SBook:

Simson Garfinkel's Address Book

Version 2.0

Program by Simson Garfinkel

Icons and documentation by Orca Starbuck

Simson Garfinkel and Associates, Inc.
52 ½ Pleasant Street
Cambridge, Massachusetts 02139

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Preface

What is SBook?

SBook is Simson Garfinkel's Address Book. As a reporter, Simson seemed to be spending his life talking on the phone and sending mail. He had a desperate need for a fast, simple address book application that dialed the phone, kept track of whom he called, and made it easy to take and keep notes. So he wrote SBook.

- SBook searches quickly for the person you want to contact,

- sends email and dials the phone,

- prints envelopes, mailing labels, and address books,

- and logs everything you do.

But SBook isn't just an address book with a lot of nice features. You can think of SBook as a *smart* address book because:

- SBook can recognize names, addresses, and phone numbers,

- knows how to dial your phone, using the dialing rules in your local calling area,

- and knows the difference between people and companies by looking at the name.

You don't have to type your address book entries in a rigid form. Instead, you can type them in a natural way, including as much extra information and comments as you like. SBook uses artificial intelligence technology to make sense of the information you type into it, so that it can handle that information much as a person would.

You can even use SBook as a general-purpose *free-form database* to store any text that you can organize by name or title. For example, you could store your favorite recipes in an SBook file. The only things you can't store with SBook are multimedia objects containing sounds, pictures, or other files.

How to use this manual

First, you'll need to install SBook on your system. Read ''Installing SBook'' in *Appendix B: Installing and Licensing SBook* to find out how to do this. When you have installed and licensed your copy of SBook, read Chapter 1, *Getting Started with SBook*, for an overview of what SBook does and how to use it.

You may want to have an open SBook file to play with while you read Chapter 1. We recommend the "developers.sbook" file included in the SBook distribution; this is the file we use in most of our examples throughout the manual. It contains a list of all the developers listed in the *NeXT Software and Peripherals Catalog* for Winter 1992.

You may also wish to look at the "congress.sbook" file and the "recipes.sbook" files, both included in the distribution, which show how you can use SBook to organize more information than just addresses and phone numbers.

What you should know

We assume that you are familiar with the standard NeXT user interface concepts, such as using the mouse (clicking, dragging, and double-clicking), using windows, menus, scroll bars, standard panels such as the Font, Colors, Open, and Save panels, and using standard applications such as Edit and Mail.

If you are new to the NeXT and are unfamiliar with these concepts, we recommend that you refer to two of the manuals that were included with your NeXT computer: *NeXT Setup and Tutorials* and *Next User's Reference*.

Conventions we use

We use **boldface** for menu choices, buttons or other objects that you click on, or menu equivalents like **command-b**.

We use *italics* for the first time something is defined, and for emphasis.

We use quotes for file and directory names (like "~/Library/Information.sbook").

We use case when we specify menu equivalents; that is, we use **command-n** and **command-N** rather than **command-n** and **command-shift-n**.

We use two formats for specifying the use of menus:

- "Go to the **Info** menu and choose **Preferences**"
- "Choose **Info>Preferences**"

Both of these put the first menu choice first, which we hope you will find more natural than the standard NeXT format, "Select **Preferences** from the **Info** menu."

What's in the manual

Chapter 1, *Getting Started with SBook* gives an overview of what SBook is and what it can do for you. You'll probably want to read this first.

Chapter 2, *Fine-Tuning Your SBook Files* explains how to make your SBook files suit you and your data perfectly.

Chapter 3, *Dialing the Phone with SBook* explains how to set up and use SBook for dialing the phone.

Chapter 4, *Importing and Exporting* explains how to convert files into and out of SBook's file format.

Chapter 5, *Making Reports with SBook* explains how to use SBook to make bulk email mailings and print address books and mailing labels.

Chapter 6, *Logging what you do with SBook* explains how to use SBook's logging facilities to keep records of your letters and telephone calls.

Appendix A: SBook's Menus and Menu Commands gives a complete, systematic overview of SBook's menus and windows and what they do.

Appendix B: Installing and Licensing SBook explains about your license agreement and how to set up and license this copy of SBook.

1

Getting Started with SBook

This section covers the basics of using SBook: creating and using files, adding and changing information, making simple searches, and using icons to print envelopes, dial the phone, and send email. Unless noted, it assumes default settings.

+ Before you can use SBook, it must be installed. See "Installing SBook" in *Appendix B: Installing and Licensing SBook* for more information.

SBook entries

An SBook file consists of some number of *entries*. Each entry has a name. When you use SBook as an address book, each entry represents a person you know. The name of the entry is the person's name, and the entry itself contains the person's address and phone number.

Simson Garfinkel & Associates
✉ 52 ½ Pleasant St.
    Cambridge, MA 02139
☎ 617-354-7888
@ sbook@next.cambridge.ma.us

Some entries are short...

NeXT Computer, Inc.
✉ 900 Chesapeake Drive
    Redwood City, CA 94063
☎ 415-366-0900
payables:
    Betty Avanol
☎ 415-780-2923
✉ 123 Saginaw
    Redwood City, CA 94063
orders:
✉ Order Management
    760 Mission Court
    Fremont, CA 94539
☎ 1-800-848-6398
☎ fax: 1-800-228-NEXT

...while others may contain much more.

SBook automatically places a small icon beside each postal address, email address, or telephone number in a displayed entry. You can click on these icons to have SBook perform services for you:

✉ You can click on an *envelope icon* to print an envelope or mailing label.

@ Or click on an *email icon* to send email.

☎ Or click on a *phone icon* to dial a phone number.

SBook windows

The SBook window has several parts:

At the top of the window is the *search field.* You can type in this field to search through the names in the file.

The pop-up menu just below the search field, on the right, allows you to specify the *search method*.

The gray numbers on the left are in the *message field*. At the moment, the message field displays how many names were found. Nothing is typed in the search field right now, so all of the names in the file match the search request.

The *matrix* contains a scrollable list of names that match what is typed in the search field. Generally, the names in the matrix appear in alphabetical order.

When a name in the matrix is selected with the mouse, it is highlighted and its associated entry is displayed in the *display* below.

+ Several names can be selected and displayed at one time, by dragging or using shift-click.

SBook files

All files created by SBook have an extension, either ".sbook" for an ordinary SBook docu-
ment, or ".sbook~" for an automatically generated backup file. SBook document files and
backup files appear in your workspace with distinctive icons. These icons are similar to the
SBook application icon:

application icon	document icon (.sbook)	backup icon (.sbook~)

Each document file that is open within SBook appears in its own window. The name of the
file appears at the top of the window:
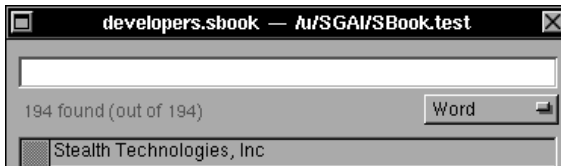
Creating new files

To create a new SBook file, go to the **File** menu and choose **New**, or type the shortcut,
command-N. A new window will appear named Untitled.
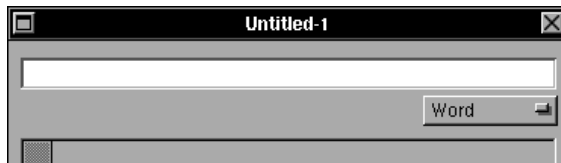
+ You need to make a new entry before you can start typing information into SBook.
  See "Adding new entries" on Page 4 for details.

Opening files

You can open a pre-existing file from within SBook by going to the **File** menu and choosing
Open, or typing the shortcut, **command-o**. A standard Open panel will appear on the
screen.

You can also open a pre-existing SBook file by double-clicking on the file's icon in Work-
space. If SBook is not running, Workspace will automatically launch it for you.

+ SBook can be set up so that every time it is launched, it automatically opens a
  particular file or files. See "The Preferences panel" in *Appendix A: SBook's
  Menus and Menu Commands*.

Closing files

You can close an SBook file by clicking on the close button of its window. Alternatively, if the window corresponding to that file is selected, you can close it with the menu options **File>Close** or **Windows>Close**. Of course, quitting SBook will close all open files.

When you close a file with unsaved changes, SBook will ask you if you want to save the file. Click **Save** (the default) to save the file, **No** to close the file without saving it, or **Cancel** if you prefer not to close the file after all.

Saving files and making backups

SBook's **File** menu offers three options for saving files: **Save**, **Save As...**, and **Save All**. These commands work as their counterparts do in other NeXT applications:

- **File>Save As...** (**command-S**) presents you with a standard Save panel so that you can specify a file name and location. Once you do this and click **OK**, SBook will save the file.

- **File>Save** (**command-s**) causes SBook to save the file quietly with its current name and location, if that is possible. If the file is new, you will be presented with a Save panel (as if you had chosen **File>Save As...**) before SBook can save the file.

- **File>Save All** will cause SBook to save all open files that need to be saved, just as if you had chosen **Save** for each one of them.

By default, SBook automatically makes a backup whenever a file is opened. Once a file is open, it is automatically saved after 5 minutes of inactivity. You can change these defaults in the Preferences panel (see "The Preferences panel" in *Appendix A: SBook's Menus and Menu Commands*).

Adding new entries

Create a new entry by going to the **Edit** menu and choosing **New entry** (**command-n**). A new entry template will appear in the display, including name, address, and comment fields. Just type the information for the new entry directly in the display.

SBook has several features that make it especially easy to type in a new entry:
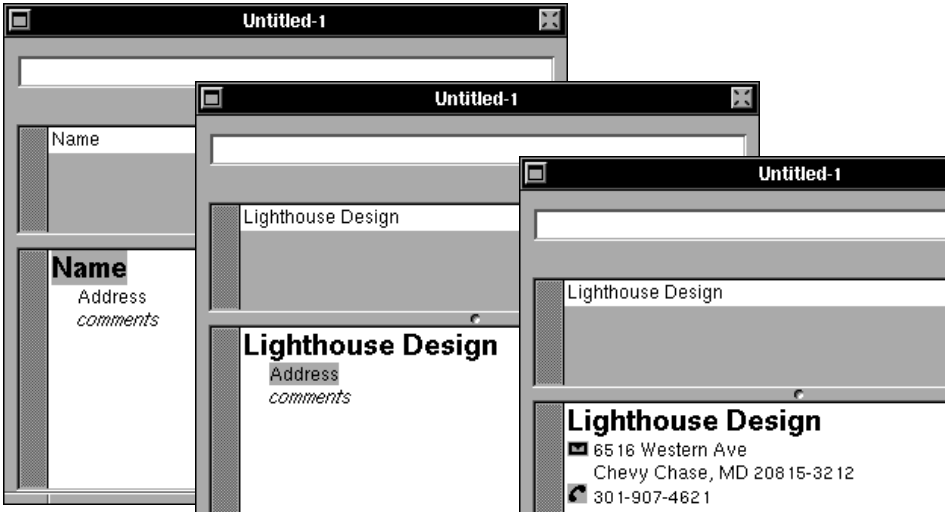
- When a new entry is created, its name is selected and highlighted. Just start typing the name of the new entry to replace the dummy name. As you type, the name will appear simultaneously in the display and the matrix above.

- After you type the name and hit return, SBook automatically selects and highlights "Address" on the template so that you can immediately begin typing in the address font.

- Type as many addresses and phone numbers as you like. Whether you are typing new information or editing old information, SBook places address and phone icons automatically, in all the right places, while you type.

Deleting entries

You can delete one or several entries from an SBook file by selecting the names of the entries that you want to delete in the matrix, and then choosing **Edit>Delete entry** (**command-D**). An alert panel will appear on the screen asking you to confirm that you really want to delete the entries.

If there is only one entry, the panel will refer to it by name.

If there are several entries, the panel will warn you how many you are about to delete.

Click **YES** (the default) to delete the entries, and **NO** to cancel the request for deletion.

Using cut, copy, and paste

SBook supplies the standard **Edit** menu options **Cut** (**command-x**), **Copy** (**command-c**), and **Paste** (**command-v**). You can use these in two ways: copying information, or copying whole entries. Either way, you can copy within SBook, or between SBook and any other NeXTSTEP application that supports copy and paste operations.

Copying information

Within SBook, copying information from one entry to another works as you would expect it to: select the information you want to copy, choose **Copy** or **Cut** in the usual way, select an insertion point, and choose **Paste** in the usual way. The font, formatting, and icon placement in the information will be preserved.

You can also copy information from an entry into any other application, or vice versa. When pasting SBook text into a Rich Text field, font and formatting will be preserved, but icons will disappear. When pasting into a plain ASCII document (or an application such as WriteNow that does not support pasting of Rich Text) only the plain text will be pasted.

Copying whole entries

You can also use the standard **Edit** commands to copy one or more *whole entries* from one SBook to another. First, select the entries you want by clicking on their names in the matrix. Several entries may be selected by dragging or using shift-click.

+ *If any text is selected within the window, you have not selected the whole entry.* You need to make sure the whole entry is selected by clicking once more on its name in the matrix.

In these two windows, only the word "Albuquerque" is selected.

This entry is selected in its entirety.
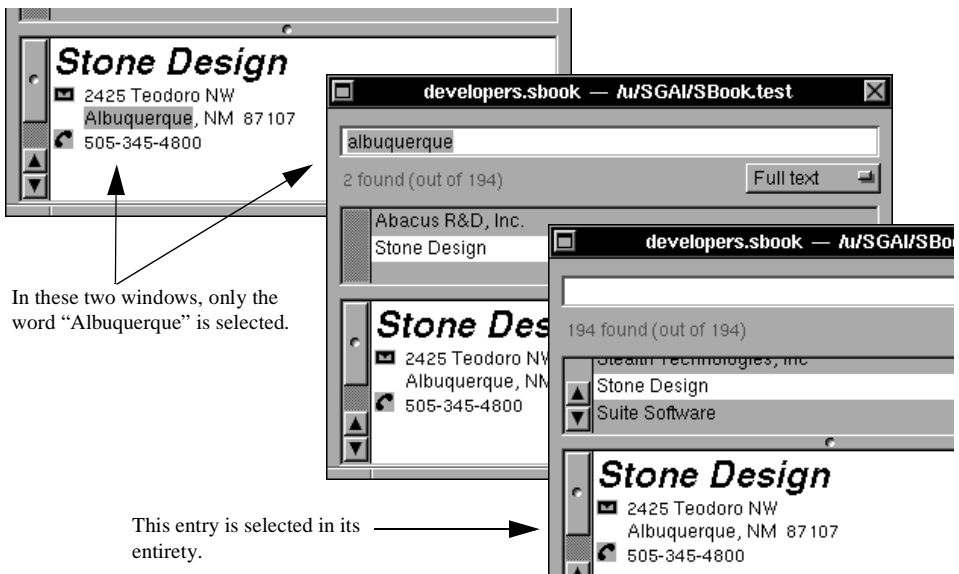
Now choose **Copy** or **Cut** in the usual way, select the target SBook file by clicking anywhere on its window, then choose **Paste** in the usual way. The entries will be pasted into the target window, and its message field will display how many entries were pasted:


+   *Pasted entries are always added to the file as a group of new entries,* whether or not an entry or a group of entries is selected in the target window.

+   If you want to copy a large number of entries from one SBook to another, or from another application into SBook, you probably want to use the **Import** and **Export** commands. Full details are in Chapter 4, *Importing and Exporting*

Searching

It's easy to search for a particular name in your SBook file. Just type in the search field. As you type, all the names that match what you have typed so far will be shown in the matrix, if there is room for them. If a lot of names match what you have typed, they will still appear in the matrix but you will have to scroll to see them all.
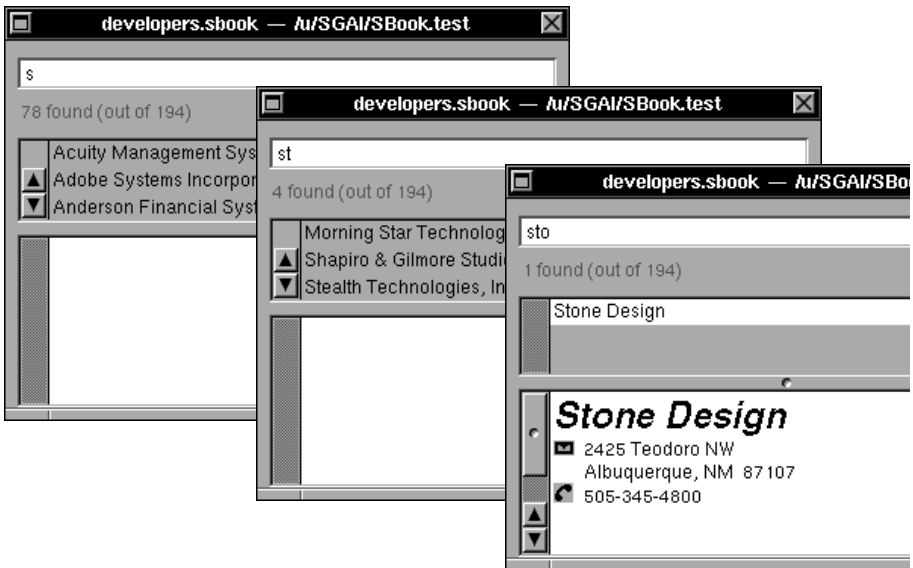
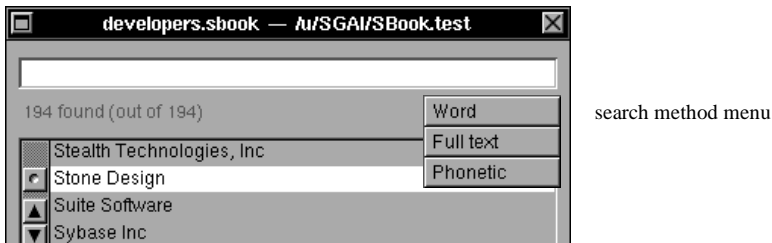In the message field just above the matrix, a number appears indicating how many names (out of the total number of entries in the file) currently match the search request. Only the matching names will appear in the matrix. If there is only one such name, it will be automatically selected, and its corresponding entry will be displayed. Otherwise, to display an entry, just select its name with the mouse.

After you have typed some text and narrowed the search to one or a few entries, back-spacing through the search field expands the search automatically to the larger set. Once you have backspaced completely through the search field, the matrix will again hold all the entries in the file, and you can try a completely new search.

+ Another way to try a new search is to select all the words in the search field by choosing **Edit>Find** (**command-f**), or double- or triple-clicking on the search field. Then replace them by typing the new search string.

Search methods

Just below the search field, on the right, there is a pop-up menu that allows you to choose between three different search methods: word matching, phonetic search, and full text search.

developers.sbook — /u/SGA/SBook.test

194 found (out of 194)   Word   search method menu
                                Full text
Stealth Technologies, Inc   Phonetic
Stone Design
Suite Software
Sybase Inc

The search method described above is the default method, *word matching*. Word matching is an incremental search in which the letters you type are used to match the beginnings of words. Words may appear in any order, and case is ignored. For example, all of the following search strings would match "Stone Design": "stone," "st de," "S D," and "d s."

SBook provides another incremental search method, *phonetic search*. This works like word matching, except that each word is matched phonetically: "Lighthouse Design" could be found by typing "lite" as well as "light."

Full text search

SBook also enables you to make a *full text search*. When you select the full text option, instead of searching through the names of the entries only, SBook will search throughout the full text of each entry.

