

# User's Guide

GETTING AROUND

CONTENTS

INDEX

**COREL**

**InfoCentral™**

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# Contents

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## Getting Started

Welcome	5
Things You Need to Know	5
Where Do I Start?	5
What Is Included in the program?	5
Starting Corel InfoCentral	5
Getting Help	6
Using Online Help	6
Using Shortcuts	9
Lesson 1: Getting Started	10
Putting Information in Corel InfoCentral	10
Organizing Information into Tabs	11
Lesson 2: Creating a Memo from Corel InfoCentral	13
Connecting a Memo to an Object in Corel InfoCentral	13
Lesson 3: Using a WordPerfect 7 Template from Corel InfoCentral	14
Lesson 4: Creating a Budget iBase	15
Lesson 5: Planning Your Day	18
Using the Dayplanner Tabs	19

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## Reference

Keeping Track of Information	25
Adding Information	25
Making Connections	25
Organizing Information	27
How Tabs Work	27
Setting Up a Tab	27
Adding Information to a Tab	27
Saving a Tab	28
Finding Information in Your iBase	28
Finding Objects	28
What If I Can't Remember a Name?	28
Finding Information About Objects	29
Organizing Information into Tabs with Find Tools	29
Using Other Ways to Find Information	29
Viewing Information on the Screen	31
Organizing Your Calls	31
Logging a Telephone Call	31
Scheduling a Telephone Call in Advance	32
Making a Note to Call Someone	33
Organizing Your Addresses	33
Adding Names to the Address Book	34
Arranging the Address Book	34
Creating a Group of Addresses	37
Importing and Exporting Addresses	39
Importing Names and Addresses into Corel InfoCentral	39
Displaying and Arranging Addresses	40
Making Telephone Calls from the Address Book	41
Sending E-Mail from the Address Book	41
Additional Information	41
Managing Time with Corel InfoCentral	45
Keeping Track of Appointments	45
Scheduling Events	45
Viewing the Event	46
Customizing the Alarm	47
Planning Your Day	47
Writing Yourself a Task List	47
Writing Notes to Yourself	48
Printing Planner Pages	48
Wrapping Things Up	49
Closing Tasks	49

Housekeeping .....	49
Managing Documents with Corel InfoCentral .....	50
Using Corel InfoCentral as a File Manager .....	50
Searching for Files .....	50
Managing Files .....	51
Connecting Files to Other Objects in Corel InfoCentral .....	52
Creating New Documents from Corel InfoCentral .....	52
Writing a Letter from Corel InfoCentral .....	52
Automatically Inserting Information from Corel InfoCentral into a New Document ...	53
Opening and Editing Related Files .....	54
Moving Information to and from Corel InfoCentral .....	55
Moving Information from One Application to Another .....	55
Exporting Information from Corel InfoCentral to Another Application .....	55
Importing Information from Another Application to Corel InfoCentral .....	57
Moving Information Between iBases .....	60
Exporting to Another iBase .....	60
Making Two iBases out of One .....	60
Taking an iBase to Another Computer .....	61
Connecting with E-Mail .....	61
Using the Pre-Filled Content iBases .....	63
Finding Information in Prefilled iBases .....	63
Using the iBase Templates .....	64
Templates Included in Corel InfoCentral .....	64
Filling out a Template .....	64
Customizing Corel InfoCentral to Fit Your Needs .....	66
Adding New Categories to Corel InfoCentral .....	66
Increasing the Amount of Information You Can Add to Corel InfoCentral .....	66
Writing Your Own Help .....	67
Ideas for Using Corel InfoCentral .....	68
Student Notes .....	68
Product Catalog .....	68
Sports .....	68
Other Ideas .....	69

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## Index

Index .....	71
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# Getting Started

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# Welcome

Welcome to Corel® InfoCentral™—a revolutionary tool that lets you easily organize all your information. This User's Guide provides the instruction you'll need to get completely organized. Each feature, whether basic or advanced, is presented in easy-to-follow steps to help you become an expert in no time.

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## Things You Need to Know

Besides being a personal information manager (PIM), Corel InfoCentral also makes it easy to

- Keep track of people, places, appointments, telephone calls, and more
- Plan your day
- Record and prioritize tasks
- Create letters, reports, spreadsheets, graphics, and other documents
- Organize and manage your documents
- Transfer information to and from Corel InfoCentral

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### Where Do I Start?

This guide offers several starting points. If you want comprehensive instruction on Corel InfoCentral, simply take one section at a time, beginning with this section and following in the order that they appear in this guide.

If you have a specific task in mind (like adding a person's name or creating a memo from Corel InfoCentral), turn to the section called *Lessons*. This section helps you master the skills you need to complete a variety of tasks in Corel InfoCentral.

If you just want to know how a specific feature works, check the Table of Contents or Index.

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### What Is Included in the program?

Corel InfoCentral starts you off with a wealth of information about the computer industry, consumer goods, travel, and wine. So if you need the telephone number for Corel Corporation or the name of a hotel in Paris, France, you can find it instantly.

As for your own personal information, Corel InfoCentral is set up so all you have to do is fill in the blanks. Corel InfoCentral makes it easy for you to insert information about clients, family, friends, CD collections, automobile records, and so on.

Once you get the hang of it, you'll find a million uses for Corel InfoCentral. You can keep track of inventories, bibliographies, patient records, school records, and players on a team. (See *Ideas for Using Corel InfoCentral* in *Using Prefilled iBases and Templates* for further information.)

To find any information in Corel InfoCentral, simply remember one detail about a person, place, or thing, and Corel InfoCentral will locate it for you in seconds.

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### Starting Corel InfoCentral

- 1 If you have not done so, turn on your computer and start Windows 95.

- 2 On the Taskbar, click Start ► Corel Office Professional ► Corel InfoCentral 7.

You can perform most Corel InfoCentral tasks using the items in the menu bar.



The Toolbar gives you quick access to commonly used features.

Tabs let you save views of similar types of information.

## Getting Help


When you need to know how a feature works, online Help is your best solution. It's convenient, sensibly organized, and easy to use. If you need assistance beyond what the online Help system provides, you can call Technical Services.

### Using Online Help

You can access Help wherever you are in the program.

#### *What's This?*

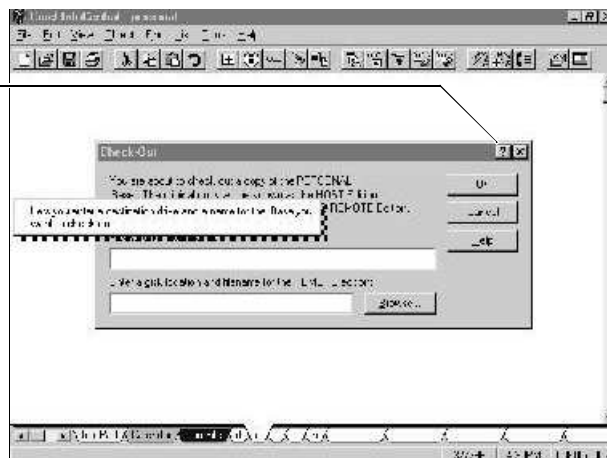
For a short description of an item in a dialog box,

- 1 Click the What's This? icon  on the top-right corner of the dialog box. Place the pointer on the item you want information about, then click.

or

Point to any item, then press Shift+F1.

Click the ? (question mark), then click any item for a short description.



- 2 Click a neutral area of the dialog box to close the What's This? information box.

HINT: You can also point to an item in a dialog box, right-click, then click the What's This? pop-up button to read a description about that item.

### Help Topics

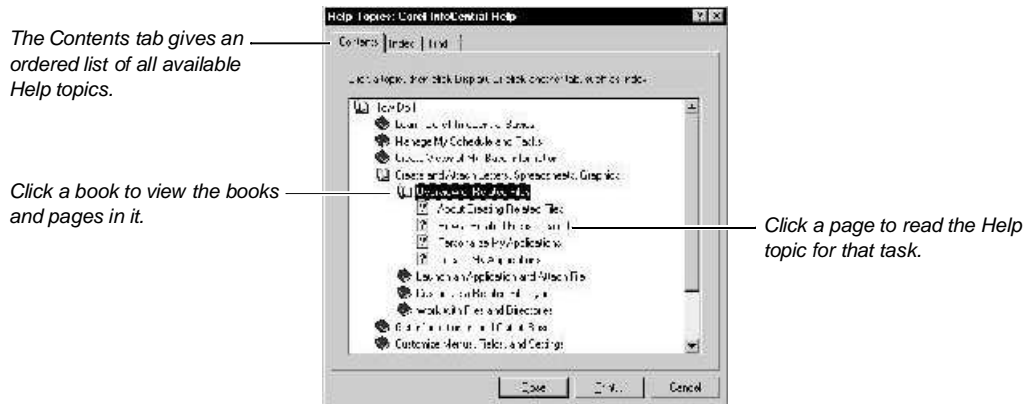
For extensive information about a feature or how to accomplish a specific task,

1 Click Help ► Help Topics.

2 Click any of the following tabs:

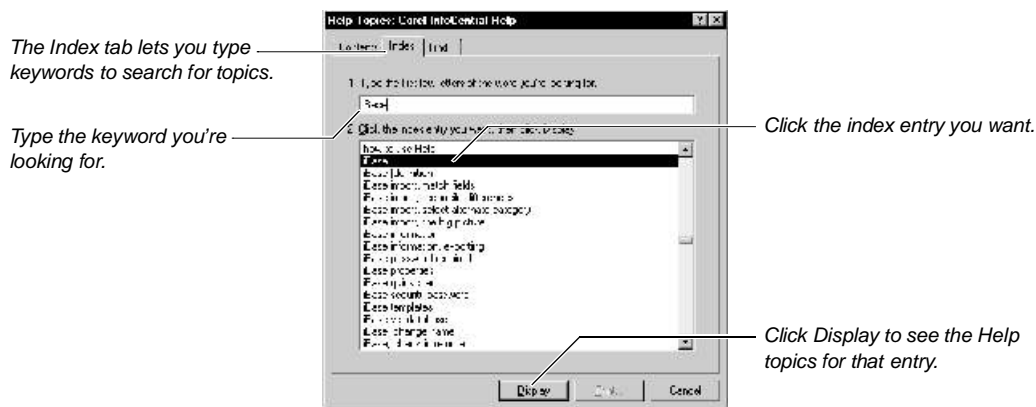
**Contents Tab** • The Contents tab is an outline of the entire Help system, organized into books and pages.

To find information on a specific task, double-click How Do I, then double-click the book that has the category you want. Continue double-clicking until you come to the page that describes the task you need, then double-click that page. To close a book, double-click it.



**Index Tab** • This tab is an alphabetized list of keywords and phrases that will take you to the Help topic you need. For example, to get information about printing, find the word “print” in the list and double-click it.

To quickly find entries in the list, type a feature name, keyword, synonym, or phrase in the text box.



HINT: Type a colon after a keyword to see all the subheadings associated with that keyword. Type a second keyword after the colon to go to a specific entry. For example, type object: copy to go directly to the entry for copying objects.



If there is more than one Help topic about the entry you chose, a list of related Help topics appears in a smaller dialog box. Click the one you want to view, then click Display.

**Find Tab** • Type a word, and the Find tab will list all the Help topics that contain that word. You can find information about a feature by typing a feature name, keyword, synonym, or phrase.



If there is more than one Help topic about the entry you chose, a list of related Help topics appears in a smaller dialog box. Click the one you want to view, then click Display.

### **Common Help Tasks**

The following table describes actions that make Help easier to use.

To do this when Help is open:

View a pop-up explanation

Do this:

Click a dot-underlined word or phrase. You may also be able to click graphics and view a pop-up explanation.

Jump to another topic

Click an underlined word or phrase.

Return to the topic you viewed last

Click the Back button.

Copy the current Help topic to the Clipboard

Click Options ► Copy

Add a note to the current Help topic

Click Options ► Annotate, type your note, then click Save.

Read a note that has been added to a topic

Click the paper clip icon at the top of the Help topic.

Delete a note that has been added to a topic

Click the paper clip icon above the purpose statement, then click Delete.

Add a bookmark to the current Help topic

Click Options ► Define a Bookmark, type a name for the bookmark, then click OK.

Move to a bookmark that has been added to a topic

Click Bookmark, then select the bookmark name.

Delete a bookmark that has been added to a topic

Click Options ► Define a Bookmark, select the bookmark name in the list box, then click Delete.





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# Lesson 1: Getting Started

This lesson guides you through the simple task of taking information from a business card and putting it in Corel InfoCentral. By the end of this lesson, you'll be able to

- Add names to Corel InfoCentral
- Connect valuable information to people and organizations
- Include detailed information about each name you add
- Organize the information logically
- Find the information in seconds



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## Putting Information in Corel InfoCentral

Begin by adding Atlantic Metals, Inc., to Corel InfoCentral.

- 1 Start Corel InfoCentral. If a Reminders dialog box appears, click Cancel.
- 2 Click the InfoPad tab at the bottom of the Corel InfoCentral desktop.
- 3 Click List ▶ Clear View.
- 4 Click Object ▶ Add.
- 5 Select Organization from the Category list box. (You may need to scroll.)
- 6 Type Atlantic Metals, Inc. in the Object Name text box, then click Add.
- 7 Type 5678 State Street in the Address 1 text box (you may need to scroll). Type the appropriate information in the city, state, and postal code text boxes, then click OK.
- 8 Click Yes to connect a person (Marc Sabatini) to Atlantic Metals.
- 9 Select Person from the Category list box.
- 10 Type Marc Sabatini in the Object Name text box, then click Add New.
- 11 Type (907) 555-1111 in the Home Telephone text box, then click OK. (You may need to scroll.)
- 12 Type Sales Representative, click New Description, then click Add.
- 13 Type (907) 555-1000 in the Direct Line text box, click OK, then click No.

What you see on the screen are two different Objects (Marc Sabatini and Atlantic Metals, Inc.), plus a Connection (Sales Representative) below each object. The connection describes the relationship between the two objects.

Click the minus (-) to hide the connections.



To see or change any information about the two objects or the connection,

- 1 Select one of the objects or the connection description.
- 2 Click Object ► Information.

For further details about adding information to Corel InfoCentral, see *Keeping Track of Information* later in this guide.

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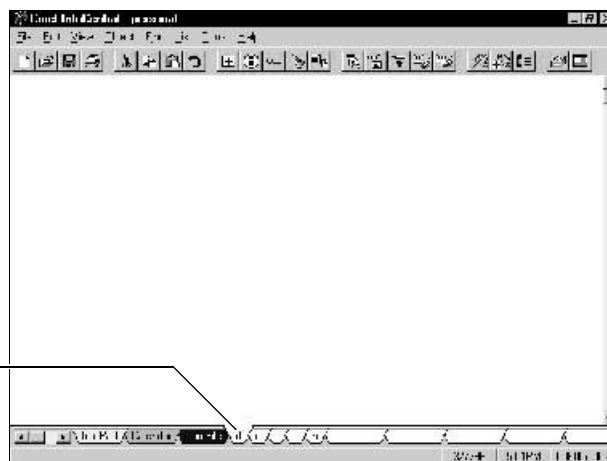
## Organizing Information into Tabs

Use tabs to divide a large chunk of information into smaller, more manageable groups. For example, take all the names of people you know and put friends in one tab, relatives in another, and so on.

Continue this lesson by setting up a tab to store the information you just added.

- 1 Select an undefined tab. (If you are prompted to save changes to the current tab, click Save.)

Choose any tab that doesn't have a name.



- 2 Click Edit ► Tab Properties, then type Sales Reps in the Tab name text box.
- 3 Select black in the Color group, then click OK.

To list Marc Sabatini on the new tab,

- 1 Click Find ► FastFind, type m s, then click Find People.
- 2 Click the + (plus sign) next to Mr. Marc Sabatini's name to see the connection.

If you were adding names of other Sales Representatives, you would add them directly to this tab.

For further details about setting up a tab and finding information in Corel InfoCentral, see *Keeping Track of Information* later in this guide.

