the import file, highlight the DeskTop Set field you wish to assign this information to, and click this button to map, or associate, the fields.
Append	You can combine multiple fields from the import file into one DeskTop Set field (see “Combining fields” on page 27).
Comma/Space	Inserts a comma or space into the DeskTop Set field. If you are appending fields (as described above) you will likely need a comma or a space between the fields. (Note: the actual comma or space may not appear until the second field is mapped).
Clear/Clear All	Click any field mapping in the list on the left, and click <b>Clear</b> to remove the mapping. <b>Clear All</b> removes all the settings, and lets you begin again.
Load/Save Map	If you will import other files that are in this same format, you may want to save the field mapping. These buttons let you save the current mapping, or load a mapping you’ve already created and saved.

Show Destination / Source Fields	Check or uncheck these options by clicking them. They will toggle the display between showing the fields' names and showing the actual data inside them (it is often best to leave these options checked, so that you are able to map all the necessary fields).
Skip first record	Some export utilities use the first line of the file to store the fields' names. If this is the case with your file (you can text this by scrolling to the first record in the Import File) check this box so that these headers are not imported as an actual record.
Video	Click here to watch a short movie that demonstrates how to map your fields.

To begin mapping the fields:

- ◆ Depending on the format of your file, Import Wizard may make some initial "guesses" as to how the fields should be mapped. If this is the case, you will see the mappings on the left side of this window: The DeskTop Set fields are listed on the left, and the fields assigned to them appear to their right.
- ◆ Once a field is mapped from the import file, it will be preceded by an asterisk (\*).
- ◆ Begin by reviewing these mappings. If some are incorrect, click each and then click the **Clear** button to remove them.

Mapping remaining fields

- ◆ Drag-and-drop the fields in the *Import File* list next to the DeskTop Set fields, **or...**
- ◆ Click a field in the *Import Field* list.
- ◆ Click the DeskTop Set field you wish to assign this information to.
- ◆ Click the **Assign** button.

Saving field mapping

When you are finished mapping the fields, you can save the field mapping. This is useful if you will be importing other files in a similar format, or if you are new to importing and feel you may need to re-import this file after reviewing the new DeskTop Set file. To do this:

- ◆ Click the **Save Map** button.
- ◆ Enter a name for this field mapping.
- ◆ Click **OK**.

Combining fields

In some instances, you may need to assign multiple fields from your import file into a single DeskTop Set field, such as *City, State Zip* from your file to `<ADDR_TWO>` in DeskTop Set. Here's how:

- ◆ Map the first field as described above (see "Mapping remaining fields" on page 27).

- ◆ Select the 2nd field to import, and click on the **Append** button, or simply drag-and drop it next to the first field. Do this for each field that you need to add.
- ◆ Use the Comma and Space buttons as need for punctuation and layout.

### **Importing the file**

Once you have completed the field mapping (and saved the field associations, if you wish to) you can import the file.

#### **To import the file:**

- ◆ Click the **Finish** button.
- ◆ The import will begin.
- ◆ When the import is completed, you will receive a confirmation message.

#### **To open your imported DeskTop Set file:**

- ◆ Run Address Book
- ◆ Choose **File/Open** from the menu.
- ◆ Locate the file you imported your information into, and highlight it.
- ◆ Click **OK**.

### **Reviewing the imported file**

When you open the new DeskTop Set address book for the first time, review its contents to verify that the field mapping choices you've made are correct.

Keep in mind as your review the file that every record may not be perfect. Check to see that the majority of the file appears correctly. You can always correct individual records later on.

The following are useful things to review:

- ◆ Page Names and Numbers. The Page Names should appear correctly, and on the right pages. Make sure, for example, that *Kevin Taylor* does not appear on the *K* page if you prefer him to appear on the *T* page.
- ◆ Business and Home Addresses. make sure these are correct, and that you have not inadvertently reversed them (you may find List View very useful for checking these fields).
- ◆ Phone Numbers. Make sure that the phone numbers and e-mail addresses appear in the correct places.

**Protecting your data** Once you've verified that the information is correct, we suggest running our *File Doctor* utility (Select **File/Utilities/File Doctor...**). We would also recommend running this utility often to prevent database corruption. This utility will ensure that your pages are properly linked, and "pack" your database to keep the file sizes to a minimum. This is especially useful if you are frequently adding, moving, or deleting pages or entries from your book.

There is also a Backup utility included with DeskTop Set. It can be found in your DeskTop Set programs group. You should backup your data regularly to protect you in the case of a power outage/surge, unrelated Windows crash, or other circumstances that may sacrifice your data's integrity.



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