+ Because full text search takes a little longer than the name-only search described above, SBook does not search incrementally when the full text option is selected. *Press return to execute each search while you are in full text mode.*

As an example, suppose I want to find all the software developers in Albuquerque. I select the full text option, type "albuquerque" into the search field, and press return. Two entries are found, so I select the one I am most interested in viewing:
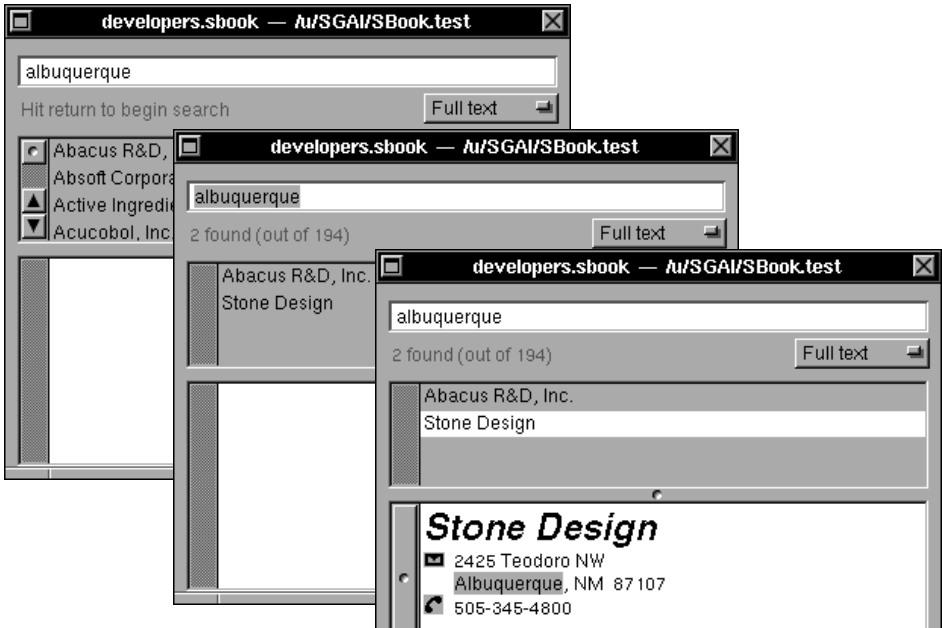
Note that the the text I searched for, "albuquerque," is highlighted in the displayed record. The highlighted text is now selected, not the whole entry. This allows you to cut, copy, paste over, or type over this text on your next action.

+   If you are in the process of copying and pasting whole entries, you may find this counter-intuitive, because clicking on the name of the entry displays the entry but does not select it. If you want to select the *whole entry*, you must click *again* on the name of the entry in the matrix. *Click twice to select a whole entry while you are in full text mode.*

Finding entries by range

SBook also allows you to find entries based on the time that they were created, last modified, or last viewed. Select **Edit>Find by range** to bring up a *range selection* panel. Set the panel for the range you desire, then click **OK** (or press return). The entries within the range you have set will be displayed in the main SBook window just as with any search. (Full details on the use of this panel given in "The Range Selection panel" in Chapter 5)

Using icons

SBook's icons are for more than just good looks. You can click on them to make SBook print envelopes, send email, and dial the phone.

+   For a discussion of how icons are inserted, and how to control icon insertion, see "Parsing and icon placement" in Chapter 2.

Printing envelopes

To print an envelope from SBook, first find the person you want to address it to, then click on the envelope icon next to the address you want to use. SBook will open a print panel showing you the envelope exactly as it will be printed.
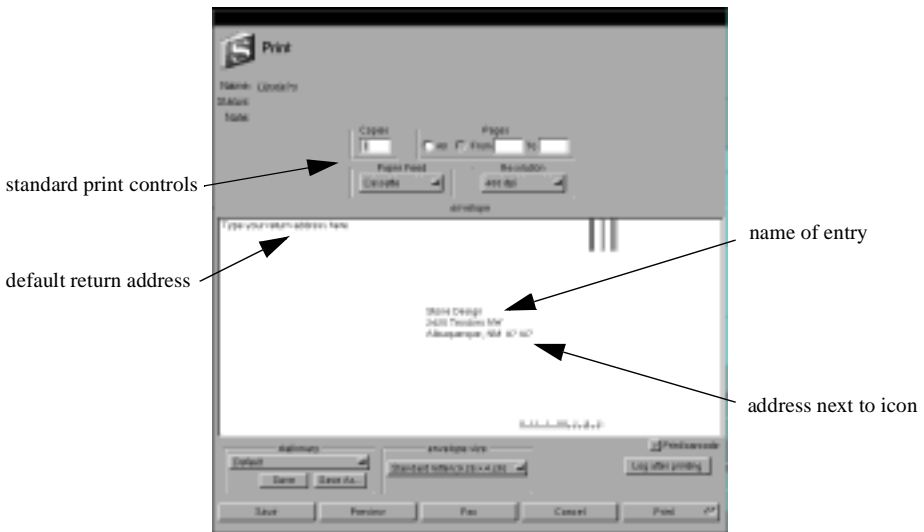
The print panel is editable, so if you have any changes you want to make, you can make them right on the envelope face. For example, you will notice that a default return address appears in the upper left corner of the envelope. You will probably want to change this address. Go ahead and edit it, on the print panel, until you are pleased with it.

When you are ready to print the envelope, slide the envelope, *face up*, into the manual feed slot on your printer, and then click on **Print**.

+   Even though you are using manual feed, do *not* set the pop-up menu in the box labeled **paper feed** to **Manual**, or the envelope will not feed through properly!

Below the envelope, on the bottom of the print panel, there are several controls that allow you to select and save different return addresses, change the envelope size, log envelopes, and control whether or not SBook prints barcodes at the top and bottom of the envelope:
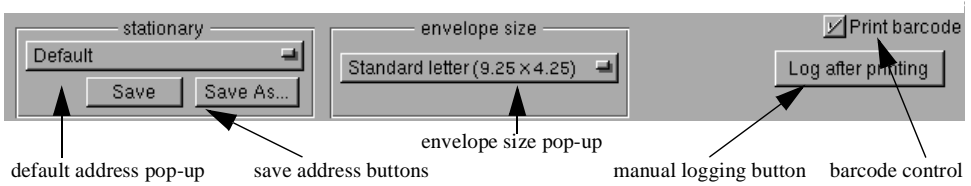
The box labeled **stationery** contains a pop-up menu that allows you to select between different return addresses. When you have changed one of these addresses by editing it on the envelope print panel, you can click on either the **Save** button or the **Save as...** button to save the changes.

> ＋ Return addresses are saved as files in a certain directory. When you save an address, *you must save it in this directory*, because the addresses appearing on the default address pop-up are exactly those stored in this directory. The location of this directory can be viewed and changed on SBook's Preferences panel: see "The Envelopes subview" in *Appendix A: SBook's Menus and Menu Commands*.

The pop-up menu in the box labeled **envelope size** allows you to select either a standard envelope, or a mailing label.

The checkbox labeled **Print barcode** determines whether SBook prints barcodes at the top and bottom of the envelope, based on the zip code.

The box labeled **Log after printing** allows you to log this envelope to a file or email.

> ＋ To log to a file, you must first set a log file. See Chapter 6, *Logging what you do with SBook*.

> ＋ You can also make bulk mailings with SBook by printing pages of mailing labels. See Chapter 5, *Making Reports with SBook*.

Dialing the phone

SBook can dial the phone for you, using either a modem or your NeXT computer's internal speaker. By default, SBook dials the phone with the speaker.

> ＋ If you want to use your modem to dial the phone, you will need to make several changes to SBook's dialing preferences. See Chapter 3, *Dialing the Phone with SBook*, for details.

To make a phone call, pick up the phone and point it towards the NeXT computer's internal speaker. You will need to hold the phone near enough to the speaker to ensure that the tone quality is good enough to dial the phone. You may need to experiment with different places.

> ＋ On a monochrome system, the speaker is located at the back of the monitor. On a color system, the speaker is located on the sound box.

Then click on the icon next to the phone number you want to dial. SBook will immediately begin dialing the phone. Telephone dialing tones will be played through the speaker, corresponding to the digits in the phone number. A panel labeled **Dialing panel** will appear on the screen while SBook dials.

phone number next to icon

button to log this call

button to cancel this call
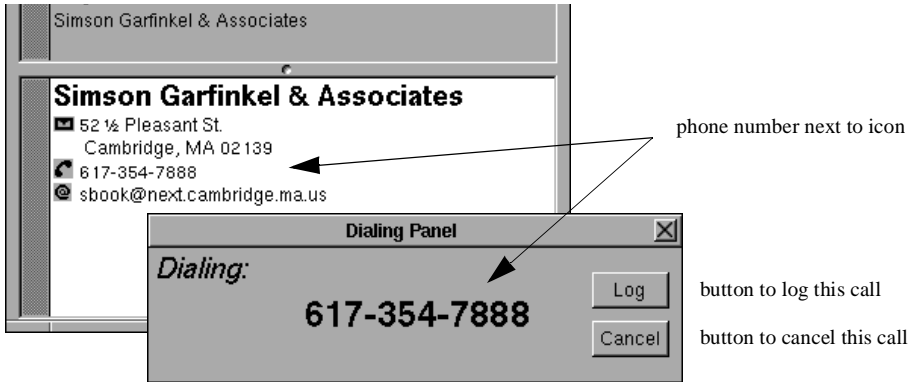
You can cancel the call with the **Cancel** button, or make a log of this call with the **Log** button.

+ More information about logging your calls can be found in Chapter 6, *Logging what you do with SBook*.

Sending email

To send email to someone from SBook, first find and display the person's entry, then click on the email icon next to the address you want to use. The Mail application will be notified, and a pre-addressed Send window will appear on your screen:

email address next to icon

name of entry
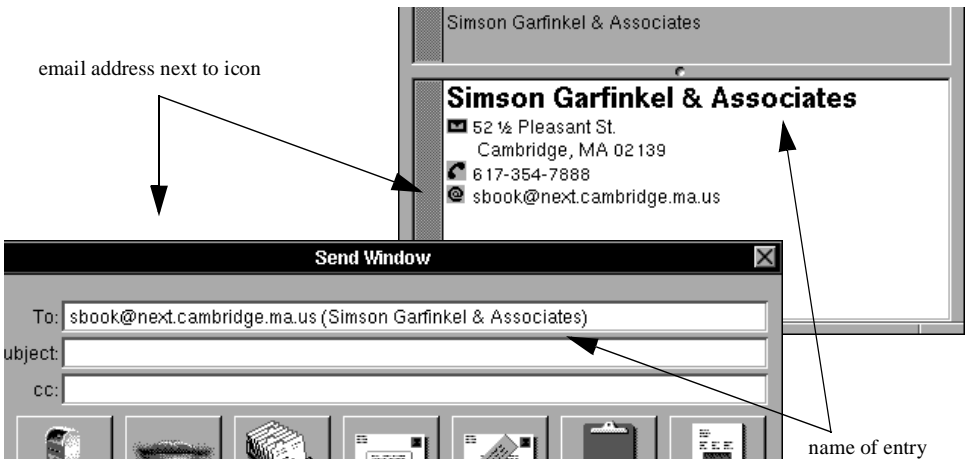
+ You can also make bulk email mailings with SBook. See Chapter 5, *Making Reports with SBook*.

2

Fine-Tuning Your SBook Files

Once you know something of how to work with SBook files and start to use SBook more frequently, you may start to find that SBook's understanding of the structure of names and addresses doesn't quite correspond with yours. Perhaps SBook misinterprets a few addresses in your file, or sorts the file differently from the way you would prefer. Or perhaps you would prefer to see names in italics and comments in boldface, rather than the other way round.

SBook provides plenty of ways to refine entries and files so that formatting is just how you like it, icons are just where you want them, and names are sorted just as you would sort them by hand. This chapter explains how to modify your SBook files to suit you perfectly.

SBook's Inspector Panel

When you make changes to an SBook file, you probably would like the file to be modified in one of three ways:

- an *individual* change modifies a single entry;

- a *global* change modifies all of the entries in the SBook file;

- a change to the *default* modifies all new, yet-to-be created entries.

SBook allows most changes to be done at any of these three levels.

+   You can also make a change to your *preferences.* Such a change will affect the way SBook behaves in general, regardless of what file you are looking at. This section does not cover changes to SBook's preferences: refer to "The Preferences panel" in *Appendix A: SBook's Menus and Menu Commands* for more information.

Some changes, such as formatting changes to an individual entry, can be done from the menus (and their associated keyboard equivalents). Most changes at the global and default levels, however, must be done from the SBook Inspector panel. You can bring up this panel by going to the **Tools** menu and choosing **Inspector...**

The Inspector panel has three subviews: **File**, **Template**, and **Entry**. Changing the pop-up menu at the top of the panel allows you to switch between the subviews.
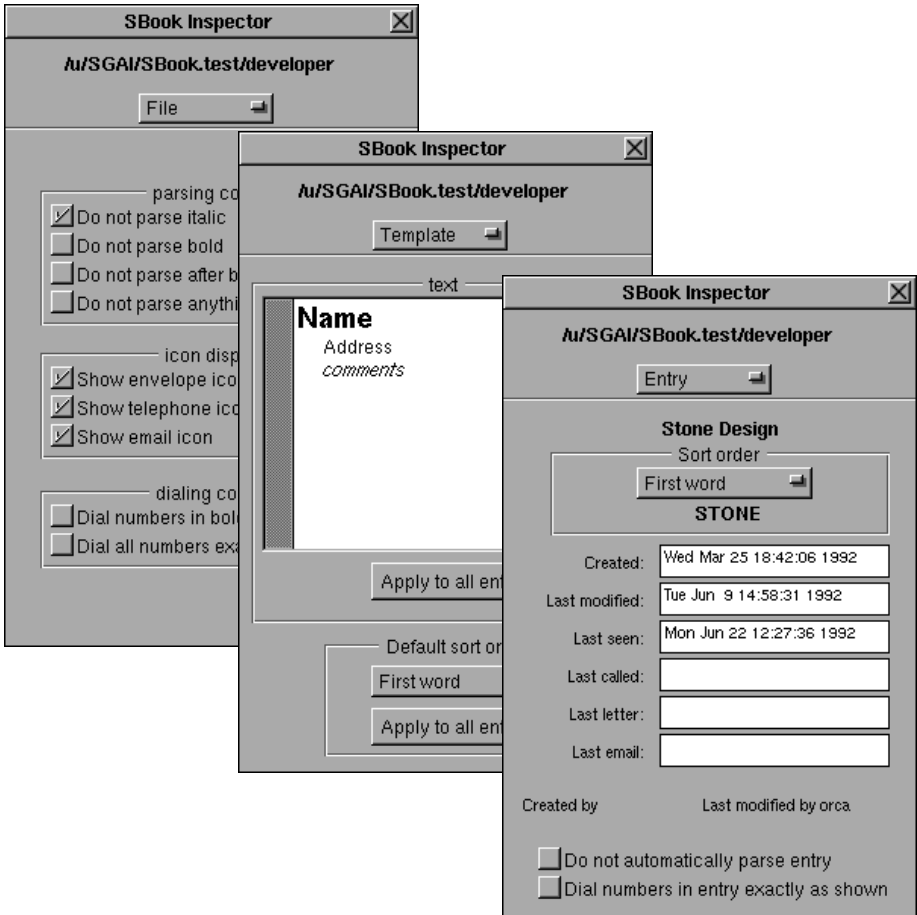
Like the Inspector panels in other NeXT applications, this panel remains on your screen until you click its close box or leave the application. The name of the file corresponding to the currently selected window is displayed across the top of the panel. Additionally, in the **Entry** subview, the name of the entry appears just below the pop-up menu. This allows you to verify which file and which entry you are currently inspecting.

The contents of the panel reflect characteristics of the current file, and in the **Entry** subview, the currently selected entry within that file. You can use the Inspector panel to examine and change these characteristics.

Sorting and sort order

A correctly sorted SBook file is not only convenient when you are scrolling through names in the matrix; it is helpful when you want to print out mailing labels, and essential when you want to print address books. SBook provides several features to help you keep all your files sorted in the way you prefer.

Re-sorting

If a file has become unsorted due to adding or changing entries, you will want to re-sort it. Choose **File>Sort entries** to re-sort the file. This may not solve all sorting problems, however. If the file is still sorted incorrectly, you will need to examine and change the sort order for individual entries or for the entire file.

Individual sort order

In a typical SBook file, names will appear in many different formats:

- Halloween K. Peabody

- Peabody and Associates, Inc.

- Lester R. Peabody, PhD

- The Peabody Savings and Loan

If these names were in my address book, I would probably want all of them to appear together, under "P." But if they were all sorted by first word, or all sorted by last word, each would appear under a different letter. Because each name is in a different format, each name needs to be sorted in a different way so that they can all appear together. Instead of requiring all the entries in your file to be sorted the same way, SBook maintains a separate *sort order* for each individual entry.

You can view and change the sort order for individual entries in the Inspector. Bring up the Inspector by choosing **Tools>Inspector...** and set the pop-up menu at the top of the panel to **Entry**. The top part of the panel shows a pop-up menu which controls the sort order for the current entry, and below the pop-up menu, the word this entry is sorted by.
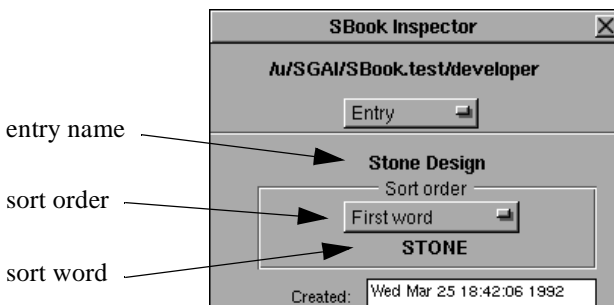
The pop-up menu allows you to choose between five different sort options:

- **First word**: Used for names like "Peabody and Associates, Inc."

- **Second word**: Used for names like "The Peabody Savings and Loan"

- **Second to last word**: Used for names like "Lester R. Peabody, PhD"

- **Last word**: Used for names like "Halloween K. Peabody"

- **Smart sort**: When this option is chosen, SBook tries to guess which word in the entry is appropriate for sorting.

After you manipulate the pop-up menu, the sort word automatically changes so that you can see if this entry will be sorted correctly. This is especially helpful when "smart sort" is chosen, since SBook's guess may not correspond to your preference.

When you have made individual changes to all the wrongly sorted entries, you will want to re-sort the file, since SBook does not do this automatically after each individual change.

Default sort order

The default sort order for a file controls how entries are sorted when you do not specify an individual sort order. By default, the default sort order is "smart sort."

$+$ We find that "smart sort" works quite well for files with mixed contents, where the names of the entries may have any of the formats described in the previous section. Other sort orders are not as useful unless the names in a file are all of the same type, such as *only* personal names (which are usually sorted by last word), or *only* businesses (which are usually sorted by first word).

You can change the default sort order for the file, or apply a global change to the file, from the **Template** section of the Inspector, at the bottom of the panel.

sort order menu

global apply button

Default sort order

First word

Apply to all entries
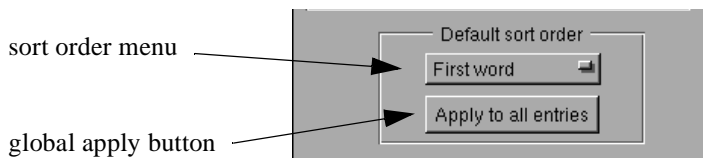
Changing the default sort order for the file will affect only new entries to the file. Existing entries will not be changed.

If you want to change the sort order for all the existing entries in the file, set the pop-up to the sort order you prefer, then click on the **Apply to all entries** button. All the entries in the file will be changed.

$+$ If you have made any changes to correct the sort order for individual entries, *they will all be overwritten by the default sort order when you click on this button.*

SBook automatically re-sorts the file after it has changed all the entries to use the default.

Parsing and icon placement

SBook recognizes names, addresses, and phone numbers by comparing the information in each entry with a pattern. But your entry doesn't have to conform to a single, rigid pattern. SBook has a large repertoire of patterns built into it, and uses the patterns it knows to make "intelligent guesses" about your text. After it has made the guesses, it places icons next to all the addresses and phone numbers in your entry. We call this process *parsing*.
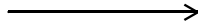
Reparsing

SBook is designed so that it parses an entry whenever parsing is needed. It is almost never necessary to tell SBook to parse an entry.

SBook parses each new entry while you type it in. After each line is entered, SBook checks to see if you have entered an address or telephone number. When you have typed in the entire entry, it will have been parsed completely.

SBook automatically recognizes when an entry needs to be reparsed:

- when parts of an entry have been edited

- when you have changed SBook's parsing options

- or when an imported entry has never yet been parsed

and reparses the entry automatically the next time the entry is displayed.

Sometimes when you are in the middle of editing an entry, icons can temporarily end up in the wrong places. Although SBook will reparse the entry correctly the next time it is displayed, you can also reparse the entry manually so that you can see how it will look right away. Choosing **Format>Icons>Parse entry** (**command-P**) will reparse any displayed entry.