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## Lesson 2: Creating a Memo from Corel InfoCentral

You can easily and conveniently create letters, spreadsheets, and other documents from Corel InfoCentral. Any document you create from Corel InfoCentral is automatically connected to the person, place, or thing in your iBase; so you can quickly find the document you need by going to the person or thing it's connected to. For this lesson, you will create a memo from Corel InfoCentral. By the end of this lesson, you'll be able to

- Create documents from Corel InfoCentral
- Connect documents to people, places, or things
- Transfer information from Corel InfoCentral into a document
- Edit documents from Corel InfoCentral

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### Connecting a Memo to an Object in Corel InfoCentral

Begin by writing a memo to Marc Sabatini. If you are not familiar with Mr. Sabatini, complete *Lesson 1: Getting Started*.

- 1 Click the Sales Reps tab, then select the object "Marc Sabatini."  
*or*  
Click View ► View Outline ► Find ► FastFind, type m s, then click Find People.
- 2 Click Object ► Create Related File.
- 3 Select Basic Memo (WordPerfect 7) from the list, then click OK.

The documents you create from Corel InfoCentral must be saved to a folder. Corel InfoCentral has already preselected a folder for you, but you can choose a different one. For information about changing the preassigned folder, see *Writing a Letter from Corel InfoCentral* in *Creating New Documents from Corel InfoCentral*.

- 4 Notice the name Corel InfoCentral assigns to the memo. The filename appears after the last backward slash (\). Type Memo about Friday's meeting in the Description text box. Click OK.
- 5 Type Friday's meeting has been canceled. I've rescheduled the meeting for Monday afternoon.
- 6 Save and print the memo. Click File ► Exit to return to the Outline view.
- 7 Select the name of the memo in the Outline view. Click Object ► File Objects ► Open. Change the word "Monday" to "Tuesday." Save and print the memo.

For further details about transferring information from Corel InfoCentral to your documents, see *Creating New Documents from Corel InfoCentral* in *Managing Documents in Corel InfoCentral*.

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# Lesson 3: Using a WordPerfect 7 Template from Corel InfoCentral

You can complete a preformatted WordPerfect 7 document and connect it to a person, place, or thing in your iBase right from Corel InfoCentral. Before you begin this lesson, make sure you've completed *Lesson 2: Creating a Memo from Corel InfoCentral*.

In this lesson, you'll create a purchase order from a WordPerfect 7 template and connect it to an object in Corel InfoCentral.

- 1 Click File ▶ Open, select PERSONAL.ica, then click Open.
- 2 Click the Sales Reps tab, then select the name "Marc Sabatini." If the name "Marc Sabatini" is not on your screen, click Find ▶ FastFind, type marc sabatini, then click Find People. (If you are unfamiliar with Marc Sabatini, see *Lesson 1: Getting Started*.)
- 3 Click Object ▶ Create Related File.
- 4 Select Document (WordPerfect 7) in the File type list box, then click OK.
- 5 Type Fax Cover Sheet in the Description text box, then click OK. (You can change the filename if you want, or use the filename Corel InfoCentral assigns.)

**IMPORTANT:** Before you begin Step 6, make sure the purchase order's complete filename is in the Quattro Pro 7 title bar. For example, if you're using the filename Corel InfoCentral assigned, you should see c:\corel\office7\icwin7\local\docs\... at the top of the Quattro Pro 7 desktop. If it does not appear, wait a few moments while Corel InfoCentral transfers the information.

- 6 Click Insert ▶ File in Corel WordPerfect 7, type c:\corel\office7\template\faxexp.wpt in the Name text box, then click OK.
- 7 Fill in the purchase order with the appropriate information.
- 8 Save and print the order. Click File ▶ Exit to return to your iBase.

For further details about using Corel InfoCentral to create documents, see *Creating New Documents from Corel InfoCentral* in *Managing Documents*.

# Lesson 4: Creating a Budget iBase

You can create your own custom iBases to organize information or to complete tasks. This particular lesson will help you create a simple budget iBase for your household expenses. You can apply the principles in this lesson to create other iBases to fit your needs.

After you complete this lesson, you'll be able to

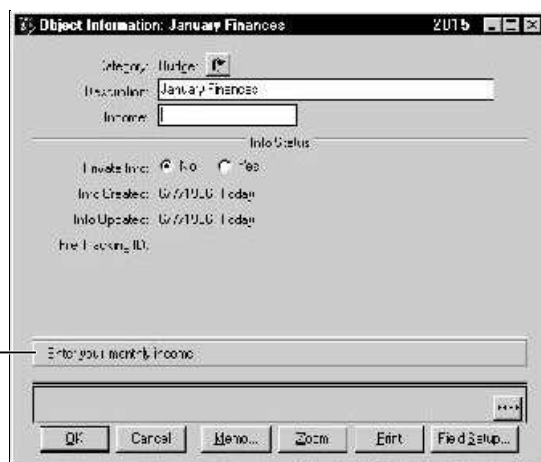
- Create a custom-made iBase
- Add new categories to Corel InfoCentral
- Set up Corel InfoCentral to perform calculations automatically
- Add additional spaces so you can enter even more information

To create a budget in Corel InfoCentral,

- 1 Click File ► New, type Budget in the New iBase Name text box (after the last backward slash), then click OK.
- 2 Click Yes.
- 3 Click Object ► Add.
- 4 Type Budget in the Category text box, then click New.
- 5 Click Thing in the Category type list box, then select a color in the Display color list box. (You will see your text in this color in the Outline view.) Click OK.
- 6 Type January Finances in the Object Name text box, then click Add.
- 7 Click Field Setup ► Add New Field.

HINT: You can access the Field Setup pop-up list by pointing to a field and right-clicking.

- 8 Select Currency from the list, type Income in the text box, then click OK.
- 9 Type Enter your monthly income in the Contextual hint text box. Click OK twice

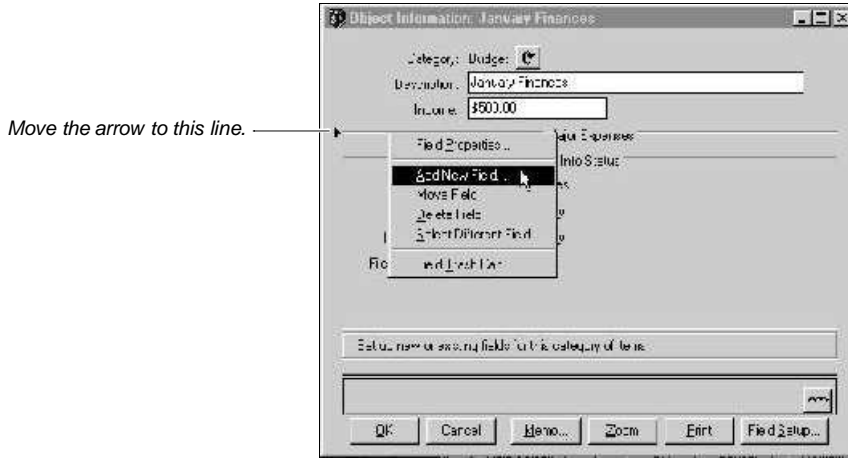


Notice the hint that appears when the cursor is in the Income field.

- 10 Type 500 in the Income field.
- 11 Click Field Setup ► Add New Field.
- 12 To insert a divider, select Group Title, click OK, then type Major Expenses in the text box. Click OK twice.



- 13 Click Field Setup ► Select Different Field, then click the line on the left side of “Major Expenses.” (Make sure the triangle on the left is pointing to the “Major Expenses” line.



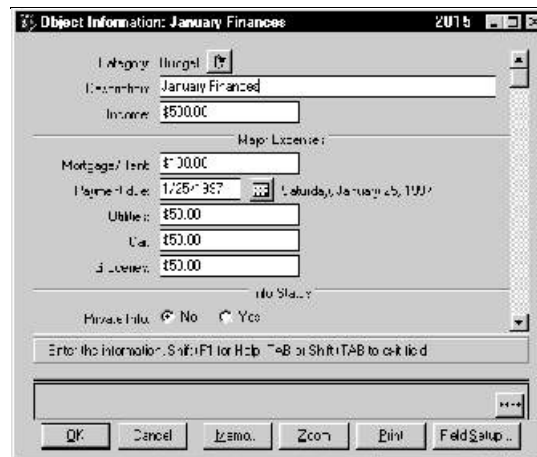
- 14 Click Add New Field, select Currency from the list, then type Mortgage/Rent in the text box. Click OK. Type Enter the amount you pay for housing each month in the Contextual hint text box, then click OK twice.

- 15 Type 100 in the Mortgage/Rent field.

- 16 Click Field Setup ► Add New Field, select Date from the list, type Payment due in the text box, then click OK. Type Enter the date payment is due or click the calendar to select a date in the Contextual hint text box, then click OK twice.

- 17 Type 1/25/97 in the payment due field.

- 18 Click Field Setup ► Add New Field, select Currency from the list, type Utilities, then click OK. Type an instructional sentence in the Contextual hint text box. Create two more currency fields called Car, and Groceries. Type 50 in all three fields.

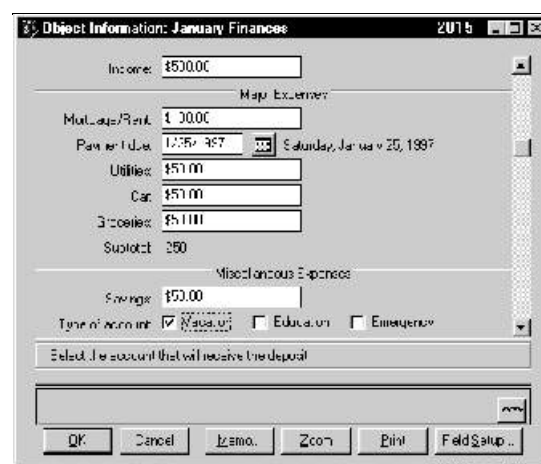


- 19 Click Field Setup ► Add New Field.

- 20 Select Calculation from the list, type Subtotal in the text box, then click OK. Type Mortgage\_Rent\$ + Utilities\$ + Car\$ + Groceries\$ in the text box. Click OK twice.

**IMPORTANT:** Type an \_ (underscore) for spaces and non-letter characters (for example, %, /, and #) that appear in the field names you want to calculate. Also, end each field name with a dollar sign (\$).

- 21 Click Field Setup ► Select Different Field, click Subtotal (you may need to scroll) to move the triangle to the Subtotal line, then click Add New Field.
- 22 To insert another divider, select Group Title, click OK, then type Miscellaneous Expenses in the text box. Click OK twice.
- 23 Click Field Setup ► Select Different Field, click the left side of the Miscellaneous Expenses line to move the triangle (you may need to scroll), then click Add New Field.
- 24 Create a currency field called “Savings.” Type 50 in the savings field.
- 25 Click Field Setup ► Add New Field, select Check Boxes from the list, type Type of account in the text box, then click OK.



- 26 Type Select the account that will receive the deposit in the Contextual hint text box. Press Tab to move the cursor to Checkbox #1, then type Vacation. Type Education in Checkbox #2, and Emergency in #3. Click OK twice, then select Vacation.
- 27 Click Field Setup ► Add New Field.
- 28 Select Group Title from the list, click OK, then type Balance. Click OK twice.
- 29 Click Field Setup ► Select Different Field, click the left side of the Balance line to move the triangle (you may need to scroll), then click Add New Field.
- 30 Select Calculation from the list, type Total in the text box, then click OK.
- 31 Type Income\$ - Subtotal\$ - Savings\$, then click OK twice.

You may add, edit, or delete any fields to suit your needs. For more information about editing or deleting fields, see *Increase the Amount of Information You can Add in Customizing Corel InfoCentral to Fit Your Needs*.

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## Lesson 5: Planning Your Day

Corel InfoCentral provides an electronic planner so you can easily keep track of time, activities, and important business and people. You can jot down appointments for any day of the year, organize your tasks, or write notes to yourself. Corel InfoCentral will even remind you of your meetings, appointments, and other important engagements.

To schedule your day,

- 1 Click **File** ► **Open**. Double-click the **Template** folder, then double-click **Dayplanr.ica**.
- 2 Click **Object** ► **Add**, then select **Meeting** from the **Category** list box. Type **Stockholder's Meeting** in the **Object Name** text box, then click **Add**.
- 3 Type **Carpool with Chris** in the **Notes** text box.

**HINT:** Press **Tab** (or use your mouse) to move to the next field. Do not press **Enter** or you will exit the dialog box and return to the main **Calendar** screen.

- 4 Click the **Start Date** calendar button.
- 5 Click the **Wednesday** following today's date, then click **OK**.
- 6 Type **3** in the **Start Time** text box. Continue by assigning an end date and time.
- 7 Click **Location** (you may need to scroll), then click **New Object**.
- 8 Type **Hotel** in the text box, then click **New Category**. Select a display color, then click **OK**.
- 9 Type **Tower Hotel**, then click **OK**. Type any applicable information, then click **OK** again.
- 10 Click the **Left-arrow** to move **Tower Hotel** to the location list. Type any applicable information, click **OK**, then click **Close**.
- 11 Select **30 Min. Before** in the **Alarm Notification** field. (Use the scroll bar to locate the field.) Click **OK**, then click **No**.
- 12 Click **View** ► **Go To Date**. Type the date of the **Stockholder's meeting**, then click **OK**.

**HINT:** You can view appointments by clicking the date in the monthly calendars on the left.

To organize your tasks,

- 1 Click **Object** ► **Add**, select **Task** from the **Category** list, then type **Write Sales Report** in the **Object Name** text box. Click **Add**.
- 2 Assign a priority, starting date (use today's date), due date, and any other applicable information, then click **People Involved**.
- 3 Click **All**, then click the **Left-arrow** to move **John Q. Public** to the **People Involved** list. Select **Participant** from the list, then click **OK**. Add any applicable information, click **OK**, then click **Close**.

**HINT:** Click **New Object** to add more names to the **People Involved** list. You can also easily add more people to the **Dayplanner iBase** by importing the names from another **iBase**. See *Moving Information Between iBases* in *Moving Information to and from Corel InfoCentral* for more information.

- 4 Continue to add any other applicable information. Use the scroll bar to locate every field. Click **OK**, then click **No**.
- 5 From the **Calendar View**, click **View** ► **Today** to see your task.

You can edit or view information about a task or appointment by selecting the object, then clicking Object ► Information.

To write a note,

- 1 From the Calendar View, type a message in the Notes box.

## Using the Dayplanner Tabs

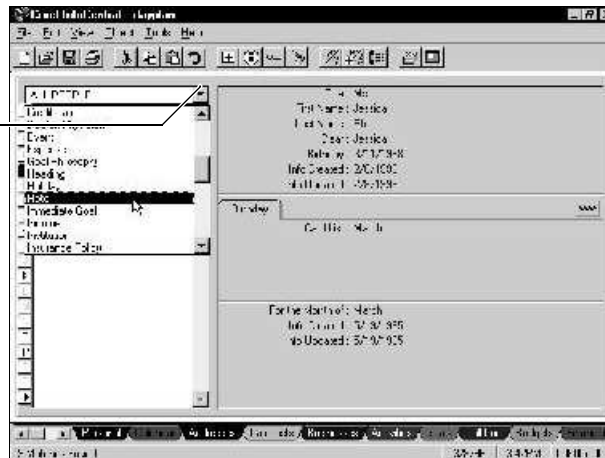
Use the following tabs to view or add information about your personal or business life:

### Addresses

Lets you find information at a glance.

- 1 Click the Addresses tab.
- 2 Select Hotel from the drop-down list (click the Down-arrow directly above the list box, then scroll until you find Hotel). Select Tower Hotel.

Click here to view the list of categories.



You can view the information about Tower Hotel on the right.

- 3 Select ALL OBJECTS from the drop-down list. Click any lettered tab on the left. Corel InfoCentral takes you to the first name that begins with that letter.

### Card Lists

Shows you who's celebrating a birthday, anniversary, or other special occasion.

- 1 Click the Card Lists tab.
- 2 Select the month you were born.
- 3 Click Object ► Add Connected. Select Person from the list, then type your name in the Object Name text box. Click Add New.  
or  
If you've already added your name to this iBase, click Connect instead of Add New, then go to Step 4.
- 4 Type your birthdate in the Birthday field, then click OK.
- 5 Select Birthday from the list, then click OK. Type any applicable information, then click OK again.