Adding icons

Sometimes, you and SBook might disagree on whether a particular block of text looks like a name, address, or telephone number, or just some comments. For example, you may be working in a corporate or university environment where internal mail has an unusual address format, like "NE43-429," and you still want to print envelopes using this address format. Or you might have a friend in a faraway country with a very different telephone number format, one that SBook doesn't know, but you still want to be able to use SBook to dial this number.

In this case, go to the **Format** menu and choose **Icons**. First make sure SBook has done its best to parse this entry, by clicking **Parse entry**. If SBook still can't recognize your unusually formatted address or phone number, place the cursor to the left of the text you want to mark with the icon, and then click on **Insert icon** of the appropriate variety.
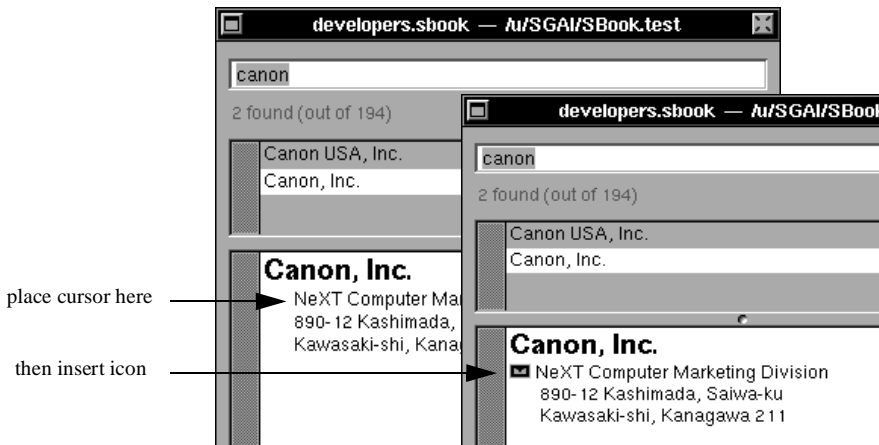
+ If SBook cannot recognize a *telephone number*, it probably does not know the correct dialing rules for that number. In addition to inserting an icon next to the number, you may have to instruct SBook to dial this number in a special way. See "Dialing unusual numbers" in Chapter 3 for details.

+ If you want to create an *entire file* with addresses or phone numbers in a non-standard format, and you don't want to insert icons manually for each entry, see "Putting icons on the font template" on Page 22.

Removing icons

Generally, you won't need to remove any of the icons that SBook inserts automatically. Although it is possible for icons to end up in the wrong places after you have edited an entry, reparsing the entry will usually remove all of the misplaced icons.

However, manually inserted icons are treated differently from automatically inserted icons. When SBook reparses an entry or file, it will not remove these special icons. If you want to remove them, you must do it manually, in one of several ways:

- You can remove icons one by one by selecting and deleting them in the usual way.

- Or you can remove all of the icons from a selected entry, including the manually-inserted ones, by choosing **Format>Icons>Remove all icons** (**command-R**).

- Or you can remove all of the icons from the entire file, including the manually-inserted ones, by choosing **File>Remove all icons**.

Although it is possible to delete automatically inserted icons, they will return as soon as the entry is reparsed. If any automatically inserted icons remain misplaced after deleting and reparsing, these icons are due to incorrect parsing, and must be *suppressed*, rather than deleted. The next section explains how to do this.

Suppressing icons

Generally, SBook knows which parts of the entry are comments, and which parts should have icons placed next to them. Sometimes, however, you might want to *insist* that SBook treat certain parts of an entry as comments. For example, you may want to store credit card numbers in an entry, and SBook may think they are telephone numbers and put telephone icons next to them.

By default, SBook assumes any text in italics is a comment, and does not try to parse it. You can change SBook's behavior in the SBook Inspector. Bring up the Inspector by choosing **Tools>Inspector...** and set the pop-up menu at the top of the Inspector to **File**.

The part of the panel labeled **parsing control** contains four checkboxes that control which parts of an entry or a file are treated as comments.
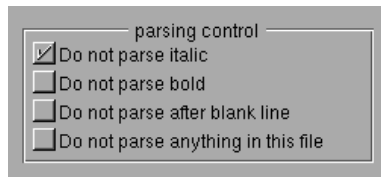
- Checking the box labeled **Do not parse italic** causes SBook to treat italic text as a comment. This is the default.

- Checking the box labeled **Do not parse bold** causes SBook to treat bold text as a comment.

- Checking the box labeled **Do not parse after blank line** causes SBook to treat all text after a blank line as a comment.

- Checking the box labeled **Do not parse anything in this file** prevents SBook from parsing any part of any entry in the file. You will have to insert all icons by hand.

More than one box may be checked, and the effects of both will be combined. For example, you could have SBook treat both italics and boldface as comment fields.

If you don't want to change SBook's behavior for the file as a whole, but you do want to keep SBook from placing icons in a particular entry, set the pop-up menu at the top of the Inspector to **Entry**, select the entry in which you want to suppress icon placement, and check the box labeled **Do not automatically parse entry**:

click here to suppress icon placement for this entry ───────▶

| Last letter: | |
| Last email: | |

Created by   Last modified by orca

☐ Do not automatically parse entry
☐ Dial numbers in entry exactly as shown
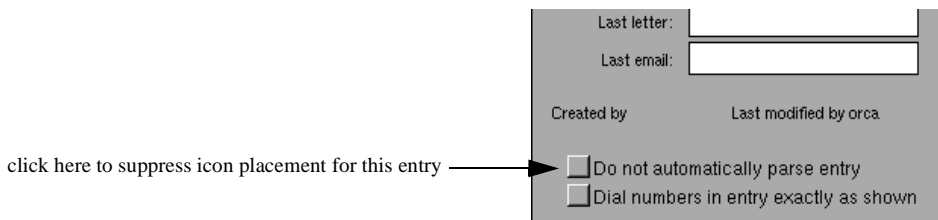
+ Use of the box labeled **Dial numbers in entry exactly as shown** is explained in the section "Dialing unusual numbers" in Chapter 3.

You can also use the Inspector to suppress the *display* of icons, rather than their placement. Set the pop-up menu at the top of the Inspector to **File**. The three checkboxes in the part labeled **icon display** control whether icons are displayed in this file. By default, all three are checked, but if you prefer not to see icons of a particular type displayed in this file, you can uncheck the boxes.

icon display
☑ Show envelope icon
☑ Show telephone icon
☑ Show email icon

Font and formatting

SBook generally doesn't care how you format the information you store in it. You can change the font and formatting for any part of an entry, and SBook will still know where to place the icons. (There are a few exceptions to this rule, such as designated comment fields: see "Suppressing icons" on Page 19 for more detail.)

If you want to make an individual change to the font, size, and formatting of an entry, just use the **Format** menu. Use the **Font** submenu to change the font, and the **Text** submenu to change the ruler. These two submenus work just as their counterparts do in other NeXT applications:

- The **Font** submenu allows you to use bold, italic, underline, superscript and subscript. You can also adjust the size and weight of text from this menu, and you can copy and paste fonts. Or you can call up the **Font Panel** (**command-t**) to find, preview, and set the font you want.

- The **Text** submenu allows you to set the tabs and change the alignment (left, right, or center). You can also view, copy, and paste a ruler from one place to another.

Formatting the default template

If you want to make a font or formatting change to the default for new entries, you can use the SBook Inspector. Choose **Template** from the pop-up menu at the top of the Inspector panel and edit the default template just as though you were editing an individual entry. You can make font and formatting changes, or textual changes.

Once you have changed the template, all new entries for that file will use the template for their initial contents:

modified template

new entry created with
command-n after modifying
template
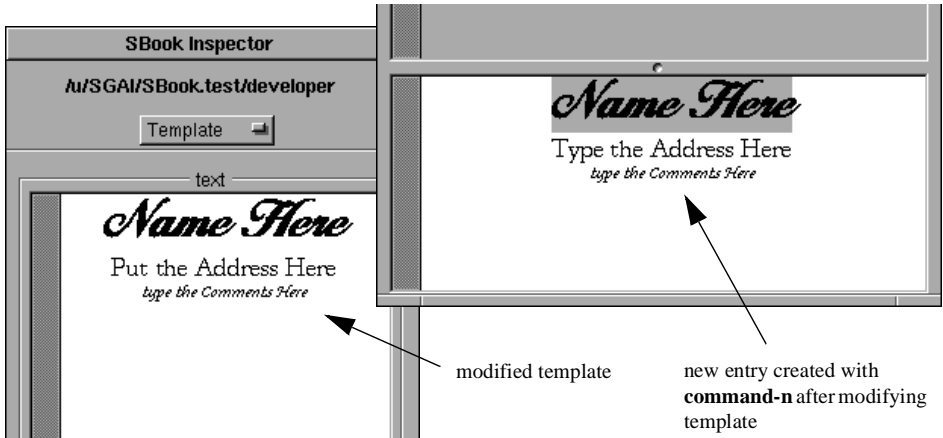
You can also make a global change from this panel. Clicking on the **Apply to all entries** button with the mouse will cause all of the entries in the file to reflect the font and formatting changes that you have made to the template. A panel labeled **Work in progress...** will appear while the changes are being made.

global apply button
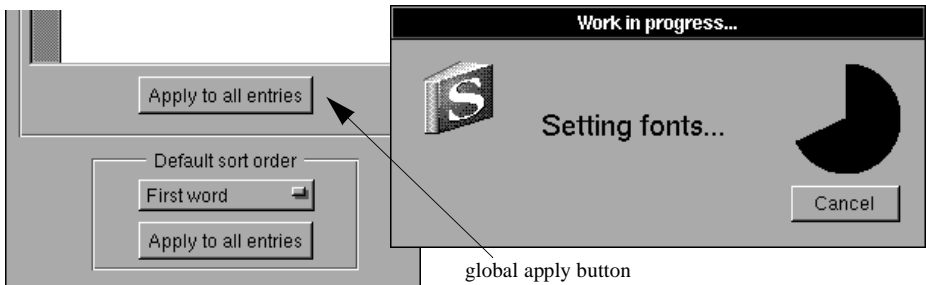
+   When a global change is applied, only the font and formatting characteristics of the *first two lines* are applied to entries: the first line's characteristics are applied to the name of each entry, and the second line's characteristics are applied to the rest of each entry. Also, if a single line contains several different fonts, only the first font on that line will be applied.

Putting icons on the font template

If you are working in a university or corporate environment, you may need to send mail to internal addresses that are not at all like standard postal addresses, or make phone calls to internal telephone numbers that are not at all like standard telephone numbers. For example, at MIT, the internal mail system only requires a person's name, a building code, and an office number, and the internal telephone system only requires a five-digit number.

Because SBook cannot recognize addresses and telephone numbers like these, one option you have is to insert icons individually next to each address or telephone number, as described in "Adding icons" on Page 18. However, you may have so many non-standard addresses and telephone numbers that this becomes inconvenient.

You can make an entire file in which addresses or telephone numbers appear in a non-standard format by placing one or more icons on the font template. These icons will appear automatically in each new entry so that you do not have to insert them by hand.
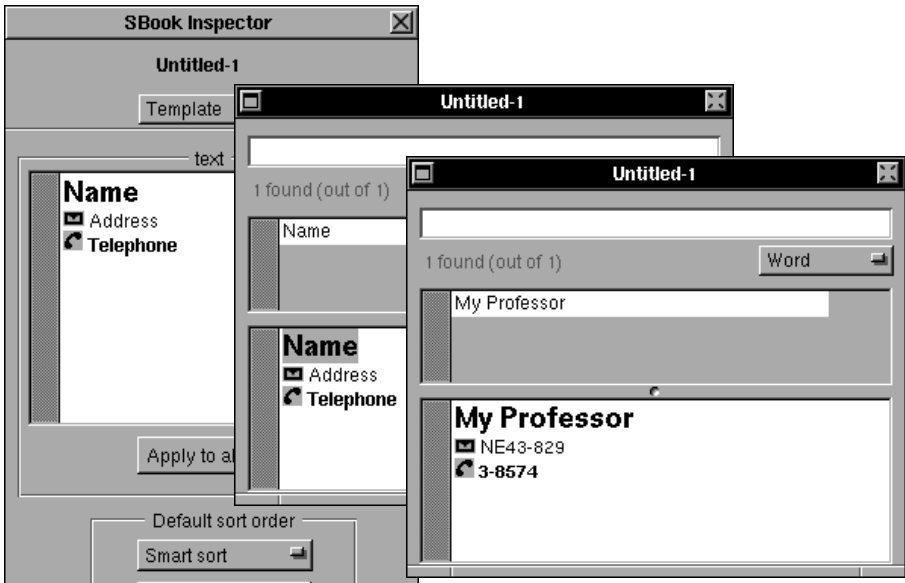
+ Note in the above example that the telephone number part of the template is in bold type, so that all the non-standard telephone numbers can by dialed exactly as shown. This is described fully in "Dialing individual numbers exactly as shown" in *Dialing the Phone with SBook.*

The Colors panel

SBook also gives you access to a standard Colors panel so that you can change the color of text in an entry, or on the template. Bring up the Colors panel by choosing **Tools>Colors...** When you have chosen a color you like on the Colors panel, select some text in a displayed

entry. Pick up the color from the color well on the Colors panel, then drop it onto the selected text. The text will now appear in the color you have chosen.

chosen color in color well

selected text

after dropping new color
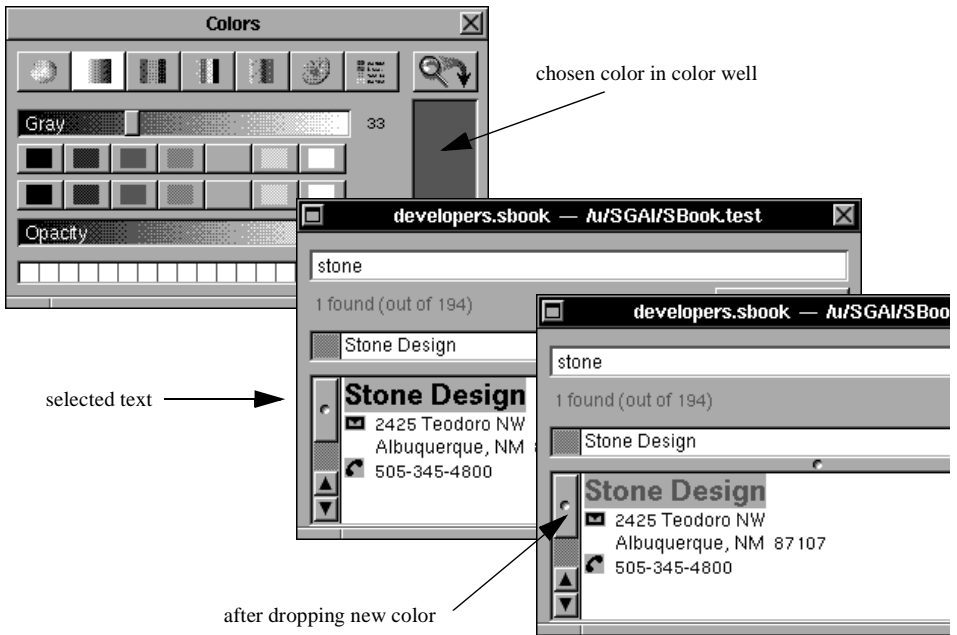
+ If you drop a color onto an icon, all of the text associated with the icon will appear in the color you have chosen.

+ You can also cause an entire entry to appear in your chosen color. If you drop a color onto an entry that does *not* have selected text within it, the entire entry will appear in that color.

3

Dialing the Phone with SBook

If you make a lot of phone calls, you will probably find SBook's dialing facility to be one of your favorite features.

- SBook can dial phone numbers for you with just one mouse click.

- Because SBook knows about US area codes and US dialing rules, it can dial phone numbers in the correct format for your area, even if they are written differently in your address book.

- SBook can dial the phone with your NeXT machine's internal speaker, or with any modem that supports the Hayes AT command set.

- Finally, SBook can log your calls to a file or email so that you have a record of the people you called and how long you talked.

This section covers SBook's settings for dialing the phone. It explains how SBook's dialing rules work, and how to modify them to suit your area. It also explains how to set up and use the internal speaker or modem, depending on which you prefer.

We assume in this section that you have a basic familiarity with SBook's dialing facility. If you don't, you can find a quick description of how to use SBook to dial the phone in Chapter 1, *Getting Started with SBook*, on Page 11. You may want to experiment with using the default settings to dial a few numbers before you continue with this section.

+   This section also does *not* explain how to log your phone calls. This is covered in Chapter 6, *Logging what you do with SBook*.

Setting up SBook's dialing rules

SBook is designed to allow you to store phone numbers in a variety of formats that are natural for you, yet have SBook dial them in the correct way for your local calling area. Just like you do when you are dialing by hand, SBook decides how to dial a number by using what it knows about the rules in your area.
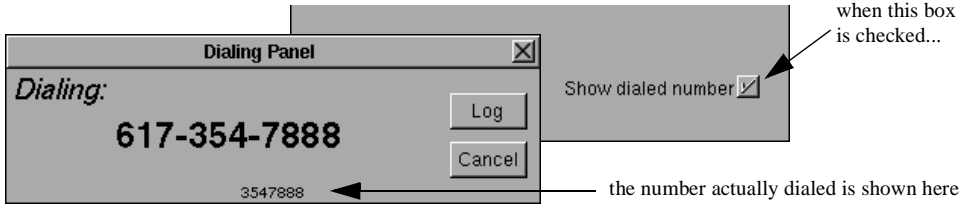
SBook's dialing rules are controlled by the **Dialing rules** section of the Preferences panel. Bring up the Preferences panel by choosing **Info>Preferences...** and select **Dialing rules** from the pop-up menu at the top of the panel. You will see one of two subviews:

dialing rules pop-up

default dialing panel

dialing panel for US & Canada
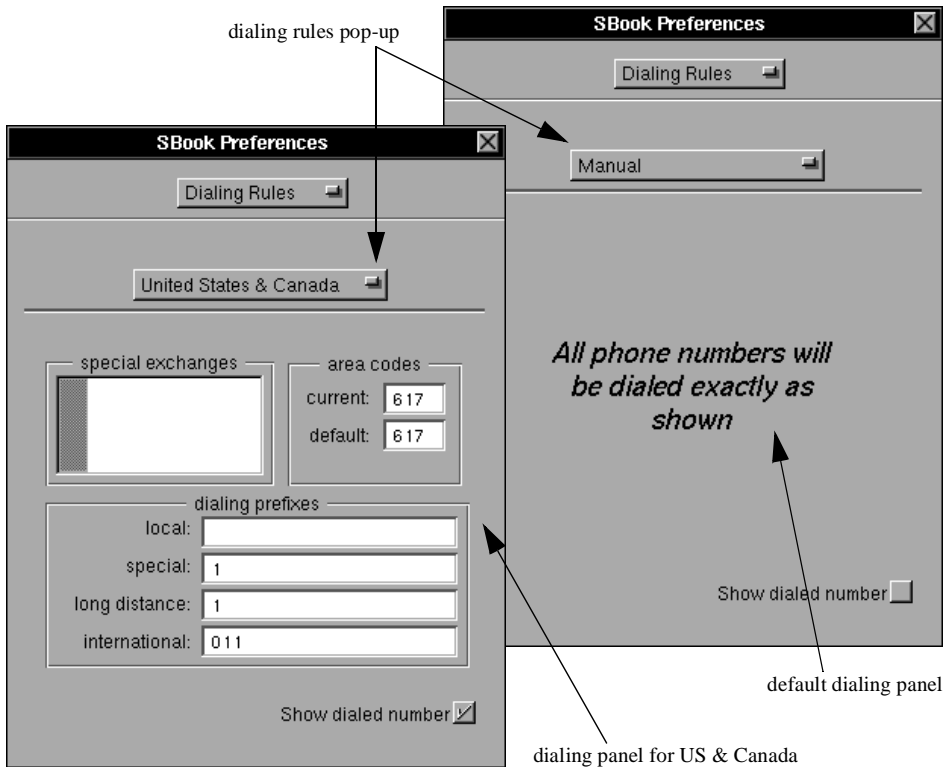
Each subview presents a different set of dialing rules, corresponding to a different dialing area. The dialing rules pop-up menu, located just below the main pop-up on the Preferences panel, controls which view is active. Choose the view from the pop-up that best corresponds to your local dialing area and its rules.

+ The current version of SBook only contains specific rules for the **United States and Canada**. All other dialing areas must use **Manual**, the default.