HINT: Keep the Card Lists tab uncluttered by hiding all first-level objects except the names of the months. To hide a first-level object that is not the name of a month, select the object, then click List ► Clear Line.

### ***Businesses***

Lets you find information about organizations at a glance.

- 1 Click the Businesses tab.
- 2 Select ALL ORGANIZATIONS from the drop-down list (click the Down-arrow directly above the list box, then scroll to find ALL ORGANIZATIONS).
- 3 Select the organization you want information about.

### ***Activities***

Helps you keep a log of your daily activities.

- 1 Click the Activities tab.
- 2 Click Object ► Add, select Activity Log from the list, type yesterday's date in the Object Name text box, then click Add.
- 3 Type today's date in the Date field, then type any applicable information in the Morning, Afternoon, and Evening Activities fields. Click OK, then click No to return to the Outline View.

### ***Goals***

Helps you set goals for self-improvement or for business endeavors.

- 1 Click the Goals tab.
- 2 Click Object ► Add, then select Goal Philosophy from the list. Type Learn to play piano in the Object Name text box, then click Add.
- 3 Type a brief message in the Philosophy text box explaining why you want to accomplish this goal and how the outcome will change your life.

HINT: Do not use the Philosophy text box to describe the steps you will take to accomplish your goal. Corel InfoCentral is set up to help you break down your goal into long and short range plans. You will be instructed to write those plans later in this lesson.

- 4 Click Long Range Goals.
- 5 Click New Object, type Take piano lessons, then click OK. Type any pertinent details and dates about your long-range goal, then click Short-Range Goals.
- 6 Click New Object, type Practice piano for one hour every day, then click OK. Type any pertinent details and dates about your short-range goal, then click Immediate Goals.
- 7 Click New Object, type Buy a piano, find a teacher, then click OK. Type any pertinent details and dates about your immediate goal, then click OK.
- 8 Click the Left-arrow to move Buy a piano... to the box on the left. Click Close.
- 9 Click OK, then click the Left-arrow to move Practice piano... to the box on the left. Type any applicable information, click OK, then click Close.
- 10 Click OK, then click the Left-arrow to move Take piano lessons... to the box on the left. Type any applicable information, click OK, then click Close.
- 11 Click OK, then click No to return to the Outline View.

### ***Call Log***

Makes it easy to keep track of incoming and outgoing phone calls.

- 1 Click the Call Log tab.
- 2 Click Object ► Add, select Telephone Call from the list, type Call from Chris in the Object Name text box, then click Add.
- 3 Select Recipient as your role, type 3:15 in the Start Time field, then type 3:25 in the End Time field.
- 4 Type any important details about your conversation in the Notes field.
- 5 Type a return number in the Call Back Number field, then select 10 Min. Before in the Alarm Notification field as a reminder. (Use the scroll bar to locate these fields.) Click OK, then click No.

### ***Budgets***

Helps you manage your household expenses.

- 1 Click the Budget tab.
- 2 Click Object ► Add, select Budget Planner from the list, type June 1996 in the Object Name text box, then click Add.
- 3 Type your income and expenses in the appropriate fields. Use the scroll bar to find all the fields that pertain to you.

Corel InfoCentral will perform all the calculations. Scroll to the bottom of the dialog box to find the totals.

### ***Financial Profile***

Lets you safely record information about your credit cards, loans, insurance policies, and investments. You can quickly access the information in the event your cards or documents are lost, destroyed, or stolen.

- 1 Click the Financial Profile tab.
- 2 Click Object ► Add, select Credit Card from the list, type the name of your credit card in the Object Name text box, then click Add.
- 3 Type the card number, expiration date, credit line, and any other pertinent information. Then click Bank.
- 4 Click New Object, type Bank Anywhere (or the name of the bank which issued the credit card) in the text box, then click OK. Type any pertinent information (telephone number, address, etc.), then click OK.
- 5 Click the Left-arrow to move Bank Anywhere to the box on the left. Type any applicable notes, click OK, then click Close.
- 6 Click Cardholders.
- 7 If you've already added your name to the Dayplanner iBase, click the letter your last name begins with, then go to Step 8.  
*or*  
Click New Object, type your name in the text box, then click OK.
- 8 Type any applicable information, then click OK.
- 9 Click the Left-arrow to move your name to the box on the left, type Cardholder in the text box, click OK, then click Add. Type any applicable information, then click OK.

**10** Repeat Step 6 if you would like to add other cardholders.

*or*

Click Close.

**11** Click Yes in the Private Info field (use the scroll bar to locate this field), click OK, then click No to return to the Outline View.

**IMPORTANT:** You can protect your financial information by assigning a password to the Dayplanner iBase. Click File ► iBase Management ► Passwords, then type a password in the All of the above and setup rights text box. You can also share this iBase with another person and still keep your financial information confidential by giving that person read-only access or read and write access. For more information on passwords, see Online Help.

Use the skills you have learned in this lesson to record information about insurance policies, investments, and loans.

**1** Click Object ► Add, select either Insurance Policy, Investment, or Loan, type a name in the Object Name text box, then click Add.

**2** Type any pertinent information.

### ***Inventory***

Lets you keep a record of appliances, electronics, paintings, jewelry, or any other valuables you posses.

**1** Click the Inventory tab.

**2** Click Object ► Add, select Appliance from the list, type Refrigerator in the Object Name text box, then click Add.

*or*

Click Object ► Add, select Iventory Item from the list, type van Gogh Painting in the Object Name text box, then click Add.

**3** Type any pertinent information.

### ***Vehicles***

Helps you calculate fuel performance and record general information about your car.

To enter information about your car,

**1** Click the Vehicles tab.

**2** Click Object ► Add, select Automobile from the list, type Family Car in the Object Name text box, then click Add.

**3** Type any pertinent information, then click Loan (use the scroll bar to locate Loan).

**4** Click New Object, type Car, then click OK.

**5** Type any pertinent information, then click OK.

**6** Click the Left-arrow to move Car to the box on the left, select Vehicle Financial Transaction from the list, click OK twice, then click Close.

**7** Click OK, then click No to return to the Outline View.



To calculate your car's fuel performance,

- 1 Click Object ► Add, select Mileage Calculator from the list, type August 1996 in the Object Name text box, then click Add.
- 2 Click Vehicle, then click the letter F. Click the Left-arrow to move Family Car to the box on the left.
- 3 Click Relationship, select Mileage Vehicle, click OK twice, then click Close.
- 4 Type various figures for miles and gallons of gas in the numeric fields, then scroll to find the totals which Corel InfoCentral calculates automatically.
- 5 Click OK, then click No to return to the Outline View.

### ***Internet Sites***

Takes you directly to your favorite pages on the internet.

- 1 Click the Internet Sites tab.
- 2 Click Object ► Add, select Internet Site from the list, type Corel in the Object Name text box, then click Add.
- 3 Type <http://www.corel.com> in the Web Address (URL) field, click OK, then click No.
- 4 Select Corel in the Card File View, then click Tools ► Internet Access.

For more information on planning your time, see *Managing Time with Corel InfoCentral*.  
For further information on using predefined iBases, see *Using Prefilled iBases and Templates*.

# Reference

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# Keeping Track of Information

In this section, you'll learn how to organize all of your information so you can find whatever you need quickly and easily. By following the simple steps outlined in this section, you'll be able to

- Record names of people, places, and things
- Organize all your information logically and efficiently
- Quickly find any information you need
- Keep track of incoming and outgoing telephone calls
- Use Corel InfoCentral as an address book
- Send information via e-mail

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## Adding Information

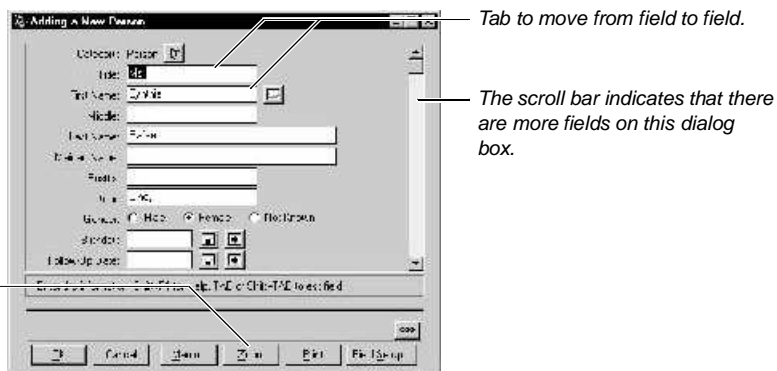
Begin organizing your information by adding a person's name to Corel InfoCentral.

- 1 Click **Object** ► **Add**.
- 2 Select **Person** from the **Category** list box.

**HINT:** Don't look for a category that describes the person, like "Sales Manager"; just select **Person**.

- 3 Type a name in the **Object name** text box, then click **Add**.
- 4 Type the information you have in the appropriate fields (you may need to scroll). You can leave fields blank if you want.

**HINT:** Don't include a company name or an office telephone number when adding a new person. You will be prompted for that information later.



- 5 Click **OK**.
- 6 Click **No** because you don't want to build a connection at this time.

The name you added will appear on your screen. Repeat steps 1 through 6 to add other people to Corel InfoCentral.

---

## Making Connections

You can continue adding information about each person (occupation, family members, and so on) using *Connections*. For the purpose of this exercise, add the name of the company where each person is employed.

- 1 Select a person's name.
- 2 Click **Object** ► **Add Connected**.
- 3 Select **Organization** from the **Category** list box.

- 4 Type the name of this person's company in the Object Name text box, then click Add New.
- 5 Type the information you have in the appropriate fields (you may need to scroll). Include only information that is specific to the company, not to individual employees. You can leave fields blank if you want.
- 6 Click OK.
- 7 Select the appropriate description, then click OK.

or

Type a new connection description in each text box, click New Description, then click Add.

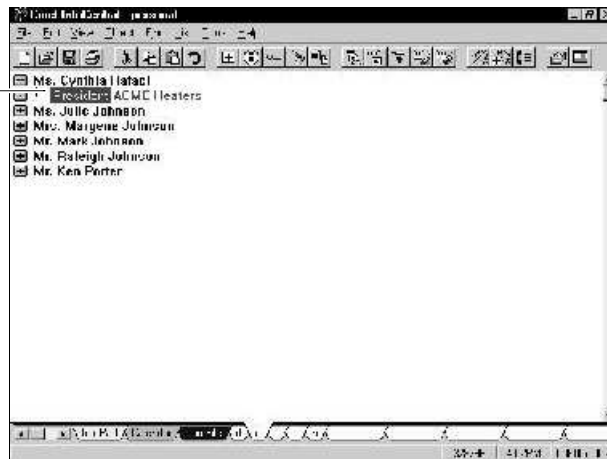
- 8 Type the information you have in the appropriate fields, then click OK to return to the Outline View.

To connect other information (like family members and club affiliations) to each person, repeat steps 1 through 8. Remember to choose a category that is appropriate for the type of information you are adding.

To change a connection description between two objects,

- 1 In the Outline view, select the connection description.

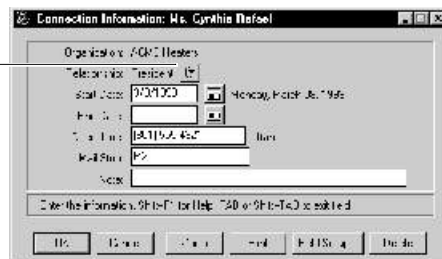
The connection description appears between the two connected objects.



- 2 Click Object > Information.

- 3 Click .

Click this button to change the connection description.



- 4 Select a new description, then click OK.

or

Type a new connection description in each text box, click New Description, then click Add.

- 5 Type any pertinent information, then click OK to return to the Outline View.

---

## Organizing Information

As you begin to organize your information, think of Corel InfoCentral as a filing cabinet. Instead of drawers, Corel InfoCentral uses *iBases*; instead of folders within the drawers, Corel InfoCentral uses *tabs*. And every item of information that goes into this filing system is now called an *object*. These tools work together to help you quickly find any information you need, even when you can remember only one small detail about that information.

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### How Tabs Work

Corel InfoCentral comes with three predefined tabs: InfoPad, Calendar, and CardFile. These tabs appear in an *iBase* called *Personal* and in any new *iBase* you create. You can use the undefined tabs to organize your information. Begin by dividing your information into groups of related objects. For example, you may want one tab for your favorite restaurants, one for business contacts, one for family members, and so on.



Tabs divide the information in your *iBase* for easier viewing and organizing

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### Setting Up a Tab

The following steps help you define and fill a tab with information about people who work with you.

- 1 In the *Personal* *iBase*, click the undefined tab you want to use, then click Edit ▸ Tab Properties.
- 2 Type a name for the tab in the Tab name text box (for example, Work Team), select a tab color, then click OK.

---

### Adding Information to a Tab

The information you add to a tab can come from two sources: you or the *iBase*. If the information already exists in the *iBase*, you can retrieve and display it on any tab. Or you can add new information to the *iBase* and it will automatically appear on the current tab. To enter new information into a tab, see *Adding Information* earlier in this section. To use existing information in an *iBase* and place it in a tab, see *Finding Information in Your iBase* later in this section.



---

## Finding Information About Objects

You can find information about an object in two ways: by opening the Object Information dialog box, or by viewing an object's connections.

To view information (address, phone number, birthday) in the Object Information dialog box,

- 1 In the Outline view, select an object.
- 2 Click Object ► Information.

HINT: Use the above steps to add or change any information about an object. Click Zoom to hide any fields that are empty. Click Unzoom to make them reappear.

- 3 Click OK to return to the Outline view.

To see people, places, or things connected to an object, click the plus sign (+) located to the left of the object. Click the minus sign (-) to hide an object's connections.

Click here to expand the list of clients.



---

## Organizing Information into Tabs with Find Tools

You can take any information you added to your iBase and organize it into tabs.

To place information into a tab,

- 1 Select a tab. See *Setting Up Tabs* earlier in this section if you need an introduction to working with tabs.
- 2 Click Find ► FastFind.
- 3 Type the name of the object you want to find in the Find text box, then click Find All.

HINT: You can also copy information from one tab to another using drag and drop. Simply select an object on one tab, then drag it to a tab marker at the bottom of the screen.

---

## Using Other Ways to Find Information

To narrow your search to objects that share the same information or connections, or to find information by phone numbers, use one of the methods described below.

### *Using Find-By-Example*

To locate objects that share some detail of information, such as a last name, address, or ZIP code,

- 1 Click Find ► Find-By-Example.
- 2 Select a category, then click OK.



- 3 Type the information in the text boxes or fields that will help you find the objects you want. For example, in the Person category, type “Mrs.” in the Title field to find all objects that contain the word “Mrs.” You can leave some text boxes blank.

or

Type the following variables in a field to make your search even more specific:

Use This Option	To Do This
* (asterisk)	Replace words, letters, or numbers. For example, typing New * finds New York, New Jersey, New Hampshire, and so on. Typing *day locates Monday, Tuesday, and Birthday.
*word* AND *word*	Locate only those objects that have both words in the field. For example, to find all objects that have both Monday and Meeting in the Notes field, type *Monday* AND *Meeting* in that field.
*word* OR *word*	Locate objects that have either word or both words in the field. For example, to find all objects with Monday or Meeting or both words in the Notes field, type *Monday* OR *Meeting* in that field.
*word* XOR *word*	Locate objects that have <i>either</i> word in the field but not <i>both</i> . For example, to find objects with either Monday <i>or</i> Meeting in the Notes field, but not objects with <i>both</i> words, type *Monday* XOR *Meeting* in that field.
*word* NOT *word*	Locates all objects except those that have the second word in the field. For example, to find objects that do not contain the word Tuesday, type *Monday* NOT *Tuesday* in that field.

### ***Find-By-Connection***

To find all objects with the same type of connection (for example, all people who are “presidents” of companies),

- 1 Click Find ► Find-By-Connection.
- 2 Select the two categories that contain the connection you want to find. For example, to find the connection “president,” you would select People and Organizations, then click OK.
- 3 Select the connection that describes the object(s) you want to find, then click Add to View.

### ***Find-By-Telephone Number***

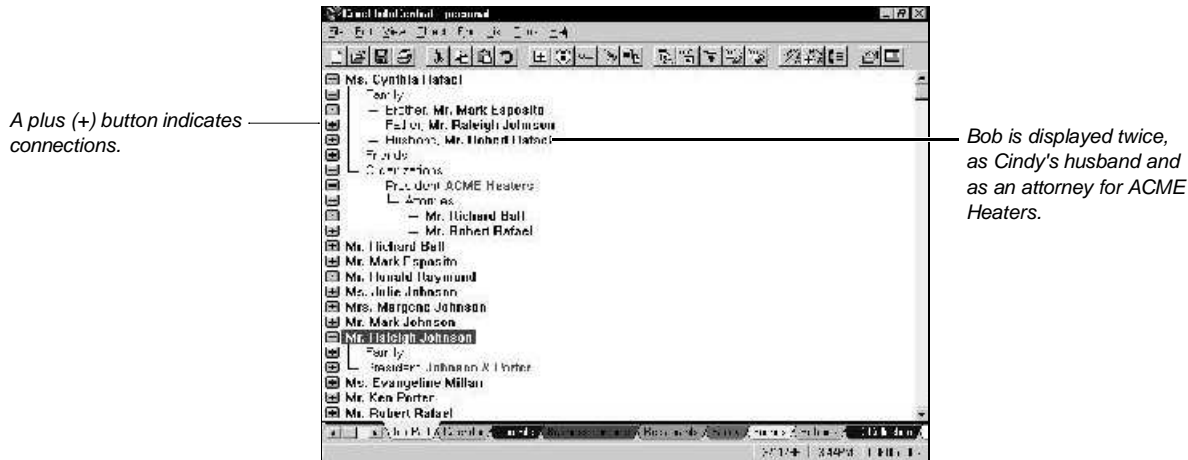
To locate an object by providing that object’s telephone number,

- 1 Click Find ► Find-By-Telephone Number.
- 2 Type the full telephone number, then click Find.

---

## Viewing Information on the Screen

You can choose what information appears on your screen and determine how it is displayed. Use the different Find methods discussed earlier in this section (FastFind, Find-By-Example, and so on) to display objects on your screen. Click the plus (+) button to show an object's connections; click the minus (-) button to hide them.



You can also use the tools on the List menu to display, arrange, or hide information.

To arrange a list of objects in alphabetical order,

- 1 From the Outline view, click List ► Sort Objects.

To hide objects from the current Outline view,

- 1 Click List ► Clear View.

or

Select one object in the Outline view, then click List ► Hoist to clear all objects from view except the one you selected.

When you hoist, clear, or otherwise change what is visible on the screen, you do not delete any of the information in your iBase. The information is always there. See *Finding Information in Your iBase* earlier in this section.

When you get a view you want to save, you can save it on a tab. Then you can quickly return to the view at any time. See *How Tabs Work* and *Setting Up a Tab* under *Keeping Track of Information*.

---

## Organizing Your Calls

With Corel InfoCentral, you'll always remember to make or return every important phone call. You'll also have access to every detail about your calls, including when they were made and what was discussed.

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### Logging a Telephone Call

When you're ready to make a call,

- 1 From the Outline view or the CardFile view, select the person you want to call, and click Tools ► Telephone.

**IMPORTANT:** Make sure you've included a phone number as part of the object's information.

- 2 If you have a modem, click Dial, then click Log Call. Otherwise, just click Log Call.

HINT: Online Help has information on how to set up Corel InfoCentral to work with your modem. Click Help ► Help Topics, click the Index tab, then type modem: define for further information and instructions.

- 3 Type a description of the call. Click the Call Date and Start Time fields to display the current date and time.
- 4 Type notes about the phone call in the Notes field, then click the End Time field when you hang up.

If you are involved in a conference call,

- 5 Click Participants.
- 6 Select a name from the Person list box, then click the arrow to move the name to the Participants list box. Type any relevant information, then click OK.

*or*

If the name you want doesn't appear in the list, click New Object. Type a person's name in the text box, click OK, type any pertinent information about that person, then click OK. Click the arrow to move the name to the Participants list box. Type any relevant information, then click OK.

- 7 Add as many participants as you like. When you finish, click Close.

If you want to connect a call to another object, such as a project or person that you have discussed,

- 8 Click the Connect button  (located just below the scroll bar on the right).

At this point, you may connect the phone call to a new object or to an existing one.

- 9 Select a category name from the Category list box, type a name in the Object Name text box, then click Add New. Type any pertinent information, click OK, select the connection description from the list, then click OK again. Type any relevant information, then click OK.

*or*

If you are connecting to an existing object, select a category name from the Category list box. Type the first few letters of the object's name in the Object Name text box, then select the object from the list. Click Connect. Select a connection description from the list, click OK, type any relevant information, then click OK again.

- 10 Add as many connections as you like. When you finish, click OK, type any pertinent information, click OK again, then click No to return to the current view.

---

## Scheduling a Telephone Call in Advance

You can schedule telephone calls just like any other appointment.

To schedule a telephone call,

- 1 Click View ► View Calendar. Click View ► Go To Date, type the date when you want to make the call, then click OK.
- 2 Select the appropriate time.
- 3 Click Object ► Add, select Telephone Call from the Category list box, then type a description in the Object name text box (for example, type "Call Richard"). Click Add.
- 4 Type an estimated end time, then set the alarm notification to remind you minutes in advance that you have a call to make. (You may need to scroll to find the alarm notification fields.)

If you're scheduling a conference call,

- 1 Click the Participants button.
- 2 Select a name from the Person list box, then click the arrow to move the name to the Participants list box. Type any pertinent information, then click OK.

*or*

If the name you want doesn't appear in the list, click New Object. Type a person's name in the text box, click OK, then type any pertinent information about that person. Click OK, then click the arrow to move the name to the Participants list box. Type any relevant information, then click OK.


- 3 Click Close when you finish adding participants. Click OK, then click No to return to the Calendar View.

---

### **Making a Note to Call Someone**

Use QuickCall as another way to remind yourself to make a phone call, or use it to record notes about a phone call.

To write a note about a phone call,

- 1 Click Object ▶ QuickNote™.
- 2 Click .
- 3 Type a message about the phone call, then type the date and time that call is to take place in the appropriate fields. Click OK.
- 4 Click View ▶ View Calendar. Click View ▶ Go To Date, type the date the call is to take place, then click OK.
- 5 Select the QuickCall time, then click Object ▶ Information to view the note.

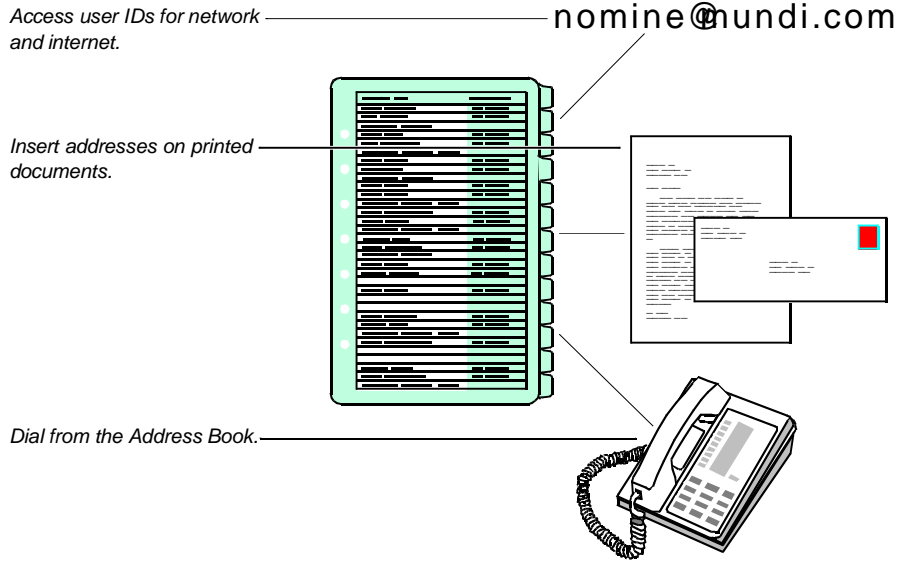
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## **Organizing Your Addresses**

Use the Address Book in Corel InfoCentral to store names, addresses, telephone numbers, user IDs—everything you need to quickly get in touch with family, friends, and business associates.

From the Address Book, you can send e-mail or place a phone call with a simple click. You can also import names and information right into Corel InfoCentral. Plus, any information

you enter in the Address Book automatically appears in Microsoft Exchange and vice versa.



---

## Adding Names to the Address Book

You can add an entry for a person or organization. When you create and edit an entry for an organization, that information is updated to all personal entries that belong to the same organization.

- 1 Click Tools ► Address Book, then click the My Addresses tab.
- 2 Click Edit ► Add Name.

HINT: You can also click Add at the bottom of the Address Book window.

- 3 Select Person or Organization for the kind of entry you want to create, then click OK.
- 4 Type in the appropriate information, then click New to create another entry, or click OK to finish. (You may leave some fields blank if you want.)

---

## Arranging the Address Book

You can create any number of smaller address books to better organize important names and addresses. Use one address book for family members, another one for clients, and still another for friends. Smaller address books are represented by tabs in the main Address Book window.

### *Adding Address Books*

- 1 Click Tools ► Address Book, then click Book ► New.
- 2 Type a name for the new book, then click OK.

To add information to any address book, see *Adding Names to the Address Book* above.

### *Selecting Entries in the Address Book*

You can open the Address Book and select names and addresses from one or more address books.

- 1 Click Tools ► Address Book.
- 2 Select an address book tab.

or

Click Book ▶ Open, select the address book you want to open, then click OK.

- 3 Click an entry to select it.

HINT: To select multiple entries, press Ctrl while clicking entries.

- 4 To select all entries (up to 1000) in the current address book, select an entry, then click Edit ▶ Select All.
- 5 To deselect all entries in the current address book, select an entry, then click Edit ▶ Deselect All.

### ***Copying Names Between Address Books***

You can quickly copy names from one address book to another. When you update information in one address book, it updates in both.

- 1 Click Tools ▶ Address Book.
- 2 Select an address book tab, then select the name you want to copy.

or

Click Book ▶ Open, select the address book you want to open, click OK, then select the name you want to copy.

HINT: To select several names, press Ctrl while clicking names. To select all names, click Edit ▶ Select All.

- 3 Click Edit ▶ Copy Names.
- 4 Specify the address book where you want the names copied, then click OK.

HINT: You can also copy by dragging selected names from one tab to another.

### ***Removing Names***

- 1 Click Tools ▶ Address Book.
- 2 Select an address book tab, then select the name you want to remove.

or

Click Book ▶ Open, select the address book you want to open, click OK, then select the name you want to remove.

- 3 Click Edit ▶ Remove ▶ Yes.

or

Drag the name(s) to the edge of the Address Book.

### ***Viewing or Editing Names***

- 1 Click Tools ▶ Address Book.
- 2 Select an address book tab, then select the name you want to edit.

or

Click Book ▶ Open, select the address book you want to open, click OK, then select the name you want to edit.

- 3 Click Edit ▶ Edit Name.

HINT: You can also click a name, then click Edit at the bottom of the Address Book window.

- 4 Change the information, then click OK.

### ***Using Cut, Copy, Paste***

You can move or copy text from one location to another without having to retype the information. For example, you could move names from one book to another; or you could copy a city name to use several times when filling out address information.

- 1 Select the address or text you want to place on the Clipboard.
- 2 Click Edit ▶ Cut to remove the selected information from its current location and place it in another.  
*or*  
Click Edit ▶ Copy to copy the selected information to another location.
- 3 Place the insertion point where you want to retrieve the information, then click Edit ▶ Paste.

### ***Renaming a Book***

- 1 Click Tools ▶ Address Book.
- 2 Select an address book tab.  
*or*  
Click Book ▶ Open, select the address book you want to open, then click OK.
- 3 Click Book ▶ Save As, then type the new name.

### ***Deleting Address Books***

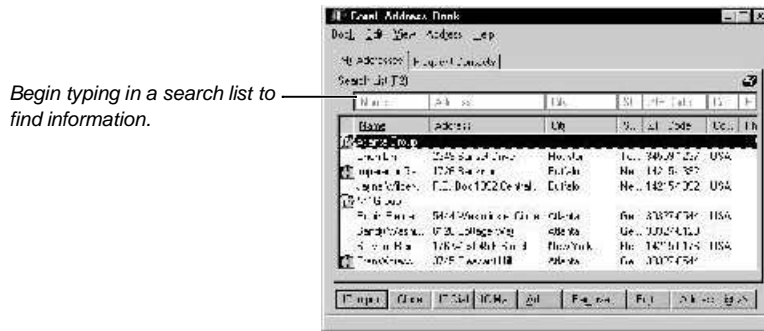
- 1 Click Tools ▶ Address Book.
- 2 Click Book ▶ Delete.
- 3 Select the book(s) you want to delete, then click OK ▶ Yes.

### ***Searching for Individual Addresses***

- 1 Click Tools ▶ Address Book.
- 2 Select an address book tab.  
*or*  
Click Book ▶ Open, select the address book you want to open, then click OK
- 3 Press F2, click OK, then type the name you want to find. To find an entry by telephone number, address, city, and so on, press Tab to move the cursor to the appropriate text box.



HINT: You can also perform an individual search by simply clicking a Search List text box (located directly above the column headings) and typing the appropriate information. For example, if you want to find people who live in a particular city, click the text box marked City, then type the name of the city.



To find multiple entries in an address book, see *Finding a Group of Addresses Quickly* later in this section.

### Opening and Closing Books

You can have any number of address books, but you can select names and addresses only from open books. If an address book is open, it will have a tab in the main Address Book window.

- 1 Click Tools ► Address Book ► Book ► Open.
- 2 Select an address book, then click OK.
- 3 To close an address book, select it, then click Book ► Close.

Closing an address book removes the tab from the main Address Book window. It does not delete the book.

### Using the Frequent Contacts Book

You can easily find the people or organizations you contact most in the Frequent Contacts tab. Every time you e-mail or telephone someone from any address book, it is recorded in the Frequent Contacts tab. You can also add or edit an entry from there.

- 1 Click Tools ► Address Book.
- 2 Select the Frequent Contacts tab.  
or  
Click Book ► Open, select Frequent Contacts from the list, then click OK.

### Exiting the Address Book

- 1 To exit the Address Book, click Book ► Exit.

HINT: You can also click Close.

## Creating a Group of Addresses

You can combine names from one or more address books and save them as a distinct group. For example, you can save your wedding guest list as a group using names from the Family tab, Friends tab, and Clients tab. Instead of searching the entire Address Book to see who's invited to the wedding, simply go to that group.

Use the Group feature to also quickly transfer a list of names and addresses to Corel InfoCentral.

## Creating an Address List

- 1 Click Tools ► Address Book, then click Address List>>.



- 2 Select an entry, then click Select Address.

HINT: You can also double-click an entry or drag selected entries to the list.

- 3 Click other address books, if you want, and add more names to the list.
- 4 To delete an entry, click it, then press Delete, or drag it off the list.
- 5 Select the Address Book where you want to save the group, click Save Group, type a name for the group, add any relevant comments, then click OK.

You can treat the group as you would any other address entry.

## Retrieving and Editing a Group

- 1 Select the address book tab where the group is located, then select the group.  
or  
Click Book ► Open, select the address book you want to open, click OK, then select the group.
- 2 Make sure the address list is open, then click Edit ► Edit Group.

HINT: Right click, then click Edit Group.

- 3 Delete or add names to the list, then click Save Group.

## Editing the Name of the Group

- 1 Open the address book where the group is located, then click the group.
- 2 Click Edit ► Edit Name.

HINT: You can also click Edit at the bottom of the Address Book window.

- 3 Type the new name.

HINT: If you want to edit the contents of the group, see *Retrieving and Editing a Group* above.

---

## Importing and Exporting Addresses

You can export selected addresses or entire address books to a file. This option lets you place an address book on another machine or network location.

### *Exporting Addresses to a File*

- 1 Click the address book you want to export.  
*or*  
Select addresses or groups.
- 2 Click Book ▶ Export.
- 3 Click Entire Address Book or Selected Items.
- 4 Type a name and path for the exported addresses.
- 5 To connect to an available network drive, click Network, specify the location, then click OK.
- 6 Click OK to save the file.