Regardless of your dialing area, you will see a checkbox labeled **Show dialed number** at the bottom of the panel:

when this box
is checked...

Dialing Panel ☒

Dialing:

617-354-7888

Log

Cancel

Show dialed number ☑

3547888 ← the number actually dialed is shown here

Checking this box allows you to determine if the dialing rules you have set are working correctly for your area. Each time you dial a number, the exact digits that SBook dials will appear on the **Dialing Panel**. While you are setting up your dialing rules, you will probably want to have this box checked. Once you become confident that your dialing rules are working correctly, you will probably want to have this box unchecked.

Dialing telephone numbers in the U.S. and Canada

SBook's dialing rules for the U.S. and Canada distinguish between four types of numbers:

- *Local numbers* are telephone numbers in your area code. From most telephones, you can make a call to a local number by dialing:

    seven digit number

- *Long distance numbers* are telephone numbers that are in an area code that is different from your area code. From most telephones, you can make a call to a long distance number by dialing:

    1 + area code + seven digit number

- *International numbers* are telephone numbers that are not in the U.S. or Canada. From most telephones, you can make a call to an international number by dialing:

    011 + country code + city code + telephone number

- *Special numbers* are telephone numbers that are in your area code but that you cannot dial in the usual way. These may be rural telephone numbers if you live in an urban area. To make a call to a special number, you might need to dial:

    1 + seven digit number

You can control which numbers are treated as local, long distance, international, or special numbers by changing the values in the **area codes** and **special exchanges** sections of the **Dialing rules** panel.

The **area codes** section controls how SBook distinguishes between local and long distance numbers. Enter your area code in the field labeled **current**. When SBook dials a number, it compares the number's area code with your current area code to determine whether this is a long distance call.

$+$ By default, SBook assumes that any numbers written in an SBook file without area codes are located in the current area code. SBook dials these numbers as local numbers. If you prefer, you can specify a *different* area code for these numbers by entering an area code in the field labeled **default**.

The **special exchanges** section controls which numbers are treated as special numbers. These numbers can usually be identified by the *exchange* (the first three digits):

(617) 354-7888
exchange

If you have any special exchanges in your area code, enter them in the **special exchanges** section. Special exchanges must be three digits long and may be separated by any non-numeric character.

Local numbers with different prefixes

In some areas, you must dial a "1" before most or even all telephone numbers in your area code. The dialing rules in these areas differ from the standard dialing rules in this way:

- You must make calls to most local numbers by dialing:

    1 + seven digit number

- You can call a few exchanges by dialing:

    seven digit number

If you live in such an area, you can switch how SBook handles local and special numbers. In the **dialing prefixes** section, enter a "1" in the field labeled **local**, and delete the "1" in the field labeled **special**. In the **special exchanges** section, list all the exchanges that can be called without a "1" in your area code. Now SBook will dial correctly for your area.

There are a few areas in the U.S. and Canada where the area code must always be dialed, even for calls in the same area code. In these areas, the dialing rule for local numbers is:

- You must make calls to most local numbers by dialing:

    1 + area code + seven digit number

If you live in such an area, enter a "1" and your area code in the field labeled **local** in the **dialing prefixes** section. Now SBook will dial all local calls with your area code, even if they are written as seven digit numbers in your address book.

Academic or corporate phone systems

In a typical academic or corporate phone system, you can make internal calls or calls to the outside. Internal calls usually only require an extension number to be dialed, which is often the last four or five digits of the seven-digit telephone number. Calls to the outside usually require an initial number to be dialed to reach an "outside line."

For example, the MIT phone system uses three exchanges within the 617 area code: 253, 258, and 225. Internal calls require only the last five digits of the seven digit phone number to be dialed. External calls require a "9" to be dialed, then the outside phone number. The rules for the MIT phone system can be summarized as:

- You can make calls to numbers in MIT exchanges by dialing:

    five digit number

- You can make calls to other numbers by dialing, as appropriate:

    9 + seven digit number

    9 + 1 + area code + seven digit number

    9 + 011 + country code + city code + telephone number

SBook can handle this situation easily.

+   SBook allows you to insert a "d" in a dialing prefix to *delete* a leading digit of the telephone number. More than one "d" can be inserted to delete multiple digits.

Using this special character, it is simple to encode the MIT rules:

- The three exchanges used by the MIT phone system can be treated as **special exchanges**. Removing the first two digits of the seven digit number gives the correct number to dial within MIT, so the **special** prefix should be "dd."

- An initial "9" should be added to the dialing prefixes for all other numbers.

The correct settings for MIT would look like this:

Calling card numbers

From some telephones, you must dial every long distance or international number by using a telephone calling card number.

+   If you do not need to dial *every* number by using a calling card number, refer instead to "Dialing unusual numbers" on Page 31.

The calling card dialing rule for long distance numbers might be:

- You must make calls to long distance numbers by dialing:

     0 + area code + seven digit number, <wait for tone>, *calling card number*

The calling card dialing rule can be encoded into SBook's **long distance** prefix, using two special characters:

+   Inserting a comma in a dialing prefix causes SBook to pause briefly at that point, then dial the rest of the number.

+   Inserting an "@" in a dialing prefix causes SBook to dial the telephone number at that point, rather than at the end of the prefix.

Therefore, the **long distance** prefix should be "0@," and then the calling card number.

As an example, for the calling card number 617-354-7888-1234, the correct **long distance** and **international** prefixes would be:

long distance:	0@,61735478881234
international:	010@,61735478881234

If you find that SBook is not pausing long enough, add another comma or two.

Extension numbers

Some people in your address book may not be reached directly by dialing a telephone number. You may need to dial a telephone number and then ask for an extension number to reach a person's office. Although some phone systems still require that you talk to a human operator to request an extension number, many systems will allow you to dial the extension number so that you can reach a person's office phone automatically.

Or you may need to dial a one- or two-digit extension number to choose between different departments in a company. For example, you can reach NeXT Computer's service department by calling NeXT, then dialing a "4" when the automated phone system answers.

The dialing rule for such a system may work as follows:

- You can make calls to numbers with extensions by dialing:

     telephone number, <pause>, *extension number*

SBook handles this rule automatically. When you type a number in your address book, you can add an extension by typing "extension" (or an abbreviation like "ext." or even "x"), and then the extension number. Then when you click on the telephone icon next to the number, SBook will dial the telephone number, pause for a moment, and then dial the extension.

NeXT Computer, Inc.
900 Chesapeake Drive
Redwood City, CA 94063
415-366-0900
product info:
1-800-848-6398 ext. 1 ← extension numbers
service:
1-800-848-6398 ext. 3
orders:
Order Management
760 Mission Court
Fremont, CA 94539
1-800-848-6398 ext. 5
fax: 1-800-228-NEXT

+ Some phone systems that use extension numbers may require you to dial a special non-numeric character (either "*" or "#") before or after the extension number. You can put the characters "*" and "#" in an extension, and SBook will dial them.

+ If you find that a particular phone system requires a longer pause than SBook normally inserts between the telephone number and the extension, you can add one or more commas just before the extension number:

1-800-848-6398 ext. ,,5 ← commas cause SBook to pause longer

Dialing unusual numbers

Regardless of the dialing rules you have set up, there may be some numbers that do not follow any rule and must be dialed in an unusual way. These may be telephone numbers that require special handling, or they may be access codes of some kind.

• For example, you might want to put your telephone calling card number in an SBook file so that you can have SBook dial the code for you if you need to make a call using the card number.

• Or you might always want to dial a particular telephone number by using a calling card or making a collect call, rather than dialing direct.

If you try to dial unusual numbers as though they were regular telephone numbers, SBook will try to interpret them according to its dialing rules, and might add or remove digits. Instead, you can tell SBook that an individual number, or all the numbers in an entry or file, must be dialed *exactly as shown*. This is done by using the SBook Inspector.

+ Refer to Chapter 2, *Fine-Tuning Your SBook Files*, if you need a complete description of the Inspector and how to use it.

+ You should use this method only as a last resort, because it causes SBook to *ignore all of its dialing rules* when dialing the affected numbers, and makes the file less portable. For example, in "Academic or corporate phone systems" on Page 29, instead of writing MIT numbers in the SBook file as seven digit numbers with special exchanges, we could have marked them to be dialed exactly as shown, but then they could not have been dialed from non-MIT telephones. Writing the MIT numbers as seven digit numbers with special exchanges allows the file to be used outside of MIT without any modification.

Dialing individual numbers exactly as shown

To mark individual numbers in a file to be dialed exactly as shown, you can enter the numbers in bold, and have SBook dial all bold numbers exactly as shown.

By default, bold numbers are dialed like any other telephone number, so you need to use the SBook Inspector to tell SBook that bold numbers *in this file* should be dialed as shown. *Each file* containing numbers that you want to mark in this way must be modified, using the SBook Inspector, so that it will treat bold numbers specially.

Make sure the file you want to modify is selected on the screen, then bring up the Inspector by choosing **Tools>Inspector...** The name of the file should appear at the top of the panel. Choose **File** from the pop-up menu just below the filename. At the bottom of the File subview, there is a box labeled **dialing control** containing two labeled checkboxes:
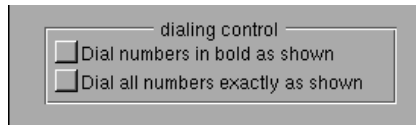
Check the box labeled **Dial numbers in bold as shown**.

Now you can mark an individual number to be dialed exactly as shown. After entering the number where you would like it to appear in your SBook file, select the number and choose **Format>Font>Bold** (**command-b**).

bold numbers to be dialed as shown
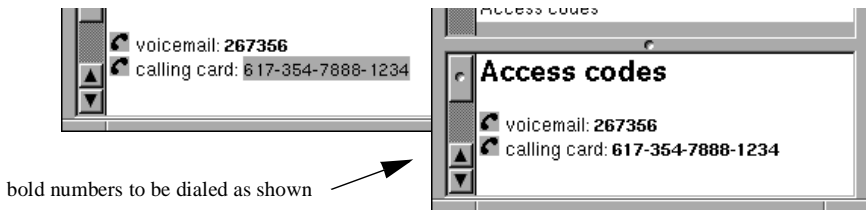
+ Although the written label next to the number need not appear in bold, *the first digit* in the number must be bold for SBook to consider it as a "bold number."


calling card: 6 17-**354-7888-1234** ◀— this number is *not* a "bold number"

Dialing all of the numbers in an entry or file exactly as shown

Instead of marking each individual number that you want dialed as shown, you can mark an entire entry or file. This tells SBook to *ignore all the dialing rules it knows* for all of the numbers in this entry or file.

If you want all the numbers in a particular entry to be dialed exactly as shown, make sure that the entry is selected or the insertion point is inside the entry in the display, then bring up the SBook Inspector by choosing **Tools>Inspector...** Choose **Entry** from the pop-up menu at the top of the panel. The name of the entry should appear near the top of the panel, just above the section labeled **Sort word**.

At the very bottom of the panel, there is a checkbox labeled **Dial numbers exactly as shown**:
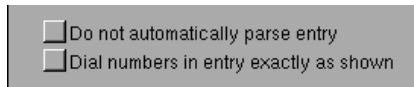
Checking this box will cause SBook to dial the numbers in this entry exactly as shown.

+   The entry itself will not appear any differently when displayed, so the only way to tell if an entry is marked this way is to bring up the Inspector.

If you want all the numbers *in this file* dialed exactly as shown, choose **File** from the pop-up menu at the top of the Inspector panel. Just below the checkbox labeled **Dial numbers in bold as shown**, you will see a checkbox labeled **Dial all numbers exactly as shown**:
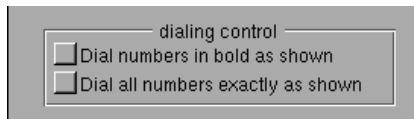
Checking this box will cause SBook to dial all of the numbers in this file exactly as shown.

Setting up SBook's dialing method

SBook allows you to use either of two dialing methods: dialing with your NeXT computer's internal speaker, or dialing with your modem.

Dialing with the internal speaker (the default) is easier to set up, requires no additional equipment, and makes a great demo for your friends. If you don't make calls with SBook very often, you will probably want to continue to use the speaker.

Dialing with the modem is more reliable, more versatile, and doesn't require you to hold the phone up to the speaker every time you make a telephone call. If you plan to make a lot of calls with SBook, you may want to start using a modem.

You can select and set up your preferred dialing method from the **Dialing method** subview of the Preferences panel. Bring up the Preferences panel by choosing **Info>Preferences...** and select **Dialing method** from the pop-up menu at the top of the panel.
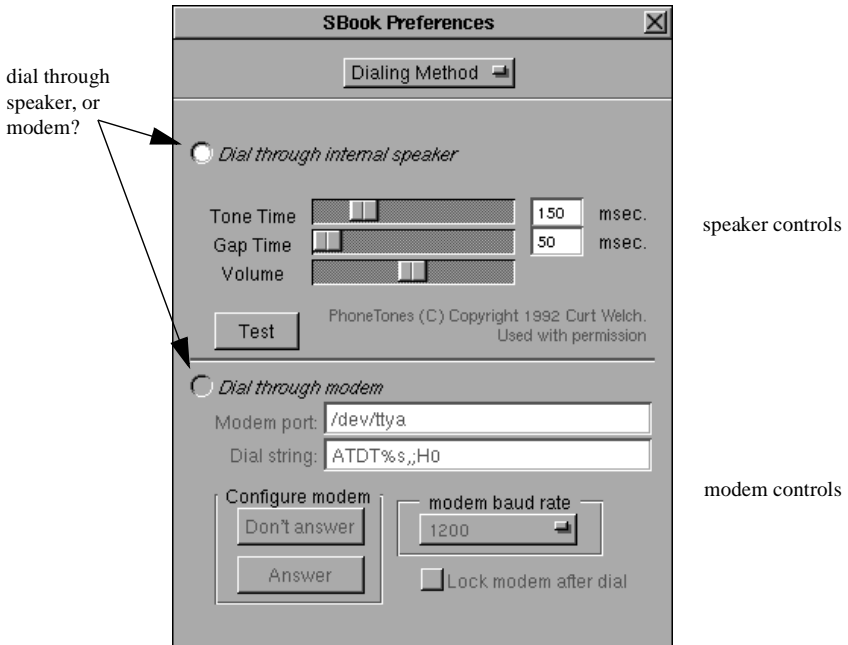

On the left side of the Preferences panel, there are two radio buttons that allow you to select a dialing method. Click on the button corresponding to the method you prefer. The half of the panel that you have selected will then be activated, and the other half will be grayed out.

Dialing with the internal speaker

This is the method described in Chapter 1, *Getting Started with SBook*. When you have your preference set to dial with the internal speaker, you hold the phone up to the speaker and SBook produces tones to dial the phone.

These tones are controlled by the top half of the **Dialing method** panel.
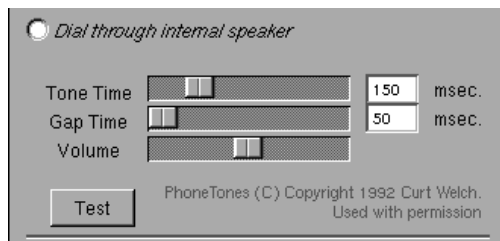
The three slider switches control the tones produced by the speaker. You probably want to adjust the sliders so that the tones are slow and loud enough to dial your phone, but fast and quiet enough that it is not unpleasant to have them played by your speaker.

- Adjusting the **Tone time** affects how long each tone lasts.

- Adjusting the **Gap time** affects how much time passes between tones.

- Adjusting the **Volume** affects how loudly the tones are played.

You can click on the button labeled **Test** to play a short sequence of tones so that you can hear how the tones will sound when SBook dials, and determine whether they dial the phone correctly. The test sequence is 555-1212.

Dialing with your modem

When you use a modem to dial the phone, the modem is attached to your voice line in parallel with your telephone. SBook sends commands to your modem which cause it to dial the phone directly, then hang up. You pick up the phone before the modem hangs up.

If you already use, or plan to use, a modem for data transmission (outgoing faxes and connecting with other computers) we recommend that you attach a *second* modem devoted to dialing the phone for your voice line. You'll probably want to use a cheap one, since all it will be doing is dialing the phone for you. An old 300 baud modem will do just fine.

$+$ If your existing modem is used for *incoming* faxes, you *must* use a modem devoted to SBook dialing, because incoming faxes block the modem.

Attach the modem, with a standard NeXT modem cable (available from NeXT Connection or Computer Attic), to one of the serial ports on the back of your NeXT. Then plug the modem into your voice line in parallel with the phone.

$+$ Don't plug your phone into the back of the modem! Modems aren't designed to be used with a voice line, and some cut off the phone's connection while they are operating. Use a "T" connector to attach the modem *in parallel* with your phone.

Once you have attached the modem to your voice line, you need to set up SBook's dialing preferences. First change the radio button to **Dial through modem**. The modem section of the panel will become activated:
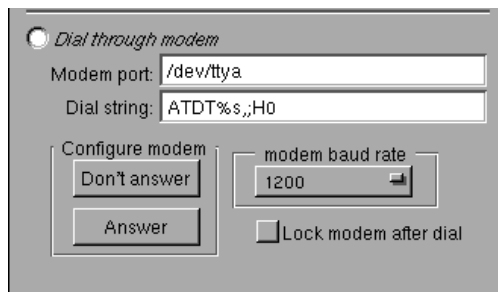
The section labeled **Configure modem** controls whether your modem will automatically answer the phone when it rings. The two buttons in this section, **Answer** and **Don't Answer**, send commands to your modem that will turn "auto-answering" on or off until the next time the modem receives one of these commands.

You should decide whether you want to turn auto-answering on or off depending on the kind of calls you receive on the telephone line you have attached to the modem:

- If this line receives voice calls, *you need to make sure your modem will not answer the phone*. Click on the button labeled **Don't answer**.

- If this line only receives data transmissions, you probably *do* want your modem to answer the phone. Click on the button labeled **Answer**.

The field labeled **Modem port** determines the port that SBook uses to dial the phone.

- If you are using a modem devoted to SBook dialing, set **modem port** to "/dev/ttya" or "/dev/ttyb" depending on whether your modem is attached to the "A" or "B" serial port.

- If you must share the modem between SBook dialing and your data transmissions, set **modem port** to "/dev/ttyda" or "/dev/ttydb."

The field labeled **dial string** determines the commands that are sent to your modem when you dial a number. Within the dial string, the characters "%s" represent the phone number. SBook will replace those characters when it dials a particular number. For example, dialing 354-7888 with the dial string set to "ATDT%s,;H0" will cause SBook to send the string "ATDT3547888,;H0" to the modem.

   +   You probably will not need to change the dial string. Refer to the owner's manual for your modem if you need more information on the commands in the dial string.

The pop-up menu labeled **modem baud rate** determines the baud rate SBook uses when it communicates with your modem. Set the pop-up to the baud rate you prefer.

Finally, whenever you make a phone call with your modem, there is a small amount of overhead involved in securing the modem port for your use. If you check the box labeled **Lock modem after dial**, SBook locks up the modem port between calls so that you don't have to secure the modem for yourself each time. The modem is locked when you make the first call, and it is unlocked when you quit out of SBook. You can unlock the modem at any time by going to the **Tools** menu and choosing **Unlock modem** (**command-U**).

   +   If you are using pulse dialing, we have found that it is usually necessary to lock the modem, because pulse dialing takes so much longer than tone dialing.

   +   When the modem is locked, other people and other applications can't use it. So if you are using your modem for data transmissions, or if other people on your system are also making calls with this modem, you should leave the box unchecked.

4

Importing and Exporting

Once you start using SBook, you will probably want to import all of your existing address databases so that you can use them as SBook files. This section explains how to import your existing files, as well as how to export SBook files to a variety of formats.

Importing files

We have tried to make it as simple as possible to import files into SBook so that you can start using your existing databases right away with a minimum of conversion time. Most of your address databases should easily convert over to SBook format. If you do have trouble, read "If importing fails" on Page 41. Keep in mind that, in addition to technical support, we also offer hand conversion as a service to our customers; contact us for details.