### *Importing Addresses from a File*

- 1 Click Book ▶ Import.
- 2 To connect to an available network drive, click Network, specify the location, then click OK.
- 3 Click an available address book file, then click OK to open the book.

If entries already exist for entries you are importing, you are asked if you want to replace the existing entries with those you are importing.

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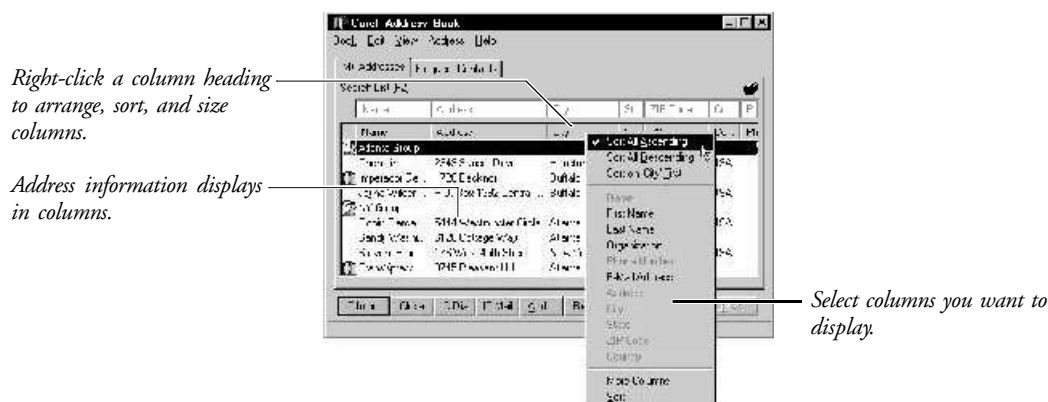
## Importing Names and Addresses into Corel InfoCentral

You can transfer names and addresses quickly and easily from the Address Book to Corel InfoCentral. There's no need to retype them.

- 1 Click File ▶ Open, select the iBase where you want to save the imported names and addresses, then click Open.
- 2 Click Tools ▶ Address Book.
- 3 Select the address book tab that contains the names and addresses you want to import.  
*or*  
Click Book ▶ Open, select the address book you want to open, then click OK.
- 4 Select the name(s) you want to import (press Ctrl to select multiple names).  
*or*  
Select the group you want to import.
- 5 Click IC Import ▶ Begin Import.

## Displaying and Arranging Addresses

There are many items of information in each Address Book entry. Each item of information is displayed in a column. You can change which columns display in the main Address Book window. You can also arrange, sort, and size columns.



### Displaying Different Columns

- 1 Click **Tools** ► **Address Book** to open the Address Book.
- 2 Select the address book tab where you want to change the displayed columns.  
*or*  
Click **Book** ► **Open**, select the address book you want to change, then click **OK**.
- 3 Click **Edit** ► **Columns**.

HINT: Right-click a column heading.

- 4 Click a column name to display or remove it from the Address Book window.

### Displaying and Arranging Columns

You can change the order in which information is displayed. Currently, entries are sorted first by name (or the first column on the left). To sort addresses by a different criteria (alphabetically by city name), move the appropriate column marker (City) to the first position on the left.

To add a new column,

- 1 Select the address book tab you want to change.  
*or*  
Click **Book** ► **Open**, select the address book you want to change, then click **OK**.
- 2 Click **Edit** ► **Columns** ► **More Columns**.
- 3 Select a new column from the Available columns list, then click **>>Add>>**.
- 4 To remove columns, select the column you want to remove from the Selected columns list, then click **<<Remove<<**.

HINT: In the main Address Book window, you can also remove columns by dragging them off the Address Book with the mouse.

- 5 To arrange the columns, select a column from Selected column list, then click **Move to the left (up)** or **Move to the right (down)**.

HINT: In the main Address Book window, you can also arrange columns by dragging the column marker to the positions you want.

#### Changing Column Widths •

- 1 Click Edit ► Columns ► More Columns.
- 2 Select the column you want to change from the Selected column list, then click < Smaller or Larger >. Click << or >> to decrease or increase by a larger amount.

HINT: You can also drag the ends of the column markers to the width you want.

Sorting Columns • Information can be sorted within columns according to different criteria. For example, you could sort by name and have information sort from top to bottom in either ascending order (A to Z) or descending (Z to A).

- 1 Click Edit ► Columns ► Sort.
- 2 Select the column you want change.
- 3 Click Ascending sort (A to Z or 1, 2, 3).  
or  
Click Descending sort (Z to A or 3, 2, 1).

---

### **Making Telephone Calls from the Address Book**

If you have a modem or network connection, you can use IC Dial to telephone a person in the address book. Dial opens the Microsoft Dial utility, enabling you to call from the Address Book.

- 1 Select a name in an address book.
- 2 Click IC Dial.
- 3 Type a brief message about the phone call, then click OK.

---

### **Sending E-Mail from the Address Book**

If you have a modem or network connection, you can use IC Mail to send e-mail messages right from the address book.

- 1 Select a name in an address book.
- 2 Click IC Mail.
- 3 Type your message, then click OK.

---

### **Additional Information**

#### ***Changing Your Preferred Messaging System***

When the Address Book is installed, it identifies your available messaging systems and uses the PerfectOffice settings as your default profile for e-mail and fax services. However, you can change your preferred settings if you have other services available, such as MS Exchange.

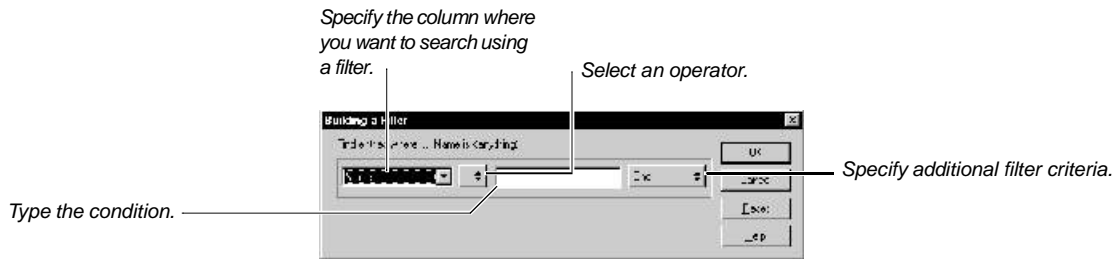
The Address Book links the selected messaging profile with specific address books. This means that when you change your preferred settings, the available address books will change also.

- 1 Open the Address Book, then click Edit ► Preferences.
- 2 Select a profile, then click OK.
- 3 To have changes take effect, exit the Address Book (and Corel InfoCentral if needed), then restart the Address Book.

## Finding a Group of Addresses Quickly

When you have a large address book, use Filters to display only the addresses you need. For example, you can display only entries with last names that begin with “D” who live in San Francisco.

- 1 Open the Address Book, then click View ► Define Filter.



- 2 Select the type of information you want to find (for example, Last Name) from the first drop-down list on the left.
- 3 Select an operator from the second drop-down list. See the table below for a definition of each operator.

Operator	Find	Example
= Equal To	All entries that match the information you type in the text box	"State = Utah" finds all entries with Utah addresses.
! Not Equal To	All entries except the ones that match the information you type in the text box	"State ! Utah" finds entries that don't have Utah addresses.
< Less Than	All entries that come before the information you type in the text box	"State < Utah" finds addresses with states that precede Utah alphabetically.
<= Less Than or Equal	All entries that come before or match the information you type in the text box	"State <= Utah" finds Utah addresses and addresses with states that precede Utah alphabetically.
> Greater Than	All entries that come after the information you type in the text box	"States > Utah" finds addresses with states that follow Utah alphabetically.
>= Greater Than or Equal	All entries that come after or match the information you type in the text box	"State >= Utah" finds Utah addresses and addresses with states that follow Utah alphabetically.
[] Contains	All entries where the information you type makes up all or part of a word or number series	"State [] ta" finds addresses with states such as Utah, Montana, and South Dakota.

- 4 Type a word or number to search for in the text box. For example, if you select Last Name and type “Brown” in the text box, the Address Book will display all entries with the last name “Brown.”

Use any of the following operators to expand your search:

Operator	Represents	Example
; (List of Values)	Or	”Adams;Smythe” finds all entries with the last name Adams or Smythe.
- (Range of Values)	Between	”Adams-McPherson” finds all entries whose last names fit alphabetically between Adams and McPherson.
* (Wildcard)	Zero or more characters	”Mc*” finds all entries with the last name McBride, McDougle, or any name that begins with “Mc”.
? (Wildcard)	A single character	”Sm?th?” finds all entries with the last name Smothe, Smithy, and so on.

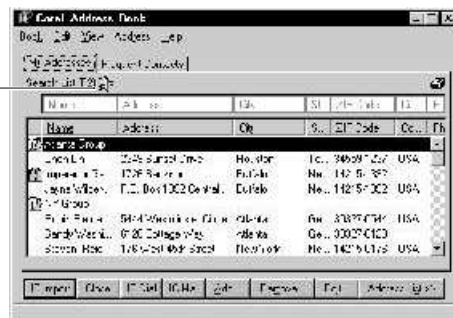
- 5 Select End from the drop-down list on the right to complete the search definition.  
or  
Select an additional filter option from the drop-down list on the right. See *Filter Options* later in this section.
- 6 Click OK to begin the search.

### Turning Filters On and Off

After a filter has been defined, you can still see all the entries in the Address Book by simply turning off the filter. You can turn it back on again at any time to display only the entries you want. When a filter has been turned off (or disabled), the filter icon appears in the Search List with a line drawn through it.

- 1 Click View ► Filtering Enabled to display the entries that were defined in your filter.

Filtering is defined for the current address book.



### Filter Options

And, Or • Use a comma (,) to join two or more search conditions. For example, to find names that begin with M, N, and O, you must type these two conditions: all names greater than L (>L\*) *and* all names less than P (<P\*). The formula is >L\*,<P\*.

Use a Shift-\ (|) when you want to include all entries that meet one of two or more conditions. For example, type =L\*|P\* to display all names that begin with either L or P.

**Inserting a Row** • Use Insert Row to make your filter more specific. Each row you insert can contain information to narrow your search. Insert Row is very useful to filter large address books.

For example, to display the names of all employees whose last name begins with D and who work in the Manufacturing Department, use a two-row filter. For the first row, click the Last Name column, click = for the operator, and type D\* as your text.

Click Insert Row in the list box to create a new row. In the second row, click the Department column, click = for the operator, and type Manufacturing as your text.

**Deleting a Row** • Use Delete Row to remove a row from your filter definition. You must have more than one row in the filter definition for Delete Row to work; you cannot delete a one-row filter.

**Creating a New Group** • A Group is two or more rows in a filter that use the same column definition. If you add a new row with a different column definition, you need to use New Group.

For example, to create a filter to display people whose last names are Smith and Jones and who live in Dallas, click the Last Name column, click = for the operator, type Smith, then click And. A second row appears. Click the Last Name column, click = for the operator, type Jones, then click New Group.

On the pull-down menu above the newly added row, click And. Click the Locality column, click = for the operator, type Dallas as the parameter, then click End.



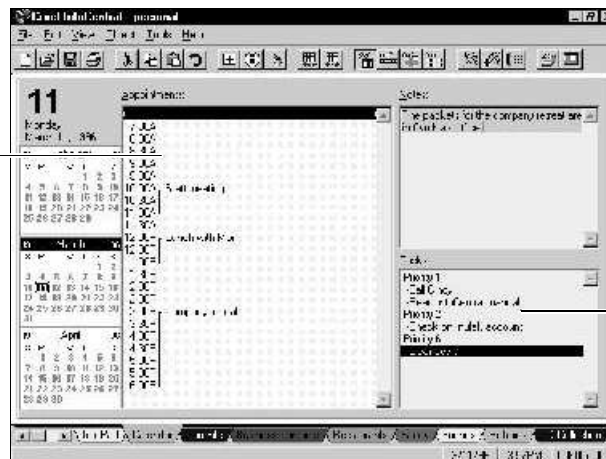
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# Managing Time with Corel InfoCentral

Keeping track of your time is easy with Corel InfoCentral. This section contains all the information you need to

- Record important events
- Plan your day completely
- Be on time to appointments

*This is Marc's schedule for the day.*



*This is Marc's list of things to do.*

---


## Keeping Track of Appointments

Use the Corel InfoCentral calendar to track your appointments and daily activities. You can also set alarms to remind you of appointments.

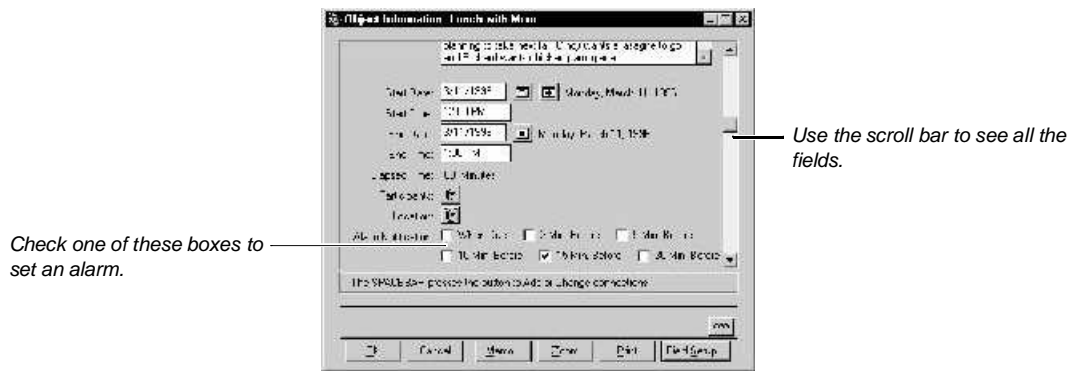
---

### Scheduling Events

You can schedule an appointment, meeting, telephone call, or event (like a birthday party or vacation). For the purpose of this exercise, schedule an appointment.

- 1 Click View ► View Calendar.
- 2 Click Object ► Add.
- 3 Select Appointment from the Category list box, then type the nature of the appointment (doctor, lawyer, and so on) in the Object Name text box. Click Add.
- 4 Type any applicable information in the Notes text box.
- 5 Type the date of the appointment in the Start Date text box.  
or  
Click  to select a date.
- 6 Type the time of the appointment in the Start Time text box. Then type the appropriate information in the End Date and the End Time text boxes.

- 7 Select an Alarm Notification option to remind yourself of the appointment minutes before (you may need to scroll).



If you want to specify a location for the appointment,

- 8 Click Location.
- 9 Select a name from the Organization list box, then click the arrow to move the name to the Location list box. Select Location/Event, click OK, type any relevant information, then click OK again.  
*or*  
If the name you want doesn't appear in the list, click New Object. Select Organization, click OK, type the name of the organization, then click OK. Type any pertinent information (telephone number, address, directions) about the location, then click OK. Click the arrow to move the name to the Location list box. Select Location/Event, click OK, type any relevant information, then click OK again.
- 10 Click Close, click OK, then click No to return to the current view.

## Viewing the Event

You can see appointments, meetings, and other events in the Outline view, Calendar view, and CardFile view.

To see the appointment in the Outline view,

- 1 Click View ► View Outline.  
*or*
- 2 Click the InfoPad tab.
- 3 If you don't see the appointment listed in the outline, click Find ► FastFind, then click Find Events.

To see the appointment in the Calendar format,

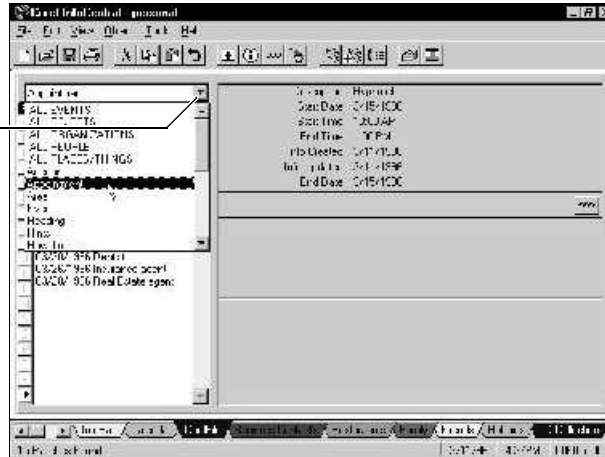
- 1 Click View ► View Calendar.
- 2 Click View ► Go To Date, then type the date of the appointment.