To import a file, go to the **File** menu and choose **Import...** If there is a currently selected SBook window, a panel labeled **Import** will appear asking if you want to import into that file, or create a new file. (If there are no windows open, the panel will not appear.) Click on **Current file** (the default), **New file**, or **Cancel Import** depending on your preference.
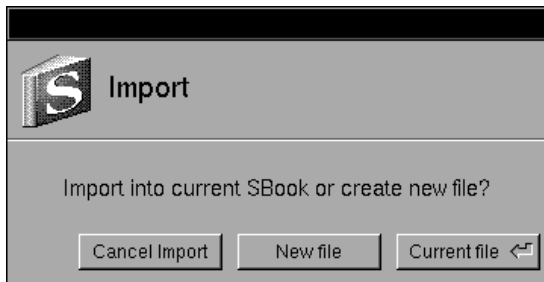

Another panel labeled **Import** will now appear, allowing you to choose the source file. This panel is just like a standard Open panel, except for a small section labeled **Import options** near the bottom of the panel. It is important to make sure the import options are set correctly. (Import options are described in detail in the following two subsections, "File formats" on Page 39 and "File sources" on Page 40.)

import options section
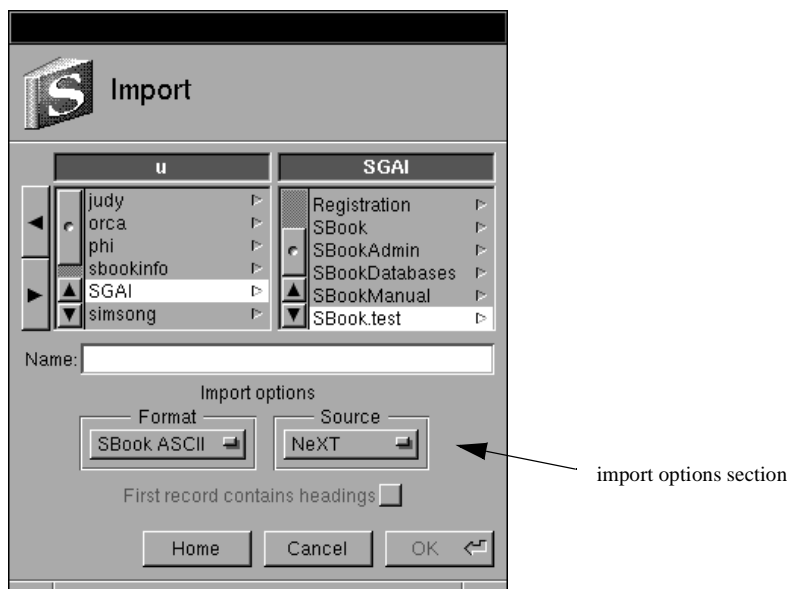
When you have chosen the file and set the options, click on the **OK** button at the bottom of the panel. SBook will now start to import the file. As the file is imported, you will see a panel displaying how many entries have been imported so far:

After the file has been successfully imported, SBook will inform you with an Alert panel displaying the total number of entries that were imported.
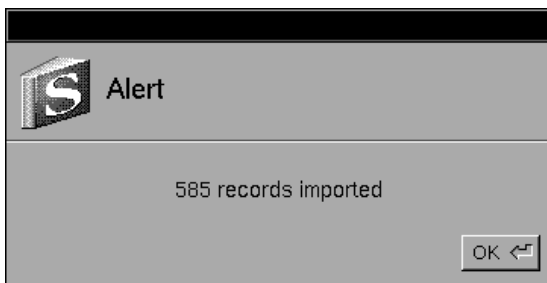

Now you will want to check to make sure the file was imported correctly. Check that the number of entries corresponds to the number of records in the original database. Look

through the file and display a few entries to be sure that they appear correct in the file. Is all the information present in each entry? Are the entries formatted properly, with appropriate line breaks?

If any of these seem incorrect, you may have imported the file with the wrong options. If the wrong file format is chosen, for example, the file may be imported as one large entry! Readjust the options and try again, and if you still have trouble, take a look at "If importing fails" on Page 41.

File formats

When importing a file, it is important to specify to SBook the format it is written in so that it can be converted properly. Make sure that the file format pop-up menu in the Import Options section of the Import panel is set correctly for your file.

file format menu
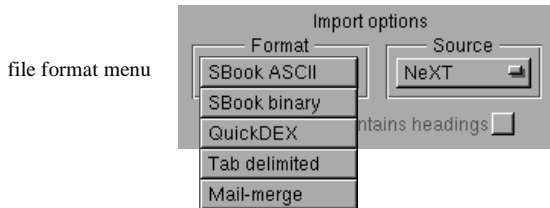
SBook can import files from the following formats, all of which are on the pop-up menu:

- **SBook ASCII**: An easy to read ASCII format in which SBook can export files. Entries are stored exactly as they appear in the display, line breaks and all, except that instead of Rich Text they are plain ASCII. Entries are separated from each other by lines of equal signs.

- **SBook binary**: This is the format that SBook document files are written in. We use NeXTSTEP's "typedstream" facility, so you can easily move SBook binary files between NeXTSTEP on a NeXTstation and NeXTSTEP/486 without any conversion.

- **QuickDEX**: A format used by QuickDEX, a popular Macintosh free-format database. This format is very similar to SBook ASCII, except that different delimeter characters are used. SBook will automatically convert Macintosh graphical characters to their corresponding Display PostScript characters on import.

- **Tab delimited**: A format used by DataPhile and most Macintosh-style databases. Generally, the first line of the database contains a list of field names. Each subsequent line corresponds to one record, in which the fields are separated by tabs. Fields that contain the "tab" character must be enclosed by quotation marks.

- **Mail-merge**: A format used by dBase and most PC-style databases. This is like tab delimited except that the fields are separated by commas rather than tabs. Fields that contain commas must be enclosed by quotation marks.

If you choose **Tab delimited** or **Mail-merge**, the box labeled **First record contains headings** will be activated (it is normally grayed out).


check this box if appropriate
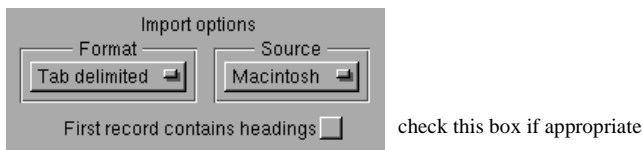
Checking this box will cause SBook to assume that the first line of your database contains a list of field names, preventing it from erroneously importing that line as a separate entry. In addition, SBook will try to make sense of the field names as best it can, so that the database will be formatted in a reasonable way once it is imported. If the database contains separate fields for area code and telephone number, for example, or for first and last names, SBook will concatenate the parts together so that they do not appear on two separate lines.

Finally, if your file does not seem to correspond to any of the five formats that SBook supports, try going back to the database program that created the file and exporting in a different format. Most database programs can export in at least one of these formats. If you cannot find a format common to your database program and SBook, skip to "If importing fails" on Page 41.

File sources

Another option you need to set when you import a file is the *source*. A file that is created in Macintosh file format, for example, has a slightly different character mapping from one that is created on the NeXT or under Unix. In order for SBook to do the conversion, you must make sure that the correct file source is chosen.
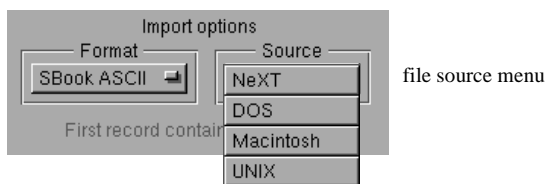
file source menu

You may not need to set this option manually, since some file formats cause SBook to set the file source automatically:

- If you have chosen either **SBook ASCII** or **SBook binary** file format, the file source is automatically set to be **NeXT**.

- If you have chosen **QuickDEX** file format, the file source is automatically set to be **Macintosh**.

However, if your file differs from SBook's assumptions, you will have to set this option yourself. Choose the source that most closely corresponds to the system your file was created under.

If importing fails

If *the number of records in the original database does not correspond to the number of entries imported*, or *each entry appears on one long line*, or *characters in the file appear incorrectly* (especially accented or other special characters):

1. You probably have set the **file format** and/or **file source** pop-up menus incorrectly. Check these settings and try again.

2. If you cannot get the file to import correctly by correcting the settings, your file may be in a format that SBook cannot import, or the file may be corrupted. Try exporting the file again from the original database application. You may be able to find a different export format that can be imported by SBook.

If *entries appear to be mixed up*, with parts of the name, address, or phone number appearing in the wrong order, or *line breaks are too frequent*, with each entry appearing in too many broken up lines:

1. The file is probably in either tab-delimited or mail-merge format, and the fields are not set up conveniently for SBook. Try exporting the file again from the original database application. You may be able to concatenate or rearrange fields so that when your file is imported, it will appear more as you desire.

2. If you cannot get the fields rearranged by exporting the file again, take a look at the file with an editor like Emacs. Note the delimiters (tabs or commas) separating the fields. Make a copy of the file, then try editing the copy, moving the fields around and adding or removing delimiters. You may be able to edit the file in this way so that it will look better once it is imported.

If all else fails, we will convert any database by hand for a nominal charge. If we are unable to convert your database, or if we determine that the trouble you were having was due to a bug in SBook, you will not be charged. Contact us for details.

Exporting files

To export a file, make sure the file you want to export is open and selected, then go to the **File** menu and choose **Export...** (If there is no open and selected file, this menu option will be grayed out. Open the file you want to export and try again.)
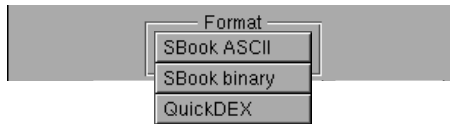
Because you may not want to export all of the entries from this file, you will automatically be presented with the Range Selection panel. Choose a range from this panel and click **OK**.

Once you have selected a range, a panel labeled **Export** will appear, allowing you to choose the destination file for the export. This panel is just like a standard Save panel, except for a pop-up menu labeled **Format** at the bottom of the panel, which allows you to choose the file format you want for the exported file:

file format pop-up menu
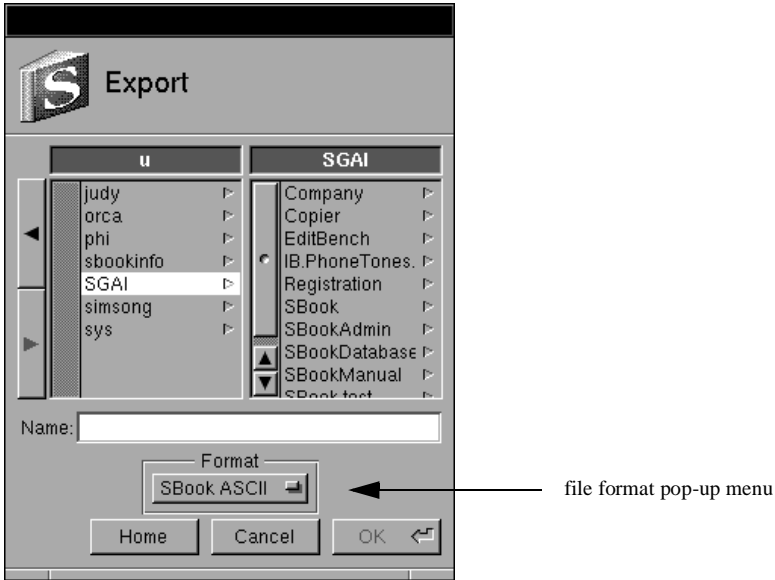
Choose the destination file in the usual way, and make sure the file format pop-up menu is set up in accordance with your preference:

- **SBook ASCII**: An easy to read ASCII format in which SBook can export files. Entries are stored exactly as they appear in the display, line breaks and all, except that instead of Rich Text they are plain ASCII. Entries are separated from each other by lines of equal signs.

- **SBook binary**: This is the format that SBook document files are written in. We use NeXTSTEP's "typedstream" facility, so you can easily move SBook binary files between NeXTSTEP on a NeXTstation and NeXTSTEP/486 without any conversion.

- **QuickDEX**: A format used by QuickDEX, a popular Macintosh free-format database. This format is very similar to SBook ASCII, except that different delimeter characters are used. SBook will automatically convert Display PostScript characters to their corresponding Macintosh graphical characters on export.

+ You may notice that this list *does not* include tab-delimited and comma-delimited formats. Because the text stored in your SBook files need not fit into a rigid pattern, SBook cannot export the records in a one-to-one way into a standard database format. That is, since each record need not consist of just a name, an address, and a phone number, for example, the records cannot be exported into a format requiring just a name, address, and phone number.

When you have chosen the destination file and set the file format correctly, click on the **OK** button at the bottom of the panel. SBook will now start to export the file. As the file is exported, you will see a panel displaying how many entries have been exported so far:

After the file has been successfully exported, SBook will inform you with an Alert panel displaying the total number of entries exported:

5

Making Reports with SBook

SBook allows you to make three kinds of reports: address books, mailing labels, and bulk email mailings.

- SBook's *address book* report allows you to print address books and phone books.

- The *mailing labels* report allows you to print sheets of mailing labels.

- The *bulk email mailing* report allows you to create and use email mailing lists.

Although the final output from each of these three reports is very different, the process of making them is very similar.

To make a report with SBook,

1. Select the SBook window corresponding to the file you want to use.

2. Choose the report type you want from the menu under **Tools>Reports**.

3. Select a range of entries that you want to use to build this report. This step is described in detail in "The Range Selection panel" on Page 46.

4. SBook will now extract the relevant information and build the report. This step is described in detail in "Building the report" on Page 48.

5. View the report, scroll through it, modify it until it pleases you, and then print the address book or labels, or make the email mailing. This step is described in detail in "Bulk email mailings" on Page 49, "Mailing labels" on Page 50, or in "Address books" on Page 52, depending on the kind of report you are making.

The Range Selection panel

If you don't want to use all the entries in the selected SBook file, you will need to select a range. To make this easy, the Range Selection panel will pop up automatically when you tell SBook to build a report.
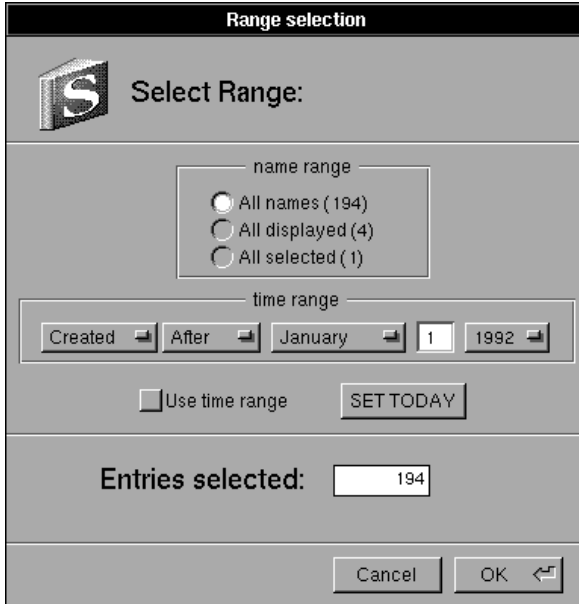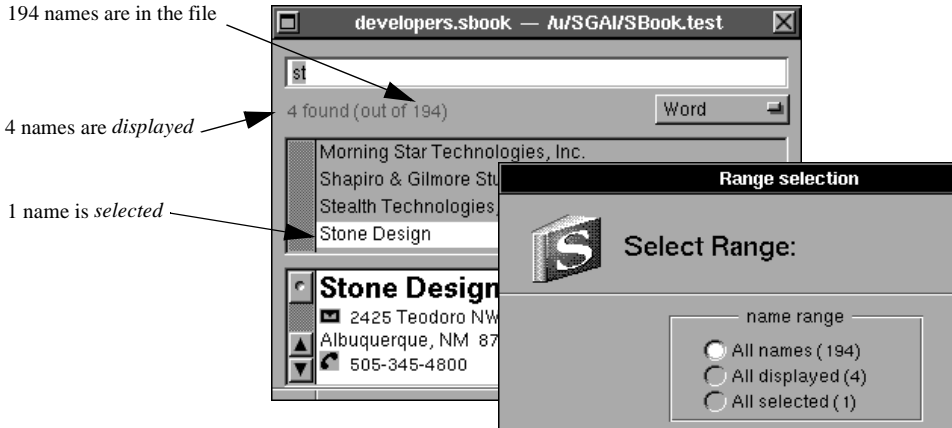

The Range Selection panel includes two subsections: the *name range*, and the *time range*. Only those entries that are chosen by *both* the name range and the time range will be included in the total range of entries. The field labeled **Entries selected** at the bottom of the Range Selection panel displays how many entries are included in the total range. When you are finished selecting a range, click the button labeled **OK** at the bottom of the panel, or just hit return. You can also cancel the range selection by clicking on the **Cancel** button.

Using the name range

The section of the panel labeled **name range** allows you to select a range of entries based on a previous search or selection.

- When the radio button labeled **All names** is selected, the name range includes all of the entries in the file.

- When the radio button labeled **All displayed** is selected, the name range includes all of the entries that match the current search request and are currently displayed in the matrix.

- When the radio button labeled **All selected** is selected, the name range includes only those entries that are *selected* in the matrix.

194 names are in the file

4 names are *displayed*

1 name is *selected*

developers.sbook — /u/SGAI/SBook.test

st

4 found (out of 194)   Word

Morning Star Technologies, Inc.
Shapiro & Gilmore Stu
Stealth Technologies,
Stone Design

Stone Design
  2425 Teodoro NW
Albuquerque, NM 87
505-345-4800

Range selection

Select Range:

name range

○ All names (194)
○ All displayed (4)
○ All selected (1)

Using the time range

The section of the panel labeled **time range** allows you to select a range of entries based
on when they were initially created, last modified, or last seen.

+   If you want to use the time range, you must check the box labeled **Use time range**
    which is located just below the **time range** section. If this box is left unchecked,
    it will not matter what values are set in the **time range** section.

The **time range** section consists of several pop-up menus. You can select a time range by
manipulating these menus, and by entering a date in the numeric field.

time range

Created	After	January	1	1992
Modified	On	Feburary		1993
Seen	Before	March		1994
		April		1995
		May		
		June		
		July		
		August		
		September		
		October		
		November		
		December		
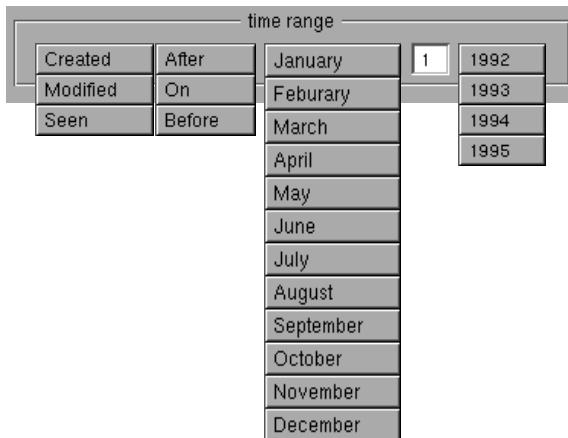
Clicking on the **SET TODAY** button below the **time range** section sets the month, date,
and year in the **time range** section to today's date.

Building the report

As soon as you have selected a range, SBook starts to extract the relevant information from the entries you have chosen:

> • For email mailings, SBook must extract all the email addresses from the file.

> • For address books and mailing labels, SBook must extract all the postal addresses and telephone numbers from the file.

This is a slow process, so it will take time for SBook to extract this information and design the report. If the range you have selected contains a large number of entries, it may take a few minutes. While SBook builds the report, a panel labeled **Work in progress...** will appear on the screen with a circular gauge showing you how many of the selected entries have been processed. You can stop the process at any time by clicking on the button labeled **Cancel** just below the circular gauge.

If some of the entries need to be parsed, SBook will parse the entries before continuing with the report. This will slow down the report-building process. A message will appear in the lower left-hand corner of the Work in Progress panel, informing you that SBook is busy parsing. Once SBook has parsed the entries that need to be parsed, it will keep information with the entries the next time the file is saved so that it will not have to do the parsing again. (For more information on parsing, refer to "Parsing and icon placement" in Chapter 2.)

SBook is parsing entries ———→
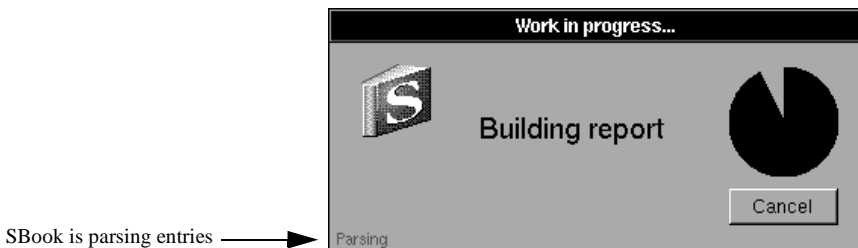
Once the information has been extracted and the report has been built, a panel will appear on your screen allowing you to view the report and modify it. Depending on which kind of report you chose, you will see a different panel. The next three sections, "Bulk email mailings," "Address books," and "Mailing labels," explain how to use these three different panels to view, modify, and output reports.