To see the appointment in the CardFile view,

- 1 Click View ► View CardFile.

- 2 Click the Down-arrow above the list box, then select Appointment.

Click here to activate the drop-down list.



## Customizing the Alarm

You can change the tune of the alarm and how frequently it plays.

To set your preferences for alarms,


- 1 Click Edit ► Corel InfoCentral Preferences ► Alarms.
- 2 Select a tune, set the duration and “remind again” time, then click OK.

## Planning Your Day

One key to personal productivity is to take a few minutes and plan what you will do each day. Corel InfoCentral can help you make and keep your plans by organizing your tasks and appointments.

### Writing Yourself a Task List

Begin your planning by making a list of the things you need to accomplish, then prioritize the items in that list.

- 1 Click Object ► Add.
- 2 Select Task from the Category list box, then type the nature of the task (write newsletter, plan conference, and so on) in the Object Name text box. Click Add.
- 3 Select a priority and type any appropriate notes.
- 4 Type the start date and due date in the appropriate text boxes.  
or  
Click  to select a date.

If you assign the task to someone else,

- 5 Click Delegated To. (You may need to scroll.)
- 6 Select a name from the Person list box, then click the arrow to move the name to the Delegated To list box. Type any relevant information, then click OK.  
or

If the name you want doesn't appear in the list, click New Object. Type a person's name, click OK, type any pertinent information about that person, then click OK again. Click the arrow to move the name to the Delegated To list box. Type any relevant information, then click OK.

7 Delegate this task to as many people as you like. When you finish, click Close.

8 Click OK, then click No to return to the current view.

Repeat the entire procedure for each task you have. Click Object ▶ View Calendar to review your list of tasks and appointments for the day. Then go to work on your first-priority tasks.

---

## Writing Notes to Yourself

Use Memos to attach important information to an appointment, meeting, event, or task. For example, you can write a list of items for your next meeting and link it to the scheduled event.

1 Select any type of event or task in the Calendar view.

2 Click Object ▶ Attach Memo, then type the message. Click Date/Time to record when you wrote the memo.

HINT: You can attach a memo while you are scheduling an event. When you are filling out the event's information dialog box (with the date, time, alarm setting, and so on), simply click Memo and type the message. Once you attach a memo to an event, you can read it by selecting the event object, then clicking Object ▶ Attach Memo.



*This icon means a note or memo is attached to this date. Right-click it and choose Attach Memo to read the note.*

---

## Printing Planner Pages

You can print your daily schedule and task list on different size pages that will fit in most popular binders.

1 From the Calendar view, click File ▶ Print Calendar.

or

From the Outline view, click File ▶ Print ▶ Calendar.

2 Select the options you want, then click Print.

---

# Wrapping Things Up

As you do your work each day and complete your tasks, there is satisfaction in marking off the tasks on your list. Also, you will occasionally want to purge your calendar of completed tasks.

---

## Closing Tasks

When you either finish a task or abandon it, you need to close out the task on your task list.

- 1 From the Calendar view, select the task you completed or the task you want to abandon.

*or*

If you're on another tab, click File ▶ FastFind ▶ Find Events, then select the task you completed or the task you want to abandon.

- 2 Click Object ▶ Information.
- 3 Select either Completed or Abandoned (you may need to scroll), then type the date in the Completed On text box.

---

## Housekeeping

When you close a task, it remains displayed under the Completed heading. You can clear these tasks from your iBase by using Housekeeping.

- 1 Click View ▶ View Outline.
- 2 Click File ▶ iBase Management ▶ Housekeeping.
- 3 Select Empty completed task items.

---

# Managing Documents with Corel InfoCentral

Use Corel InfoCentral to organize your online documents, so you can find whatever document you need quickly and easily. You'll also be able to

- Copy, edit, move, or delete files
- Create letters, spreadsheets, graphics, and other documents from Corel InfoCentral
- Insert information from Corel InfoCentral into a new document automatically

---

## Using Corel InfoCentral as a File Manager

Corel InfoCentral gives you quick access to all the documents you have stored in your system. From Corel InfoCentral, you can read a letter you wrote to a client, make a copy of a spreadsheet, transfer a set of documents from one folder to another, and more. Corel InfoCentral makes it easy to find and use any file. In addition, you can connect these files to any other objects in your iBases.

---

### Searching for Files

To locate files in your system,

- 1 In the Outline view, click Find ► FastFind Files.
- 2 Type the name of the file in the text box. Be sure to include the full path (for example, for a file named "Letter" located on your c drive, type "c:\letter.\*").  
*or*  
Type the name of a folder. This brings up a list of files found in that folder. Be sure to include the full path. (For example, type "c:\sample" to bring up a list of files contained in the folder named "sample.")
- 3 Click Find Files.

To see the name of a file, click the + (plus sign) next to the File object, then click OK.

#### *Narrowing the Search for Files*

Use Find External Files when you want to locate a document but can't remember what you named it or where you saved it. Simply provide a word or two contained in the file to locate it. You can also find files by their creation date or size.

Find External Files is also helpful when you want to locate a group of documents. For example, you can quickly find all memos that contain a certain word, like "gold," or you can find all documents that were created on a particular day.

- 1 In the Outline view, click Find ► Find External Files.
- 2 Type the name of the folder you want to search in the Show files matching text box. (Remember to include the full path of the folder.)

*or*

Click Browse to select the folder name from a list.

- 3 Type a word in the Text to search for text box that appears in the file(s) you want to find.

HINT: Type a word in the second text box, then click And to find only those files that contain both words. Click Or to find files that contain either word.

- 4 Select any other options you want, then click OK.

---

## Managing Files

You can easily edit, view, rename, move, copy, and delete files that are listed in Corel InfoCentral. For example, you can rename a document and move it from your hard drive to a network without ever leaving Corel InfoCentral.

### *Editing a File*

To edit or view a document listed in Corel InfoCentral,

- 1 In the Outline view, select the document you want to edit.
- 2 Click Object ▶ File Objects ▶ Open.

### *Renaming a File*

To rename a document listed in Corel InfoCentral,

- 1 In the Outline view, select the document you want to rename.
- 2 Click Object ▶ File Objects ▶ Rename, type a new name for the document in the Filename text box, click OK, then click Rename.

### *Moving a File to Another Folder*

To move a document from one folder to another while in Corel InfoCentral,

- 1 In the Outline view, select the document you want to move.
- 2 Click Object ▶ File Objects ▶ Move.
- 3 Type the name of the folder in the Location text box (remember to include the full path) where you want to put the document.  
*or*  
Click Browse to select the name of a folder from a list. The folder you select is where you want to put the document. Click OK.
- 4 Click OK, then click Move.

### *Coping a File*

To make a copy of a document from Corel InfoCentral,

- 1 In the Outline view, select the document you want to copy.
- 2 Click Object ▶ File Objects ▶ Copy.
- 3 Type a new name for the file in the Filename text box to copy the file to the same location.  
*or*  
Select a different folder from the Folders list to copy the file to another location.
- 4 Click Open.

### *Deleting a File*

To permanently remove a file from a folder,

- 1 In the Outline view, select the document you want to delete.
- 2 Click Object ▶ File Objects ▶ Delete.
- 3 Click Delete to remove the file. (If you change your mind, and you want to restore the last file you deleted, click Object ▶ File Objects ▶ Undelete.)  
*or*  
Click Shred to permanently remove the file from your system. You cannot restore a shredded file.

---

## Connecting Files to Other Objects in Corel InfoCentral

You can organize your files and documents by connecting them to people or things in your iBase. For example, to keep track of the letters you write, connect them to the individuals who receive them. Now, to find any letter, simply go to that individual's name in Corel InfoCentral.

The following steps help you display a list of files which you can then connect to the appropriate persons.

- 1 In the Outline view, click Find ► FastFind Files.
- 2 Type the name of the folder (include the full path), then click Find Files.
- 3 Click the plus sign (+) next to the Files object, then click OK.

HINT: To find a specific group of files (like all letters created within a certain time frame), see *Narrow the Search for Files* earlier in this section.

- 4 Click Find ► FastFind ► Find People.
- 5 Select a file, drag it to a person's name, then select the connection description from the Connection descriptions list box. Click OK.

You can also connect files to organizations, events, or any other objects in Corel InfoCentral.

HINT: In addition, you can drag and drop files from Windows Explorer onto objects in Corel InfoCentral to make connections. To access Windows Explorer from Corel InfoCentral, click Tools ► Windows' Explorer, type a description, click Paste Link, click OK, select a connection description, then click OK.

---

## Creating New Documents from Corel InfoCentral

You can organize your documents from Corel InfoCentral as you create them. For tasks like writing letters or creating spreadsheets, start from Corel InfoCentral. Once you finish the document, it will be automatically connected to the person (or other object) in your iBase. When you need to find that document again, you'll know right where to go.

This feature can best be illustrated by the following example:

---

### Writing a Letter from Corel InfoCentral

- 1 Select the person (or organization) that will receive the letter.
- 2 Click Object ► Create Related File.
- 3 Select Letter (WordPerfect 7) as the file type, then click OK.
- 4 Select Home Address to include the person's home address in the letter, then click OK.

or

Select Select a Different Object, click OK, then double-click the name of an organization to include the business address in the letter.

HINT: If you selected an organization in Step 1, you can still address the letter to an individual in your iBase. In Step 4, select a name (from the list) of the person who will receive the letter. If the name you want doesn't appear on the list, select Select a Different Person, click OK, then double-click a name in the Outline view.

- 5 Type a description for the letter, then click OK. The description will appear in the RE: (regarding) line.



Corel InfoCentral launches your word processor, names and saves the file, and fills in the date and addressee information.

6 Type your letter.

7 Save the changes you made to the letter, print it, then close your word processor.

HINT: Corel InfoCentral will automatically save your letter to the sub-folder “Docs” in your Corel InfoCentral folder. However, you can save the letter to a different location by assigning a different default folder. To change the default folder, click Object ▶ Create Related File, select Letter from the list box, click Type Setup ▶ Advanced, then type a new location in the Data file folder text box. Remember to include the full path with the folder name.

You are returned to your iBase. Click the plus sign (+) to expand the connections on the addressee. You’ll see that the letter you just wrote is a file connected to that person.

---

## Automatically Inserting Information from Corel InfoCentral into a New Document

Corel InfoCentral can partially complete a document for you by automatically inserting the text you want, where you want it. A great time-saver, Corel InfoCentral can instantly add names, dates, addresses, account numbers, and more to several types of documents. For example, to create hundreds of form letters, type the text once and let Corel InfoCentral do the rest.

This feature can best be illustrated by creating a form letter template.

1 Select a person’s name in the Outline view.

2 Click Object ▶ Create Related File, type Form Letter in the text box, then click New Type.

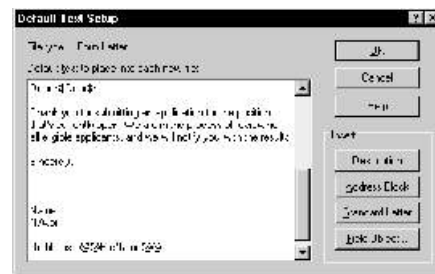
3 Click Add, then click No.

4 Select WordPerfect 7 for Windows 95 from the Windows application drop-down list (you may need to scroll), then select {New Description} from the Connection description drop-down list.

5 Click Default Text, then click Standard Letter.

As you create the form letter, the symbols that appear in the text box will be replaced by information about the person you’ve selected.

6 Type the text of the form letter after the line that reads “Dear \$\$Dear\$\$:”. The text you type will appear on every form letter you create using Corel InfoCentral. Then click OK.



7 Click OK again, type Form Letter in the Connection Description text box, then click OK.

8 Click Scan Drives. Make sure Form Letter is selected, click OK, then type a description for the form letter. Click OK.

For more information about transferring information from Corel InfoCentral into a new document, see *Lesson 2: Creating a Memo from Corel InfoCentral* in *Lessons*.

### ***What Do All the Symbols Mean?***

The symbols and references (like \$\$Dear\$\$) that appear in the Default Text window are placeholders for the names, dates, and other information that Corel InfoCentral will insert automatically.

You can add a variety of placeholders into any file type:

Type This	To Insert This
@@Sys_Date1@@	The current date as MM/DD/YY. For example, 06/21/59.
@@Sys_Date3@@	The current date as Month DD, YYYY. For example, June 21, 1959.
@@Sys_Date5@@	The current date as Day, Month DDth, YYYY. For example, Sunday, June 21st, 1959.
@@Sys_Time1@@	The current time as HH:MM am/pm. For example, 7:30 pm.
@@Sys_Time3@@	The current time as HH:MM (24-hour format). For example, 19:30.
@@FileDesc@@	The file description you typed for the created file. (Use it after the "RE:" notation in a memo. For example, RE: Memo to all employees).
\$\$Object_Desc\$\$	The full name of the person connected to the related file.
%%Object_Desc%%	The name of the non-person connected to the related file (like a company, restaurant, project name).
\$\$Dear\$\$	The name you typed in the "Dear" text box in the person information dialog box.
##Address_Block##	Address information about the non-person or person connected to the related file.

---

## **Opening and Editing Related Files**

Right from Corel InfoCentral, you can read or make changes to any documents that are connected to objects.

To open a document from Corel InfoCentral,

- 1 Select the description of a document in the Outline view, then click Object ► File Objects ► Open.

The appropriate application is started, and the file is opened for you to review or edit.

- 2 If you make changes, save the file, then close the application to return to Corel InfoCentral.

---

# Moving Information to and from Corel InfoCentral

With Corel InfoCentral, you don't have to start every project from scratch. Instead, you can pull information from other projects and use it to build iBases, labels, schedules, and more. This section will show you how you can easily

- Move information from one application to another
- Share information between iBases
- Send e-mail from Corel InfoCentral
- Create iBases from existing ones

**IMPORTANT:** The information you move between applications and iBases is only a copy. You will not lose any information from the original source by using the export or import features in Corel InfoCentral.

---

## Moving Information from One Application to Another

Corel InfoCentral saves you time by letting you take the work you completed in one application and use it in another. For example, you can transfer names and addresses from Corel InfoCentral to WordPerfect 7 to quickly create a mailing list. Or use the information you saved in other databases, PIMs, or spreadsheet programs and bring it into Corel InfoCentral. You can also copy appointments and tasks from Novell® GroupWise™ and view them in the Corel InfoCentral Calendar.

---

### Exporting Information from Corel InfoCentral to another application

Instead of typing the same information twice, you can quickly transfer any information from Corel InfoCentral to a database, spreadsheet program, PIM, or word processor.

For example, create a mailing list from names stored in Corel InfoCentral. You can then bring up the mailing list in your word processor and merge it with a letter.

- 1 Click File ► Open. Select the iBase that contains the names and addresses you want to export, then click Open.
- 2 Display the objects you want to export in the Outline view. See *Finding Information in Your iBase* in *Keeping Track of Information* for details about finding and displaying information in Corel InfoCentral.

or

If the information you want to export is already displayed on a tab, select that tab.

- 3 Click File ► Export ► Data, select Typical Contact List from the list box, then click OK.

**IMPORTANT:** Corel InfoCentral will export only one category at a time. You can, however, export objects from a second category, but only if they're connected to the first category you select. To export objects from a second category, make sure Include a connected category is selected.

- 4 Select Person from the list box, select Export objects in current view only, then click OK.

**HINT:** Deselect Export objects in current... to export all the names of people contained in the iBase.

- 5 Select Organization from the list box, then click OK.
- 6 Select All Connections from the list box, then click OK.

- 7 Type a filename for the export file. Notice the folder where the export file will be saved. Click OK.
- 8 Select the fields (like First Name, Last Name, and Address 1) that contain the information you want to export, and drag them to the list box on the right. Click OK.  
*or*  
Click All Fields to export all the information in the Person category, then click OK.

**IMPORTANT:** The categories and fields you selected in Steps 3-6 are saved to the "Typical Contact List." Now, every time you want to export the same type of information, use the "Typical Contact List." To find out how to export different types of information, see *Changing, Creating, or Deleting an Export Scenario* below.