Bulk email mailings

The simplest kind of report is a bulk email mailing. When SBook has built the bulk email report, you will see a simple panel on the screen titled **Bulk email**. This panel contains all of the email addresses from the entries in the range you chose. The number of addresses appears in the lower left corner of the panel.

+   If an entry contains more than one email address, all of the email addresses contained in the entry will appear in the list, not just the first one.

You can scroll through the panel to view all of the email addresses. Each address is followed by the entry's name in parentheses, just as if you had clicked on the email icon to send email to that address.
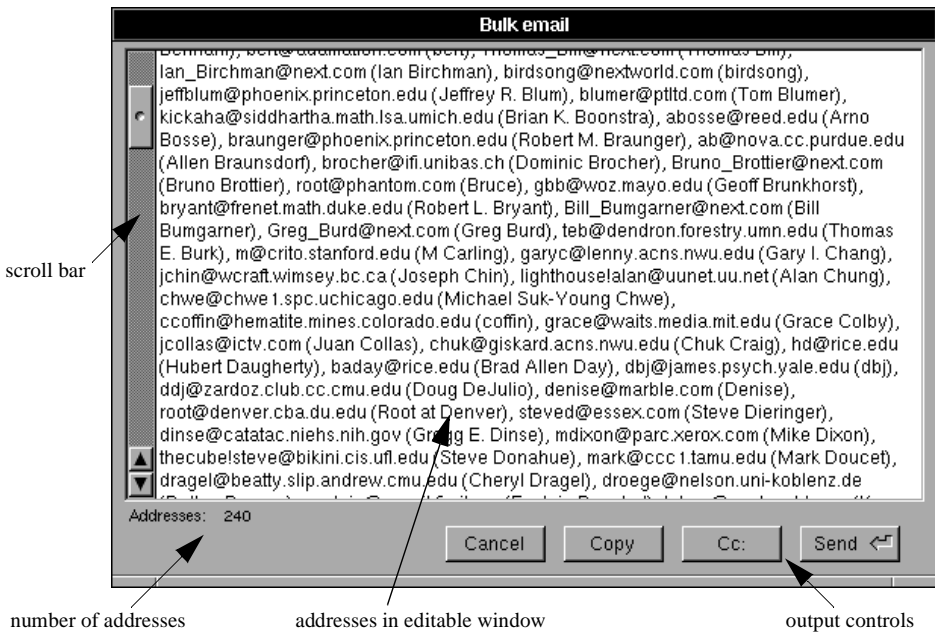
If you wish to add, remove, or modify addresses before you make the bulk mailing, you can edit the panel directly in the usual way.

Once you are satisfied with the addresses on the panel, you can use the output controls at the bottom of the panel to make a bulk email mailing with these addresses.

- Click on **Send** (the default) to place the addresses in the To: field of a message.

- Click on **Cc:** to place the addresses in the Cc: field of a message.

- If you need to place the addresses in the Bcc: field of a message, or in a file (to make a mail alias, for example), click on **Copy** to copy them to the pasteboard.

- You can also click on **Cancel** if you prefer.

Mailing labels

When SBook has built a mailing labels report, you will see a panel on the screen labeled **Labels**. This is a complex panel with numerous controls that allow you to scroll through the labels, zoom in and out, change what is displayed, and change the format of the labels.
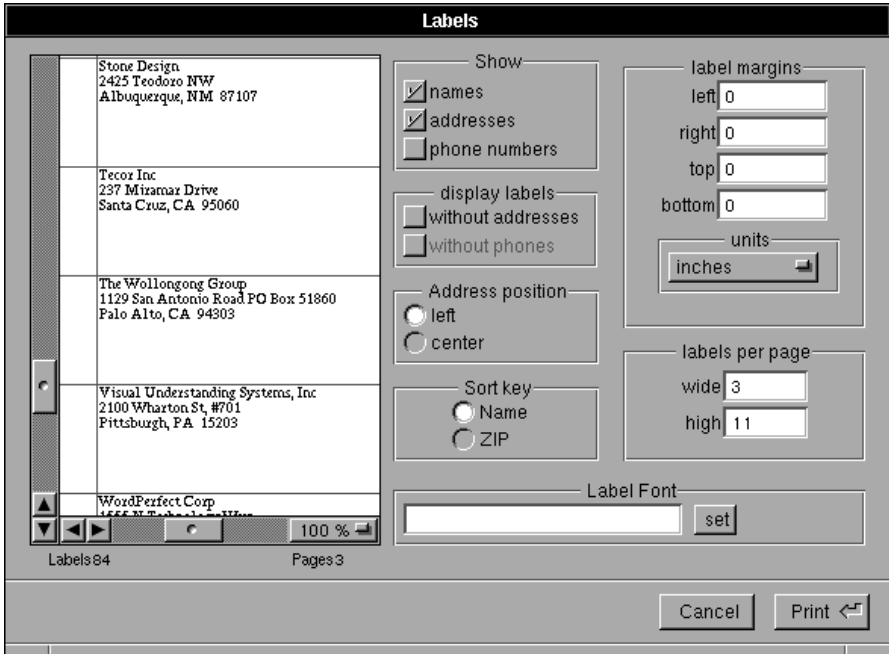
The left side of the panel contains a scrolling window so that you can view the labels as they will be printed. A zoom control pop-up menu allows you to zoom in to view the labels up close, or zoom out to look at a whole page of labels.
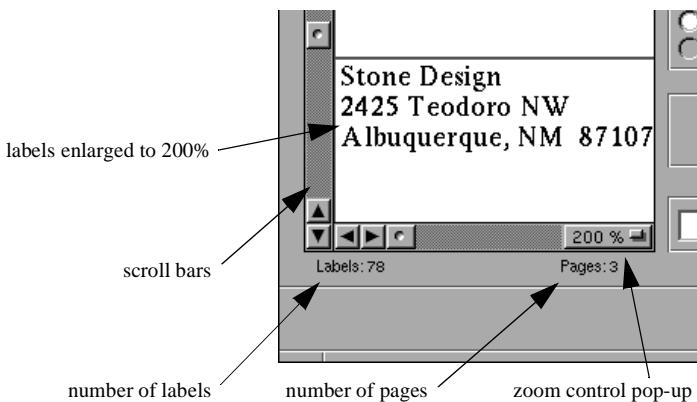
The right side of the panel contains controls for changing what is displayed and the format of the labels. As soon as you change the settings, SBook will immediately reformat the labels and display them. This makes it especially easy to set up the format you prefer because you can experiment with different formats until you find one you like.

Once you are happy with the labels and their format, click on **Print** (the default), or **Cancel**.

Deciding what is displayed

The sections labeled **Show** and **display labels** allow you to change the information displayed in the labels.

- The settings in the section labeled **Show** determine whether the labels show names only, addresses only, phone numbers only, or any combination of the three.

- The section labeled **display labels** is only activated when you have set SBook to show addresses or phone numbers in the labels. Do you want to display *only* those labels containing *all* the information you have selected to be shown, or do you want to display all of the possible labels even though some of the people may not have addresses or telephone numbers to show?

For example, if you want to print labels for making a bulk mailing, you will want to show names and addresses, but not phone numbers, and you will not want to display labels without addresses, so the settings shown in the illustration on the left would be correct.

Deciding how the labels are formatted

All of the other sections on the panel determine the format of the labels.

The section labeled **Sort key** determines whether the labels appear sorted by name or zip.

The section labeled **Address position** determines where the name and address information appears on each label. You can choose to have addresses appear at the top left of each label, or centered in each label.

The section labeled **label margins** allows you to have SBook print the labels with larger margins, if you prefer. SBook scales the contents of each label to fit within the margins.

The section labeled **labels per page** allows SBook to account for different label formats. You should enter the number of *columns* of labels in the field labeled **width**, and enter the number of *rows* of labels in the field labeled **height**.

＋ At this time, SBook can only design reports for labels that are all the same size and extend to the edges of a standard letter-sized page. Pages with labels of different sizes, or labels that do not extend to the edges of the page, will be handled in a future version of SBook.

The section labeled **Label Font** allows you to change the font used for printing the labels. Clicking on the button labeled **set** brings up the standard Font Panel.

Address books

When SBook has built an address book report, you will see a panel called **Address Book**. This is an even larger and more complex panel than the **Mailing labels** panel; nevertheless, because (like the **Mailing labels** panel) it allows you to experiment with its settings and view the corresponding changes immediately, it is very easy to use.
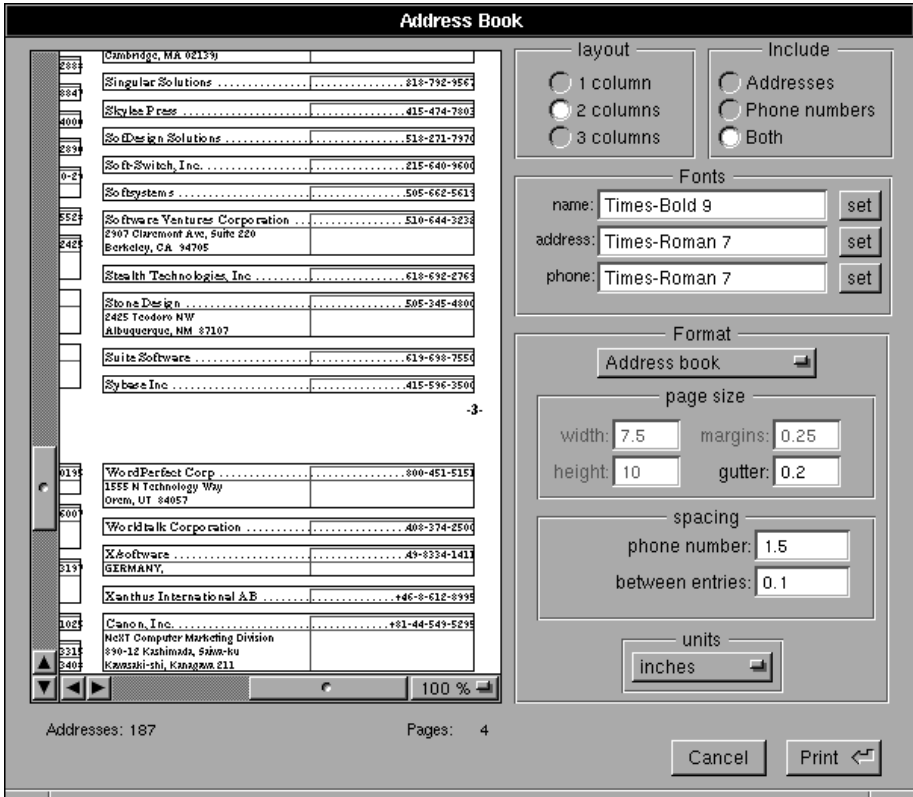
The left side of the panel contains a scrolling window, which works just like the **Mailing labels** panel, so that you can scroll through the address book and zoom in and out.

+ The lines that you see surrounding the parts of text in the window only appear so that you can easily see where SBook is laying out the fields for names, addresses, and phone numbers. The only lines that will print in the finished address book are the dotted lines that link names to phone numbers.

The right side of the panel contains controls for changing what is displayed and the format of the address book. Most of the controls affect the format.

The section labeled **Include** is the only one that affects what is displayed. Click on the appropriate radio button to display addresses, phone numbers, or both.

Choosing a format for the address book

The primary control for formatting an address book is the pop-up menu that appears at the top of the section labeled **Format**. This pop-up menu allows you to choose between five different preset formats, or choose **Manual** to create a format for unusually sized pages.

| Address book |
| Day Planner |
| Pocket book (1 fold) |
| Pocket book (2 folds) |
| Pocket book (3 folds) |
| Manual |
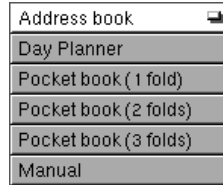
When you switch between the different preset formats on the pop-up menu, the settings on the rest of the panel that control formatting change to the defaults for the format you have chosen. For example, the defaults for the **Address book** menu option (a format designed to print full-size address books) are shown on the illustration at left.

If you want to use a preset format, but you do not want to use all of the default settings for that format, almost all of the settings can be changed. The only settings you cannot change are those that control the size of the page; those settings are just below the pop-up, in the section labeled **page size**, and they are grayed out when a preset format is selected.

If you want to use a different page size, you must choose the last option on the menu, **Manual**, and then adjust the **page size** settings to the sizes you require.

Refining the format you have chosen

The **layout** section at the top of the panel allows you to select the number of columns.

The **Fonts** section allows you to change the fonts for names, addresses, and phone numbers. Clicking on any of the three **set** buttons will bring up the standard Font Panel.

In the **Format** section, the **units** menu allows you to choose between inches, centimeters, points, and picas. There are also six fields that allow you to adjust formatting:

- The **width** setting determines the page width.
- The **height** setting determines the page height.
- The **margins** setting determines the page margins.
- The **gutter** setting determines the space between columns.
- The **phone number** setting determines the width allocated to phone numbers.
- The **between entries** setting determines the vertical space between entries.

Printing and assembling pocket books

If you are printing an **Address book**, **Day Planner**, or **Manual** address book, you can print in the usual way, using the paper cassette. But if you are printing a **Pocket book**, either one-fold, two-fold, or three-fold, you will have to print in a special way.

Once you are happy with the pocket book as it appears in the window, click on **Print** (the default) to print the book. You will be presented with a standard Print panel.
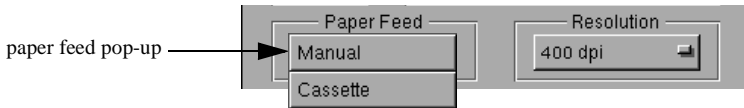
paper feed pop-up ──────→

Printing a pocket book requires printing double-sided pages. To do this, you must switch the paper feed pop-up to **Manual**. Then click on **Print** to start printing.

1. When your NeXT computer prompts you for the first page, feed a sheet of paper into the printer, using the manual feed slot.

2. Wait for the sheet to come out of the printer, then feed the sheet of paper back into the printer, with the *same leading edge* as before, but with the *blank side up*.

3. Repeat this process until the entire book is printed.

Once the pocket book is printed, you must assemble it. SBook prints folding and stapling instructions right on the pages so that assembling is easy to do:

1. Find the dotted line labeled **first fold** on the page. Fold the page along that line so that the fold line appears on the *outside* of the fold.

2. If you are making a two-fold or three-fold pocket book, fold along the **second fold** and/or **third fold** lines in the same way as the first fold, always making sure that the fold lines fall on the *outside* of the fold.

3. If your pocket book consists of more than one sheet of paper, fold all the sheets the same way as the first. Then stack all the folded sheets together, with all the final folds forming the "spine" of the book. Make sure the sheets are stacked together in the right order, with page numbers coming out correctly.

4. On the outside of the final fold, you will see instructions to **staple** in two or three places along the fold. Staple all of the sheets together in the places indicated, making sure that the top of each staple falls on the *outside* of the fold.

5. Using a pocket knife or a letter opener, slice open all of the folded pages except for those along the spine. You now have a completed pocket book!

6

Logging what you do with SBook

If you need to keep track of the people you call or write to, or how much time you spend on the phone, you will want to use SBook's logging facility.

- SBook allows you to log the calls you make and the envelopes you print.

- You can also log memos or incoming calls by bringing up the log panel manually.

- You can have SBook send you log messages in email, or you can create a log file that can be imported into a time-billing system or a general purpose database.

- You can make notes to yourself right on the log panel, and they will appear in the email or file, so that you can keep track of what was said and done.

Getting started with logging

The simplest way to get started with logging is to log your calls, letters, and other messages *manually*. You can log any message by bringing up the Log panel with a command, or you can click on the Dialing Panel, or the envelope print panel, to log calls or letters.

The Log panel

To log an incoming call, memo to yourself, billable time, or other miscellaneous message, choose **Tools>Logging panel...** (**command-l**) to bring up the Log panel manually.
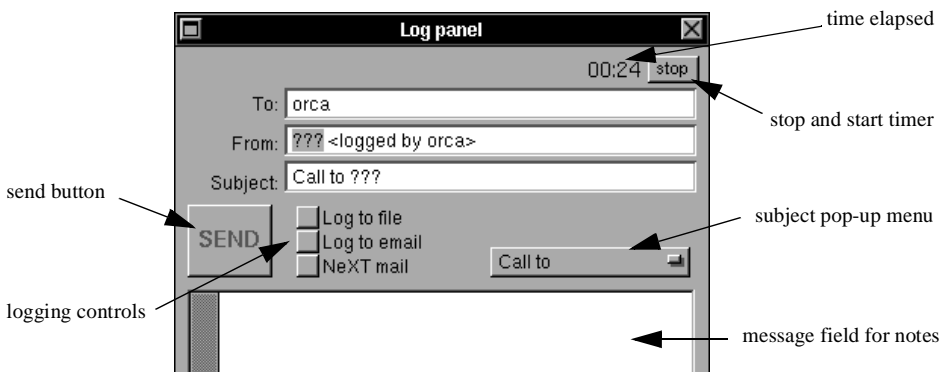
At the top of the panel, just under the close box, there is a timer with a stop/start button:

timer is stopped;
click **start** to start

timer is running;
click **stop** to stop
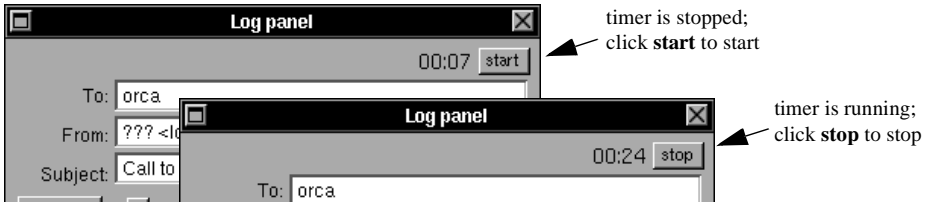
By default, the timer starts running as soon as you bring up the Log panel. You can stop the timer at any time by clicking on **stop**. Once it is stopped, you can start the timer again by clicking on **start**. SBook will record the total elapsed time in the log.

The subject line of the Log panel allows you to define the category of what you are logging: whether you are logging a telephone call, a message, a fax, or a reminder to yourself, or making a record of billable time. You can change the subject line manually, or by choosing from the variety of preset subject lines on the subject pop-up menu:

subject line

menu of preset subject lines
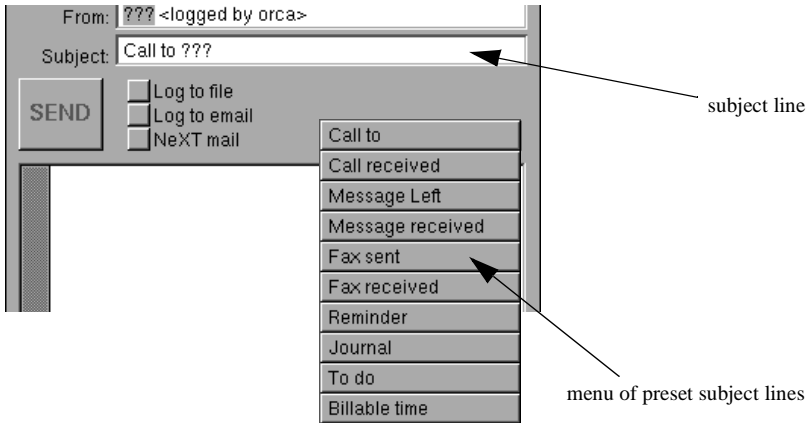
Once you have chosen the subject line, you can fill in the person you called or other relevant information in the **From:** line and **Subject:** line of the Log panel:

filled-in fields

chosen subject line

Fill in as many notes and other information as you wish in the scrollable message field on the Log panel. These notes will appear in the log, as well.
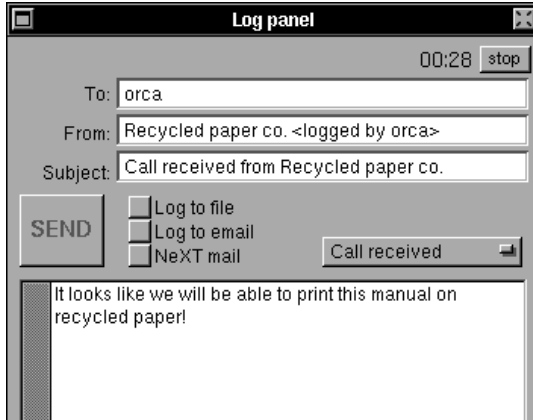
+ If you want to make notes in Rich Text, you can check the box labeled **NeXTmail** just below the **Log to email** button.