- 9 Click Begin Export, then click OK.

Corel InfoCentral saves the information to the folder and filename you designated in Step 5. You can open the file in WordPerfect 7 (or other word processor) and use the information to create a mailing list.

### ***Changing, Creating, or Deleting an Export Scenario***

When you export information from Corel InfoCentral, you must use an Export Scenario. An example of an Export Scenario is the "Typical Contact List" you created in the steps above. The "Typical Contact List" tells Corel InfoCentral what parts of your iBase to export. You can define one Export Scenario to export business names and their telephone numbers, another to export meeting times and locations, another to export names and addresses, and so forth. Once you define Export Scenarios, you can use them as often as you like, but only in the iBase where they were created.

To define an Export Scenario,

- 1 Click File ► Open. Select the iBase that contains the information you want to export, then click Open.
- 2 Display the objects you want to export in the Outline View.  
*or*  
If the information you want to export is already displayed on a tab, select that tab.
- 3 Click File ► Export ► Data.
- 4 Type a new name in the Export scenario text box. (The name you type should reflect the type of export you want to do. For example, if you want to export business names and telephone numbers, type Business Phone List.) Click New Scenario, then click Add.
- 5 Select a category (where the information you want to export is found) from the list. Click OK.

**IMPORTANT:** If you want to export information from two categories, select Include a connected category. However, Corel InfoCentral will export only objects from the second category if they are connected to the first category.

- 6 Type a filename for the export file. Notice the folder where the export file will be saved. You may select a new folder or use the default folder. Click OK.
- 7 Select the fields (like Organization Name, Main Telephone, and Address 1) that contain the information you want to export, and drag them to the list box on the right. Click OK.  
*or*  
Click All Fields to export all the information in the category, then click OK.
- 8 Click Begin Export.



- 6 Select Organization from the list box as the second receiving category, then click OK.
- 7 Select a connection description that will describe how every person is connected to the organization, then click OK.

HINT: Because you can select only one connection description for every object you're importing, you may want to select a generic description (like Staff Member).

- 8 Select the preferences you want to use when the people are added to your iBase, then click OK. (Note: If your import file contains two people with the same name, and you want them treated as separate individuals, do not select Consolidate duplicates for People.)

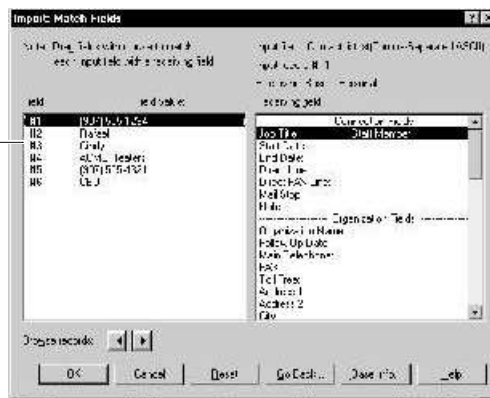
or

Click OK to use the preferences that Corel InfoCentral has set.

- 9 Drag each of the numbered fields from the left list box and match them to the appropriate field in the right list box. (For example, drag field #1 to the Home Telephone field, field #2 to the Last Name field, and so on.) Use the scroll bar to find the fields you need. Click OK.

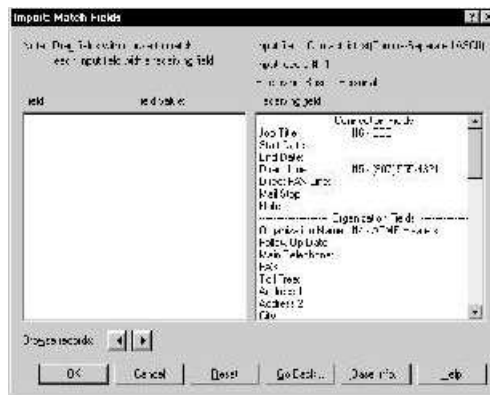
HINT: If you cannot find an appropriate match for part of the information you're importing, cancel the import, and add the field you need to Corel InfoCentral. See *Increasing the Amount of Information You Can Add to Corel InfoCentral in Customizing Corel InfoCentral to Fit Your Needs*.

Drag the fields on the left to the appropriate fields on the right.



Before matching fields

The fields in the import file are matched with the iBase fields.



After matching fields

**10** Click Begin Import, then click OK to return to the Outline view.

You can see the information you added in the Outline view or CardFile view. See *Finding Objects in Keeping Track of Information*.

### ***Creating, Changing, or Deleting an Import Scenario***

When you import information from Corel InfoCentral, you must use an Import Scenario. (An example of an Import Scenario is the “Typical Contact List” you created in the steps above.) You can create a new Import Scenario for each ASCII file you import into Corel InfoCentral, or use the same Import Scenario for several ASCII files. However, you can use only an import scenario in the iBase where it was created.

To set up an Import Scenario for a file,

- 1** Click File ▶ Import ▶ Data.
- 2** Type a name in the Import Scenario text box, click New Scenario, then click Add.
- 3** Select the comma-delimited or tab-delimited ASCII file you want to import, then click OK. (If you are unfamiliar with this type of ASCII file, see *Importing Information from Another Application to Corel InfoCentral* earlier in this section. Also, if you’re importing a tab-delimited ASCII file, select Tab-Sep. ASCII as the file type before you open it.)
- 4** Select a receiving category. (For example, if you are importing names of people, select Person.) Click OK.

**IMPORTANT:** Select Split each input record... if your ASCII file contains two categories of information, like *people* and *companies*. For further details, review *Importing Information from Another Application to Corel InfoCentral* earlier in this section.

- 5** If you did not select Split each input record..., set the preferences you want to use, then click OK.  
*or*  
If you selected Split each input record..., select a second receiving category, click OK, select a default connection (like Staff Member), then click OK again. Set the preferences you want to use, then click OK.
- 6** Drag each of the numbered fields from the left list box to the appropriate field in the right list box. Use the scroll bar to find the fields you need. Click OK.
- 7** Click Begin Import.

The Import Scenario you just created will use the same ASCII file for all future imports.

Attaching a New File to an Import Scenario • To designate a different ASCII file for a scenario,

- 1** Click File ▶ Import ▶ Data.
- 2** Select an Import Scenario from the list box, then click OK.
- 3** Click Setup, select the new ASCII file you want to import, then click OK.
- 4** Follow Steps 4-7 as outlined above in *Creating, Changing, or Deleting an Import Scenario*.



---

# Moving Information Between iBases

The task of organizing your information is nearly complete. You've divided your information into groups and placed each group in an iBase. For example, you have one iBase for family members, one for clients, one for your CD collection, and so on.

Now suppose a client marries one of your relatives. You now have to put that client's name in the Family iBase, too. No problem. Just copy the information you need right to the Family iBase—there's no typing required.

Corel InfoCentral makes it easy to

- Copy all or part of an iBase to another iBase
- Make a duplicate of an iBase
- Create a traveling iBase that you can use on a different computer

---

## Exporting to Another iBase

To transfer a list of names from one iBase to another,

- 1 Display the information you want to export in the Outline view, then click File ▶ Export ▶ iBase.

**HINT:** Use FastFind, Find-By-Example, or Find-By-Connection to assemble your list of information. Or select a tab with the list already displayed and up-to-date. See *Keeping Track of Information with Corel InfoCentral* earlier in this guide for details on building lists and using tabs.

- 2 Click Objects and first-level connections on current tab, then click OK.

**HINT:** If you expand the view on the current tab to display the connections and choose Objects and connections on current tab, the result will be the same.

- 3 Notice the name of the export file and the folder where it is being saved, then click Open.

or

Select a different folder where the export file will be saved. You can also type a new name for the iBase export file. Then click Open.

**IMPORTANT:** iBase-to-iBase export files must have a .OMG extension. It is best to accept the filename Corel InfoCentral assigns to the export file.

### *Importing Information from Another iBase*

To bring information from an export file into a different iBase,

- 1 Click File ▶ Open, select the iBase where you want to add the information, then click Open.
- 2 Click File ▶ Import ▶ iBase.
- 3 Select the file you want to import, then click Open.

**HINT:** Remember that the file you want has a .OMG extension.

- 4 Click OK.
- 5 Add a field, connection, or object if prompted to do so to make sure all information is imported.

---

## Making Two iBases out of One

You can use one iBase as a foundation to build another. By copying and renaming an iBase, you can create a second iBase from an existing one, make any changes you want, and keep the original iBase intact.

To create a second iBase from an existing one,



- 1 Click File ▶ Open, select the iBase you want to copy and rename, then click Open.
- 2 Click File ▶ Save As, type a new name, then click Save.

---

### Taking an iBase to Another Computer

You and another person can work on an iBase at the same time, and at separate computers. Or you can take an iBase home to finish the job.

To check out a copy of an iBase,

- 1 Click File ▶ Open, select the iBase you want to check out, then click Open.
- 2 Click File ▶ iBase Management ▶ Check-Out iBase.
- 3 Type your name, then type a disk location and filename for the remote edition of the iBase. (For example, type *a:\remote* to copy the remote iBase to a floppy disk.)

To add the changes you made in the Remote iBase to the original (or Host) iBase,

- 1 Click File ▶ Open, select the same iBase you copied and checked out, then click Open.
- 2 Click File ▶ iBase Management ▶ Check-In iBase.
- 3 Type the location of the Remote iBase. (Remember to include the full path.) Click OK.

---

## Connecting with E-Mail

You can quickly send e-mail messages or files from Corel InfoCentral to another computer. For example, you can type a report in WordPerfect 7, connect it to a person in Corel InfoCentral, and send the report via GroupWise to that person's home office—all without leaving Corel InfoCentral!

In addition, you can view GroupWise appointments and tasks in Corel InfoCentral and vice versa.

**HINT:** For more information about working with files in Corel InfoCentral, see *Managing Documents with Corel InfoCentral*.

To e-mail a message or file from Corel InfoCentral,

- 1 Click File ▶ Send.  
*or*  
Select a file in the Outline view, then click File ▶ Send.

The e-mail application you use comes up ready to send a message with the file already attached.

- 2 Specify a recipient, type any accompanying message, and send the e-mail.

To synchronize GroupWise appointments and tasks with Corel InfoCentral, and vice versa,

- 1 Click File ▶ GroupWise ▶ Synchronize Calendars.
- 2 Click Corel InfoCentral to update the GroupWise calendar with appointments and tasks from Corel InfoCentral.  
*or*  
Click GroupWise to update the Corel InfoCentral calendar with appointments and tasks from GroupWise.

- 3 Specify the number of days and select the items you want to be affected by the synchronization.

IMPORTANT: GroupWise tasks with a priority A1, C5, and Z2, for example, are converted to priority 1, 5, and 2 respectively. GroupWise tasks that are prioritized with only a letter (A, C, and Z) receive a priority 1 in Corel InfoCentral.

# Using the Pre-Filled Content iBases

Corel InfoCentral comes with four iBases that are already loaded with information for you to use. You can edit the information in these iBases and add information to them as the need arises.

The information in these iBases is as correct and complete as possible at the time they were created. The information is, of course, subject to change.

These are the four iBases:

- ComputerCentral™ (computer.ica) This iBase contains information on hundreds of companies in the computer industry. Products, support telephone numbers, and key people for each company are included.
- ConsumerCentral™ (consumer.ica) This iBase contains addresses and consumer service telephone numbers to manufacturers and dealers of major appliances, audio equipment, sporting goods, and more.
- TravelCentral™ (travel.ica) This iBase contains information on hotels, airlines, convention centers, restaurants, car rental agencies, and more for cities around the world. The information is focused on business travel, rather than tourist information.
- WineCentral™ (wines.ica) This iBase contains information on fine wines of the world. Organized by growing region, the information includes vineyards, wineries, labels, price ranges, classifications, and festivals.

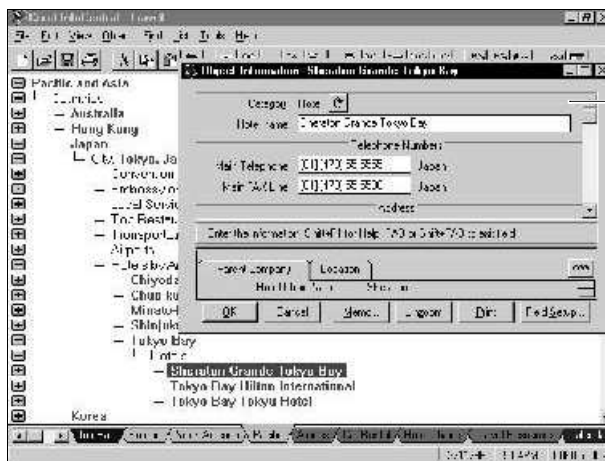
## Finding Information in Prefilled iBases

Information about travel, wine, companies, and more is just a click away. For example, if you were traveling to Tokyo and needed hotel information, you could find it fast in Corel InfoCentral.

To get information about hotels in Tokyo,

- 1 Click File ▶ Open.
- 2 Select travel.ica, then click Open.
- 3 Click the Pacific tab.
- 4 Click the plus sign (+) by Japan. Then click the + in this order: City, Tokyo, Japan; Hotels by Area; Tokyo Bay; and Hotels.
- 5 Select Sheraton Grande Tokyo Bay, then click Object ▶ Information. You'll find all the information you need to make a reservation.

You can expand further to get information on transportation, restaurants, and airports.



The object Information dialog provides useful information about hotels, restaurants, and more.

While in Tokyo, you find a restaurant that you like that is not in TravelCentral. Wanting to remember it, you simply add the restaurant and connect it to Top Restaurants under the City, Tokyo, Japan object. See *Keeping Track of Information with Corel InfoCentral* earlier in this guide; or use online Help for information about adding and connecting objects.

---

## Using the iBase Templates

The predefined iBases (or templates) that come with Corel InfoCentral give you a good place to start. All you have to do is plug in the information and Corel InfoCentral puts it right where it belongs. You'll find a few sample items in each template that show you how these iBases can be used.

For example, the video collection template lists a few films that are connected to actors, directors, producers, and screen writers.

Use these template iBases like any other iBase. You can add, connect, and delete objects; you can export the structure of the templates and import it into another iBase. To get the most out of the templates, make sure you are reasonably familiar with Corel InfoCentral basics.

---

### Templates Included in Corel InfoCentral

The following iBases help you quickly and easily organize a variety of information:

- Automobile Records (auto.ica)
- CD Collection (cd.ica)
- Contact Manager (contact.ica)
- Gardening (gardning.ica)
- Home and Family Records (home.ica)
- Party/Wedding Planner (party.ica)
- Real Estate (real\_est.ica)
- Stamp Collection (stamp.ica)
- Video Collection (video.ica)

To use any of these iBases,

- 1 Click File ► Open, then double-click the template folder.
- 2 Select an iBase template from the list box, then click Open.

The names of the iBase templates, as they appear in the list box, are shown in parentheses above.

---

### Filling out a Template


The following examples show you how to add information to iBase templates.

#### *Automobile Records (auto.ica)*

Use this iBase to keep track of valuable car information, like your favorite mechanic's phone number, the name of your insurance agent, and your next tune-up.

For example,

- 1 Click File ► Open, double-click Template, select auto.ica, then click Open.
- 2 Click Object ► Add, select Automobile from the Category list, then type the name of your car in the Object Name text box. Click Add.
- 3 Fill in the information for your car, then click OK.

- 4** Click Yes to make a connection. Select Event from the Category list, type oil change in the Object Name text box, then click Add New.
- 5** Type in a date, time, and other information.
- 6** Click , then click Every \_ Weeks and type 12. Click OK.
- 7** Click Location (you may need to scroll), then click New Object.
- 8** Select Company, then click OK.
- 9** Type the name of the service center where you usually get your car serviced, then click OK.
- 10** Type the address and other pertinent information, then click OK.
- 11** Click the Left-arrow to move the service center to the Location list box, then click OK.
- 12** Click Close, then click OK.
- 13** Select Automobile/Maintenance, then choose OK.
- 14** Click No to return to the Outline view.

---

# Customizing Corel InfoCentral to Fit Your Needs

Do you have some important information, but can't find a place to put it? This section will help you make the necessary room so you can organize all your information.

---

## Adding New Categories to Corel InfoCentral

You'll find a variety of categories in Corel InfoCentral (like Person, Organization, and Meeting) that match the information you want to organize. When you can't find the category you need, simply add a new one.

To learn this feature, create a new category called "Pet."

- 1 Click Object ► Add.
- 2 Type Pet in the Category text box, then click New.
- 3 Click Thing as the category type, and select a color. (If you want this category to be preselected every time you add a new object, click Make Default.) Click OK.

HINT: To add text boxes for information (like Vaccinations, Favorite Food, Next Check-up), see *Increasing the Amount of Information You Can Add to Corel InfoCentral* below.

---

## Increasing the Amount of Information You Can Add to Corel InfoCentral

Suppose you want to add a detail or two about a category, but Corel InfoCentral doesn't provide a blank space for it. No problem. Simply add a field.

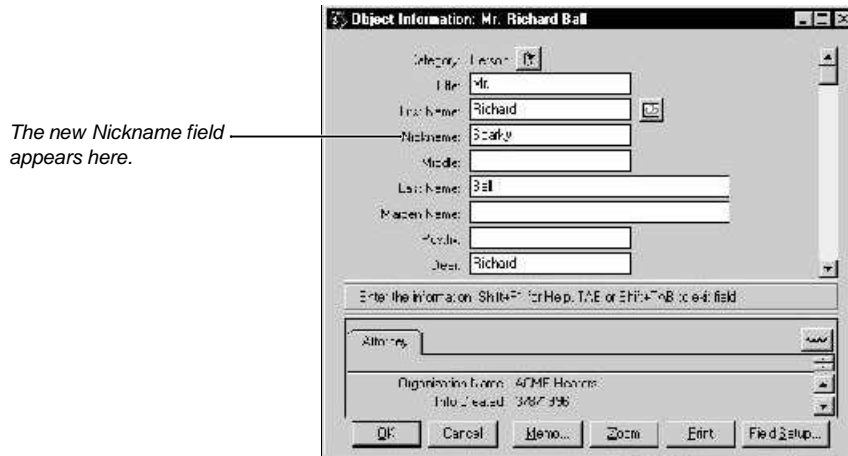
For example, if you want to include a person's nickname as part of their information, you can add a field called "Nickname."

- 1 Select a person's name in the Outline view, then click Object ► Information.  
*or*  
Click Object ► Add, select Person in the Category list box, type the name of the person in the Object Name text box, then click Add.
- 2 Press the Tab key to move the cursor to the First Name text box (or field). (If you went too far, press Shift+Tab to go back.)

IMPORTANT: The new field you are adding will appear directly below the cursor. For example, in Step 2, the new field "Nickname" will appear directly below the First Name field because that's where the cursor is. If you want the new field to appear directly below the Maiden Name field, place the cursor there. Also, the new field is automatically saved to the entire category. So every time you add a person or view a person's information, you will see the new field "Nickname."

- 3 Click Field Setup ► Add New Field. Select Alpha/Numeric, type Nickname in the Field name text box, then click OK.

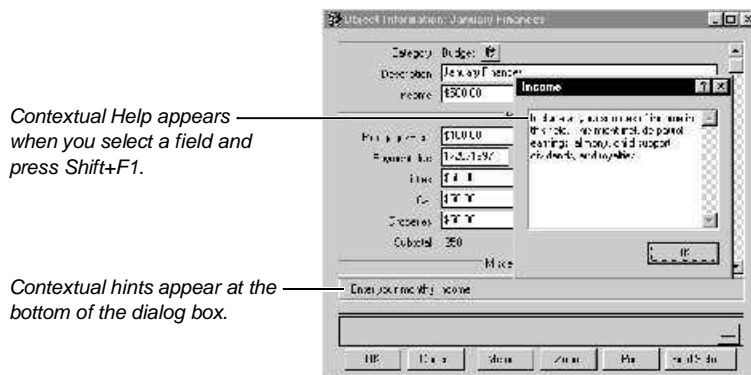
- 4 Type one sentence of instructions in the Contextual Hint text box. Type more extensive instructions in the Contextual Help text box. Click OK.



Corel InfoCentral lets you add several types of fields. You can add fields for dates, telephone numbers, calculations, and more. For further instruction on adding fields to Corel InfoCentral, see *Lesson 4: Creating a Budget iBase*.

## Writing Your Own Help

You can find instructions for any of the fields right in the Information dialog boxes. Click inside a field to bring up a hint that tells you what to enter. Or press Shift+F1 to get additional Help about the field you've selected. You can edit any of the current hints to fit your needs, or write guidelines for the new fields you created.



To write your own Help,

- 1 Click View ► View Outline, select an object, then click Object ► Information.
- 2 Select a field in the Object Information dialog box. (Press Tab to move down to the next field; press Shift-Tab to move up.)
- 3 Click Field Setup ► Field Properties, then click Advanced.
- 4 Type a brief description or hint for the current field in the Contextual hint text box.
- 5 Type more extensive helps and hints in the Contextual Help text box.
- 6 Click OK.

---

# Ideas for Using Corel InfoCentral

The uses for Corel InfoCentral are limited only by your imagination. To trigger your own thoughts, here are a number of suggested iBase ideas.

---

## Student Notes

To keep track of your notes from school, you might include some of these categories:

- School
- Club
- Textbook
- Class
- Lab
- Meeting
- Assignment
- Exam

Possible connection descriptions:

- Teacher
- Administrator
- Student
- Advisor
- Exam
- Report
- Final/Midterm

Related files you'd most likely use:

- Papers
- Class notes
- Research notes

---

## Product Catalog

Do you have a small retail business? You can create a product catalog and include some of these categories:

- Person
- Inventory item
- Equipment location
- Company
- Product

Possible connection descriptions:

- Customer
- Client
- Account
- Classification
- Supplier
- Vendor

Related files you'd most likely use:

- Letters
- Invoices

---

## Sports

Whether you're in a league or just a spectator, Corel InfoCentral can help you track sports activities.

You might include the following object categories:

- Team
- Sport
- Time
- Sponsor



- Award

Possible connection descriptions:

- Amateur
- Professional
- Coach
- Player
- Division
- Statistics
- Award

Related files you'd most likely use:

- Research notes
- Newsletter
- Calendar

---

## Other Ideas

Use any of the following ideas to get completely organized with Corel InfoCentral:

- Company personnel directory
- Supplier/vendor directory
- Project management
- Patient information (for a medical or dental clinic)
- Home construction project
- Children's school progress
- First aid guide
- Grocery, meals, nutrition management
- Club membership records
- Law enforcement/Investigation records
- Genealogy and family history
- Card collection

# Index

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# Index

## A

- Abandon tasks 49
- Adding
  - bookmarks to Help topics 8
  - events 45
  - notes to Help topics 8
  - tasks 47
- Adding new fields 66
- Address Book 33
  - address display 40
  - arranging columns 40
  - changing column width 41
  - closing personal address books 37
  - cutting, copying, pasting 36
  - defining filters 42
  - defining search options 42
  - deleting books 36
  - deleting rows 44
  - dialing 41
  - displaying books 34
  - displaying columns 40
  - displaying different information 40
  - editing name information 35
  - exiting 37
  - frequent contacts 37
  - inserting rows 44
  - names, copying 35
  - names, removing 35
  - new filter group 44
  - opening 34
  - opening personal address books 37
  - phoning from 41
  - removing address book tabs 37
  - renaming books 36
  - searching 42
  - selecting entries 34
  - settings 41
  - sorting addresses 41
  - sorting columns 41
  - taking files to another machine 39
  - viewing name information 35
- Alarms
  - preferences 47
  - setting 47
  - tuning 47
- Alphabetizing a list 31
- And, search filter operator 43
- Annotate (online Help) 8
- Appointments
  - attaching notes to 48
  - keeping track of 45
  - scheduling 45
  - setting the location 46
  - viewing 46
- ASCII, file for importing 57
- Authoring your own Help 67

## B

- Bookmarks (online Help) 9
- Bulk mailings, using address books for 38

## C

- Calculations 16
- Calendar, task 47
- Calendar information, printing 48
- Categories, adding new 15, 66
- Checking out an iBase 61
- Cleaning up an iBase 49
- Clearing the screen 31
- Closing tasks 49
- Color on tabs 27
- Computer industry iBase 63
- Connecting
  - documents to objects 14, 52
  - files to other objects 52
  - objects to documents 13
  - people, places, and things 25
  - related files 13
  - telephone calls 32
- Connections
  - adding a new connection
    - description 26
  - changing a connection description 26
  - creating 25
  - creating while adding objects 10
  - finding objects by 30
- Consumer service iBase 63
- Content iBases 63
- Contents of online Help 7
- Contextual Help 67
- Contextual Hint 67
- Copy, Help topics 8
- Copying documents 51
- Copying Help topic to clipboard 8
- Corel InfoCentral, starting 5
- Correspondence 52
- Creating
  - connected files 52
  - documents, from Corel InfoCentral 13, 14, 52
  - documents, shortcuts 53
  - iBases 15
  - new categories 15
  - related files 13, 52
- Custom-made iBases 15
- Customizing Corel InfoCentral 15, 66
- Cut, Copy, Paste, Address Book 36

## D

- Daily plan 47
- Daily schedule, printing 48
- Day planning 47
  - tasks 47
- Defining a tab 11
- Deleting
  - completed tasks 49

- rows in Address Book 44
- Deleting documents 51
- Dialing from Address Book 34, 41
- Displaying Keep Help on Top 9
- Document management *see* File management
- Documents
  - creating from Corel InfoCentral 13
  - finding 50
  - organizing 50

## E

- E-mail, sending from Corel InfoCentral 61
- E-mailing, with address books 41
- Editing
  - documents 51
  - related files 54
  - tabs 27
- Empty iBases 64
- Events, scheduling 45
- Exchanging information between iBases 60
- Export scenarios
  - changing or creating 56
  - definition 56
  - deleting 57
- Exporting
  - change or create scenarios 56
  - information from one iBase to another 60
  - information to a database, spreadsheet, PIM, or word processor 55
  - information to another iBase 60
- Exporting file, Address Book 39

## F

- FastFind 28
- FastFind Files 50
- Fax settings, Address Book 41
- Features
  - finding Help on 7, 8
  - using the Toolbar 9
- Fields
  - adding 15
  - adding new 66
  - alphanumeric 66
  - calculating 16
  - check boxes 17
  - date 16
  - group titles 15
  - number/currency 15
  - telephone 66
- File management 50
  - connecting files to people, places, or things 52
  - copying documents 51
  - deleting documents 51
  - editing documents 51
  - moving documents 51
  - renaming documents 51

- viewing documents 51
- Filenames, related files 53
- Files
  - creating related 52
  - editing 54
  - managing 50
  - opening 54
  - searching for 50
- Filters, Address Book 43
- Find External Files 50
- Finding
  - by connection 30
  - by example 29
  - by telephone number 30
  - documents 50
  - information about objects 29
  - people, places, and things 28
- Finding information 28
  - by category 28
- G**
- Getting started 10
- H**
- Help
  - copy topics 8
  - online, using 6
- Help see Online Help
- Help tasks
  - jumping to another topic 8
  - returning to last topic 8
- Help topics
  - adding bookmarks to 8
  - adding notes to 8
  - copying to Clipboard 8
- Help, online
  - annotating 8
  - authoring 67
  - book icons 7
  - bookmark 8
  - common tasks 8
  - Contents 7
  - contextual help 67
  - contextual hints 67
  - finding 6
  - for specific tasks 7
  - How Do I 7
  - icons 7
  - Keep Help on top, displaying 9
  - printing topics 9
  - search using keywords 7, 8
  - search using synonyms 7, 8
  - searching for Help topics 7, 8
- Hiding information 31
- Hoist 31
- Housekeeping 49
- I**
- iBase
  - content 63
  - ideas 68
  - importing information from one iBase to another 60
  - templates 64
- iBases

- adding categories 66
- creating new 15
- dayplanner 18
- making portable 61
- opening 63
- passwords 22
- renaming 60
- sharing information 60
- templates 64
- templates, adding information 64
- Ideas for using Corel InfoCentral 68
- Import scenario
  - creating or changing 59
  - definition 59
  - deleting 59
  - using a new import file 59
- Importing
  - import file 57
  - information for a database, spreadsheet, PIM, or word processor 57
  - information from another iBase 60
  - information from one iBase to another 60
- Importing files, Address Book 39
- Increasing the amount of information you can add 66
- Information
  - adding 25
  - exporting 55
  - importing 57
  - organizing 25
  - transferring to Corel InfoCentral 55
- Inserting new fields 15
- Inserting rows in Address Book 44
- Internet access 23
- J**
- Jumping to another topic 8
- K**
- Keeping track of time 18
- L**
- Launching applications from Corel InfoCentral 13, 14
- Letters, writing 52
- Logging a telephone call 31
- M**
- Meetings
  - attaching notes to 48
  - scheduling 45
- Memos, attaching to date 48
- Minus (-) button 29
- Moving documents 51
- Moving information between iBases 60

- N**
- Notes
  - attaching to appointments 48
  - attaching to date 48
  - attaching to meetings 48
- O**
- Objects
  - adding 10
  - connecting documents to 13
  - finding 28
  - information about 29
  - internet addresses 23
- Online Help 6
  - making Help easier to use 8
  - using 6
  - Whats This descriptions 6
- Opening an iBase 63
- Opening related files 54
- Operators, search filters 42
- Or, search filter operator 43
- Organizing
  - activities 20
  - addresses 19
  - budgets 21
  - day 45
  - documents 50
  - ideas 68
  - tasks 18
  - time 18, 45
- Organizing information 25
  - adding people, places, and things 10
  - finding information 28
  - telephone calls 31
  - using tabs 27
  - viewing 31
  - with connections 25
  - with find tools 29
- P**
- Participants in conference call 32
- Passwords 22
- Planner pages, printing 48
- Planning your day 18, 47
- Plus (+) button 29
- Pop-up explanations, viewing 8
- Preferences
  - Address Book 41
  - alarms 47
- Prefilled iBases 63
- Printing
  - appointments and tasks 48
  - Help topics 9
  - pages for daily planners 48
  - planner pages 48
- Protecting information 21
- Q**
- QuickCall 33

## R

Recording information 25  
Related files  
  creating 13, 14, 52  
  creating letters 52  
  creating memos 13  
  editing 13, 54  
  inserting text automatically 53  
  opening 54  
  using symbols in 54  
  using templates in 14  
Reminders 18  
Remote iBases  
  checking in 61  
  checking out 61  
Renaming documents 51  
Renaming iBases 60

## S

Sample iBases 63  
Scheduling  
  appointments 45  
  days 18  
  events 45  
  meetings 45  
  tasks 47  
  telephone calls 32  
  using QuickCall 33  
Search filters, operators 42, 43  
Search for files 50  
Search Help 7, 8  
Searching for files 50  
Searching iBases 28  
Sending e-mail 61  
Setting appointments *see*  
  Scheduling  
Setting up a tab 27  
Sharing information between iBases  
  60  
Sounds, alarm settings 47  
Symbols used in related files 54  
Synonym, using to search Help 7, 8  
System variables 54

## T

Tabs 27  
  adding information 27  
  creating 11, 27  
  dayplanner 19  
  definition 27  
  naming 11, 27  
  organizing information 11, 27  
  saving information 28  
Tasks  
  abandoning 49  
  add 47  
  checking off 49  
  closing 49  
  organizing 18  
  removing old 49  
  scheduling 47  
Tasks, help for specific 7  
Telephone, dialing from Address  
  Book 34, 41  
Telephone call

  dialing 32  
  logging 31  
Telephone calls  
  conference calls 32  
  connecting to other objects 32  
  organizing 31  
  scheduling 32  
  using QuickCall 33  
Telephone numbers, finding 30  
Template iBases 64  
Templates, adding information 64  
Time, management 45  
Toolbar, accessing features 9  
Transferring information from Corel  
  InfoCentral into documents 53  
Travel iBase 63

## U

Unzoom 29  
User ID, address books 33

## V

Viewing  
  appointments 46  
  GroupWise appointments and  
  tasks 61  
  information 31  
  pop-ups in online Help 8

## W

Windows Explorer 52  
Wines iBase 63  
Writing letters 52  
Writing your own Help 67

## Z

Zoom 29