When you are ready to log this note and return to SBook, check the box labeled **Log to email** next to the large button labeled **SEND**. The **SEND** button will become activated:
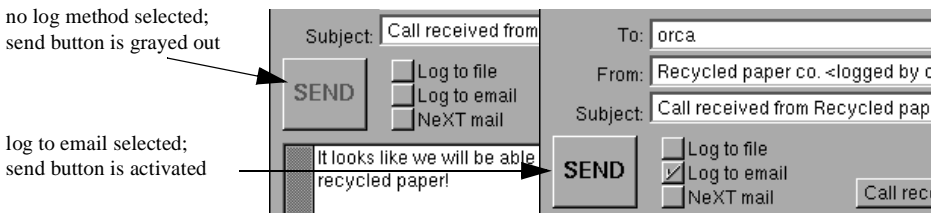
+ Don't check the **Log to file** button yet. You cannot log to a file until you have a log file chosen in your Preferences. Refer to "Choosing the default logging method" on Page 60.

Now when you click on the **SEND** button, SBook will send this message to you in email:
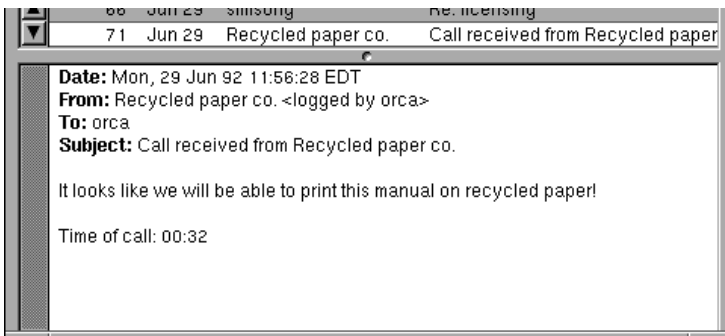
Logging calls and letters manually

You can log any of your outgoing telephone calls by clicking on the **Log** button that appears on the right side of the Dialing Panel:

log this outgoing call
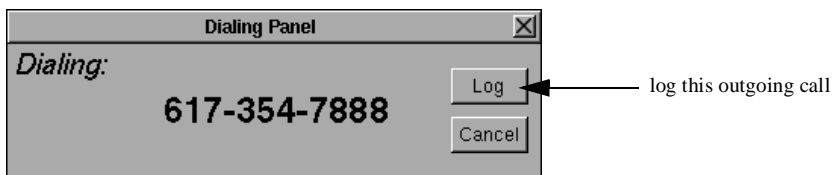
The Log panel will appear, as before, but with the **From:** and **Subject:** lines on the panel filled in appropriately:

From: and **Subject:** lines are filled in automatically

Information about this call is filled in automatically
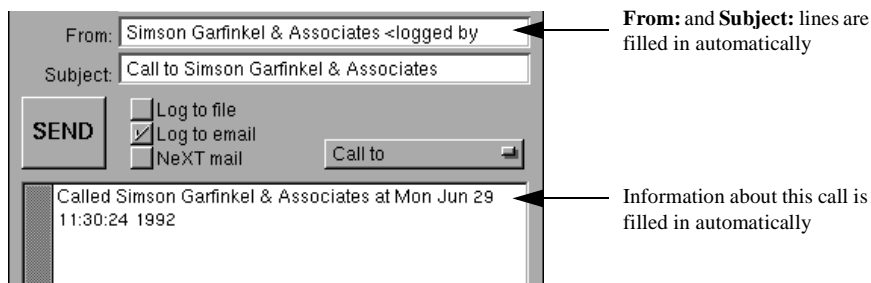
- The **From:** line is automatically filled in with the name of the person you called. This is taken from the name of the entry associated with the telephone icon you clicked on to make this call.

- The **Subject:** line is automatically filled in with the message that you made a telephone call to this person or organization.

- The message field of the panel is automatically filled in with all of the above information, as well as the date and time that SBook began dialing.

After you have added any notes you need in the message field, make a log to email in the usual way. The message will include the elapsed time, as before.

Likewise, you can log the letters you send by clicking on the **Log after printing** button that appears in the lower right corner of the envelope print panel:

log after printing this envelope
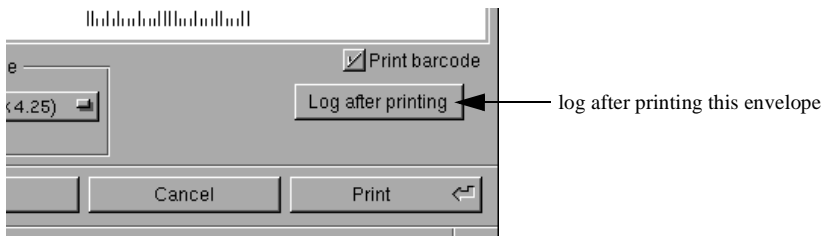
As above, the Log panel will appear with the **From:** and **Subject:** lines on the panel filled in appropriately:

From: and Subject: lines are filled in automatically

Address this letter was sent to is filled in automatically
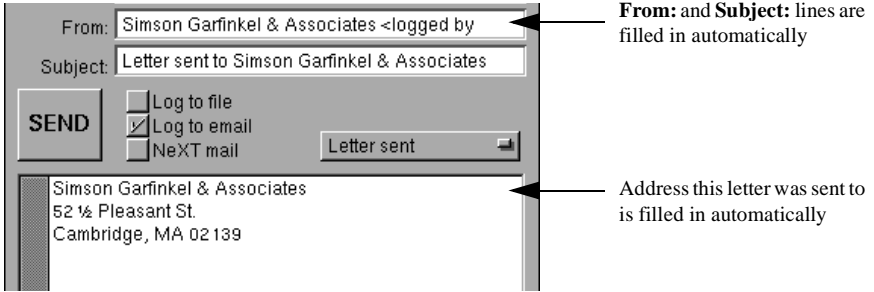
- The **From:** line is automatically filled in with the name of the person you sent this letter to. If you edited the envelope panel before printing this envelope, *the modified name from the panel*, rather than the original name, will appear in the log.

- The **Subject:** line is automatically filled in with the message that you sent a letter to this person or organization.

- The message field of the panel is automatically filled in with the complete address that you printed on this envelope. Again, this is taken from the *envelope panel*, not from the original entry.

After you have added any notes you need in the message field, make a log to email in the usual way.

Changing your logging preferences

Once you are familiar with the Log panel, and you start to log your calls, letters, and other messages more frequently, you may want to have every call and letter logged automatically. Or you may want to start logging to one or more files, so that you can import your record of the people you called and the time you spent into a time-billing system or other database. To do these things, you will need to set up SBook's logging preferences.

SBook's logging preferences

SBook's logging preferences are a subview of the Preferences panel. You can bring up the Preferences panel by choosing **Info>Preferences...** To get to the **Logging** subview, choose **Logging** from the pop-up menu at the top of the panel:

choose **Logging** to get to logging subview
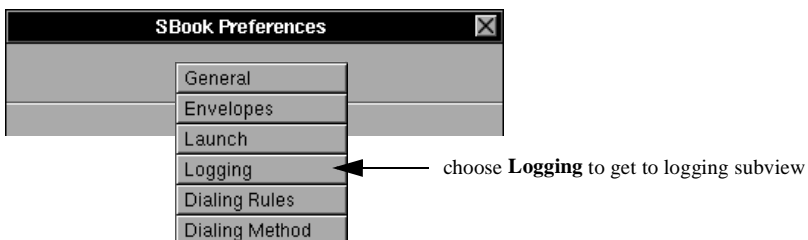
+ You can find more information about the Preferences panel in "The Preferences panel" in *Appendix A: SBook's Menus and Menu Commands*.

The Logging subview contains two sections:
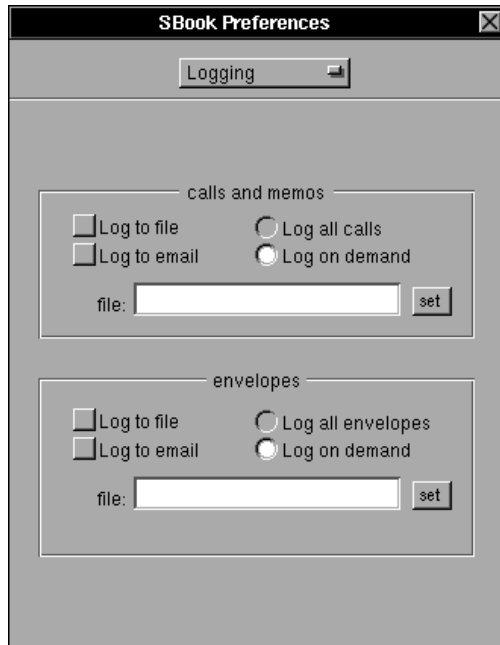
• The section labeled **calls and memos** determines how SBook logs your telephone calls and any messages you log by bringing up the Log panel manually.

• The section labeled **envelopes** determines how SBook logs your envelopes.

+ Since the two sections are so similar, this section will only explicitly show you how to change the settings for **calls and memos**. You can change the settings for **envelopes** in exactly the same way.

Choosing the default logging method

By default, SBook does not check either the **Log to file** or **Log to email** buttons on the Log panel when it is brought up. You must check the appropriate box yourself before you click on the **SEND** button to log the message:
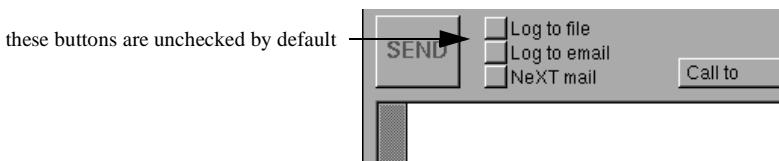
If you usually log to email, you can check the **Log to email** box on the Preferences panel. When this box is checked, the **Log to email** box on the Log panel is automatically checked for you every time you make a call or memo.
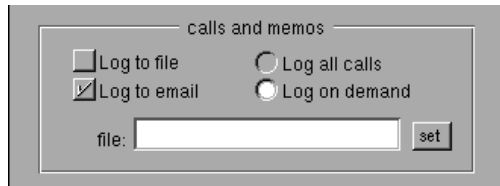
If you want to log to a file, you can check the **Log to file** box on the Preferences panel. When this box is checked, the **Log to file** box on the Log panel is automatically checked for you every time you make a call or memo.

> ✛ To log to a file, you must set a log file. Click on the box labeled **set** next to the field labeled **file**. You will be presented with a panel just like a standard Save panel that is labeled **Set telephone log file**. Once you have chosen a file, the filename will appear in the **file** field.
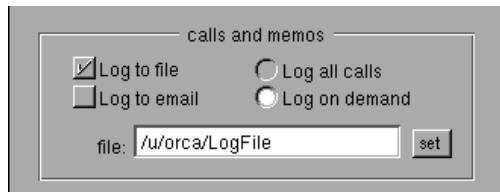
If you want to log to a file *and* log to email, you can check both boxes.

Automatic logging

If you want to log *all* of your calls, you can select the radio button labeled **Log all calls**:
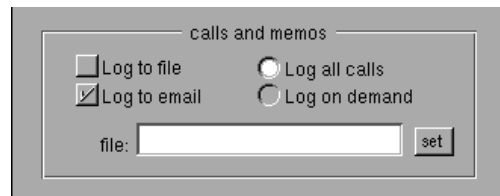
When the **Log all calls** button is selected, each time you make a call the Log panel will come up automatically, just as though you had clicked on the **Log** button on the Dialing Panel to log this call manually.

Appendix A: SBook's Menus and Menu Commands

This Appendix shows all of SBook's menus and menu commands, and refers to the parts of the main text in which they are described in detail. This Appendix also covers SBook's Preference panel and its subviews.

The main menu
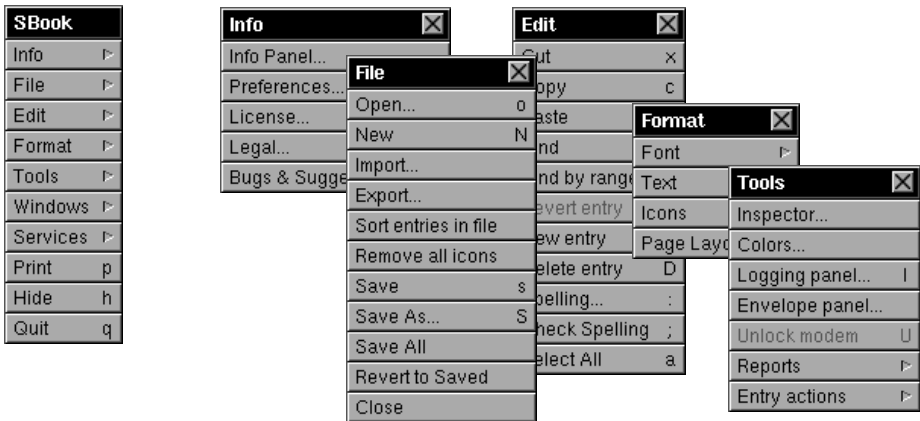
SBook's main menu contains five submenus which are described in this chapter: the **Info** menu on Page 64, the **File** menu on Page 65, the **Edit** menu on Page 66, the **Format** menu on Page 67, and the **Tools** menu on Page 68.

The main menu also contains five other standard menu items, which are not described in detail because they behave as their counterparts do in other NeXT applications:

- The **Windows** menu allows you to select and arrange SBook's windows.

- The **Services** menu allows you to use services from other applications.

- The **Print** command allows you to print a currently selected entry.

- The **Hide** command causes SBook to hide itself.

- The **Quit** command causes SBook to close all files and quit.

The Info menu

SBook		Info
Info	▷	Info Panel...
File	▷	Preferences...
Edit	▷	License...
Format	▷	Legal...
Tools	▷	Bugs & Suggestions...
Windows	▷	
Services	▷	
Print	p	
Hide	h	
Quit	q	

SBook's Info menu allows you to get information about SBook itself, whether this copy of SBook is licensed, what version you are using, and your license agreement. You can also change your preferences from this menu using the **Preferences...** command, and you can send us a suggestion or a bug report by using the **Bugs & Suggestions...** command.

- The **Info Panel...** command brings up SBook's Info Panel. This panel displays copyright and version information, and a few acknowledgements.

Info	✕

Version 2.0

SBook

Simson Garfinkel's Address Book

(C) Copyright 1992, Simson Garfinkel and Associates, Inc.
Program by Simson Garfinkel
Icons and documentation by Orca Starbuck

Special thanks to
John Barlow, Andrew Stone,
Eric Celeste, and all of our beta testers!
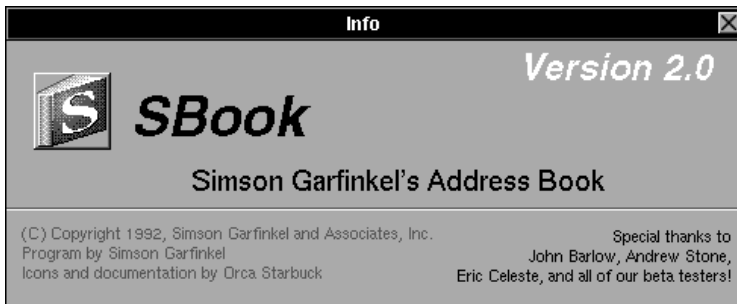
- The **Preferences...** command brings up SBook's Preferences panel. This is a complex panel with many subviews. It is decribed in detail in "The Preferences panel" on Page 69.

- The **License...** command brings up SBook's License panel. You can read about the License panel and get information about your license agreement in "The License Panel" in *Appendix B: Installing and Licensing SBook*.

- The **Legal...** command brings up a panel which allows you to scroll through SBook's single-user and network license agreements. These agreements are described and explained in "SBook Licenses" in *Appendix B: Installing and Licensing SBook*.

- The **Bugs & Suggestions...** command notifies the Mail application to bring up a new Send window, pre-addressed to us, so that you can send us your bug reports and suggestions.

The File menu

SBook		File	
Info	▷	Open...	o
File	▷	New	N
Edit	▷	Import...	
Format	▷	Export...	
Tools	▷	Sort entries in file	
Windows	▷	Remove all icons	
Services	▷	Save	s
Print	p	Save As...	S
Hide	h	Save All	
Quit	q	Revert to Saved	
		Close	

SBook's File menu allows you to do various things to files:

- The **Open** command (**command-o**) opens a pre-existing SBook document file. This command is described in "Opening files" in Chapter 1.

- The **New** command (**command-N**) creates a new SBook document file. This command is described in "Creating new files" in Chapter 1.

- The **Import...** command allows you to import files into SBook's file format. This command is described in "Importing files" in Chapter 4.

- The **Export...** command allows you to export files into other file formats. This command is described in "Exporting files" in Chapter 4.

- The **Sort entries in file** command sorts all the entries in the currently selected file according to the current sort order. This command is described in "Re-sorting" in Chapter 2.

- The **Remove all icons** command removes all the icons in the currently selected file, including those that you have inserted yourself. This command is described in "Removing icons" in Chapter 2.

- The **Save** command (**command-s**) saves the currently selected file. This command is described in "Saving files and making backups" in Chapter 1.

- The **Save As...** command (**command-S**) allows you to save the currently selected file under a different filename. This command is described in "Saving files and making backups" in Chapter 1.

- The **Save All** command saves all open files that need to be saved. This command is described in "Saving files and making backups" in Chapter 1.

- The **Revert to Saved** command reverts the currently selected file to the last saved version of that file.

- The **Close** command closes the currently open file. This command is described in "Closing files" in Chapter 1.

The Edit menu

SBook		Edit	
Info	▷	Cut	x
File	▷	Copy	c
Edit	▷	Paste	v
Format	▷	Find	f
Tools	▷	Find by range	
Windows	▷	Revert entry	U
Services	▷	New entry	n
Print	p	Delete entry	D
Hide	h	Spelling...	:
Quit	q	Check Spelling	;
		Select All	a

SBook's Edit menu allows you to create, search for, and modify SBook entries:

- The **Cut** command (**command-x**), **Copy** command (**command-c**), and **Paste** command (**command-v**) are the standard NeXT commands that allow you to cut, copy, and paste entries and information. They are described in "Using cut, copy, and paste" in Chapter 1.

- The **Find** command (**command-f**) selects the contents of the search field so that you can begin a new search. It is described in "Searching" in Chapter 1.

- The **Find by range** command brings up the Range Selection panel so that you can search for entries within a given range. This command is described in "Searching" in Chapter 1, and the Range Selection panel is described in "The Range Selection panel" in Chapter 5.

- The **Revert entry** command (**command-U**) reverts the currently selected and displayed entry to its last saved version.

- The **New entry** command (**command-n**) creates a new entry in the currently selected file. It is described in "Adding new entries" in Chapter 1.

- The **Delete entry** command (**command-D**) deletes the currently selected entry or entries. It is described in "Deleting entries" in Chapter 1.

- The **Spelling...** command (**command-:**) and the **Check Spelling** command (**command-;**) allow you to check the spelling of words in an SBook entry.

- The **Select All** command (**command-a**) selects all the entries in the currently selected SBook file.

The Format menu

SBook			Format	
Info	▷		Font	▷
File	▷		Text	▷
Edit	▷		Icons	▷
Format	▷		Page Layout...	
Tools	▷			
Windows	▷			
Services	▷			
Print	p			
Hide	h			
Quit	q			

Font	☒
Font Panel...	t
Bold	b
Italic	i
Underline	u
Larger	
Smaller	
Heavier	
Lighter	
Superscript	
Subscript	
Unscript	
Copy Font	3
Paste Font	4

Text	☒
Align Left	{
Center	-
Align Right	}
Show Ruler	r
Copy Ruler	1
Paste Ruler	2

Icons	☒
Insert telephone icon	
Insert email icon	
Insert envelope icon	
Parse entry	P
Remove all icons	R

SBook's Format menu allows you to change the font and formatting of text, insert and remove icons, and change the page layout:

- The **Font** menu works as its counterparts do in other NeXT applications, allowing you to modify, copy, and paste fonts. Its use is described in "Font and formatting" in Chapter 2.

- The **Text** menu works as its counterparts do in other NeXT applications, allowing you to change the formatting of text, and view and change rulers. Its use is described in "Font and formatting" in Chapter 2.

- The **Icons** menu has several commands that allow you to insert and remove icons, as well as parse entries:

  The **Insert telephone icon** command, the **Insert email icon** command, and the **Insert envelope icon** command allow you to insert icons by hand (SBook usually inserts icons automatically). The use of these commands is described in "Adding icons" in Chapter 2.

  The **Parse entry** command (**command-P**) parses the selected entry. It is described in "Reparsing" in Chapter 2.

  The **Remove all icons** command (**command-R**) removes all of the icons from the selected entry. It is described in "Removing icons" in Chapter 2.

The Tools menu

SBook		Tools	
Info	▹	Inspector...	
File	▹	Colors...	
Edit	▹	Logging panel...	l
Format	▹	Envelope panel...	
Tools	▹	Unlock modem	U
Windows	▹	Reports	▹
Services	▹	Entry actions	▹
Print	p		
Hide	h		
Quit	q		

Reports	☒
Address book...	
Mailing labels...	
Bulk email...	

Entry actions	☒
Dial first phone in entry	d
Print first envelope in entry	e
Send first email in entry	E

SBook's Tools menu allows you to print reports and use several helpful tools:

- The **Inspector...** command brings up the Inspector panel. This panel and its use is described in "SBook's Inspector Panel" in Chapter 2.

- The **Colors...** command brings up a standard Colors panel. The use of this panel is described in "The Colors panel" in Chapter 2.

- The **Logging panel...** command brings up the Logging panel. This panel is described in Chapter 6, *Logging what you do with SBook*.

- The **Envelope panel...** command brings up a blank envelope print panel so that you can fill in an address and mail an envelope.

- The **Unlock modem** command (**command-U**) unlocks the modem. This is described in "Dialing with your modem" in Chapter 3.

- The **Reports** menu allows you to make three kinds of reports: address books, mailing labels, and bulk email mailings. These three reports are described in Chapter 5, *Making Reports with SBook*.

- The **Entry actions** menu allows you to use keyboard equivalents to dial the phone, print envelopes, and send email:

  The **Dial first phone in entry** command (**command-d**) dials the first telephone number in the entry, just as though you had clicked on the icon. Dialing a telephone number is described in "Dialing the phone" in Chapter 1.

  The **Print first envelope in entry** command (**command-e**) prints the first address in the entry on an envelope, just as though you had clicked on the icon. Printing an envelope is described in "Printing envelopes" in Chapter 1.

  The **Send first email in entry** command (**command-E**) opens a Send window addressed to the first email address in the entry, just as though you had clicked on the icon. Sending email is described in "Sending email" in Chapter 1.

The Preferences panel

SBook's Preferences Panel allows you to view and change SBook's six different types of preference settings: **General** settings, settings concerning **Envelopes**, settings determining which files are opened at **Launch** time, settings concerning **Logging** to a file or email, settings for SBook's **Dialing Rules**, and settings for SBook's **Dialing Method**.

- SBook's **General**, **Envelopes**, and **Launch** settings are covered in this section.

- SBook's **Logging** settings are covered in Chapter 6, *Logging what you do with SBook*.

- SBook's **Dialing Rules** and **Dialing Method** settings are covered in Chapter 3, *Dialing the Phone with SBook*.

You can bring up the Preferences panel at any time by choosing **Info>Preferences**. The pop-up menu at the top of the panel allows you to choose between the six different subviews corresponding to the six different types of preference settings:
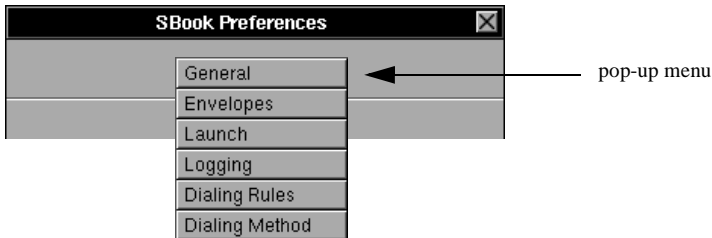
The General subview

The **General** subview controls several miscellaneous settings: autosave, automatic backups, and display of entries. In addition, using the **General** subview, you can reset all of SBook's preferences back to the factory defaults.
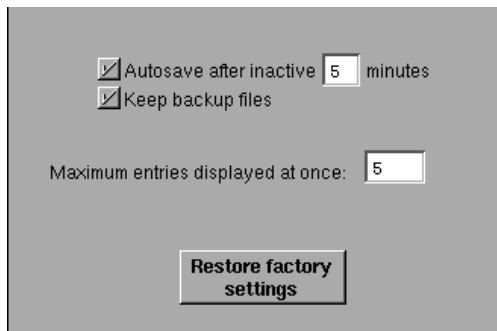
If you want to reset all of SBook's settings, click on the large button labeled **Restore Factory Settings** near the bottom of the panel.

Once you click on the **Restore Factory Settings** button, SBook will display an alert panel:
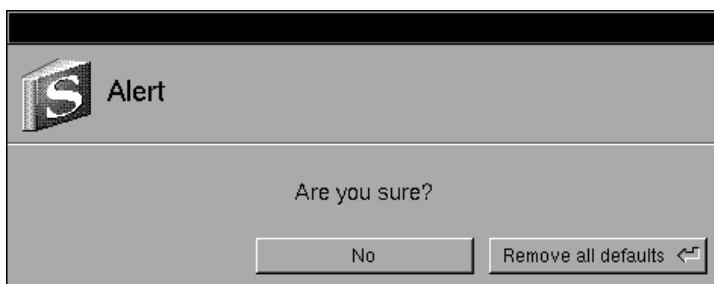
Clicking on **Remove all defaults** changes *all* of SBook's preferences back to the factory settings, so you should be really sure you want to do this. If you are sure, and you click on **Remove all defaults**, SBook will display another alert panel:
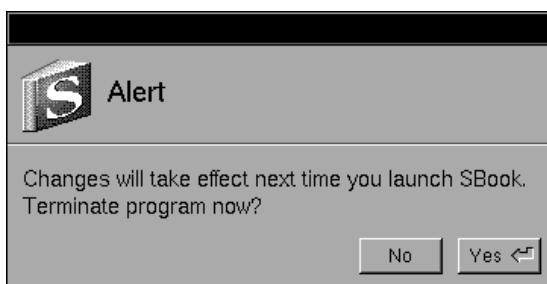
This panel informs you that the factory defaults cannot be restored until you quit SBook and start it up again. If you want to start using the factory defaults right away, and you have no more work to do or files to save, click on **Yes**. Otherwise, click on **No** and finish your work before leaving SBook.

The **General** subview also allows you to set the following preferences:
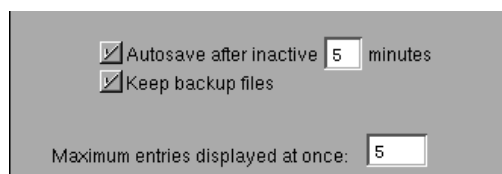
- The checkbox labeled **Autosave after...** determines whether autosaving is turned on, and if so, how many minutes of inactivity pass before SBook autosaves.

- The checkbox labeled **Keep backup files** determines whether SBook keeps automatic backups.

- The field labeled **Maximum entries displayed at once** determines how many entries SBook will display (in the display window) at once. When you attempt to display more than this, SBook only displays the number of entries selected.

The Envelopes subview

The Envelopes subview controls envelope printing:
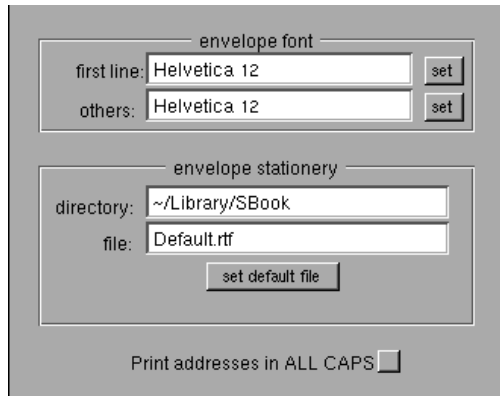
The box labeled **envelope font** allows you to view and change the default font for addresses printed on envelopes:

- The field labeled **first line** determines the font that the name is printed in

- The field labeled **others** controls the font that all subsequent lines are printed in.

You can change either one of these two font defaults by clicking on one of the buttons labeled **set**. The Font Panel will appear so that you can choose and set the font.

The box labeled **envelope stationery** allows you to change the default directory and file containing the default return address:

- The field labeled **directory** determines the directory which contains all the default return addresses that appear on the default return address pop-up on the envelope panel (see "Printing envelopes" in Chapter 1):
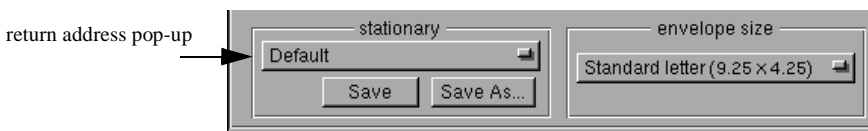
- The field labeled **file** determines which file in the above directory is the default.

You can change these fields by clicking on the button labeled **set default file**.

If the checkbox labeled **Print addresses in ALL CAPS** is checked, SBook will print all return addresses in all caps, regardless of how they appear in the SBook document file.

The Launch subview

The **Launch** subview controls which files are opened automatically each time you launch SBook. In the scrollable field labeled **Files to open on launch:** there is a list of all the files marked to be opened on launch. (By default, no files are marked to be opened on launch.)

Clicking on the button labeled **Add** brings up a panel that is just like a standard Open panel, except that it is named **Add autolaunch file**:

Choose a file in the usual way, and click on **OK**. Once the file is added, you will immediately see it appear in the **Files to open on launch:** field.

You can delete a file from the **Files to open on launch:** field by selecting the file in the field, then clicking on the button labeled **Remove**. You will be presented with an alert panel in which you will need to confirm whether you really want to remove the file from the field. Clicking **Yes** (the default) will remove the file.

At the bottom of the **Launch** subview, the checkbox labeled **Hide on autolaunch** determines whether SBook hides itself when it is automatically launched from your dock or otherwise. By default, this button is checked.

Appendix B: Installing and Licensing SBook

Installing SBook

The SBook distribution disk contains the SBook application itself, a help file called "Instructions.sbook", and a folder called "DemoFiles" containing the three demo files "developers.sbook," "congress.sbook," and "recipes.sbook":
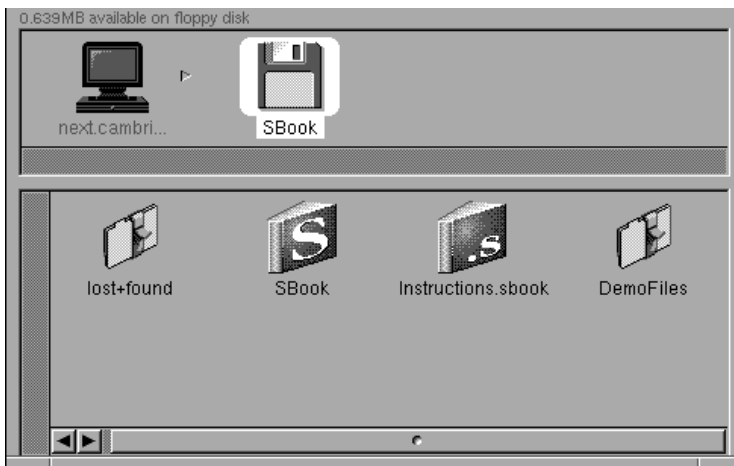
Copy SBook from the distribution disk to "/LocalApps," if this copy of SBook is to be used by all users of your machine, or to "~/Apps," if this copy of SBook is only to be used by you, and you prefer to keep it in your home directory. You may want to put SBook on your dock, if you plan to use it often.

Copy Information.sbook to "/LocalLibrary," if you have put SBook in "/LocalApps," or to "~/Library."

If you want to play with the demo files that are included in the distribution (the files "developers.sbook," "congress.sbook," and "recipes.sbook"), copy them to a convenient place in your home directory. Or, if several people on your system are going to be interested in these files, you might want to put them somewhere public.

Registering this copy of SBook

When you start up SBook for the first time, you will see a warning panel:
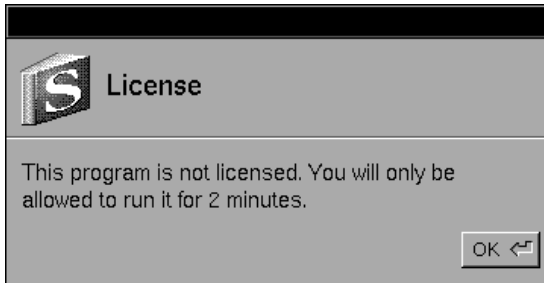
Click on the button labeled **OK**, or press return. A large panel labeled **Registration Panel** will appear on the screen:

You will need to type your license string in the box provided on the Registration Panel.

- If you have purchased a regular single-user license or a site license, you will find your license string clearly marked on your *license card* (the bright-colored printed sheet of paper that was slipped into the front of your manual).

- If you have purchased a student license, you will have received your license string directly from us, by email, US Mail, or fax.

SBook automatically determines from the license string whether this is a single-user or network license. If it is a network license, SBook also determines how many simultaneous users this license authorizes. You don't need to enter any of this information — just enter the license string.

Below the license string, if this is a single user license, enter your name. If this is a network license, enter your company's name. Then click on **Register Program**.

If you have mistyped your license string, a panel will appear to inform you that the string you entered was not valid. Click **OK**. You will be returned to the Registration Panel so that you can try again.
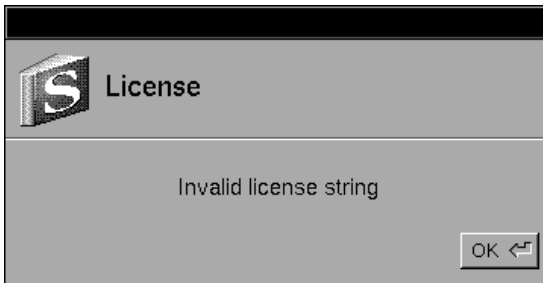
When you have entered a valid license, you will see one of two alert panels, depending on whether the license string that you entered was purchased for a single user or for a network:
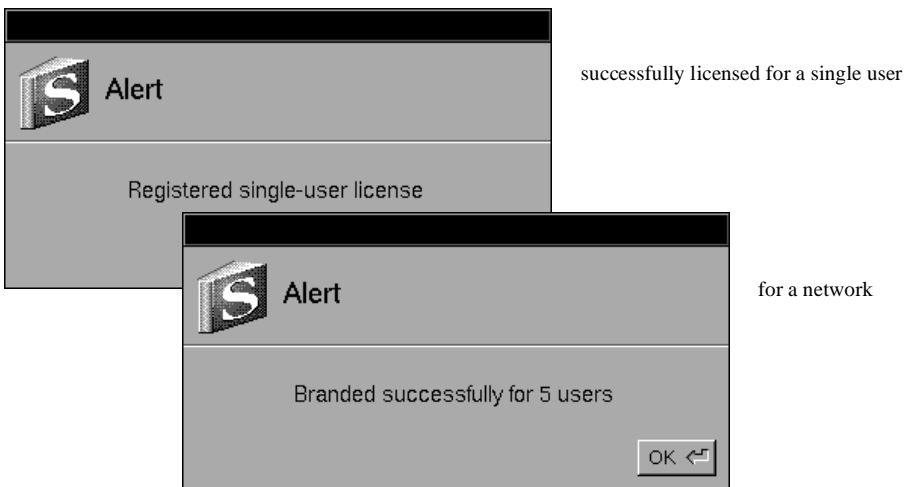
successfully licensed for a single user

for a network

Successfully registering a single-user license causes the license information to be written into your defaults database. The application itself is not changed. This allows you to use the application freely, but prevents other people from using it unless they have also obtained a license number from us. You can move or copy the application and still use it freely as long as you retain the licensing information in your defaults database.

Successfully registering a network license, on the other hand, causes the installed copy of the application to be modified so that anyone may use it, up to the number of simultaneous users allowed by the license. This modification is called *branding*, which is why the panel announces that the application was "branded successfully." If a branded copy of SBook is moved or copied, it will cease to be branded, and you will need to re-brand it with the original license number.

You have now installed and licensed this copy of SBook. The rest of this chapter describes SBook licenses and license agreements in detail. You may want to read it now, or come back to it later for reference. If you need basic information on how to start using SBook, read Chapter 1, *Getting Started with SBook* now.

SBook Licenses

The License Panel

When you are using a copy of SBook, you can see who this copy of SBook is licensed to by looking at the **License** panel. Choose **Info>License...** to bring up the panel. (If the copy is not licensed, you will get the Registration panel instead. See Page 74 of this chapter.)

single-user license panel

network license panel

If this copy is licensed for a single user, the name of the person will appear. If it is licensed for a network, the name of the company will appear, along with the number of simultaneous users this license allows.

Besides the name of the person who licensed the application, the **License** panel displays the customer number of the person who bought the license. This allows us to track copies of our software.
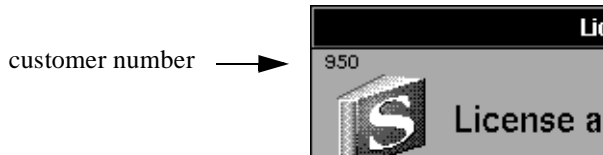
Knowing your customer number does not make it possible for unauthorized individuals to determine your license string and use it to license software. *Your license string will never be displayed*. Nobody can learn your license string unless you release it to them.

Single user licenses

Successfully registering a single-user license causes the license information to be written into your defaults database. The application itself is not changed. You can move or copy the application and still use it freely as long as you retain the licensing information in your defaults database.

Your single-user license allows you to run SBook on only one computer at a time. You cannot run more than one instance of SBook, even if it is on the same computer. Other users on the same machine or network will be able to start up the program, but it will work as a demo version unless they have also obtained a license number from us.

Your license agreement allows you to make copies of SBook directly from your distribution disk, and give away as many copies as you like. *You are not allowed to distribute your license string*. The copies that you distribute will work as demo copies.

Network licenses

Successfully registering a network license causes the installed copy of the application to be modified so that anyone may use it, up to the number of simultaneous users allowed by the license. This modification is called *branding*, which is why the panel announces that the application was "branded successfully."

> + Licensed single users can use a branded copy of SBook without affecting how many other users can use it at once.

If a branded copy of SBook is moved or copied, it will cease to be branded, and you will need to re-brand it with the original license number. To rebrand a copy of SBook, you must have write access to the file. When you start up the copy, it will behave as though it has never been licensed, and you will have to go through the licensing process as described on Page 74 of this chapter.

Every site with a network license should have a designated contact person who is responsible for licensing and maintaining SBook. Only the contact person needs to know the

license string, since it is only needed when the copy is initially branded or re-branded because it has been moved. *The license string should not be distributed among the users.*

Your license agreement allows you to make copies of SBook directly from your distribution disk, and give away as many copies as you like, as long as you do not brand them with your license string or modify them in any other way. *You are not allowed to distribute your license string.* The copies that you distribute will work as demo copies.

If your needs change, and you want to add more users to your license, you can always order a new license number by telephone or fax and add the additional users right away.

Requesting source code

You can request a copy of SBook's source code, free of charge, at the time you buy your software, or at any time thereafter, for as long as you remain a licensed user. If you request source code after you buy your software, there will be a nominal handling fee; contact us for more details.

In order to request source code, *you must first sign a special source code release agreement and send it back to us* by fax, or US Mail.

You will receive a complete copy of the source code, except for three files, which are supplied to you as object files: "parse_case.o," "parse_address.o," and "parse_company.o." These files contain the heart of SBook's parser. We don't provide code for these files because they are compiled with tools that are not widely available.

Once you receive your source code, you are free to modify the code and make additions, then recompile it to make copies of SBook for your own use. However, *neither the original source code, nor any recompiled copies of it, may be distributed to anyone.*

For more information about ordering source code or the specific terms of your source code agreement, contact us.

document files 3

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